



# Cost Management

Product Category		Approved Changes	
		Orders	Revenue
Electronics	Smartphones	150,000	\$1,500,000
	Laptops	80,000	\$800,000
	Tablets	30,000	\$300,000
	Smart TVs	20,000	\$200,000
	Gaming Consoles	10,000	\$100,000
	Wearables	50,000	\$500,000
	Smart Home Devices	40,000	\$400,000
	Audio Equipment	15,000	\$150,000
	Cameras	12,000	\$120,000
	Peripherals	8,000	\$80,000
Home Goods	Furniture	10,000	\$100,000
	Decorative Items	20,000	\$200,000
	Bedding	15,000	\$150,000
	Bath Products	12,000	\$120,000
	Kitchenware	18,000	\$180,000
	Garden Tools	8,000	\$80,000
	Storage Solutions	10,000	\$100,000
	Lighting	12,000	\$120,000
	Textiles	15,000	\$150,000
	Home Appliances	10,000	\$100,000
Clothing & Accessories	Men's Clothing	120,000	\$1,200,000
	Women's Clothing	150,000	\$1,500,000
	Children's Clothing	80,000	\$800,000
	Footwear	60,000	\$600,000
	Accessories	40,000	\$400,000
	Outerwear	30,000	\$300,000
	Activewear	50,000	\$500,000
	Formal Wear	20,000	\$200,000
	Seasonal Items	15,000	\$150,000
	Specialty Items	10,000	\$100,000

		Status	Open
...etting			
...on			
Budget Code	B472001099000008 - Painting		
SCOPE OF WORK			
FINANCIAL			
Award Amount	565,648.71	Changes	0.00
Total	565,648.71	Retention	0 %
SUPPLIER DETAILS			
Name	Select...		
Contact	Select...		
DOCUMENT BY RECIPIENT			
There are no available documents.			
<input type="button" value="Generate..."/>			
APPROVAL			
Created By	Ian Turner	Changed By	Ian Turner
Purchased By	Ian Turner	Signed By	S...

# Introduction

Tracking costs, managing risk, and keeping a project on budget can be one of the biggest hurdles in a construction project, and finding efficiencies in this area can make all the difference in delivering a project on time and on budget.

But with the new BIM 360 Cost Management module bringing powerful cost control, change management, and pay application

workflows to the BIM 360 platform teams can minimize risk by managing all cost related construction activities in a single software.

The following guide introduces the BIM 360 suggested cost management workflow and gives context to the different capabilities built into the product, including step-by-step starter guides.

## Autodesk BIM 360

BIM 360 improves the process of construction by supporting informed decision making throughout the project lifecycle. It does this by centralizing all project data in a single data repository and connecting project stakeholders and workflows—from design to construction to operations, from the field to the office and back.

Visit BIM 360 Site



*Please note that the capabilities outlined in this guide are reflective as of July 2020 and will continue to undergo improvements. Additionally, some capabilities are only available in certain countries. For more information on product updates and capabilities please visit the [BIM 360 Product Release Notes](#).*





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- Expenses
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## Additional Capabilities

- Account Admin
- Integration Partners



# Suggested Workflow



# Cost & Change Management Workflow

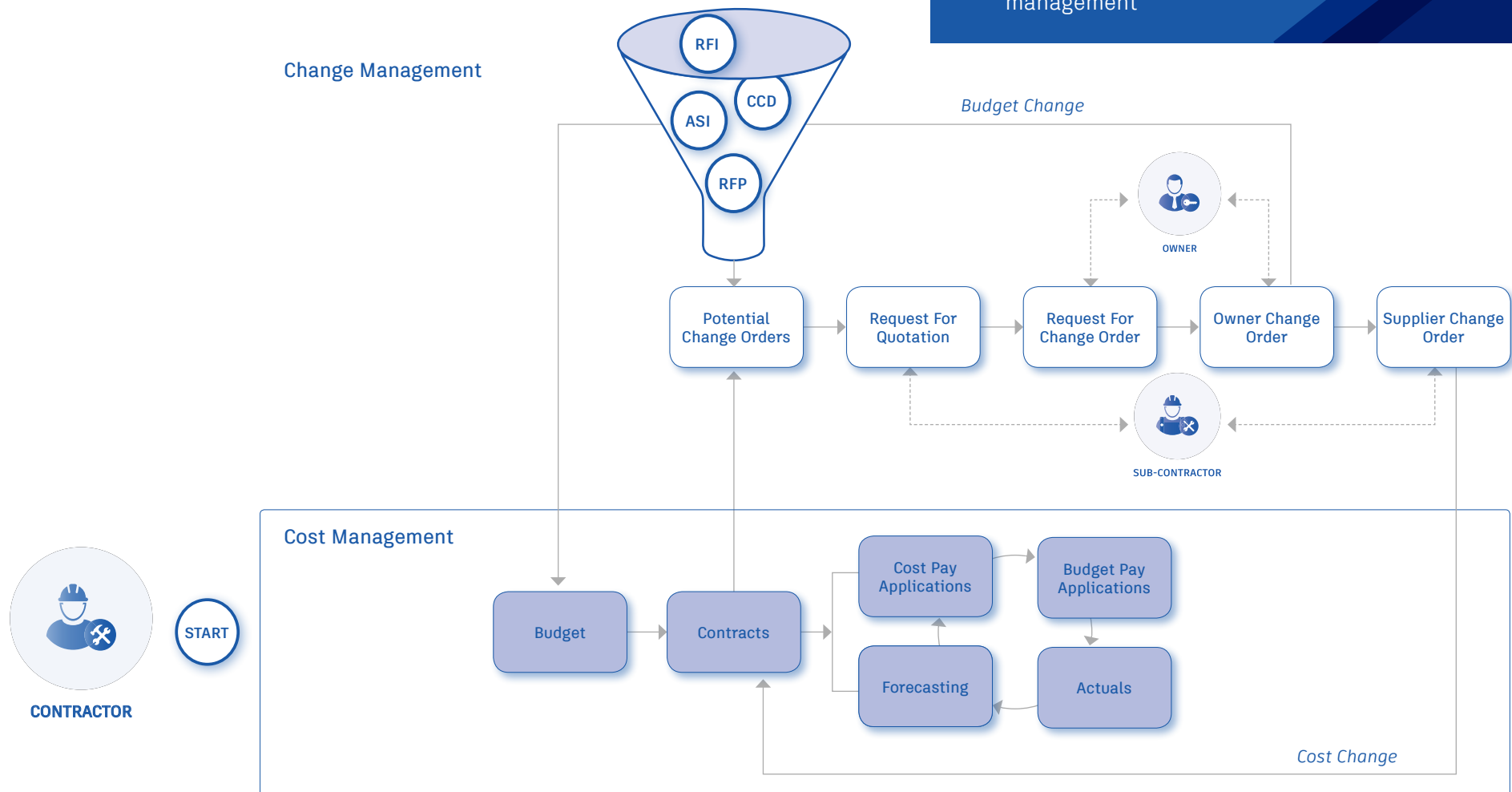
Used to help control cost and confirm all changes are accounted for and managed effectively to maintain positive cash flow, reduce risk and maximize profit. The graphic below outlines the suggested cost management workflow using BIM 360.

## Why follow this workflow?

- Customizable to suit users needs and preferences
- Provides a real-time summary view of all budget items and contracts
- Streamlines upstream and downstream change order workflows

## BIM 360 capabilities used

- Budget management
- Contract management
- Change order management
- Pay applications
- Forecasting
- Actuals



# Payment Application Workflow

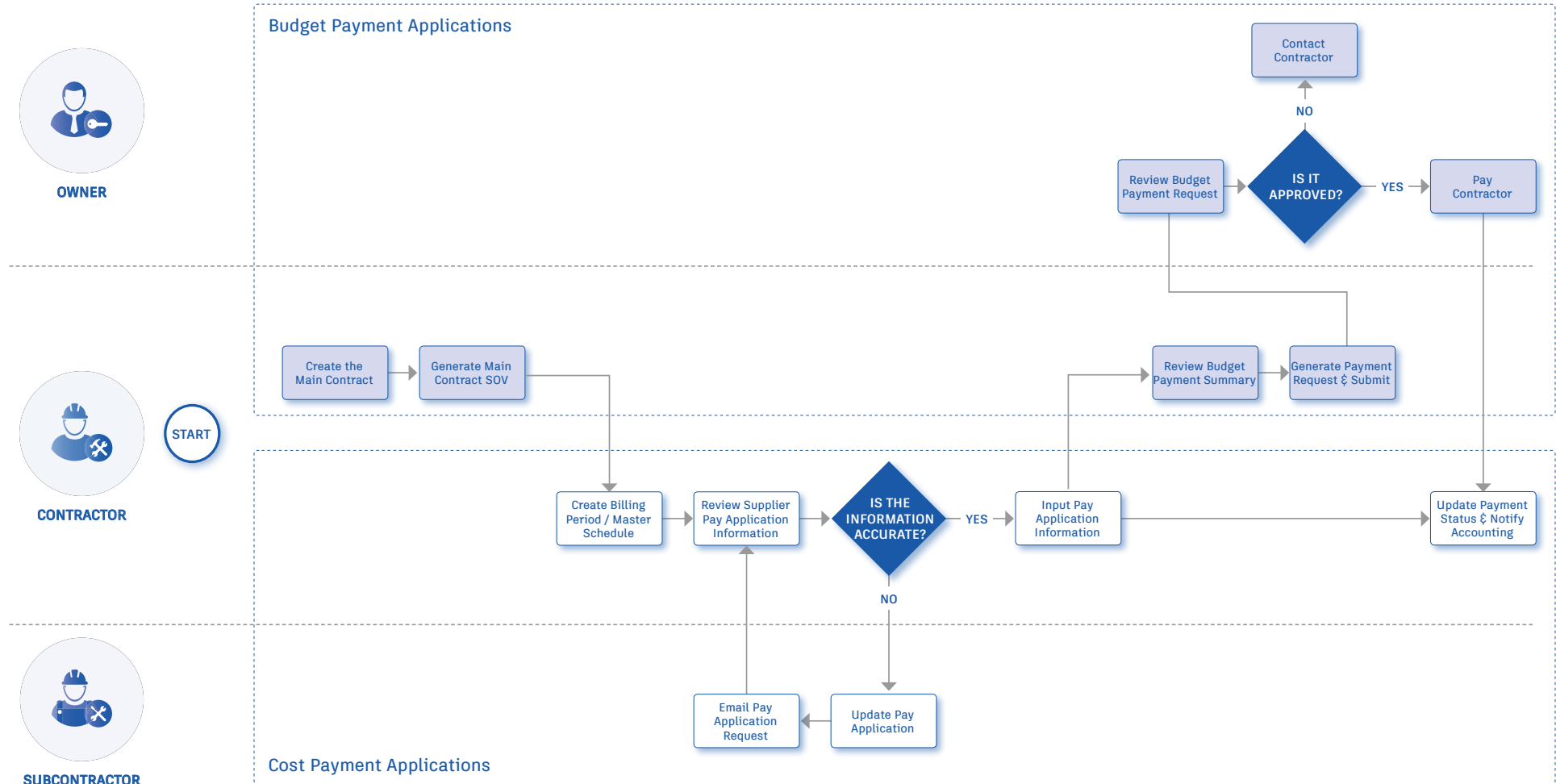
Used to help effectively manage incremental pay applications to automate tasks and gain a real-time view of the financial health of the project. The graphic below outlines the suggested pay application workflow using BIM 360.

## Why follow this workflow?

- Adds a level of automation
- Easy to manage and track
- Provides a real-time summary view of all cost and budget payments

## BIM 360 capabilities used

- Main contract & budget items
- Budget payment applications
- Cost payment applications



# Cost Management Capabilities



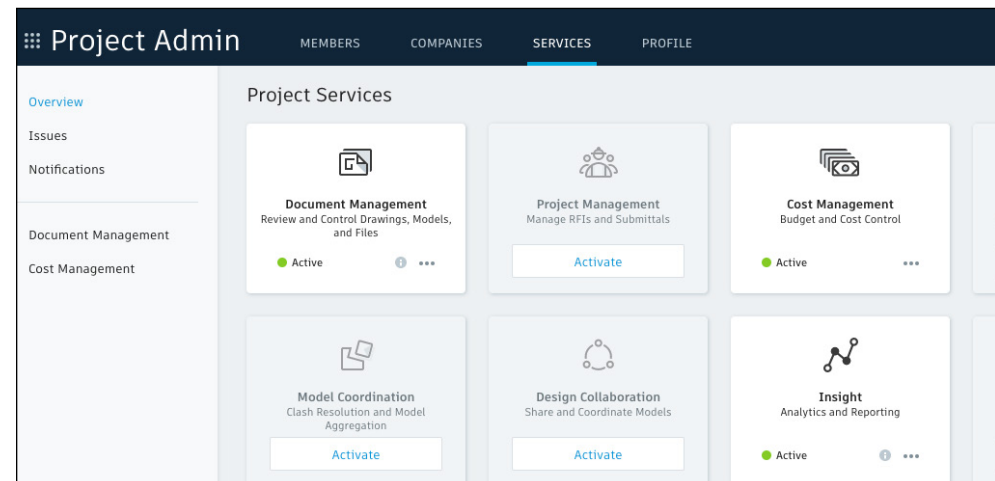
# Settings & Permissions

Cost Management is flexible and customizable. Configurable features allow teams to customize the software to suit their needs and preferences. Teams can also ensure the right information stays in the right hands by setting permission levels for each tab within Cost Management.

## 1 Activate the Cost Management Module

- A project admin needs to activate the Cost Management module.
- In the Project Admin module select the “Services” tab, then “Overview” on the left sidebar.
- In the Cost Management row, select “Activate” and designate at least one project admin.

**PRO TIP:** The Document Management module needs to be activated first.



# Settings & Permissions

## 2 Accessing Settings

- Project Admins are the only individuals who have permission to access and edit the modules settings.
- In the “Project Admin” module, select the “Services” tab.
- On the left sidebar select “Cost Management,” you will now be able to access the modules general settings and settings for each individual tab (e.g. Change Order).

## 3 General Settings

Select the “General” tab.

1. **Unit of Measure:** select imperial or metric.
2. **Unit of Measure List:** set specific dimension as default of deactivate certain units from the list. Click “Add” to manually add additional dimensions
3. **Companies Setup:** identify the project Owner, General Contractor and Architect. Use the drop-down to select the correct contact or add a new contact.
4. **Round Settings:** select the “Rule” (Half Up, Round Up, Round Down) and “Accuracy” (1, 0.1, 0.01, 0.05). In the example field you can test the settings.

Autodesk BIM 360 | United Construction - Pacific Center Campus

Project Admin MEMBERS COMPANIES SERVICES PROFILE

Overview Issues Notifications Locations Document Management Project Management Cost Management Design Collaboration Model Coordination Field Management BIM 360 Plan

General Income Expenditure Change Order Permission Activity

Unit of Measure

Metric 1 Add

Display Name	Description	Dimension	Status
d1	Centimetre	Volume / Capacity	Active
cm	Centimetre	Length	Active
cm2	Square Centimetre	Area	Active
cm3	Cubic Centimetre	Volume / Capacity	Active
d	Count / General	Count / General	Active
dm	Decimetre	Volume / Capacity	Active
dm2	Square Decimetre	Area	Active
dm3	Cubic Decimetre	Volume / Capacity	Active

Companies Setup

Owner Contact 3  
Martha's Landscaping Select...

General Contractor Contact  
United Construction Select...

Architect Contact  
BNIM Select...

Notary Contact  
Select... Select...

Rounding Settings 4

Rule Accuracy Example  
Round up 0.01 1.2345 => 1.24

Budget Payment Application Retention

Completed Work Materials on File

# Settings & Permissions

3

## General Settings (continued)

**Retention:** allows you to put in a default retention amount for completed work and materials on site. This will automatically be added to every line item, but can be edited/removed per line.

5. **Budget Payment Application Retention:** allows you to put in a specific retention % for completed work and materials on site.
6. **Cost Payment Application Retention:** allows you to put in a specific retention % for completed work and materials on site.
7. **Document and Attachments:** allows you to choose to store generated documents and uploaded attachments in both Cost Management and Document Management.

- If you choose to store the files in Document Management follow the steps in the bottom image.
- This creates a single repository of all generated documents specific to each company for future audit purposes, and if desired, the folder can be shared with other project members to access the information.

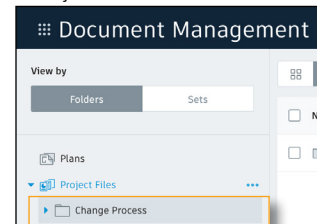
8. **Custom Tab Names:** allows you to customize the names of the main tabs (Income, Expenditure, Change Order) and the subtabs within each (e.g., Cost Item, PCO, RFQ, etc.) to better suit your needs. To change the display order of the subtabs in each section, select the three dots.

The screenshot shows the 'General Settings' page with four sections highlighted by orange circles and numbers:

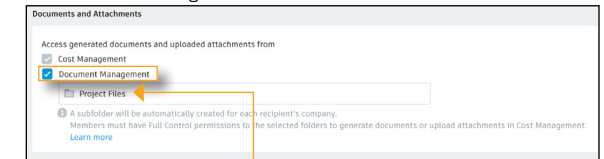
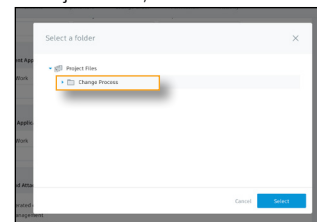
- 5. Budget Payment Application Retention:** Two input fields for 'Completed Work' and 'Materials on Site' with percentage signs.
- 6. Cost Payment Application Retention:** Two input fields for 'Completed Work' and 'Materials on Site' with percentage signs.
- 7. Documents and Attachments:** Two checkboxes, 'Cost Management' and 'Document Management', both checked. Below them is a text box for 'A subfolder will be automatically created for each recipient's company.' and a 'Learn more' link.
- 8. Tab Names and Order:** A table with two columns: 'Original' and 'Customized'. The 'Original' column lists tabs like Income, Budget, Main Contract, Budget Payment App, Expenditure, Change Order, Cost Item, PCO, RFQ, etc. The 'Customized' column shows a list of tabs with three dots next to each for reordering.

### Setup Steps for Storing Documents & Attachments in Document Management:

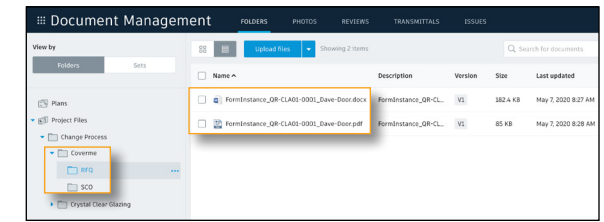
1. In Docs create a subfolder in Project Files
2. Within the General settings choose the option to save to Document Management



4. Choose the folder you create in Project Files, click "select"



3. Click "Project Files"
5. A subfolder auto create per supplier. As docs are generated a new folder for each document type auto creates, both Word & PDF docs save.





# Settings & Permissions

## 4 Income Settings

Select the “Income” tab.

1. **Budget Code Segments:** used to set up your budget code template, refer to the budget code setup section for more details on setting up your budget.
2. **Lock Budget:** once the original budget setup is finalized, you may lock it to avoid accidental change.
3. **Allow Internal Budget Transfer:** Turn off if you want to allow users to be able to make an internal budget transfer from the budget summary view.
4. **Main Contract Schedule of Values:** Choose if you want change orders to appear as a line item or as a column.
5. **Main Contract Types:** use the “Add” button to create a list of main contract types. This is the primary contractual agreement entered into directly, for example, between an owner and a general contractor. In edit mode in the Main Contract tab, you can assign a contract type to a line item via a drop-down.

**PRO TIP:** As with all our custom lists system defaults cannot be deleted but they can be deactivated so they will not show up in the user interface.

6. **Document Templates:** used to create standard budget payment application and main contract template formats, the templates are created using fields that automatically populate with data from the system. Refer to the document Templates section to learn how to create document templates.
7. **Custom Attributes:** used to customize portions of the details flyout panel for items in each subtab within the Income tab. Refer to the Custom Attribute section to learn how to create custom attributes.

The screenshot displays the 'Income' settings page in Autodesk BIM 360 Project Admin. The page is organized into several sections, each with a numbered callout (1-7) corresponding to the instructions provided.   
1. **Budget Code Segments:** This section allows users to define budget code segments. It includes a 'Budget code preview' field showing '001.032000.1(SUB)B'. Below this is a table with columns: Project Code, Sub Job, CSI, Sequence, Cost Type, and Segment 5. The 'Where' field is set to 'Info Only', '# of Digits' is '04', and 'Delimiter' is 'None'. A 'Segment code preview' shows '8472'. There is an 'Add' button and a 'Download Template' link.   
2. **Lock Budget:** This section has a toggle to 'Lock budget' to prevent accidental changes. A note states: 'Only project administrators can edit original budgets after it is locked.'   
3. **Allow Internal Budget Transfer:** This section has a toggle set to 'On'.   
4. **Main Contract Schedule of Values:** This section has a toggle to 'Show change orders' set to 'As a column'.   
5. **Main Contract Types:** This section shows a table of contract types with columns: Type, Description, and Status. The types listed are 'Cost Plus', 'Fixed Price', and 'Unit Price'. There is an 'Add' button.   
6. **Document Templates:** This section shows templates for 'Main Contract' and 'Budget Payment Application'. Each has an 'Add' button.   
7. **Custom Attributes:** This section shows attributes for 'Budget', 'Main Contract', and 'Budget Payment Application'. Each has an 'Add' button.

# Settings & Permissions

## 5 Expenditure Settings

Select the “Expenditure” tab.

1. **Code Format:** you have the option to configure the expense code format by customizing the prefix, suffix, number of digits, and start number. You can choose to also include the type in the prefix.
2. **Contract Types:** use the “Add” button to create a list of contract types. In edit mode in the Contracts tab, you can assign a contract type to a line item via a drop-down.
3. **Expense Types:** use the “Add” button to create a list of expense types. In the Expense tab, you can assign an expense type to a line item via a drop-down.
4. **Actual Cost:** how the actual cost column in the Budget and Contract tabs will populate.
  - **Direct Input:** actual cost value will be entered directly into the Budget via the edit mode view or API.
  - **Expense and Cost Payment Application:** actual cost value will be the sum of Expense and Cost Payment Application value.
5. **Document Templates:** used to create standard cost payment application and contract template formats, the templates are created using fields that automatically populate with data from the system. Refer to the document Templates section to learn how to create document templates.
6. **Custom Attributes:** used to customize portions of the details flyout panel for items in each subtab within the Expenditure tab. Refer to the Custom Attribute section to learn how to create custom attributes.

The screenshot displays the 'Expenditure' settings page in Autodesk BIM 360 Project Admin. The page is organized into several sections, each with an 'Add' button and a table of existing items. The sections are: 1. Code Format: A form with fields for Prefix, Suffix, Number of Digits, and Start Number. 2. Contract Types: A table with columns for Type, Description, and Status. 3. Expense Types: A table with columns for Type, Description, Prefix Code, and Status. 4. Actual Cost: A section with radio buttons for 'Direct Input' and 'Expense and Cost Payment Application'. 5. Document Templates: A table of templates and a 'Cost Payment Application' section with an 'Add' button. 6. Custom Attributes: A table of attributes and a 'Cost Payment Application' section with an 'Add' button.

# Settings & Permissions

## 6 Change Order Settings

Select the “Change Order” tab.

- Code Format:** you have the option to configure the code format by customizing the prefix, suffix, number of digits, and start number for each component.
  - As a reminder, the component names (Cost Item, PCO, RFQ, RCO, OCO, SCO) can be customized within General settings.
  - This will dictate how the information is displayed in the number column of each tab within the Cost Management module.
  - You can also choose to use Change Order type and Contract code in the coding structure to provide easy grouping and filtering.
- Financial Markup Formulas:** where you can create multiple project level markup configurations to apply to Potential Change Orders (PCOs), Requests for Change Orders (RCOs) or Owner Change Orders (OCOs). Refer to the Financial Markup Formulas chapter to learn how to create custom markups.
- Change Order Types:** use the “Add” button to create a list of change order types. In the Change Orders subtabs, you can assign a type to a line item via a drop-down list. This allows them to be grouped by type and if preferred have different numbering schemes per type.
- Cost Item Types:** use the “Add” button to create a list of cost item types. In the Cost Item tab within Change Orders, you can assign a cost item type to a line item via a drop-down list.

**Code Format**

Cost Item	Prefix	Suffix	Number of Digits	Start Number
CI-			4	1

**PCO**

Prefix	Suffix	Number of Digits	Start Number
P-		4	1

☐ Include type in prefix

**RFQ**

Prefix	Suffix	Number of Digits	Start Number
QR-		4	1

☒ Include contract code in prefix ☐ Include type in prefix

QR-(Contract Code)-

**RCO**

Prefix	Suffix	Number of Digits	Start Number
R-		4	1

☐ Include type in prefix

**OCO**

Prefix	Suffix	Number of Digits	Start Number
O-		4	1

☐ Include type in prefix

**SCO**

Prefix	Suffix	Number of Digits	Start Number
S-		4	1

☐ Include contract code in prefix ☐ Include type in prefix

**Financial Markup Formulas**

Name	Description	Created By	Created At
Standard Markup	Standard Markup	Ian Turner	Oct 1, 2018
New Formula	Insurance Cost	Arun Duraiswamy	Oct 18, 2019
Alternative Markup 1	New Financial Markup Formula	John Sanner	Nov 6, 2018

**Change Order Types**

Type	Description	Prefix Code	Status
Internal Change		INT	Active
Owner Change		OCO	Active
Owner Direct Purchase		ODP	Active
Owner Directive		ODR	Active
Purchase Order Change		POCO	Active
Purchase Order Quotation		PQ	Active
Subcontract Change Order		SCO	Active
Subcontract Quotation		SQ	Active

**Cost Item Types**

Type	Description	Status
Back Charge		Active
Budget Transfer		Active
Contingency		Active
Internal Change		Active
Owner Change Order		Active
Owner Directive		Active



# Settings & Permissions

6

## Change Order Settings (continued)

5. **PCO Source Types:** use the “Add” button to create a list of PCO source types. In the PCO tab within Change Orders, you can assign a PCO source type to a line item via a drop-down list.
6. **RFQ Response Due:** the default number of days given to respond to an RFQ. Can be edited per RFQ.
7. **Document Templates:** used to create standard Potential Change Order (PCO), Request for Quotation (RFQ), Request for Change Order (RCO), Owner Change Order (OCO), and Supplier Change Order (SCO) template formats. The templates are created using fields that automatically populate with data from the system. Refer to the document Templates section to learn how to create document templates.
  - As a reminder, the names PCO, RFQ, RCO, OCO, an SCO can be customized within General settings.
8. **Custom Attributes:** used to customize portions of the details flyout panel within the Change Order tab. Refer to the Custom Attribute section to learn how to create custom attributes.

The screenshot displays the 'Change Order Settings' interface with four main sections:

- PCO Source Types (5):** A table with columns 'Type', 'Description', and 'Status'. It lists source types: ASI (Architect's Supplemental Instructions), CCD (Construction Change Directives), INT (Internal), ISSUE (Issue), RFI (Request for Information), RFP (Request for Proposal), and T&M (Time and Materials). All are 'Active'. An 'Add' button is in the top right.
- RFQ Response Due (6):** A form with a label 'RFQ response due in' and a value of '14' days (1 - 999).
- Document Templates (7):** A grid showing templates for PCO, RFQ, RCO, OCO, and SCO. Each entry includes the template name, author 'Ian Turner', and date 'Oct 24, 2018'. Each has a '1 document' indicator.
- Custom Attributes (8):** A grid for defining custom attributes for PCO, RFQ, RCO, OCO, and SCO. The PCO section shows an 'Add' button. Other sections show 'Add new attribute' text.

# Settings & Permissions

## 7 Permissions

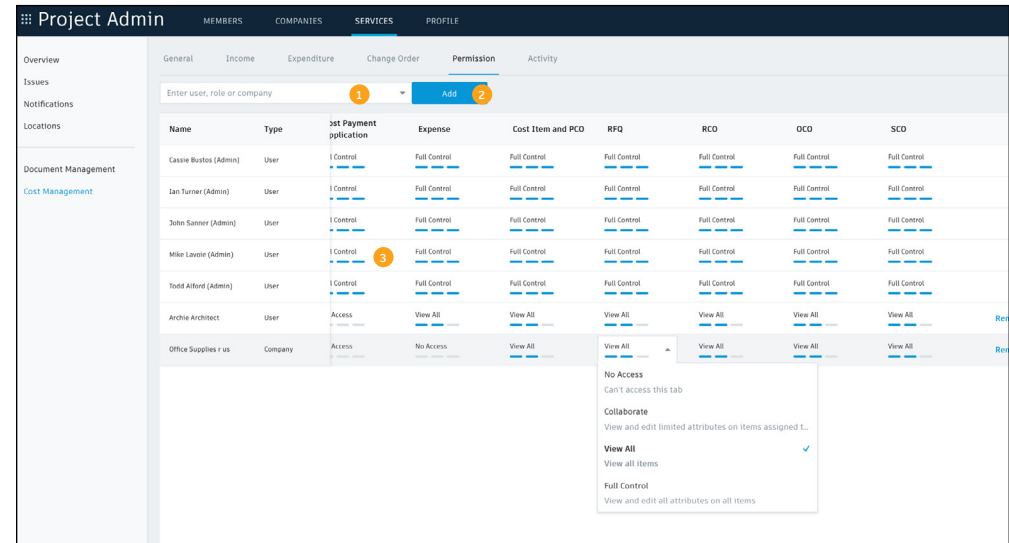
Select the “Permissions” tab. You can designate user-, role-, or company-based permissions for each tab within Cost Management. Permission levels are:

- **No Access:** can't access the tab
- **Collaborate:** can view & edit limited attributes of items assigned to them in the tab
- **View All:** can view all items within the tab
- **Full Control:** can view and edit all attributes on all items within the tab

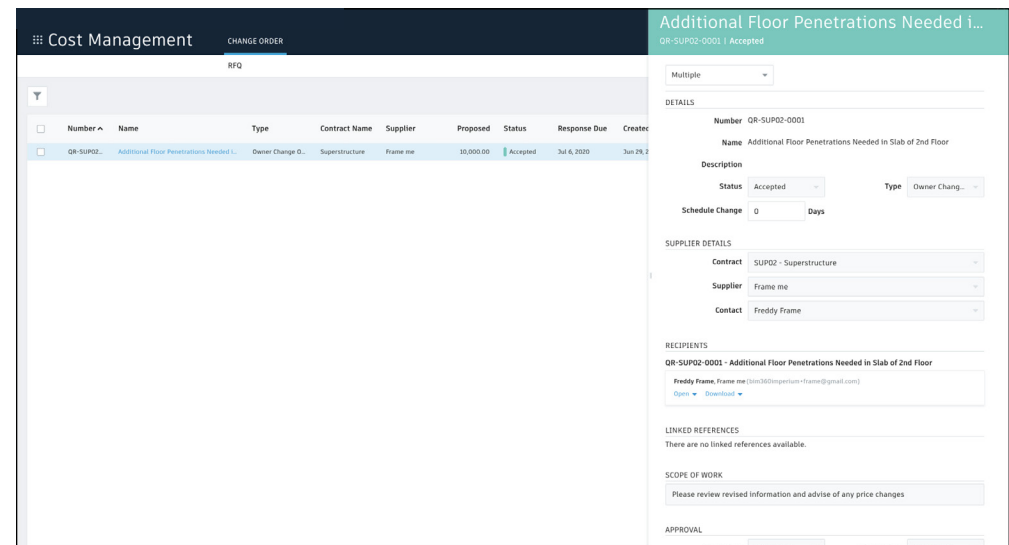
1. Use the search field to find the desired a user, company or role.
2. Click “Add.”
3. Hover over the permission level and click to access the menu drop-down. Set the appropriate permission level for each column.

### Owner & Supplier Access

- To help streamline workflows and enhance collaboration with Owners and Suppliers, give them Collaborate access to view and interact with certain information.
- The collaborate permission is available for specific tabs within Cost Management, and allows them to only view and edit limited attributes on items assigned to them.
- Note, Owners and Suppliers will need a BIM 360 license.



Example of what a Supplier with RFQ collaborate access sees



# Settings & Permissions

## Permissions (continued)

What Owner/Supplier with Collaborate permission can do	Related tab in Cost Management
<b>Supplier Request for Quotation (RFQ)</b> <ul style="list-style-type: none"> <li>Provide work breakdown &amp; propose a price</li> <li>Upload/download attachments</li> </ul>	RFQ Tab
<b>Owner Request for Change Order (RCO)</b> <ul style="list-style-type: none"> <li>Accept or reject RCO</li> <li>Download RCO documents</li> <li>Upload/download attachments</li> </ul>	RCO Tab
<b>Owner Change Orders (OCO)</b> <ul style="list-style-type: none"> <li>Approve or reject OCO</li> <li>Download OCO documents</li> <li>Upload/download attachments</li> </ul>	OCO Tab
<b>Supplier Payment Application</b> <ul style="list-style-type: none"> <li>Fill in pay application &amp; submit to contractor</li> <li>View previous applications</li> <li>Generate payment application documents</li> <li>Upload/download attachments</li> </ul>	Cost Payment Application Tab (coming soon)
<b>Owner Payment Application</b> <ul style="list-style-type: none"> <li>Approve or reject pay application</li> <li>View previous applications</li> <li>Download payment application documents</li> <li>Upload/download attachments</li> </ul>	Budget Payment Application Tab (coming soon)
<b>Supplier Contract Exhibits/Attachments</b> <ul style="list-style-type: none"> <li>Upload/download</li> </ul>	Contract Tab (coming soon)
<b>Supplier Schedule of Values</b> <ul style="list-style-type: none"> <li>Provide Schedule of Values breakdown</li> </ul>	Contract Tab (coming soon)

**Project Admin** | MEMBERS | COMPANIES | SERVICES | PROFILE

Overview | Issues | Notifications | Locations | Document Management | Cost Management

General | Income | Expenditure | Change Order | **Permission** | Activity

Enter user, role or company [Add]

Name	Type	1st Payment application	Expense	Cost Item and PCO	RFQ	RCO	OCO	SCO
Cassie Bustos (Admin)	User	Full Control	Full Control	Full Control	Full Control	Full Control	Full Control	Full Control
Ian Turner (Admin)	User	Full Control	Full Control	Full Control	Full Control	Full Control	Full Control	Full Control
John Samner (Admin)	User	Full Control	Full Control	Full Control	Full Control	Full Control	Full Control	Full Control
Mike Lavette (Admin)	User	Full Control	Full Control	Full Control	Full Control	Full Control	Full Control	Full Control
Todd Alford (Admin)	User	Full Control	Full Control	Full Control	Full Control	Full Control	Full Control	Full Control
Archie Architect	User	Access	View All	View All	View All	View All	View All	View All
Office Supplies Inc	Company	Access	No Access	View All	View All	View All	View All	View All

**Collaborate**  
View and edit limited attributes on items assigned to you

**View All**  
View all items

**Full Control**  
View and edit all attributes on all items

PRO TIP: Project Admins set permissions within the project admin module.

The Supplier with RFQ collaborate access can only see their assigned item

**Cost Management** | CHANGE ORDER

RFQ

Number	Name	Type	Contract Name	Supplier	Proposed	Status	Response Due	Created
QR-SUP02-0001	Additional Floor Penetrations Needed in Slab of 2nd Floor	Owner Change Order	Superstructure	Frame me	10,000.00	Accepted	Jul 6, 2020	Jun 28, 2020

**Additional Floor Penetrations Needed i...**  
QR-SUP02-0001 | Accepted

Multiple [v]

**DETAILS**

Number: QR-SUP02-0001

Name: Additional Floor Penetrations Needed in Slab of 2nd Floor

Description: [v]

Status: Accepted [v] Type: Owner Change [v]

Schedule Change: 0 Days

**SUPPLIER DETAILS**

Contract: SUP02 - Superstructure [v]

Supplier: Frame me [v]

Contact: Freddy Frame [v]

**RECIPIENTS**

QR-SUP02-0001 - Additional Floor Penetrations Needed in Slab of 2nd Floor

Freddy Frame, Frame me (m3303@frame-me.com)

Open [v] Download [v]

**LINKED REFERENCES**

There are no linked references available.

**SCOPE OF WORK**

Please review revised information and advise of any price changes

**APPROVAL**



# Budget Code Setup

Cost Management is customizable to suit your needs and preferences including detailed hierarchical build ups, custom segment options, and master lists.



## 1 Accessing the Budget Code Settings

Project Admins are the only individuals who have permission to access and edit the budget code.

1. In the “Project Admin” module, select the “Services” tab.
2. On the left sidebar select “Cost Management.”
3. You will now be able to access the settings for the different tabs within the module. The Income tab is where the budget code is set up.

A screenshot of the Autodesk BIM 360 Project Admin web application. The interface shows the 'Project Admin' module with tabs for MEMBERS, COMPANIES, SERVICES (highlighted with an orange box and a '3' in a circle), and PROFILE. The SERVICES tab is active, showing sub-tabs: General (highlighted with an orange box and a '3' in a circle), Income, Expenditure, Change Order, Permission, and Activity. On the left sidebar, 'Cost Management' is highlighted with an orange box and a '2' in a circle. The main content area shows the 'Unit of Measure' dropdown set to 'Metric' and a table of units.

Display Name ^	Description	Dimension	Status
cl	*** Centilitre	Volume / Capacity	Active
cm	*** Centimetre	Length	Active
cm2	*** Square Centimetre	Area	Active

# Budget Code Setup

## 2 Budget Code Templates

- Within the Income tab, you can build the budget code format from scratch or by importing an excel list from an accounting system or similar.
- This informs BIM 360 how the budget codes should appear in the Cost Management module.

The screenshot shows the 'Project Admin' interface with the 'Income' tab selected. The 'Budget Code Segments' section is visible, featuring a 'Budget code preview' field and a 'Segment code preview' field. The 'Add New' button is highlighted. Below the 'Add New' button, there are three dropdown menus: 'Where' (set to 'Code'), '# of Digits' (set to '01'), and 'Delimiter' (set to 'None'). The 'Segment Code Master List' table is also visible, showing columns for 'Original Code', 'System Code', and 'Description'.

## 3 Creating Budget Segments

- In the Segment section select “Add New” and double-click to rename the segment.
- At a minimum there must be least one segment, but you can create as many segments as required.
- Click and drag the segment tabs to rearrange.

The screenshot shows the 'Project Admin' interface with the 'Income' tab selected. The 'Budget Code Segments' section is visible, featuring a 'Budget code preview' field and a 'Segment code preview' field. The 'Add New' button is highlighted. Below the 'Add New' button, there are three dropdown menus: 'Where' (set to 'Code'), '# of Digits' (set to '01'), and 'Delimiter' (set to 'None'). The 'Segment Code Master List' table is also visible, showing columns for 'Original Code', 'System Code', and 'Description'.

## 4 Adding Budget Segment Details

- “Where” informs BIM 360 on how to show the segment:
  - **Code** - as part of the whole budget code.
  - **Column** - in a separate column from the budget code.
  - **Info only** - purely for information and not shown in the budget columns.
- “# of Digits” informs BIM 360 how many digits are expected for that segment.
- “Delimiter” informs BIM 360 how to separate the segments if at all.

The screenshot shows the 'Project Admin' interface with the 'Income' tab selected. The 'Budget Code Segments' section is visible, featuring a 'Budget code preview' field and a 'Segment code preview' field. The 'Add New' button is highlighted. Below the 'Add New' button, there are three dropdown menus: 'Where' (set to 'Code'), '# of Digits' (set to '01'), and 'Delimiter' (set to 'None'). The 'Segment Code Master List' table is also visible, showing columns for 'Original Code', 'System Code', and 'Description'.

PRO TIP: You can't edit segments when there are budget items in the project.

# Budget Code Setup

## 5 Adding Segment Values

- Segment values can be added individually by selecting “Add” or by importing a master list.
- When importing a master list you can either drag and drop or browse for an Excel sheet.
- When importing a list first down a template by clicking “Download Template.”
- Hierarchy levels are unlimited. Child levels don’t require a column header; just insert a column for each level of hierarchy.
- Note, every line item can only have one code. When importing make sure you have the correct # of digits set or you will get an error.
- Adding a master list of values for each segment is not a system requirement. It is optional data to add but facilitates creating dynamic grouping in the budget overview and Main Contract set up. Example: if your budget code contains standard data such as work item classifications, cost types, or other default lists of values always used in your projects, this provides the ability for us to look up the code and find the description that matches it and use it in the group naming.

Excel template:

Code	Description
000000	Procurement and Contracting Requirements
001000	Solicitation
001100	Advertisements and Invitations
002000	Instructions for Procurement
002100	Instructions
002200	Supplementary instructions

[Download Setup Templates](#) 

Results in the budget code setup tab:

<input type="checkbox"/>	Code ^	Description
<input type="checkbox"/>	▼ 000000	Procurement and Contracting Requirements
<input type="checkbox"/>	001000	Solicitation
<input type="checkbox"/>	001100	Advertisements and Invitations
<input type="checkbox"/>	002000	Instructions for Procurement
<input type="checkbox"/>	002100	Instructions
<input type="checkbox"/>	002200	Supplementary Instructions

Example budget flyout view where you can see the benefits/ results of the master lists import:

Envelope package		
84720010722000SUB		
BUDGET CODE DETAILS		
Segment Name	Code	Description
Project Code	8472	8472
Sub Job	001	001
CSI	072200	Roof and Deck Insulation
Sequence	0	0
Cost Type	SUB	Subcontractor

# Budget Code Setup

## 6 Deleting Segment Values

- To delete a segment value select the check box next to the line item. Under “Segment Code Master List” the “Add” button will turn into “Delete.” Select “Delete”
- To delete all items select the check box in the header row.

The screenshot shows the 'Project Admin' interface with the 'Income' tab selected. Under 'Budget Code Segments', the 'Segment Code Master List' table is visible. The 'Delete' button is highlighted in the header row of this table. The table has columns for 'Original Code', 'System Code', and 'Description'. The first row is 'FEE' with 'FEE' as the system code and 'Fees' as the description.

Original Code	System Code	Description
<input checked="" type="checkbox"/>	FEE	Fees
<input type="checkbox"/>	GEN	General Conditions
<input type="checkbox"/>	INT	Internal
<input type="checkbox"/>	LAB	Labor
<input type="checkbox"/>	MAT	Material
<input type="checkbox"/>	SUB	Subcontractor

## 7 Code Preview

- The “Segment Code Preview” field allows you to input example data to confirm the segment code details are accurate.
- The “Budget Code Preview” displays a preview of the entire budget code as it will be shown in the Cost Management module.
- If you hover over the “Budget Code Preview” a “Full Code Preview” pops up to display the code as it might look when imported into Cost Management from your accounting system.

The screenshot shows the 'Project Admin' interface with the 'Income' tab selected. Under 'Budget Code Segments', the 'Budget code preview' field is highlighted. A 'Full code preview' pop-up is shown, displaying the full budget code '84720010330001SUB#'. The 'Segment code preview' field is also highlighted, showing the segment code '8472'.

Original Code	System Code	Description
<input type="checkbox"/>	1212	1212

# Custom Attributes

The details flyout panel allows users to quickly view detailed information behind any item in multiple tabs within Cost Management. With the Custom Attribute feature teams can customize a portion of the details flyout panel to suit their needs and preferences.



## 1 Accessing Custom Attributes

Project Admins are the only individuals who have permission to create and edit custom attributes.

1. In the “Project Admin” module, select the “Services” tab.
  2. On the left sidebar select “Cost Management.”
  3. You will now be able to access the settings for the different tabs within the module. Custom attributes can be created in the following tabs for each component:
    - **Income:** Budget, Main Contract, & Budget Payment Application
    - **Expenditure:** Contract & Cost Payment Application
    - **Change Order:** Cost Item, PCO, RFQ, RCO, OCO, & SCO
- Note, the main tab and component names can be customized within General Settings.

A screenshot of the Autodesk BIM 360 Project Admin interface. The top navigation bar shows the 'SERVICES' tab selected. The left sidebar has 'Cost Management' highlighted. The main content area shows the 'General' tab for the 'Unit of Measure' component, with a table listing various units and their dimensions.

Display Name ^	Description	Dimension	Status
cl	Centilitre	Volume / Capacity	Active
cm	Centimetre	Length	Active
cm2	Square Centimetre	Area	Active
cm3	Cubic Centimetre	Volume / Capacity	Active

Terminology Reference

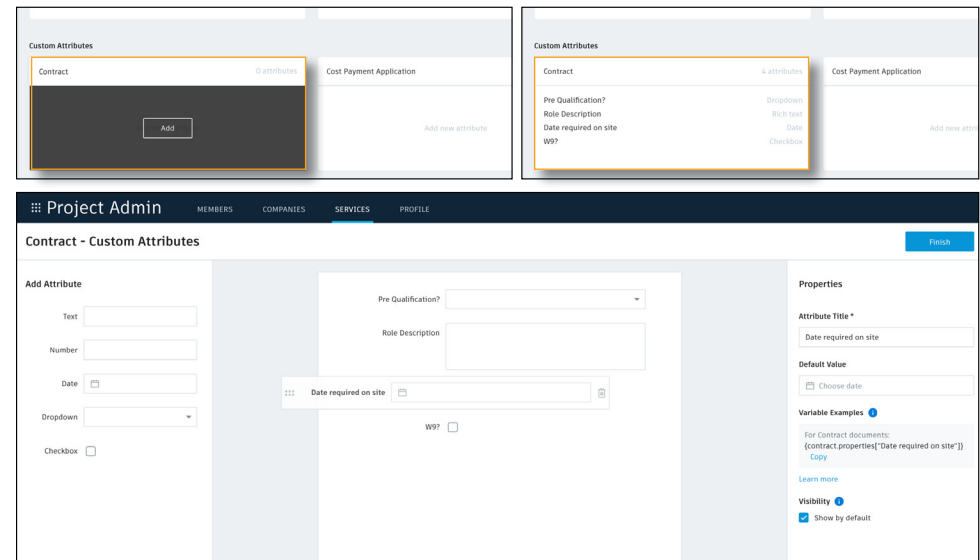




# Custom Attributes

## 2 Creating a Custom Attribute

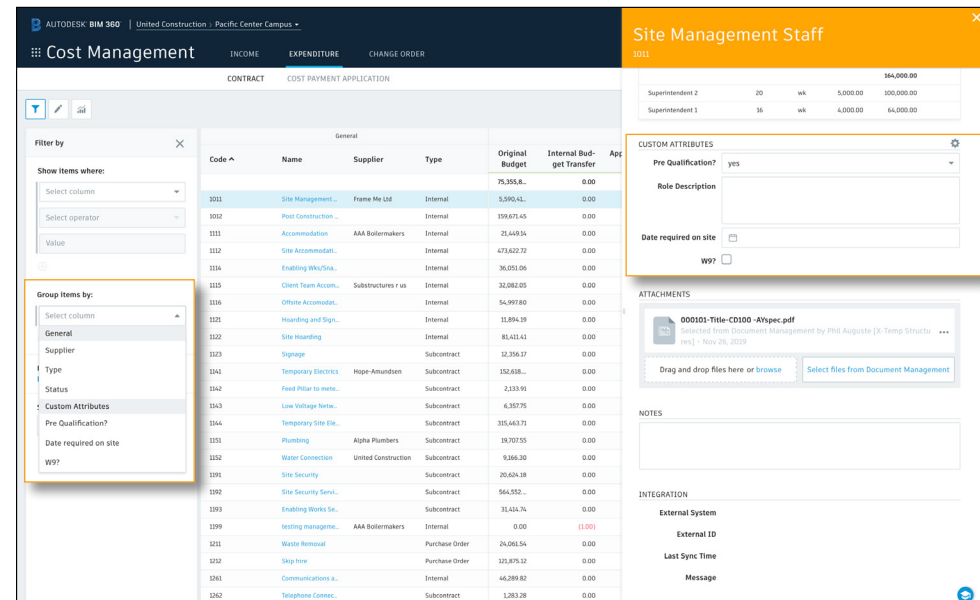
- To create a custom attribute, hover over the component and select “Add.”
- Either click to add or drag and drop the attribute from the left sidebar into the center preview panel.
- Select the attribute to define it in the properties panel on the right.
- Rearrange the attributes by clicking then dragging and dropping the field. Select “Finish” when done.
- The attributes will appear in the component. Like adding, click to edit.



## 3 View Custom Attribute in the Items Details Flyout

- Select a item within any of the Income, Expenditure or Change Order tabs. The details flyout will appear.
- In the details flyout select “Custom Attributes” from the top left drop-down list.
- This will display the custom attributes created in the Project Admin module.

**PRO TIP:** Add your custom attributes to the table view via the control icon. In the table view, you can assign them. You can also use custom attributes for grouping and filtering. To do this, select the filter icon and then choose the attribute from the Group Items By drop-down.



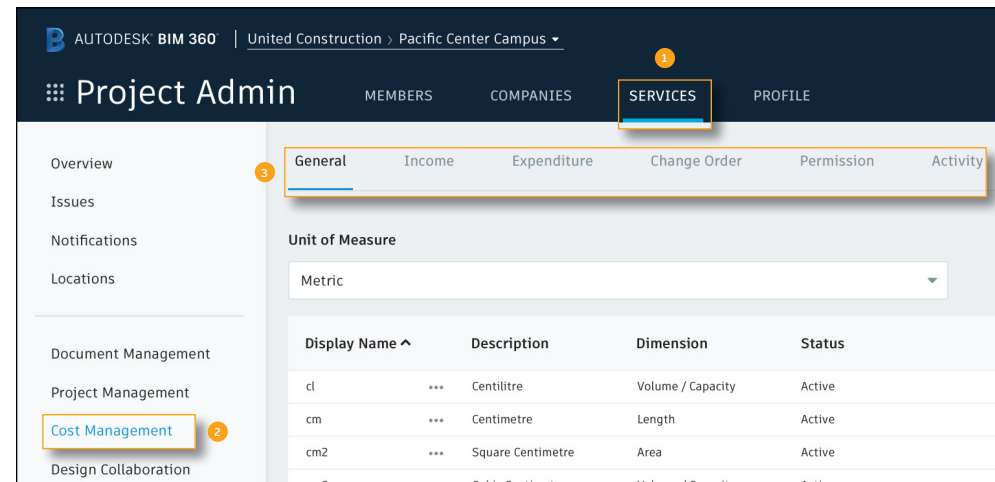
# Document Templates

Easily create standard documentation formats for distribution with Cost Management's Document Templates capabilities. Templates are created using fields that are automatically populated with data from the system when generated.

## 1 Accessing Document Templates

Project Admins are the only individuals who have permission to create and edit document templates.

1. In the "Project Admin" module, select the "Services" tab.
  2. On the left sidebar select "Cost Management."
  3. You will now be able to access the settings for the different tabs within the module. Document templates can be created in the following tabs for each component:
    - **Income:** Main Contract, & Budget Payment Application
    - **Expenditure:** Contract & Cost Payment Application
    - **Change Order:** PCO, RFQ, RCO, OCO, & SCO
- There is no limit to the number of document templates that can be associated with each component.
  - Note, the main tab and component names can be customized within General Settings.

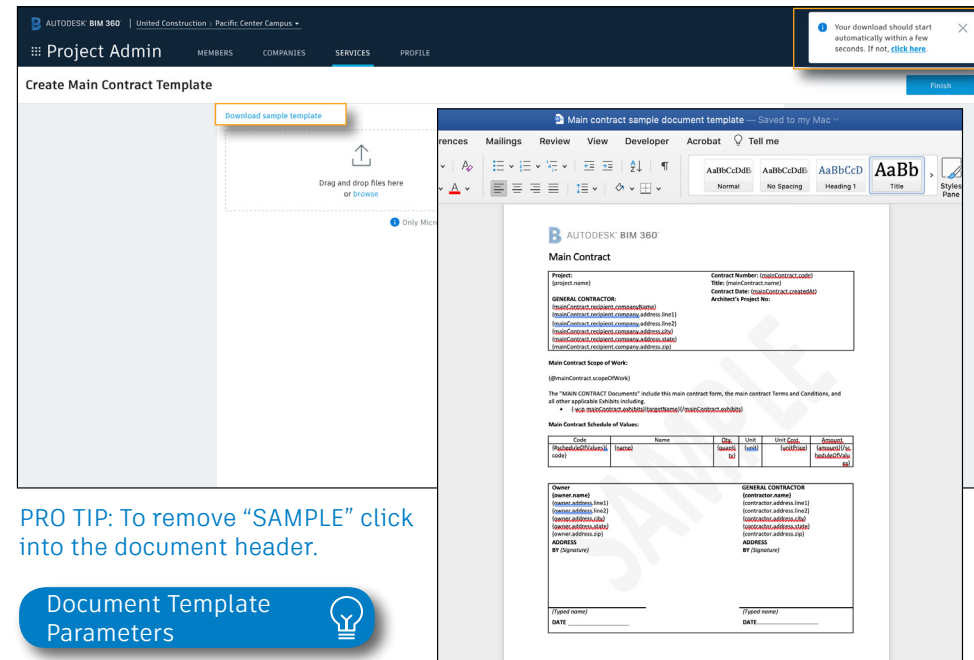


**PRO TIP:** Only Microsoft Word Documents are supported.

# Document Templates

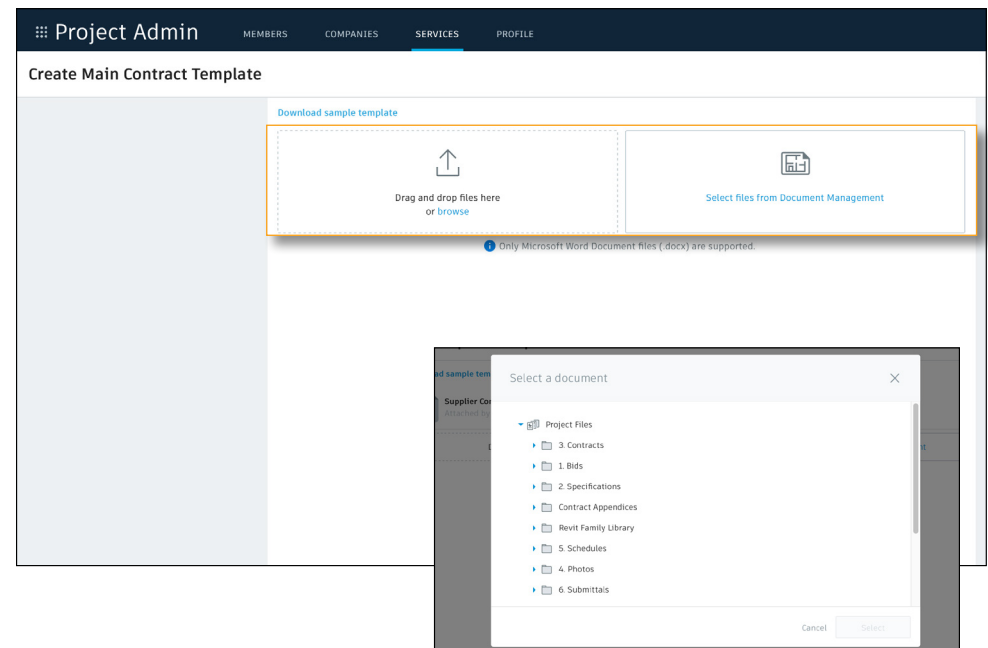
## 2 Downloading a Sample Template

- Within the Document Templates section, select the component you want to add a template to.
- Select “Download sample template,” a Word template will automatically download.
- The downloaded template can be customized to suit your needs. Note, the content within the brackets must stay the same for the module to recognize and to auto-populate it when generating the document.
- Once finalized, update the template name and save.



## 3 Uploading a Document Template

- There are two ways you can upload a document template:
  - **Option 1:** Drag and drop the file or click “browse” to locate the file on your computer for upload.
  - **Option 2:** Select a document from the BIM 360 Document Management module by clicking “Select files from Document Management” and navigating to the correct folder.
- Select “Finish” to save and exit.



# Financial Markup Formulas

Easily create multiple project level markup configurations to apply to Potential Change Orders (PCOs), Requests for Change Orders (RCOs) or Owner Change Orders (OCOs).

## 1 Accessing Financial Markups

Project Admins are the only individuals who have permission to create and edit financial markups.

1. In the “Project Admin” module, select the “Services” tab.
  2. On the left sidebar select “Cost Management.”
  3. You will now be able to access the settings for the different tabs within the module. Financial markups are created in the Change Order tab.
- Multiple markup formulas can be created and any existing formulas will be available in the list.
  - The markups created here can then be applied to either PCOs, RCOs, or OCOs.

The screenshot displays the Autodesk BIM 360 Project Admin interface. The top navigation bar includes the Autodesk BIM 360 logo, the project name 'United Construction > Pacific Center Campus', and tabs for MEMBERS, COMPANIES, SERVICES (highlighted with a red box and a red circle 1), and PROFILE. The left sidebar contains a list of modules: Overview, Issues, Notifications, Locations, Document Management, Project Management, Cost Management (highlighted with a red box and a red circle 2), and Design Collaboration. The main content area shows the 'Change Order' tab (highlighted with a red box and a red circle 3) under the 'General' section. The 'Code Format' section is visible, showing a table for 'Cost Item' with columns for Prefix, Suffix, Number of Digits, and Start Number. The table contains one row with the values 'CI-', an empty field, '4', and '1'. Below this, the 'PCO' and 'RFQ' tabs are visible.

Prefix	Suffix	Number of Digits	Start Number
CI-		4	1

General	Income	Expenditure	Change Order	Permission	Activity
Code Format					
Cost Item					
Prefix	Suffix	Number of Digits	Start Number		
CI-		4	1		
PCO				RFQ	

# Financial Markup Formulas

## 2 Creating a Markup Formula

- Scroll to the Financial Markup Formulas section, select “Add.”
- Select the top “New Formula” field to title the formula.
- To add a description select the pencil icon next to “New Financial Markup Formula.”
- To enter a sample cost basis, which will allow you to check the calculation as you start building the formula, select the pencil icon next to “Sample cost basis.”

### Creating the Formula:

1. Click “Markup” to add a new markup row to the formula or select “Markup” and drag it into the center preview panel.
2. In the Markup edit panel name the markup (e.g. Fee).
3. Select the markup type & amount:
  - “Percentage” for a standard percentage based markup.
  - “Flat” for a flat fee, per PCO.
4. Select the “Cost Basis” from the drop-down.
5. (Optional) add a description of the markup.
6. Search or scroll to select a target budget item for the markup.
7. By default, markups are calculated on all budget items. Using the “Calculate on” fields you can enter rules to only calculate on particular budget codes, cost types etc.

Autodesk BIM 360 | United Construction - Pacific Center Campus

Project Admin MEMBERS COMPANIES SERVICES PROFILE

New Formula

New Financial Markup Formula Sample cost basis 1,000.00

Drag and drop to add formula item

Name	Amount	Cost Basis	Result
Markup	0.00		
Subtotal	0.00		
Grand total			1,000.00

Markup total: 0.00

Please note

Autodesk BIM 360 | United Construction - Pacific Center Campus

Project Admin MEMBERS COMPANIES SERVICES PROFILE

Alternative Markup 1

New Financial Markup Formula Sample cost basis 10,000.00

Drag and drop to add formula item

Name	Amount	Cost Basis	Result
Insurance	2.00%	10,000.00	200.00
Insurance			200.00
Contingency	3.00%	10,200.00	306.00
Fee	4.00%	10,943.75	437.75
Contingency & Fee			743.75
Markup total			943.75
Grand total			10,943.75

Markup total: 943.75

Grand total: 10,943.75

Please note

Markup edit

Name: Fee

Type & amount: Percentage

Cost Basis: Grand total

Description:

Map markup to budget code: 8472001012101FEE

Calculate on: Select column

Select operator: Value

# Financial Markup Formulas

8. Add a subtotal by selecting “Subtotal” or dragging it into the center preview panel.

- Name the subtotal (e.g. Contingency & Fee).
- Select the appropriate “Cost Basis Revising” option.
  - “Revise Cost Basis” (default) if revising the cost basis for all subsequent markups will be included.
  - “Info Only” to summarize any markups above for information

- Select “Save.”

The screenshot shows the 'Alternative Markup 1' configuration screen in the Autodesk BIM 360 Project Admin interface. The interface is divided into several sections:

- Drag and drop to add formula item:** A list of items to be added to the markup formula, including 'Markup' and 'Subtotal'.
- Table:** A table showing the calculated markup items and their results.
- Subtotal edit:** A panel on the right for editing the subtotal, including a 'Name' field and a 'Cost basis revising' section with two options: 'Revise cost basis' (selected) and 'Info only'.

Name	Amount	Cost Basis	Result
Insurance	2.00%	10,000.00	200.00
Contingency	3.00%	10,200.00	306.00
Fee	4.00%	10,506.25	437.75
Contingency & Fee			743.75
Markup total			943.75
Grand total			10,943.75

**Subtotal edit**

Name: Contingency & Fee

**Cost basis revising**

☒ Revise cost basis  
Creates a sub total and recalculates the sample "Cost Basis" for subsequent markups.

☐ Info only  
Creates a sub total for information purposes without recalculating the "Cost Basis" for subsequent markups.

PRO TIP: Drag and drop markups and subtotals to rearrange if required.



# Module Overview

Cost Management provides a real-time summary view of all budget items and contracts, giving a clear picture of revenue, costs, forecast and variance related to each item. This enables teams to minimize risk by managing all cost-related construction activities in a single software.

## 1 Budget Tab Overview Mode

Open the Cost Management module and select the Income menu.

1. You can select the filter icon to open a flyout panel where you can create and save filters with multiple conditions.
2. The edit icon allows you to toggle between the overview and edit modes.
3. The chart icon allows you to turn charts on or off.
4. You can select the column headers to sort in ascending or descending order.
5. Column settings allows you to select the columns you wish to include in your view.
6. Export button allows you to export a nicely formatted budget report. The Excel report provides the option to include additional historical data. With the PDF report you can choose to export a full report with all columns except custom attributes or an income report with columns in General and Income.

The screenshot shows the Autodesk BIM 360 Cost Management interface. The top navigation bar includes 'INCOME', 'EXPENDITURE', and 'CHANGE ORDER' tabs. Below the navigation bar, there are two charts: 'Budget Trend' and 'Cost Trend'. The main area displays a table of budget items with columns for Budget Code, Cost Type, Budget Name, Supplier Contract, Original Budget, Internal Budget, Approved Owner Changes, Revised Budget, Pending Owner Changes, Projected Budget, and Orig. Commitment. On the right side, there is a 'Column Settings' panel. At the bottom, there are two pop-up windows: 'Export Report' and 'Export PDF'.

# Module Overview

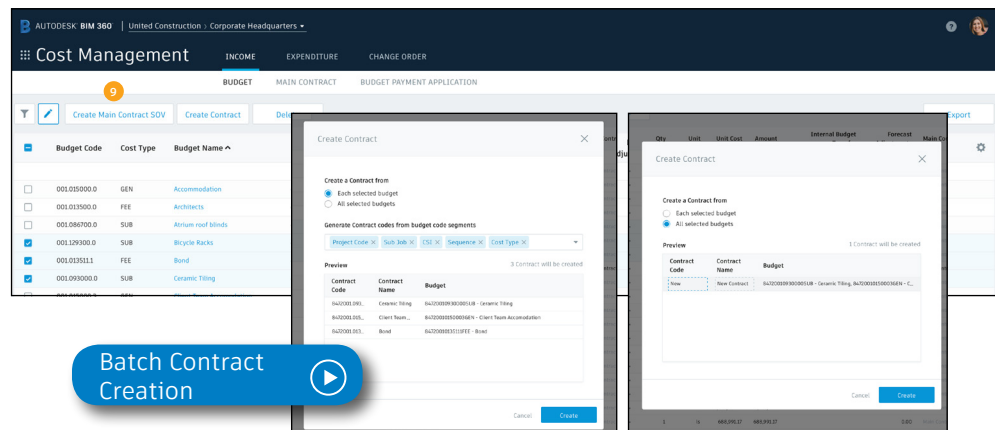
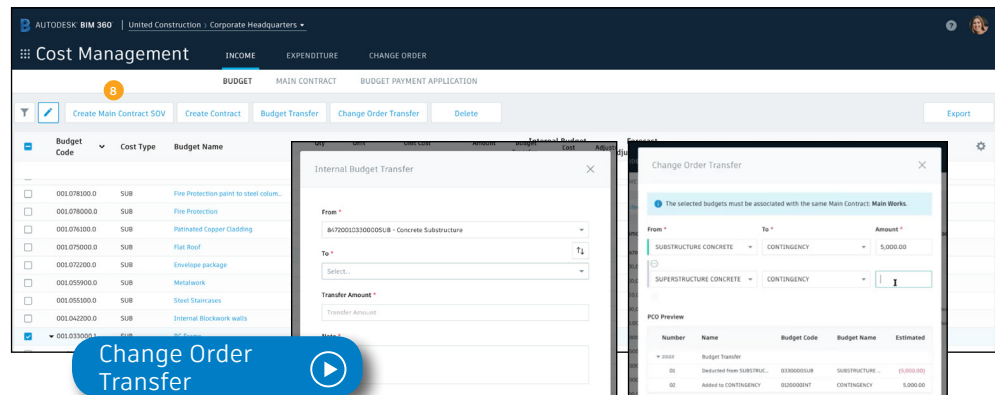
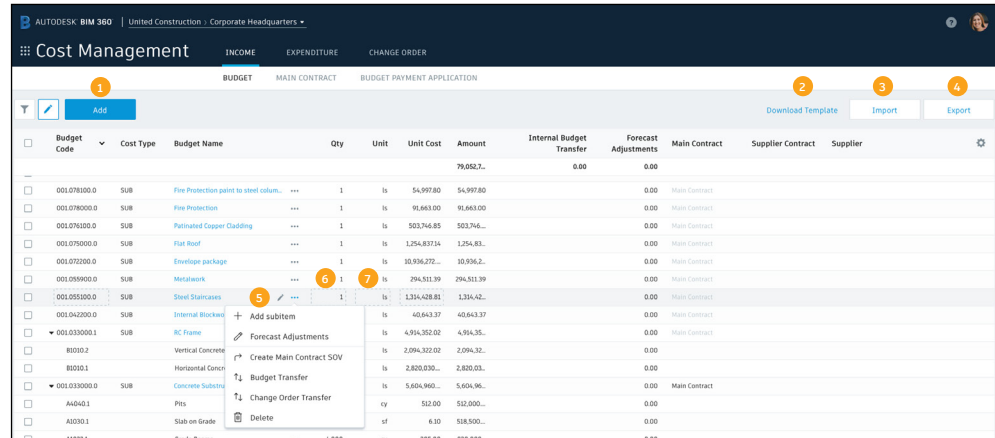
## 2 Budget Tab Edit Mode

In the Budget tab select the edit icon to enable the edit mode.

1. “Add” allows you to manually enter new budget items.
2. “Download Template” will download a budget import template.
3. “Import” allows you to import an Excel file. It works the same as budget template creation.
4. “Export” will provide an Excel export of the budget.
5. Select the budget item's name to open the details flyout panel. Select the pencil icon to edit the budget name and the three-dot menu offers additional actions for that specific budget item.
6. Click within the Qty column to edit the quantity.
7. Click within the Unit column to access a drop-down list of available units, assign the appropriate unit.
8. Like the three-dot menu, a single budget item selected additional actions for that specific budget item will appear at the top.
9. With multiple budget items selected, you can create a Main Contract SOV or Contract for each item chosen or the ability to compile them into one.

There are no restriction on hierarchy levels, and the totals from all child items are rolled up to the parent and divided by the parent qty to provide a unit cost allowing visibility into how the budget number was derived.

**PRO TIP:** If the user has view only permission they will have access to enter the edit mode. However, they will not have access to make edits.

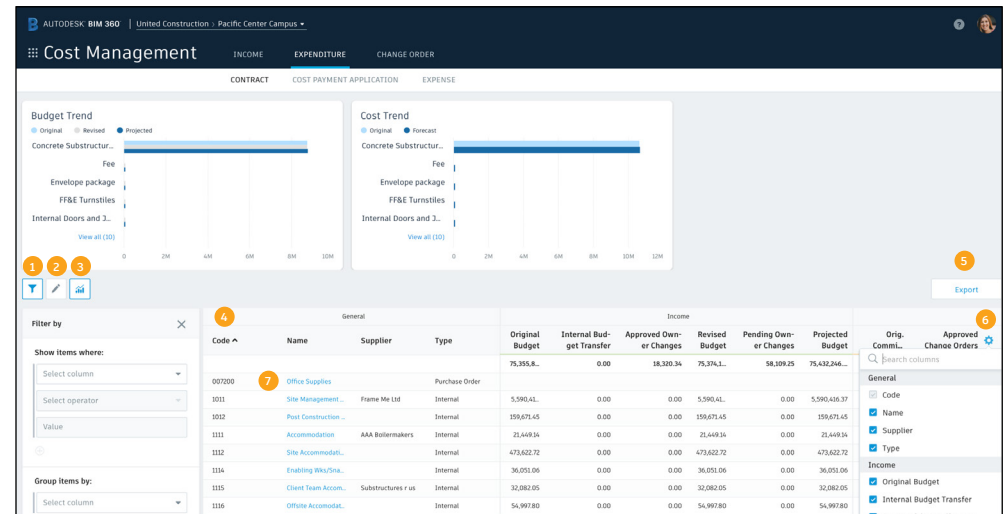


# Module Overview

## 3 Contract Tab Overview Mode

In the Expenditure menu select the Contract tab. The contract overview works the same as the budget overview.

1. You can select the filter icon to open a flyout panel where you can create and save filters with multiple conditions.
2. The edit icon allows you to toggle between the overview and edit modes.
3. The chart icon allows you to turn charts on or off.
4. You can select the column headers to sort in ascending or descending order.
5. Export button allows you to export the contract summary to Excel.
6. Column settings allows you to select the columns you wish to include in your view.
7. Select the contract name to open the details flyout panel.



**PRO TIP:** Though some companies may have the same budget list as they do contracts, having both views is to facilitate having different lists even though the financial data adds up to the same total. This allows for contracts to be made of multiple budget codes and be able to be viewed either way.

## 4 Contract Tab Edit Mode

In the Contract tab select the edit icon to enable the edit mode. This works similarly to the budget edit mode.

1. "Add" allows you to manually enter a contract item.
2. "Download Template" will download a contract import template.
3. "Import" allows you to import an Excel file.
4. "Export" allows you to export a contract report.

Code	Name	Supplier	Type	Budget Code	Budget Name	Awarded Date	Amount	Status	W99
007000	Office Supplies	Frame Me Ltd	Purchase...				77,225.3...	Open	
1011	Site Management Staff	Frame Me Ltd	Internal	84720001010000INT	Site Management Staff		5,590.41...	Open	yes
1012	Post Construction Staff	Frame Me Ltd	Internal	310100000000INT	Post Construction Staff		159,671.45	Executed	
1111	Accommodation	AAA Boilermakers	Internal	310100000000INT	Accommodation		21,449.34	Open	
1112	Site Accommodation	AAA Boilermakers	Internal	310100000000INT	Site Accommodation		473,622.72	Open	
1114	Enabling Wks/Snagging...	AAA Boilermakers	Internal	310100000000INT	Enabling Wks/Snagging...		36,051.06	Open	
1115	Client Team Accommodat...	Substructures r us	Internal	310100000000INT	Client Team Accommodat...		32,082.05	Open	
1116	Offsite Accommodation c...	Substructures r us	Internal	310100000000INT	Offsite Accommodation co...		54,997.80	Open	
1121	Hoarding and Signage	AAA Boilermakers	Internal	84720001010000INT	Hoarding and Signage		11,894.19	Open	
1122	Site Hoarding	AAA Boilermakers	Internal	84720001010000INT	Site Hoarding		81,411.41	Open	
1123	Signage	Substructures r us	Internal	84720001010000INT	Signage		12,354.17	Open	

# Module Overview

## Contract Tab Edit Mode (continued)

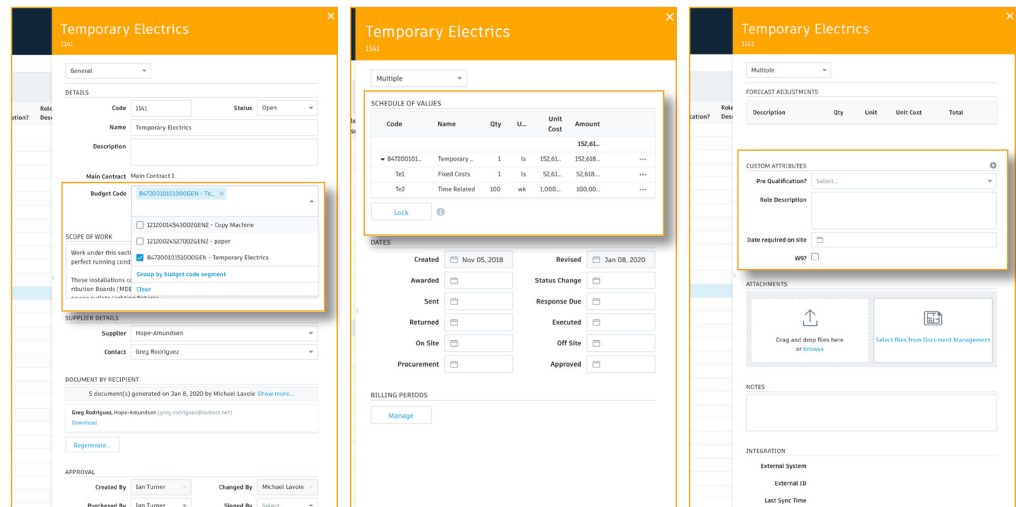
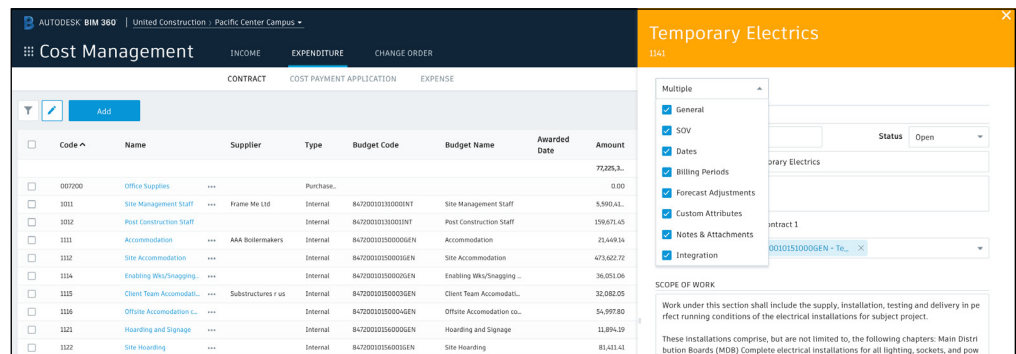
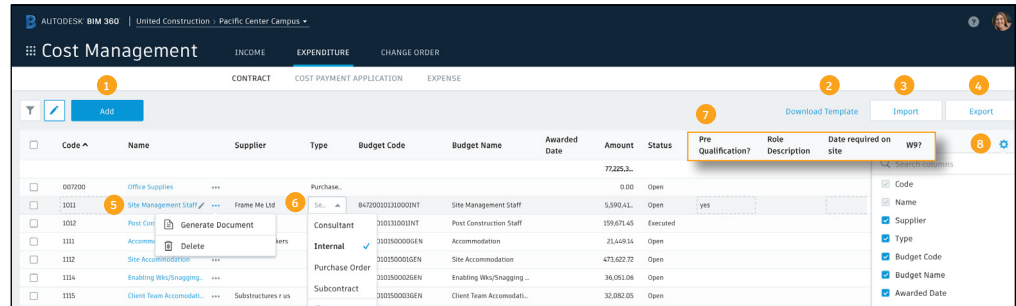
5. Select a contract name to open the details flyout panel. Use the pencil icon to edit the name or select the three-dot menu to generate a document or delete the contract.
6. Click within the Type column to add a contract type to the line item. Project admins create the list of types within expenditure settings in the Project Admin module.
7. Project admins can create custom attributes for contracts within expenditure settings in the Project Admin module.
8. Column settings allows you to select the columns you wish to include in your view.

### Details Flyout Panel

The details flyout panel provides more information and can be used to update/edit contract details. Use the drop-down to select the items to view in the flyout.

#### Key Items:

- Budget Code - Provides a list of all unallocated budget items. Create the connection between contract and budget item by assigning from this list.
- SOV (Schedule of Values) - By default the SOV will inherit any budget item build ups from the connected budget item. They can be removed by right clicking if you want to create a different list of items. They can also be appended or edited and the values overwritten to create the correct award value for the contract.
- Custom Attributes - Allows you to customize the type of information you want to capture for contracts. Steps for creating a custom attribute can be found in the custom attributes section of this guide.



**PRO TIP:** If the user has view only permission they will have access to enter the edit mode. However, they will not have access to make edits.

# Module Overview

## 5 Fundamental Forecasting

New columns have been added to the Budget & Contracts tab as the first step to incorporating forecasting functionality into Cost Management. The columns include:

- Actual Costs
- Forecast Adjustments
- Forecast to Complete
- Forecast Final Cost
- Forecast Variance

The screenshot displays the 'Cost Management' interface with the 'BUDGET' tab selected. A list of budget items is shown, including 'Copy Mach...', 'paper', 'Fees/Legal/...', 'Solicitors F...', 'Bill Prepara...', 'Testing and...', 'Risk Contin...', '3D Printing', and 'Site Manag...'. A context menu is open over the 'Site Manag...' item, showing options: 'Forecast Adjustments', 'Budget Transfer', and 'Change Order Transfer'. An 'Edit Forecast Adjustments' window is also shown, allowing users to add line items with description, quantity, unit, unit cost, and total.

### Making Forecast Adjustments

- In the line, you wish to adjust right-click within the Forecast Adjustments column or select the three dots next to the item name to access the Edit Forecast Adjustments window.
- Select “add line item” and fill in the necessary information; you can add multiple list items. To delete an item, select the three dots. Select the “x” to exit back to the tab view.
- The total adjustments will appear in the Forecast Adjustments and Forecast Variance column. The Forecast Cost to Complete and Forecast Final Cost will now reflect the change.

The screenshot displays the 'Cost Management' interface with the 'BUDGET' tab selected. A detailed table of budget items is shown, including columns for Revised Budget, Pending Owner Changes, Projected Budget, Orig. Commitment, Uncommitted Change Orders, Approved Change Orders, Pending Change Orders, Reserves, Projected Cost, Actual Cost, Forecast Adjustments, Forecast Cost to Complete, % Complete, Forecast Final Cost, Variance, and Forecast Variance. A context menu is open over a line item, showing options: 'Forecast Adjustments', 'Budget Transfer', and 'Change Order Transfer'.

**PRO TIP:** The forecast adjustments can also be viewed in the details flyout panel by selecting the top drop-down, then “Forecast Adjustments.”

The screenshot displays the 'Forecast Adjustments' window. It shows a table of adjustments with columns for Description, Qty, Unit, Unit Cost, and Total. The table includes items like 'Add Resource Item 1' and 'Add Resource Item 2'.



# Change Order Management

A typical construction project can have dozens of change orders. Improve change order tracking across the entire approval process and view details of cost item impacts as well as historical reference points with Cost Management's change order capabilities.

## 1 Cost Item

Cost items are the individual detailed items for each budget code associated with a potential change. The typical workflow is to create a Potential Change Order (PCO) and add cost items to it. However, in the Cost Items tab in Cost Management, you can easily add cost items or edit existing cost items.

This works similarly to the edit mode in the contract tab.

1. **Add:** allows you to manually enter a cost item.
2. **Export:** allows you to export a PDF or Excel cost item report.
3. **Control Icon:** the column settings allows you to select the columns you wish to include in your view.
4. **Budget Status:** is the current status of the cost item in the budget request workflow.
5. **Accessing Item:** Select the link to open the 'container' for whichever part of the process the cost item is currently in.
6. **Three Dot Menu:** Select the three dots to delete a cost item.
7. **Accessing Details Flyout:** Select a cost item name to open the details flyout panel.

Autodesk

BIM 360

United Construction - Pacific Center Campus

Cost Management

Income

Expenditure

Change Order

1

2

Y

Add

Export

Number

Name

Scope

Type

Budget Code

Budget Name

Supplier

Estimated

Proposed

Submitted

Approved

Committed

Budget Status

Cost Status

PCO

RFQ

RCO

OCO

CF-0037

Frame - Additional Floor...

Out

Owner Chan...

8470003033...

RC Frame

Subtriv...

995,634.07

1,201,746...

1,193,705...

1,165,495...

92,782.00

Accepted

Proposed

P-0041

OR-41

CF-0038

Revised Signage

Out

Owner Direc...

8470003030L...

Signage

10,000.00

11,050.00

11,050.00

11,050.00

2,000.00

Approved

Open

P-0006

OR-06

CF-0065

Contingency

Out

Owner Direc...

8470003032...

Risk Conting...

450.00

450.00

450.00

450.00

450.00

Approved

Open

CF-0096

Insurance

Out

Owner Direc...

8470003032...

Fees/Legal/Ins.

309.00

309.00

309.00

309.00

309.00

Approved

Open

CF-0067

Bond

Out

Owner Direc...

8470003032...

Fees/Legal/Ins.

154.50

154.50

154.50

154.50

154.50

Approved

Open

CF-0068

Fee

Out

Owner Direc...

8470003032...

Fees/Legal/Ins.

663.07

663.07

663.07

663.07

663.07

Approved

Open

CF-0081

Contingency

Out

Owner Chan...

8470003032...

Risk Conting...

306.00

0.00

0.00

0.00

0.00

Open

CF-0082

Fee

Out

Owner Chan...

8470003032...

Fees/Legal/Ins.

437.75

0.00

0.00

0.00

0.00

Open

CF-0084

Owner - Revised Main E...

Out

Owner Chan...

8470003033...

RC Frame

Subtriv...

5,000.00

5,000.00

6,000.00

6,000.00

6,000.00

Approved

Open

P-0037

OR-37

CF-0021

Flipping - Revised Main...

Out

Owner Chan...

8470003033...

RC Frame

Subtriv...

5,000.00

9,000.00

10,000.00

10,000.00

9,000.00

Rejected

Open

CF-0047

Cladding Specification...

Out

Owner Chan...

8470003033...

RC Frame

Subtriv...

800,000.00

1,000,000.00

1,000,000.00

1,000,000.00

1,000,000.00

Approved

Proposed

P-0020

OR-20

Reset

CF-0050

ACI 308 - Floor slabs L...

Out

Owner Chan...

8470003035...

TF&E Kitchen IL

5,328.00

5,328.00

5,328.00

5,328.00

50.00

Approved

Proposed

P-0023

OR-23

OR-0011

O-0021

CF-0051

WFL 2028 - Floor slabs L...

Out

Owner Chan...

8470003035...

Temporary Pla...

Alpha PL

22,732.00

22,732.00

22,732.00

22,732.00

22,732.00

Approved

Proposed

P-0024

OR-24

CF-0052

Metal Panel Additions

Out

Owner Chan...

8470003035...

Metallwork

25,000.00

25,000.00

25,000.00

25,000.00

25,000.00

Open

Pricing

P-0025

OR-0028

R-0005

O-0009

CF-0069

Contingency

Out

Internal Cha...

8470003032...

Risk Conting...

750

15.00

30.00

30.00

30.00

Open

CF-0070

Insurance

Out

Internal Cha...

8470003032...

Fees/Legal/Ins.

5.15

10.30

20.60

20.60

20.60

Open

Search columns

Number

Name

Scope

Type

Budget Code

Budget Name

Supplier

Estimated

Proposed

Submitted

Approved

Committed

Budget Status

Cost Status

PCO

RFQ

RCO

OCO

5

Reset

**PRO TIP:** Project Admins can customize the main menu name (Change Order) and the subtab names (Cost Item, PCO, RFQ, RCO, OCO, SCO) and change the order of the tabs within the general settings in the project admin module. Refer to the Settings & Permission chapter for more details.



# Change Order Management

## Cost Item (Continued)

### Details Flyout Panel:

- In the details flyout panel use the drop-down to select the sections to view. Sections can be viewed individually or in a scrolling list. Creating and editing cost items will be done in the details flyout panel.
- Under “Cost Summary” you can break down the cost item into a more granular level of detail by selecting “define cost item hierarchy/breakdown.”

### Assigning Cost Items to a PCO:

- Existing or new cost items created directly in the cost item view can be “assigned” to a PCO by selecting the check box next to the cost item or the three dot menu next to the items name.
- Once selected an “assign” button appears. Click the drop down to assign.
- An assign window will pop up where you can type in search criteria to filter the list. Select the PCO to add the cost item.

The screenshot shows the Autodesk BIM 360 Cost Management interface. The 'CHANGE ORDER' tab is active. A details flyout panel is open for cost item C1-0037, showing a 'COST SUMMARY' section with a 'Define Cost Item Hierarchy/Breakdown' link. The main table lists various cost items with columns for Number, Name, Scope, Type, Budget Code, Budget Name, Supplier, Estimated, Proposed, Submitted, Approved, and Committed.

Number	Name	Scope	Type	Budget Code	Budget Name	Supplier	Estimated	Proposed	Submitted	Approved	Committed
C1-0066	Insurance	Out	Owner Dir...	8470000012	Fees/Legal/Ins...		995,634.07	1,201,746.44	1,193,705.92	1,185,495.43	92,782.00
C1-0067	Bond	Out	Owner Dir...				209.00	209.00	209.00	209.00	
C1-0068	Fee	Out	Owner Dir...				354.50	354.50	354.50	354.50	
C1-0069	Contingency	Out	Owner Dir...	8470000012	Risk Conting...		463.07	463.07	463.07	463.07	
C1-0082	Fee	Out	Owner Dir...	8470000012	Risk Conting...		306.00	0.00	0.00	0.00	0
C1-0084	Doors - Revised Main E...	Out	Owner Dir...	8470000012	Fees/Legal/Ins...		437.75	0.00	0.00	0.00	0
C1-0085	Doors - Revised Main E...	Out	Owner Dir...	8470000012	Risk Conting...		5,000.00	5,000.00	5,000.00	5,000.00	4,000
C1-0086	Doors - Revised Main E...	Out	Owner Dir...	8470000012	Risk Conting...		5,000.00	5,000.00	5,000.00	5,000.00	4,000
C1-0087	Cladding Specification	Out	Owner Dir...	8470000012	Risk Conting...		800,000.00	1,000,000.00	1,000,000.00	1,000,000.00	
C1-0088	AS1 #13 Revised Kitch...	Out	Owner Dir...	8470000012	FF&E Kitchen U...		5,238.00	5,238.00	5,238.00	5,238.00	30
C1-0089	RFI #426 - floor slabs f...	Out	Owner Dir...	8470000012	Temporary Pla...	Alpha PL	22,732.00	22,732.00	22,732.00	22,732.00	
C1-0090	Metal Panel Additions	Out	Owner Dir...	8470000012	Metawork		25,000.00	25,000.00	25,000.00	25,000.00	
C1-0091	Contingency	TBD	Internal Cha...	8470000012	Risk Conting...		7.50	15.00	30.00	30.00	
C1-0092	Insurance	TBD	Internal Cha...	8470000012	Fees/Legal/Ins...		5.15	10.30	20.60	20.60	
C1-0093	Bond	TBD	Internal Cha...	8470000012	Fees/Legal/Ins...		2.58	5.15	10.30	10.30	
C1-0094	Fee	TBD	Internal Cha...	8470000012	Fees/Legal/Ins...		11.06	22.11	44.21	44.21	
C1-0095	Contingency	TBD	Internal Cha...	8470000012	Risk Conting...		9.00	0.00	0.00	0.00	
C1-0096	Bond	TBD	Internal Cha...	8470000012	Fees/Legal/Ins...		3.89	0.00	0.00	0.00	
C1-0097	Insurance	TBD	Internal Cha...	8470000012	Fees/Legal/Ins...		6.18	0.00	0.00	0.00	
C1-0098	Fee	TBD	Internal Cha...	8470000012	Fees/Legal/Ins...		13.27	0.00	0.00	0.00	
C1-0099							154.84	154.84	154.84	0.00	
C1-0100							107.70	107.70	107.70	0.00	
C1-0101							53.85	53.85	53.85	0.00	
C1-0102							231.10	231.10	231.10	0.00	
C1-0103							154.84	154.84	154.84	154.84	
C1-0104							107.70	107.70	107.70	107.70	
C1-0105							53.85	53.85	53.85	53.85	
C1-0106							231.10	231.10	231.10	231.10	

The screenshot shows the Autodesk BIM 360 Cost Management interface. The 'CHANGE ORDER' tab is active. An 'Assign' button is highlighted next to cost item C1-0037. A dropdown menu is open, showing options to assign the cost item to a PCO.

Number	Name	Scope	Type	Budget Code	Budget Name	Supplier	Estimated	Proposed	Submitted	Approved	Committed	Budget Status	Cost Status	PCO	RI
C1-0036	Door height conflicts with...	Out		8470000012	Service Riser Des...		995,634.07	1,201,746.44	1,193,705.92	1,185,495.43	92,782.00	Open	Approved	P-0043	
C1-0037	Door height conflicts with...	Out		8470000012	Service Riser Des...		1,000.00	1,000.00			1,000.00	Open	Executed		

The screenshot shows the 'Assign to PCO' dialog box. The 'Name' field is populated with 'Door height conflicts with structure' and 'P-0043'. The 'Assign' button is highlighted.

Name *
Search...
Brick Wall Removal
P-0038
Cladding Change
P-0020
clashing between dth fhjs
P-0044
Door height conflicts with structure
P-0043
Dry wall
P-0037

# Change Order Management

## 2 PCO Sub-Tab

PCO's (Potential Change Orders) are the starting point of any budget or cost change, and used to generate an RFQ, RCO, OCO, or SCO. The PCO tab is within the Change Orders tab in the Cost Management Module.

1. Select "Add" to create a new PCO.
2. "Export" allows you to export a PDF or CSV PCO report.
3. Column settings allows you to select the columns you wish to include in your view.
4. "Type" allows you to select the type of PCO.
5. "Scope" allows you to indicate whether the PCO is an "In" or "Out" scope change. The former meaning a cost change and the latter meaning a budget (and cost) change. It's important to include this as it will define where it's shown in the budget and contracts overview tabs.
6. "Source Type" allows you to select the PCO source.
7. "Source Ref #" is the reference number associated with the type.
8. "Budget Status" is the current status of the PCO in the budget request workflow.
9. "Cost Status" is the current status of the PCO in the cost change workflow.
10. Select the PCO name to open the details flyout panel, the pencil allows you to edit the name, and the three-dot menu provides additional options.

Depending on the budget and cost statuses when you select a PCO, you will be given the option to set it to open, delete it, or generate an RFQ, RCO, OCO or SCO.

Number	Name	Type	Scope	Source Type	Source Ref #	Estimated	Proposed	Submitted	Approved	Committed	Budget Status	Cost Status	Created Date	Main Contract
1	P-0006	Owner Directive	Out	ASI	001	10,943.75	12,092.85	12,092.85	12,092.85	2,000.00	Approved	Proposed	Oct 24, 2018	Main Contract 1
2	P-0007	Owner Directive	Out	ASI	002	10,943.75	12,092.85	12,092.85	12,092.85	2,000.00	Approved	Proposed	Nov 6, 2018	Main Contract 1
3	P-0008	Owner Directive	Out	ASI	001	10,943.75	12,092.85	12,092.85	12,092.85	2,000.00	Approved	Proposed	Nov 6, 2018	Main Contract 1
4	P-0009	Owner Directive	Out	ASI	001	10,943.75	12,092.85	12,092.85	12,092.85	2,000.00	Approved	Proposed	Nov 6, 2018	Main Contract 1
5	P-0010	Owner Directive	Out	ASI	001	10,943.75	12,092.85	12,092.85	12,092.85	2,000.00	Approved	Proposed	Nov 6, 2018	Main Contract 1
6	P-0011	Owner Directive	Out	ASI	001	10,943.75	12,092.85	12,092.85	12,092.85	2,000.00	Approved	Proposed	Nov 6, 2018	Main Contract 1
7	P-0012	Owner Directive	Out	ASI	001	10,943.75	12,092.85	12,092.85	12,092.85	2,000.00	Approved	Proposed	Nov 6, 2018	Main Contract 1
8	P-0013	Owner Directive	Out	ASI	001	10,943.75	12,092.85	12,092.85	12,092.85	2,000.00	Approved	Proposed	Nov 6, 2018	Main Contract 1
9	P-0014	Owner Directive	Out	ASI	001	10,943.75	12,092.85	12,092.85	12,092.85	2,000.00	Approved	Proposed	Nov 6, 2018	Main Contract 1
10	P-0015	Owner Directive	Out	ASI	001	10,943.75	12,092.85	12,092.85	12,092.85	2,000.00	Approved	Proposed	Nov 6, 2018	Main Contract 1

**PRO TIP:** If you see your calculated markups are out of sync select the line item and in the "Apply Markup" drop-down select the necessary markup from the list.

Scope	Type	Source Type	Source Ref #	Budget Status	Cost Status
In	Budget Transfer	ASI	005	Approved	Proposed
Out	Owner Change Order	CCD	001	Submitted	Proposed
Contingency	Owner Direct Purchase	INT		Approved	Proposed
Out	Owner Directive	ISSUE		Submitted	
Out	Internal Change	RFI		Submitted	
Out	Contingency	RFP		Submitted	
Out	Back Charge	T&M		Submitted	
Out	Subcontract Quotation			Open	Open
Out	Purchase Order Quotation			Open	Draft

**PRO TIP:** PCO Source Types are created/managed by the Project Admin within the Change Order settings in the project admin module.

Number	Name	Type	Scope	Source Type	Source Ref #	Estimated	Proposed	Submitted	Approved	Committed	Budget Status	Cost Status	Created Date	Main Contract
1	P-0006	Owner Directive	Out	ASI	001	10,943.75	12,092.85	12,092.85	12,092.85	2,000.00	Approved	Proposed	Oct 24, 2018	Main Contract 1
2	P-0007	Owner Directive	Out	ASI	002	10,943.75	12,092.85	12,092.85	12,092.85	2,000.00	Approved	Proposed	Nov 6, 2018	Main Contract 1
3	P-0008	Owner Directive	Out	ASI	001	10,943.75	12,092.85	12,092.85	12,092.85	2,000.00	Approved	Proposed	Nov 6, 2018	Main Contract 1
4	P-0009	Owner Directive	Out	ASI	001	10,943.75	12,092.85	12,092.85	12,092.85	2,000.00	Approved	Proposed	Nov 6, 2018	Main Contract 1
5	P-0010	Owner Directive	Out	ASI	001	10,943.75	12,092.85	12,092.85	12,092.85	2,000.00	Approved	Proposed	Nov 6, 2018	Main Contract 1
6	P-0011	Owner Directive	Out	ASI	001	10,943.75	12,092.85	12,092.85	12,092.85	2,000.00	Approved	Proposed	Nov 6, 2018	Main Contract 1
7	P-0012	Owner Directive	Out	ASI	001	10,943.75	12,092.85	12,092.85	12,092.85	2,000.00	Approved	Proposed	Nov 6, 2018	Main Contract 1
8	P-0013	Owner Directive	Out	ASI	001	10,943.75	12,092.85	12,092.85	12,092.85	2,000.00	Approved	Proposed	Nov 6, 2018	Main Contract 1
9	P-0014	Owner Directive	Out	ASI	001	10,943.75	12,092.85	12,092.85	12,092.85	2,000.00	Approved	Proposed	Nov 6, 2018	Main Contract 1
10	P-0015	Owner Directive	Out	ASI	001	10,943.75	12,092.85	12,092.85	12,092.85	2,000.00	Approved	Proposed	Nov 6, 2018	Main Contract 1

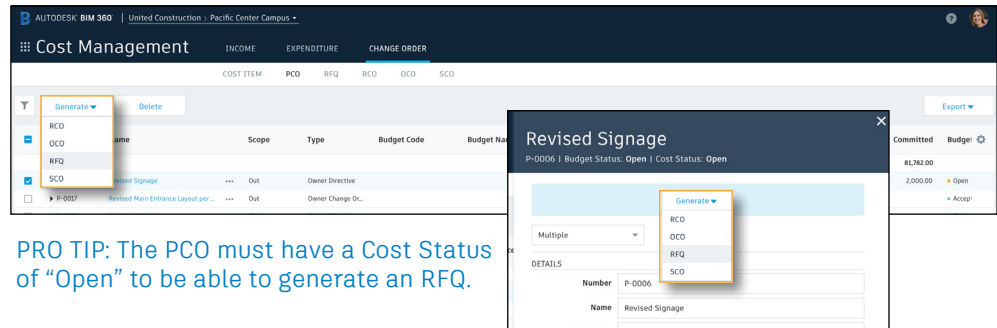
**PRO TIP:** To detach a cost item from a PCO select the item, a detach button will appear.

# Change Order Management

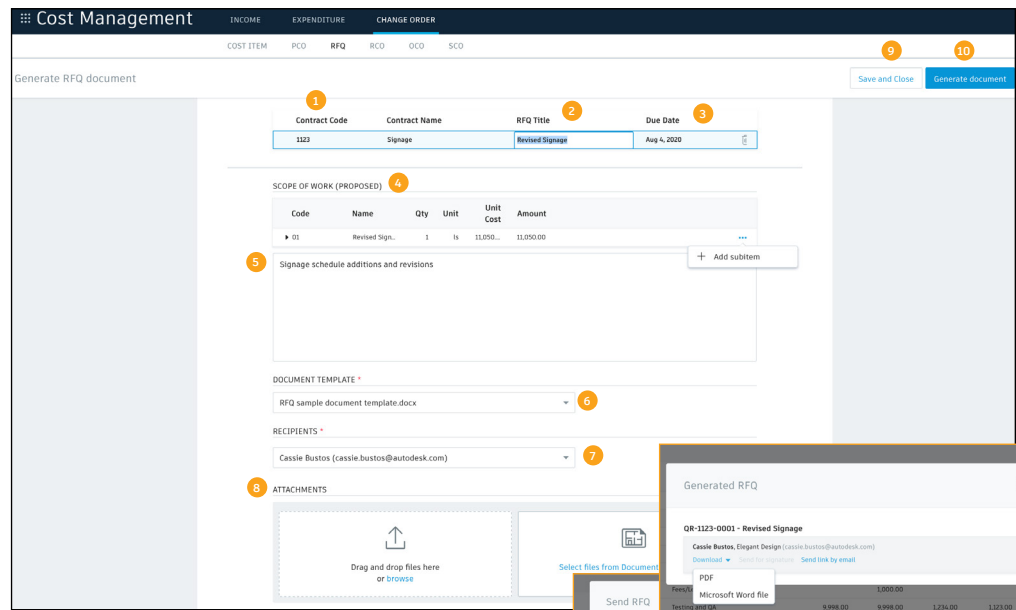
## 3 Generating an RFQ from a PCO

RFQ (Request for Quotation) are the documents you generate to solicit pricing from a supplier. This process utilizes the document templates created in the Project Admin module.

- In the PCO tab, if you want to generate a single RFQ that includes all the associated cost items, select the checkbox next to the PCO or select the PCO name to open the details flyout panel. To generate individual RFQs for specific cost items in the PCO, select that line item.
- A “Generate” drop-down will appear, select RFQ. An RFQ generator window will open.
  - Contract Code and Name are auto-populated by the related budget code.
  - You can customize the RFQ title.
  - Add a due date. By default due date requires a Project Admin permission level, but can be overwritten here.
  - Edit unit cost or add a sub-item.
  - Additional scope description will automatically be populated here from the PCO/Cost Item details flyouts, but can be edited/appended here.
  - Select the desired document template.
  - Search to add additional recipients. The default recipient is auto-populated based on the contract award of the same budget code the cost item is assigned.
  - Additional files can be uploaded from your desktop or selected from the BIM 360 Document Management module.
  - “Save” allows you to save the document in the current state and return to it later to complete.
  - “Generate” allows you to create the document.



**PRO TIP:** The PCO must have a Cost Status of “Open” to be able to generate an RFQ.



**PRO TIPS:**

- Utilizes the document templates capabilities set up in the Project Admin module.
- If recipients don't populate in the drop-down, go to the contract tab to confirm contract(s) are listed.
- A Word and PDF document will be generated.
- Select “Send link by email” to send the generated PDF to the recipient from the system. Note, the recipient requires a BIM 360 license to access the file via email.

# Change Order Management

## 4 RFQ Sub-Tab

The RFQ tab is within the Change Orders tab in the Cost Management Module.

1. "Status" auto updates to "Open" after a RFQ is generated from a PCO.
  2. "Response Due" will be populated when a date is added in the dates section of the details flyout panel.
  3. "Source Type" can be added by clicking to access the drop-down list.
  4. "Source Ref #" allows you to manually enter a number.
  5. "Detach" allows you to detach as cost item from an RFQ. You need to select a cost item to access the detach button. It will still be part of the PCO.
  6. Select the three-dot menu to update the status, generate/regenerate the document, or delete the RFQ.
  7. Select the name to open the details flyout panel.
- In the details flyout panel like the Contract module, use the drop-down list to select the sections to view. Sections can be viewed individually or in a scrolling list. Editing RFQ items can be done in this view.
  - Selectable workflow- based actions (buttons) will appear to help walk you through the process. For example, when the RFQ status is "Open," you will see a "Request Quotation" button. By selecting it the status color changes and the next options you see are "Set as Proposed" or "Rejected." Once proposed you can choose the next action.
  - When Accepted, select "SCO" to generate a Supplier Change Order. This process is similar to creating an RFQ. Fill in the information, select the document template, choose the recipient(s), attach files, and generate the document.

**Cost Management** INCOME EXPENDITURE **CHANGE ORDER**

COST ITEM PCO RFQ RCO SCO

Detach 5

Number	Name	Contract Name	Supplier	Estimated	Proposed	Submitted	Approved	Committed	Status	Response Due	Created Date	Created By	Source Type	Source Ref #
QR-0007	Additional Floor Openings as per R...		Frame Me...	\$50,226.00	1,063,274.00	1,042,512.00	1,007,461.00	30,050.00	Proposed	Oct 31, 2018	Oct 24, 2018	Ian Turner	RFI	000
QR-0028	Metal Panel Additions		Cover me...	25,000.00	25,000.00	25,000.00	25,000.00		Pricing	Sep 25, 2021	Apr 26, 2019	Tessa Kassl...	ASI	001
QR-0030	Clothing Change		Elegant O...	800,000.00	1,000,000.00	1,000,000.00	1,000,000.00		Pricing	Aug 4, 2020	Jul 21, 2019	Jarrod Krug	CCD	001
QR-1123-0...	Revised Signage			10,000.00	11,050.00	11,050.00	11,050.00	2,000.00	Pricing					
QR-1703-0...	Revised Signage			10,000.00	11,050.00	11,050.00	11,050.00	2,000.00	Pricing					
QR-1705-0...	Brick Wall Removal			1,000.00	1,000.00				Proposed	Apr 23, 2020	Apr 9, 2020	Hansen Liu	INT	
QR-1705-0...	Dry wall			9,998.00	9,998.00	1,234.00	1,123.00	2,000.00	Proposed	Apr 24, 2020	Apr 10, 2020	Hansen Liu	RFI	
QR-1705-0...	Door height conflicts with structure			1,000.00	1,000.00				Open	Jun 9, 2020	May 26, 2020	Stanley Lei	RFP	
QR-1705-0...	Door height conflicts with structure			1,000.00	1,000.00				Executed		May 26, 2020	Stanley Lei	RFP	
QR-1705-0...	Door height conflicts with structure			1,000.00	1,000.00				Proposed	Apr 24, 2020	Apr 10, 2020	Hansen Liu	RFI	

**Revised Signage**  
QR-1123-0001 | Open

Request Quotation

Multiple

DETAILS

Number QR-1123-0001

Name Revised Signage

Description

Main Contract Main Contract 1

Document Template RFQ sample document template.docx

Status Open

Type Owner Direct...

**Revised Signage**  
QR-1123-0001 | Proposed

Accept Revise and Resubmit Reject

Multiple

DETAILS

Number QR-1123-0001

Name Revised Signage

Description

Main Contract Main Contract 1

Document Template RFQ sample document template.docx

Status Proposed

Type Owner Direct...

**Revised Signage**  
QR-1123-0001 | Accepted

Revise and Resubmit Generate

Multiple

DETAILS

Number QR-1123-0001

Name Revised Signage

Description

Main Contract Main Contract 1

Document Template RFQ sample document template.docx

Status Accepted

Type Owner Direct...

# Change Order Management

## 5 Generating an RCO from a PCO

RCO (Request for Change Order) are upstream budget change orders. They are a means to request a change in the contract between the Owner and the Main Contractor. Typically, the RCO created by the Main Contractor is built from one or more cost items and sent to the Owner.

- In the PCO tab, if you want to generate a RCO select the check-box next to the PCO or select the PCO name to open the details flyout panel.
- A “Generate” drop-down will appear, select RCO. An RCO generator window will open.
- Like an RFQ, scope information is auto-populated. You can re-calculate the markups, select the document template, choose the recipient(s), attach files, and generate the document.
- Multiple PCOs can be rolled up into a single RCO.
- Select the check-box next to multiple PCOs you would like to generate into a single RCO. When the “Generate” drop-down appears select RCO.
- The process is the same as generating a single document. However, the RCO will be a combination of the selected PCOs. The cost items will be combined and the scope is auto-populated but can be adjusted. Select the document template and recipient.

The screenshot shows the 'Cost Management' interface with the 'CHANGE ORDER' tab selected. The 'PCO' sub-tab is active, displaying a table of PCOs. A 'Generate' dropdown menu is open, showing options for 'RCO' and 'OCO'. The 'RCO' option is highlighted. A 'Revised Signage' flyout panel is also visible, showing details for a selected PCO, including its name, description, main contract, and document template. The 'Budget Status' is set to 'Open' and the 'Cost Status' is 'Accepted'.

PRO TIP: The PCO must have a Budget Status of “Open” to be able to generate an RCO.

The screenshot shows the 'Generate RCO document' window. It includes fields for 'RCO TITLE', 'SCOPE OF WORK (SUBMITTED)', 'DOCUMENT TEMPLATE', 'RECIPIENTS', and 'ATTACHMENTS'. The 'SCOPE OF WORK' section shows a table with columns for Code, Name, Qty, Unit, Unit Cost, and Amount. The 'DOCUMENT TEMPLATE' section shows a dropdown menu with the selected template 'RCO sample document template with options.docx'. The 'RECIPIENTS' section shows a search bar and a dropdown menu. The 'ATTACHMENTS' section shows a drag-and-drop area. The resulting 'Request for Change Order' document is shown, featuring a header with the project name 'Pacific Center Campus' and the request number 'R-0019'. The document details the scope of work, including 'Signage schedule additions and revisions', and provides a cost breakdown table.

PRO TIP: If you don't need to generate an RCO bypass this step and go straight to an OCO.

# Change Order Management

## 6 RCO Sub-Tab

The RCO tab is within the Change Orders tab in the Cost Management Module.

1. “Status” auto updates to “Open” after a RCO is generated from a PCO.
  2. Select the check-box next to the line item to update the item’s status or access the delete button.
  3. Select the three-dot menu next to a specific item to update the status and access additional option.
  4. Select the name to open the details flyout panel.
- In the details flyout panel use the drop-down list to select the sections to view. Sections can be viewed individually or in a scrolling list. Editing RCO items can be done in this view.
  - Again, selectable workflow-based actions (buttons) will appear to help walk you through the process. For example, when the RCO status is “Submitted,” you will see a “Set as Accepted” and “Set as Rejected” button.
  - By selecting “Set as Accepted” the status color changes and the next options you see are “Set as Rejected,” “Generate” and “Revert to Submitted.”
  - Now, with the status as “Accepted” you will be able to generate an OCO or a SCO. Once you select the appropriate option this process is the same as generating an RFQ or RCO document.

Cost Management

INCOME EXPENDITURE CHANGE ORDER

COST ITEM PCO RFQ RCO OCO SCO

Set as Accepted Set as Rejected Delete

Export

Number	Name	Type	Estimated	Proposed	Submitted	Approved	Committed	Status	Created Date	Created By	Submitted Date
R-0013	Additional Floor Openings as per...	Owner Directive	74,419.24	79,568.34	69,804.34	42,143.34	52,859.00	Submitted	Nov 8, 2019	John Sanner	Nov 8, 2019
R-0011	AST #13 Revised Kit		5,777.49	5,777.49	5,777.49	5,777.49	50.00	Draft	Oct 28, 2019	Cassie Bustos	Nov 8, 2019
R-0018	Brick Wall Removal			1,000.00				Open	Nov 12, 2019	Donr Open	
R-0015	Metal Panel Addition		27,700.00	27,700.00	27,700.00	150.00	25,000.00	Open	Mar 30, 2020	John Sanner	
R-0014	Revised Main Entry							Accepted	Mar 27, 2020	John Sanner	Mar 27, 2020
R-0019	Revised Signage		10,943.75	12,092.85	12,092.85	12,092.85	2,000.00	Open	Jul 21, 2020	Cassie Bustos	
R-0017	Revised Conference		9,998.00	9,998.00	1,234.00	1,234.00	2,000.00	Submitted	Apr 10, 2020	Hansen Liu	Apr 10, 2020
R-0016	Additional cubicles		20,000.00	23,000.00	23,000.00	23,000.00	23,000.00	Accepted	Apr 10, 2020	Hansen Liu	Apr 10, 2020

Search columns

Number  
Name  
Type  
Estimated  
Proposed  
Submitted  
Approved  
Committed  
Status

Revised Signage  
R-0019 | Submitted

Set as Accepted Set as Rejected

Multiple

Committed Status

52,859.00  
50.00 Open  
25,000.00 Open  
23,000.00 Accepted  
2,000.00 Submitted  
2,000.00 Open  
2,000.00 Submitted

DETAILS

Number R-0019  
Name Revised Signage  
Description  
Main Contract Main Contract 1  
Document Template RCO sample document template with options.docx

Status Submitted Type Owner Direct...

Revised Signage  
R-0019 | Accepted

Set as Rejected Generate Revert to Submitted

Multiple

Committed Status

52,859.00  
50.00 Open  
25,000.00 Open  
23,000.00 Accepted  
2,000.00 Submitted  
2,000.00 Open  
2,000.00 Accepted

DETAILS

Number R-0019  
Name Revised Signage  
Description  
Main Contract Main Contract 1  
Document Template RCO sample document template with options.docx

Status Accepted Type Owner Direct...



# Change Order Management

## 7 Generating an OCO from a RCO

OCO (Owner Change Order) represents a change order from the Owner to the Main Contractor/Construction Manager. These documents are built from one or many change requests (RCOs) by processing the RCOs into an OCO. The signed OCO legally amends a contract to affect a change in requirements, cost, or schedule to the previously negotiated contract.

- The RCO status must be “Accepted” to be able to generate an OCO.
- When you select “OCO” in the generate drop-down the process is the same as generating an RFQ or RCO document.
- Like an RCO, scope information is auto-populated. You can select the document template, choose the recipient(s), attached files and generate the document.
- Multiple RCOs can be rolled up into a single OCO.
- Select the check-box next to multiple RCOs you would like to generate into a single OCO. When the “Generate” drop down appears select OCO.
- The process is the same as generating a single document. However, the OCO will be a combination of the selected RCOs. The cost items will be combined and the scope is auto-populated but can be adjusted. Select the document template and recipient.

The screenshot shows the 'Revised Signage' RCO details in the Autodesk BIM 360 Cost Management interface. The RCO is titled 'R-0011' and is in the 'Accepted' status. The 'Details' section shows the RCO number, name, description, document template, status, and schedule change. The 'Recipients' section lists the recipient as 'John Sanner, United Construction'. The 'Scope of Work' section is also visible.

The screenshot shows the 'Generate OCO: 1' process in the Autodesk BIM 360 Cost Management interface. The 'OCO TITLE' is 'AS1 #13 Revised Kitchen Equipment Schedules'. The 'SCOPE OF WORK (APPROVED)' table lists the following items:

Code	Name	Qty	Unit	Unit Cost	Total
C1-0150	AS1 #13 Revised...	1	Is	5,228.00	5,228.00
C1-0195	Bond	1	Is	53.85	53.85
C1-0193	Contingency	1	Is	156.84	156.84
C1-0196	Fee	1	Is	231.10	231.10
C1-0194	Insurance	1	Is	107.70	107.70

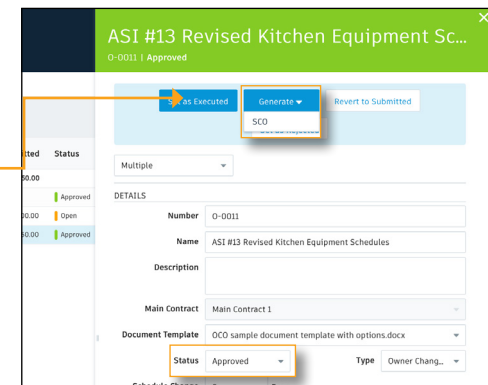
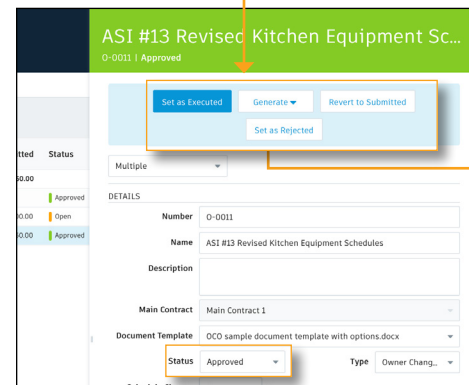
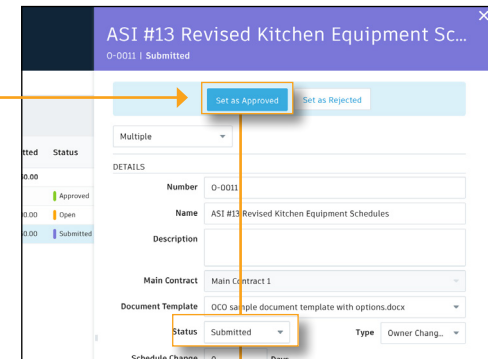
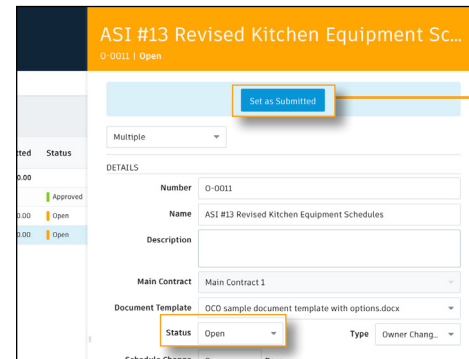
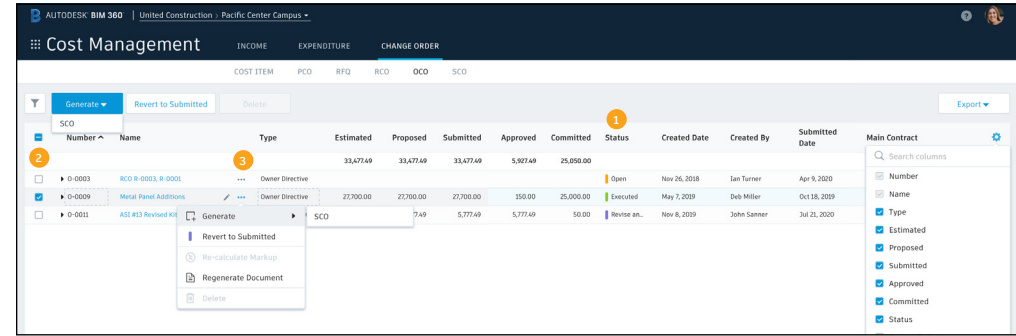
The 'Generate' button is highlighted. Below the table, there are sections for 'OCO Details', 'Contract scope changes', and 'Contract scope items'. The 'OCO Details' section includes the OCO title, project name, and change order number. The 'Contract scope changes' section lists the changes and their amounts. The 'Contract scope items' section lists the items and their amounts.

# Change Order Management

## 8 OCO Sub-Tab

The OCO tab is within the Change Orders tab in the Cost Management Module.

1. "Status" auto updates to "Open" after a OCO is generated from a RCO.
  2. Select the check-box next to the line item to access the generate, revert, or deleted buttons.
  3. Select the three-dot menu to access the generate option, revert status option, re-calculate markup, generate/regenerate the document, and deleted options.
  4. Select the name to open the details flyout panel.
- In the details flyout panel use the drop-down list to select the sections to view. Sections can be viewed individually or in a scrolling list. Editing OCO items can be done in this view.
  - Again, selectable workflow-based actions (buttons) will appear to help walk you through the process. For example, when the OCO status is "Open," you will see a "Set as Submitted" button. By selecting it the status color changes and the next options you see are "Set as Approved" or "Set as Rejected."
  - Once the status is "Approved" you will be able to generate a SCO. You can either generate it now or select "Set as Executed" and then generate it. The SCO generation process is the same as generating a RFQ, RCO, and OCO.



# Change Order Management

## 9 Generating an SCO

SCO (Supplier Change Order) is a downstream cost change order which amend the original supplier contracts.

There are a few different ways you can generate an SCO:

- From a PCO with a budget status of “Open”, “Approved” or “Executed” and cost status of “Open” or “Proposed.”
- From an RFQ with a status of “Proposed.”
- From an RCO with the status of “Accepted.”
- From an OCO with the status of “Approved” or “Executed.”
- To generate a single SCO consisting of all cost items associated with a ‘parent’ line item, select the check-box next to the parent.
- To create individual SCOs for specific cost items within a “Parent,” select the box next to the cost item.
- You can also select multiple SCOs with multiple ‘parents’ to generate a single SCO from.
- The SCO generation process is the same as generating an RFQ, RCO, and OCO. When the document generator window opens information will be auto-populated. You can select the document template, choose the recipient(s), attach files and generate the document.

The screenshot shows the 'Cost Management' tab with the 'CHANGE ORDER' sub-tab selected. The 'PCO' (Parent Change Order) is highlighted. The 'Generate' button is clicked, opening a 'Metal Panel Additions' window. The 'Details' section shows the 'Number' as P-0025, 'Name' as Metal Panel Additions, and 'Description' as Metal Panel Additions. The 'Main Contract' is Main Contract 1. The 'Document Template' is selected. The 'Budget Status' is Open, and the 'Cost Status' is Proposed. The 'Type' is Owner Direct, and the 'Schedule Change' is 0 days.

The screenshot shows the 'Cost Management' tab with the 'CHANGE ORDER' sub-tab selected. The 'RFQ' (Request for Quote) is highlighted. The 'Generate' button is clicked, opening a 'Door height conflicts with structure' window. The 'Details' section shows the 'Number' as QR-6442-0001, 'Name' as Door height conflicts with structure, and 'Description' as Door height conflicts with structure. The 'Main Contract' is Main Contract 1. The 'Document Template' is RFQ sample document template.docx. The 'Status' is Accepted, and the 'Type' is selected. The 'Schedule Change' is 0 days.

The screenshot shows the 'Cost Management' tab with the 'CHANGE ORDER' sub-tab selected. The 'OCO' (Owner Change Order) is highlighted. The 'Generate' button is clicked, opening a 'Metal Panel Additions' window. The 'Details' section shows the 'Number' as O-0009, 'Name' as Metal Panel Additions, and 'Description' as Metal Panel Additions. The 'Main Contract' is Main Contract 1. The 'Document Template' is OCO sample document template with options.docx. The 'Status' is Approved, and the 'Type' is Owner Direct. The 'Schedule Change' is 0 days.

**PRO TIP:** If an SCO is being generated from an OCO made up of multiple RCOs the SCO will generate individual documents for each supplier affected by the change.

# Change Order Management

## 10 SCO Sub-Tab

The SCO tab is within the Change Orders tab in the Cost Management Module.

1. "Status" auto updates to "Open" after a SCO is generated.
  2. Select the check-box next to the line item to access the delete button.
  3. Select the three-dot menu to update the item's status, generate/regenerate the document or delete the SCO.
  4. Select the name to open the details flyout panel.
- In the details flyout panel use the drop-down list to select the sections to view. Sections can be viewed individually or in a scrolling list. Editing SCO items can be done in this view.
  - Again, selectable workflow-based actions (buttons) will appear to help walk you through the process. For example, when the SCO status is "Open," you will see a "Set as Sent" button. By selecting it the status color changes and the next option you see is "Set as Executed."

Number	Name	Contract Name	Supplier	Estimated	Proposed	Submitted	Approved	Committed	Status	Created Date	Created By
S-0007	Concrete Works (C01)	Concrete Substr...	Substructures f...	71,226.00	79,226.00	70,462.00	45,351.00	68,050.00	Executed	Nov 29, 2018	San Turner
S-0017	Metal Panel Additions	Concrete Substr...	Substructures f...	5,000.00	9,000.00	10,000.00	10,000.00	9,000.00	Open	Apr 26, 2019	Jesse Kassinger
S-0018	Additional Floor Openings as per S...	Concrete Substr...	Substructures f...	25,000.00	25,000.00	25,000.00	25,000.00	25,000.00	Open	Oct 29, 2019	Cassie Bunkles
S-0020	Doors - Revised Main Entrance La...	Concrete Substr...	Substructures f...	20,000.00	23,000.00	23,000.00	23,000.00	23,000.00	Open	Apr 9, 2020	Hansen Liu
S-0021	AST #13 Revised Kitchen Equipm...	FRGE Kitchen Lin...	FRGE Kitchen Lin...	5,000.00	5,000.00	6,000.00	6,000.00	6,000.00	Draft	Apr 9, 2020	Hansen Liu

**Metal Panel Additions**  
S-0017 | Open

Multiple

DETAILS

Number S-0017

Name Metal Panel Additions

Description

Document Template SCO sample document template.docx

Budget Code 8472001055900005UB

Status Open

Schedule Change 0 Days

SUPPLIER DETAILS

**Metal Panel Additions**  
S-0017 | Sent

Multiple

DETAILS

Number S-0017

Name Metal Panel Additions

Description

Document Template SCO sample document template.docx

Budget Code 8472001055900005UB

Status Sent

Schedule Change 0 Days

SUPPLIER DETAILS

**Metal Panel Additions**  
S-0017 | Executed

Multiple

DETAILS

Number S-0017

Name Metal Panel Additions

Description

Document Template SCO sample document template.docx

Budget Code 8472001055900005UB

Status Executed

Schedule Change 0 Days

SUPPLIER DETAILS

# Change Order Management

## 11 RFI to PCO

BIM 360 Project Management Admins and RFI Managers who have a Cost Management license with full budget permission control can create a Potential Change Order (PCO) from an RFI or link existing RFIs to PCOs. This process creates a bi-directional link

### Creating a PCO from an RFI:

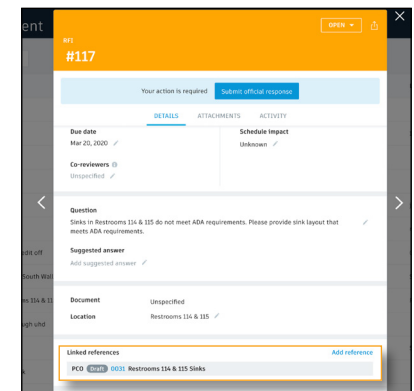
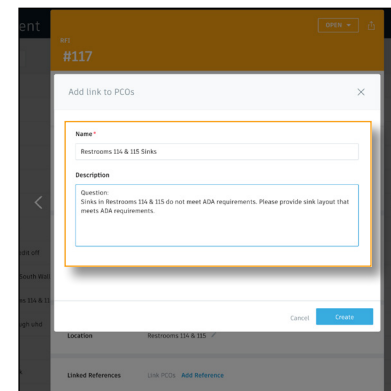
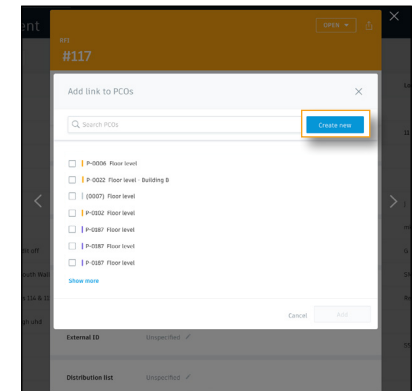
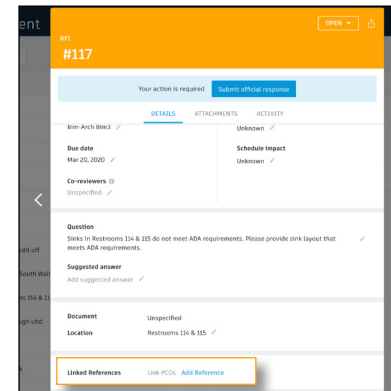
- In the Project Management module, open the RFI record. Within the details tab, scroll to linked references and select “Add reference.”
- A link PCO box will appear, select the “Create new” button.
- A form will open, fill in the PCO name and description, then select “Create PCO.” This information will copy over from the RFI to the PCO, but it can be altered directly in the PCO record.
- Once the PCO is created, a bi-directional relationship between the RFI and PCO is established, and the activity captured in the RFI activity log.

### Linking RFIs to PCOs:

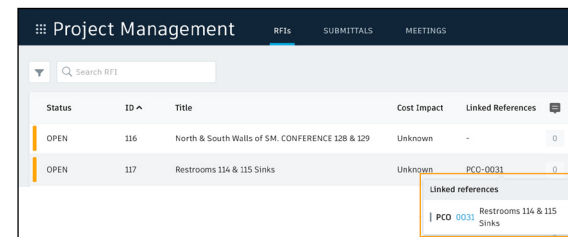
- To link RFIs to PCOs follow the same steps as above. However, when the link PCO box appears, simply select the PCO(s) from the list and click “Add.”
- To unlink a PCO select the “X” and “Unlink.”

### Accessing Linked RFIs & PCOs from the list views:

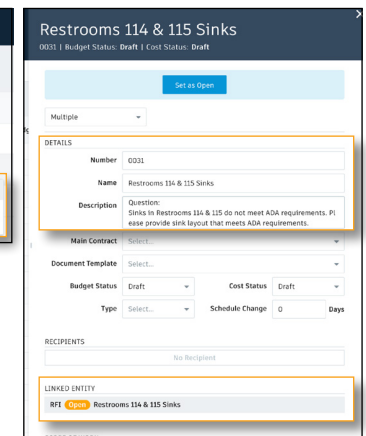
- Only Admins & RFI Managers can view linked PCOs. Within the RFI list view in the linked references column, select the PCO number to open the PCO in the Cost Management module.
- In the Cost Management Module within the PCO details flyout panel, select the RFI to be directed to the RFI in the Project Management module.



### RFI List View



### PCO Created (Details Flyout Panel)



# Expenses

Cost Management includes a robust set of functionality that enables teams to streamline the management of expenses. Not only does it streamline invoice reviews and approvals, but teams can utilize up to date actual cost data for more accurate forecasting and add expense data to Budget Payment Applications.

## 1 Expense Tab

Open the Cost Management module, select the Expenditure tab, then Expenses. This is where users can manage all invoices and expenses outside of pay applications. To add an expense you must have full control permission for this tab. Project Admins control the permission levels within the project admin module.

### 3 Ways to Add Expenses:

- Add from an existing contract
- Manually add
- Use APIs to build an integration with their accounting/ERP system to automatically flow data between the two platforms.

## 2 Adding from an Existing Contract

1. Select the “Add from Contract” button.
2. In the dialog box use the drop-down to find the correct contract.
3. Select “Add.”

### Adding an Expense from an Existing Contract

The screenshot shows the 'Cost Management' interface with the 'EXPENSE' tab selected. A dialog box titled 'Add Expense from Contract' is open. It contains a search bar and a list of contracts. The 'Add' button is highlighted with a red box and a number 3. The list of contracts includes:

- 007200 - Office Supplies
- CLAD1 - Roof and Wall Cladding
- CT01 - Owner Contingency
- CT02 - Fee
- GCD01 - Staff

### Existing Contract in Contract Tab

The screenshot shows the 'Cost Management' interface with the 'CONTRACT' tab selected. The 'Office Supplies' contract is displayed. The contract details are as follows:

Code	Name	Supplier	Type	Original Budget	Internal Budget	Approved Budget	Revised Budget	Pending Owner Changes	Projected Budget	Orig. Commit.	Approved Change Orders	Uncomm. Cha
007200	Office Supplies	Office Supplies R...	Purchase Order	10,000.00	0.00	0.00	10,000.00	0.00	10,000.00	10,000.00	0.00	0.00
CLAD1	Roof and Wall Cl...	Cover Me	Subcontract	2,000,000.00	0.00	30,000,000.00	2,000,000.00	0.00	2,000,000.00	2,000,000.00	0.00	30.00
CT01	Owner Contingency	Imperium	Internal	100,000.00	0.00	0.00	100,000.00	1,800.00	101,800.00	100,000.00	0.00	0.00
CT02	Fee	Imperium	Internal	400,000.00	0.00	0.00	400,000.00	2,756.84	402,756.84	0.00	0.00	0.00
GCD01	Staff	BIM 360 Contract...	Internal	300,000.00	0.00	0.00	300,000.00	0.00	300,000.00	300,000.00	0.00	0.00
W0100	Warning and Pe...	Crystal Clear Glas...	Subcontract	100,000.00	0.00	0.00	100,000.00	0.00	100,000.00	100,000.00	0.00	0.00
W0102	WSP	WSP	Subcontract	2,000,000.00	0.00	0.00	2,000,000.00	0.00	2,000,000.00	2,000,000.00	0.00	0.00
W0103	Substructure	Substructure r...	Subcontract	1,000,000.00	0.00	0.00	1,000,000.00	0.00	1,000,000.00	1,000,000.00	0.00	0.00



# Expenses

## Adding from an Existing Contract (continued)

4. Details are automatically brought in. For example, Name, Supplier, Contract, and Amount. The item is also automatically connected to the correct budget code to show liability.
5. **Amount:** By default, the amount is set to full. To change the amount to something less than full, click in the Amount field and update the number.
6. **Scope:** In the Scope column, use the drop-down menu to categorize the payment type, Full or Partial.
7. **Type:** In the Type column, use the drop-down to select the appropriate expense type (e.g., Internal, Invoice, Overhead Cost). Project Admins are the individuals with permission to create the list of expense types in the settings. Refer to the Settings and Permissions chapter to learn how this is done.
8. **Date Issued:** In the Date Issued column, use the calendar to select the appropriate date. For example, the date the invoice was issued.
9. **Reference Number:** To include a reference number, click into the Reference Number field.
10. **Status:** In the Status column, use the drop-down menu to set the appropriate status.
11. **Date Paid:** When the items status is set to paid, the date will automatically populate in the Date Paid field.

**PRO TIP:** To delete a subitem or expense, select the three dots in the appropriate row. You can delete an expense or subitem if the expense status is Draft, Pending, Revise and Resubmit, or Rejected.

If connected Cost Management to your Accounting/ERP system as changes are made the information will automatically update in both systems.

# Expenses

## 3 Adding an Expense Manually

If there is no purchase order, you can manually add an expense to be able to track it and show liability against the budget.

1. Select the arrow next to the “Add from Contract” button, then select “Add.”
2. **Name:** In the Name column, type in the name for the expense.
3. **Supplier:** In the Supplier column, use the drop-down menu to choose the appropriate supplier. If it's not listed you can manually enter it.
4. **Type:** In the Type column, use the drop-down to select the appropriate expense type (e.g., Internal, Invoice, Overhead Cost). Project Admins are the individuals with permission to create the list of expense types in the settings. Refer to the Settings and Permissions chapter to learn how this is done.
5. **Date Issued:** In the Date Issues column, use the calendar to select the appropriate date. For example, the date the invoice was issued.

*Continued on the following page...*

### Adding an Expense Manually

Cost Management | INCOME | EXPENDITURE | CHANGE ORDER

CONTRACT | COST PAYMENT APPLICATION | EXPENSE

1

	Supplier	Contract	Amount	Type	Budget Code	Budget Name	Date Issued	Date Paid	Status	Scope
<input type="checkbox"/>										

Cost Management | INCOME | EXPENDITURE | CHANGE ORDER

CONTRACT | COST PAYMENT APPLICATION | EXPENSE

2

	Number	Name	Supplier	Contract	Amount	Type	Budget Code	Budget Name	Date Issued	Date Paid	Status	Scope
<input type="checkbox"/>												

Cost Management | INCOME | EXPENDITURE | CHANGE ORDER

CONTRACT | COST PAYMENT APPLICATION | EXPENSE

3

Supplier dropdown list:

- Global Construction
- AAA Boilermakers
- Hope-Amundsen
- Cover me Ltd
- Welcome Entrances Ltd
- Frame Me Ltd
- Crystal Clear Glazing
- Substructures r us

Name: Mystery PO | Supplier: Fedex | Enter: Fedex

PRO TIP: If the supplier isn't in the system, type the name in the field and click "Enter:..."

Cost Management | INCOME | EXPENDITURE | CHANGE ORDER

CONTRACT | COST PAYMENT APPLICATION | EXPENSE

4

	Number	Name	Supplier	Contract	Amount	Type	Budget Code	Budget Name	Date Issued	Date Paid	Status	Scope
<input type="checkbox"/>	0001	Mystery PO	Fedex			Internal					Draft	Full

Cost Management | INCOME | EXPENDITURE | CHANGE ORDER

CONTRACT | COST PAYMENT APPLICATION | EXPENSE

5

	Number	Name	Supplier	Contract	Amount	Type	Budget Code	Budget Name	Date Issued	Date Paid	Status	Scope
<input type="checkbox"/>	0001	Mystery PO	Fedex			Invoice					Draft	Full

Calendar: July 2020

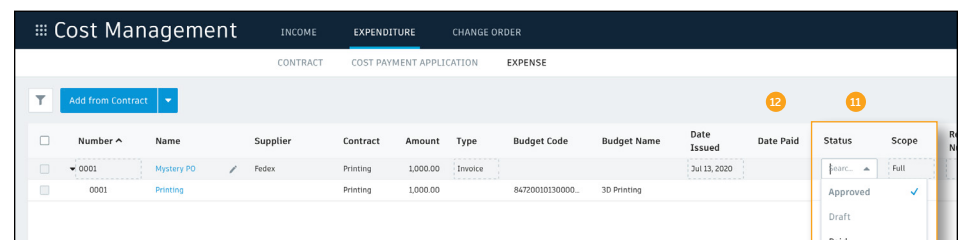
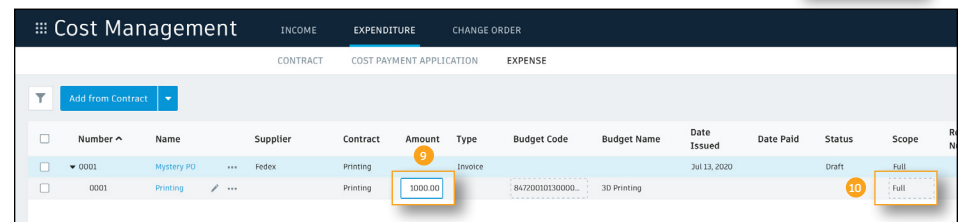
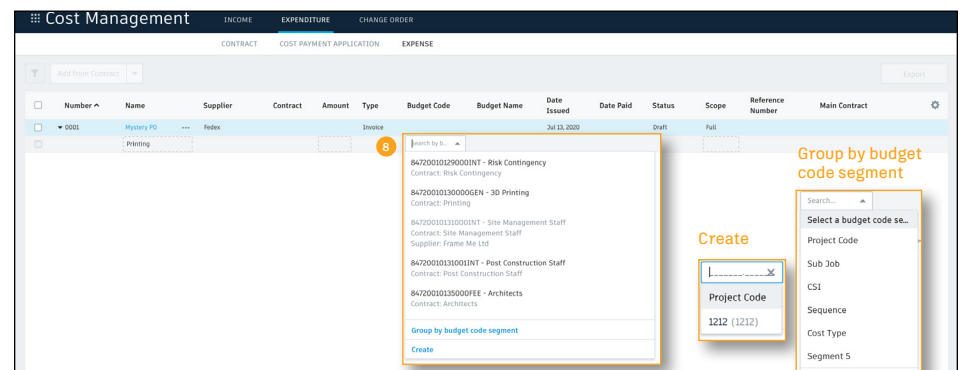
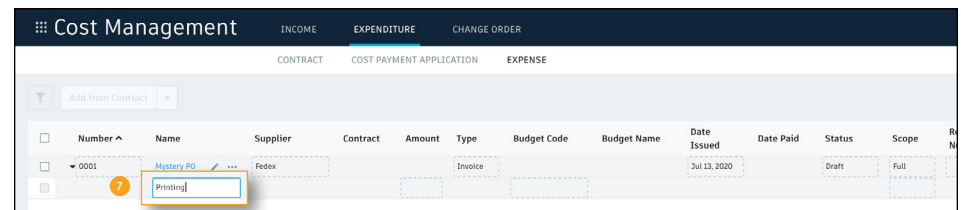
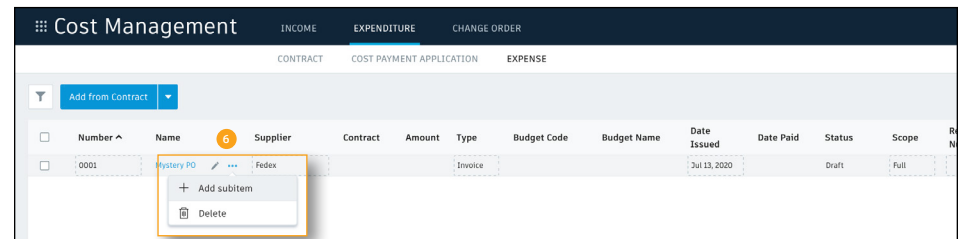
# Expenses

## Adding an Expense Manually (continued)

6. **Add Subitem:** To add cost details, select the three dots to the right of the Expense name. You can add an unlimited number of subitems to a contract as long as the status is Draft.
7. **Name:** In the Name column, click to manually add the name of the item. Then push enter.
8. **Budget Code:** In the Budget Code column, use the drop-down menu to select a budget item. You can type to filter the list and use the group by segment to organize the list as preferred. If the budget code isn't listed, you can choose "Create" it.
  - Note: If creating the code manually, click the field to save it.
9. **Amount:** In the Amount column, click to manually add the amount.
10. **Scope:** In the Scope column, use the drop-down menu to categorize the payment type, Full or Partial. This will automatically update the contracts scope.
11. **Status:** In the Status column, use the drop-down menu to set the appropriate status.
12. **Date Paid:** When the items status is set to paid, the date will automatically populate into the Date Paid field.

**PRO TIP:** To delete a subitem or expense, select the three dots in the appropriate row. You can delete an expense or subitem if the expense status is Draft, Pending, Revise and Resubmit, or Rejected.

If connected Cost Management to your Accounting/ERP system as changes are made the information will automatically update in both systems.



# Expenses

4

## Adding Expenses to Budget Payment Applications

Associating expenses to a budget payment application is a similar process to associating cost payment applications to the budget payment application.

1. In the Income menu navigate to the Budget Payment Application tab.
2. Use the drop-down menu to navigate to the correct contract.
3. Select the contract main to open the details flyout panel.
4. Scroll to the "Associate Expense" section and select "Add existing."
5. A list of approved expenses will populate, select the one(s) you wish to associate.
6. The associated expense will appear in the details flyout panel.

**PRO TIP:** When generating the budget payment application document, you can choose to collate associated expenses, attachments, and Supplier pay applications together for submission to the Owner.

Cost Management

INCOME EXPENDITURE CHANGE ORDER

BUDGET MAIN CONTRACT BUDGET PAYMENT APPLICATION

Main Contract 1 Jan 1, 2019 - Jan 31, 2019 Submitted

Associated Cost Payment Application: 1 View

General		Scheduled Value		From Previous Application		This Period	
Number	Name	Qty	Unit	Unit Cost	Amount	Qty	Unit Cost
MC-1	Main Contract 1 - PA001				79,361.99		
	Main Con.				75,355.81		

MC-1

Total 5,777.49

DOCUMENT BY RECIPIENT

1 document(s) generated on Jul 15, 2020 by Cassie Bustos Show more...

Edward Roy, Modern Developments (lun360user4@yahoo.com)

Download

Regenerate...

ASSOCIATED COST PAYMENT APPLICATION

Create Add existing

Contract	Supplier	Billing Period	Status	Payment Requested
Site Manage...	Frame Me Ltd	Jan 1, 2019 - Jan 31, 2019	Accepted	0.00

ASSOCIATED EXPENSE

Add existing

WORK COMPLETED THIS PERIOD

Update value in Work Completed This Period from associated Cost Payment Application and Expense.

Update

Associated Expense must have a status of 'Approved' in order to update the Budget Payment Application.

Last Updated: Apr 16, 2020 8:27 PM by Hansen Liu

Add Expense

Select Expense

Number	Contract	Supplier	Date Issued	Status	Amount
0001	Printing	Fedex	Jul 13, 2020		1,000.00
0002	Office Su...		Jul 14, 2020		2,300.00

Cancel Add

ASSOCIATED EXPENSE

Add existing

Number	Contract	Supplier	Date Issued	Status	Amount
0001	Printing	Fedex	Jul 13, 2020	Approv...	1,000.00

WORK COMPLETED THIS PERIOD

# Expenses

5

## Viewing Expense Details in the Budget Summary

Similar to approved cost payment application details pulling into the budget summary, approved/paid expenses automatically pull into the budget summary view. This gives you the ability to view actual cost breakdowns and make accurate forecast adjustments.

1. In the Income menu navigate to the Budget tab.
2. Scroll to the right to the Actual Cost column. Expenses with an approved or paid status will display in the list.
3. Select the total in the Actual Cost column to view the cost breakdown.
4. Select the Budget Name to open the details flyout panel for more detailed information.
5. For any budget item, if a forecast adjustment, budget transfer, or change order transfer needs to be made, select the three-dot menu next to the budget item name.

**Cost Management** INCOME EXPENDITURE CHANGE ORDER

BUDGET MAIN CONTRACT BUDGET PAYMENT APPLICATION

General				Income				Expenditure		Forecast	
Budget Code ^	Cost Type	Budget Name	Supplier Contract	Original Budget	Internal Budget Transfer	Approved Owner Changes	Revised Budget	Projected Cost	Actual Cost	Forecast Adjustments	Forecast Cost to Complete
001.454300.2.2	GEN	Copy Machine	---	0.00	0.00	18,320.34	75,374.1...	77,328,306...	3,300.00	164,000.00	77,489,006.4
002.452700.2.2	GEN	paper	---	0.00	0.00	0.00	0.00	0.00	800.00	0.00	(1,500.00)
001.012100.1	FEE	Fees/Legal/L...	Fees/Legal/Insura...	193,633...	1.00	1,043.52	194,677.52	194,633.00	0.00	0.00	194,633.00

**Cost Management** INCOME EXPENDITURE CHANGE ORDER

BUDGET MAIN CONTRACT BUDGET PAYMENT APPLICATION

General				Income				Expenditure		Forecast	
Budget Code ^	Cost Type	Budget Name	Supplier Contract	Original Budget	Internal Budget Transfer	Approved Owner Changes	Revised Budget	Projected Cost	Actual Cost	Forecast Adjustments	Forecast Cost to Complete
001.454300.2.2	GEN	Copy Machine	---	0.00	0.00	18,320.34	75,374.1...	77,328,306...	3,300.00	164,000.00	77,489,006.4
0002		Office Suppliers R...							1,500.00		

12120014543002GEN2

Multiple

DETAILS

Budget Code 1212

Name Cop

Description

BUDGET CODE DETAILS

Segment Name

**Cost Management** INCOME EXPENDITURE CHANGE ORDER

BUDGET MAIN CONTRACT BUDGET PAYMENT APPLICATION

General				Income				Expenditure		Forecast	
Budget Code ^	Cost Type	Budget Name	Supplier Contract	Original Budget	Internal Budget Transfer	Approved Owner Changes	Revised Budget	Projected Cost	Actual Cost	Forecast Adjustments	Forecast Cost to Complete
001.454300.2.2	GEN	Copy Machine	---	0.00	0.00	18,320.34	75,374.1...	77,328,306...	3,300.00	164,000.00	77,489,006.4
0002		Office Suppliers R...							1,500.00		
001.012100.1	FEE	Fees/Legal/L...	Fees/Legal/Insura...	193,633...	1.00	1,043.52	194,677.52	194,633.00	0.00	0.00	194,633.00

Forecast Adjustments

Budget Transfer

Change Order Transfer

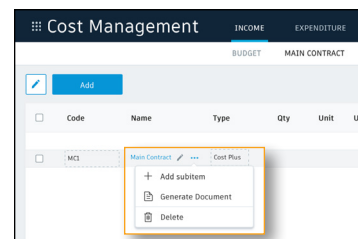
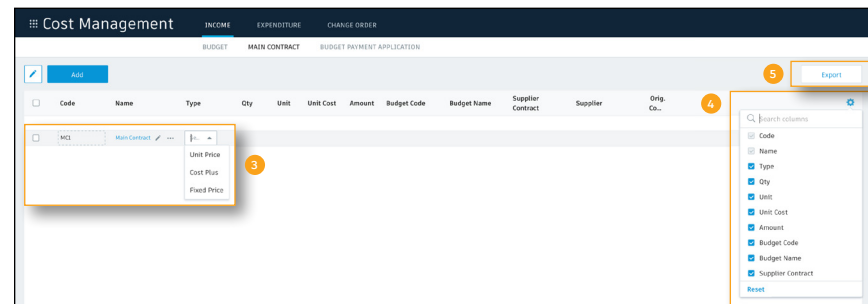
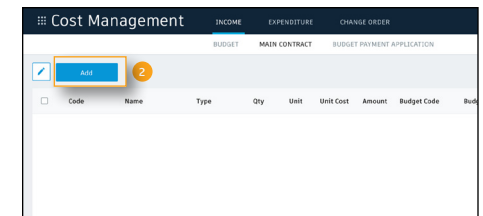
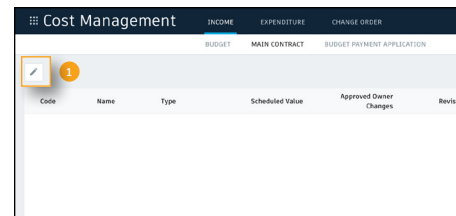
# Payment Applications

Avoid risk and errors resulting from the use of disconnected cost management tools, and benefit from real-time visibility into how payments are affecting the project budget to maintain a real-time view of the financial health of the project.

## 1 Creating main/prime contract(s)

Open the Cost Management module, select the Income menu, then Main Contract. To create a contract you must have full control permission for this tab. Project Admins control the permission levels within the project admin module.

1. Select the edit icon.
2. In edit mode, an “Add” button will appear; select it to create a new main contract(s).
3. Type the contract code, name, and select the type drop-down.
4. Column settings allow you to select the columns you wish to include in your view.
5. The export button allows you to export the information in the Main Contract tab to Excel.



**PRO TIP:** After a contract is created if you wish to edit you need to be in edit mode. If you choose to add a sub-item, generate a document, or delete a contract select the three-dots after the contract name.



# Pay Applications

2

## Creating the main/prime contract schedule of values (SOV)

You can either manually create the SOV or automatically create it from selected items within the Budget tab.

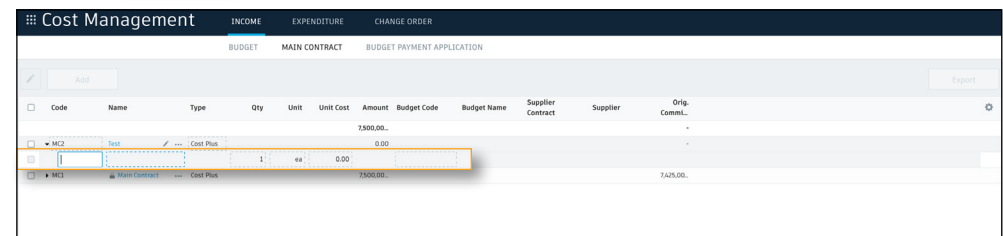
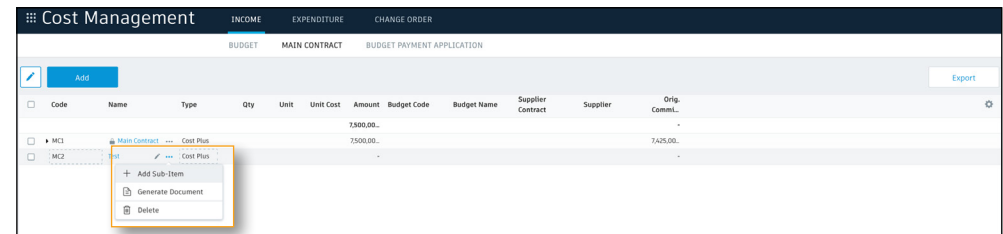
### Manually Creating the SOV:

- In the correct main contract row, select the three-dots then “Add Sub-Item.”
- A new line will appear under the main contract, fill in the necessary information. You can type in a value or associate it to a budget code by selecting within the budget code column; the value will auto-populate.

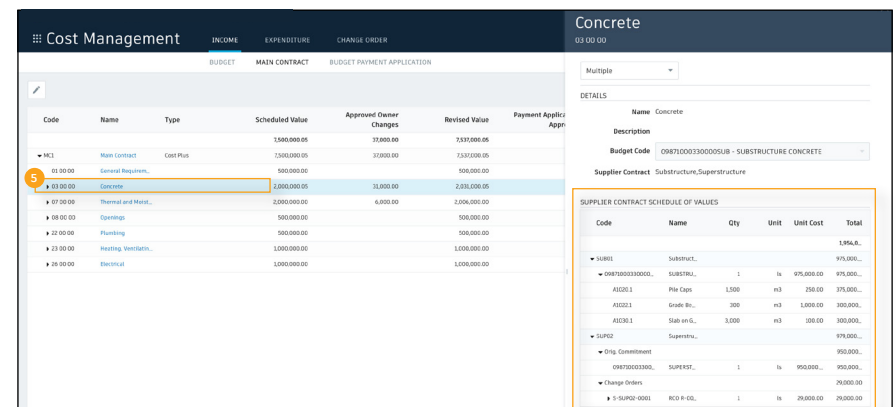
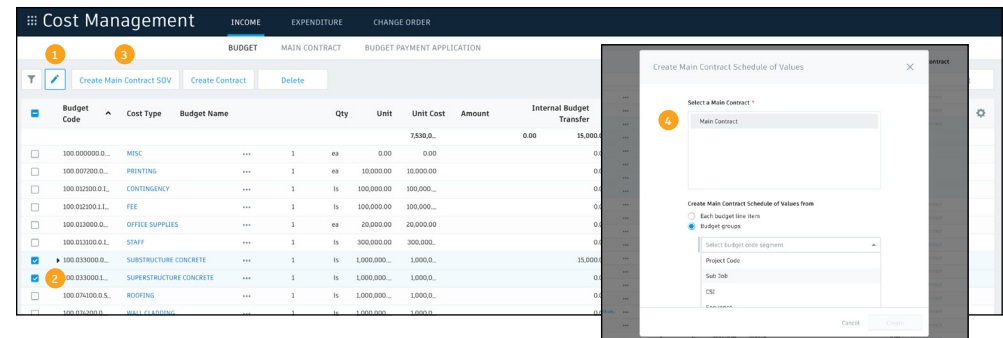
### Automatically Creating the SOV:

1. Within the Budget tab, select the edit icon.
2. Select the budget items you would like to associate with the main contract.
3. A “Create Main Contract SOV” button will appear, select it.
4. Within the Create Main Contract SOV dialog box, select the main contract from the list. Then choose what you want to create the SOV from; when done, click “Create.”
5. The main contract SOV will now be created automatically with links to the budget using the selected settings. This connection allows you to see what you will be paid and what you need to pay your Suppliers.

### Manually Creating the SOV:



### Automatically Adding the SOV:



# Pay Applications

3

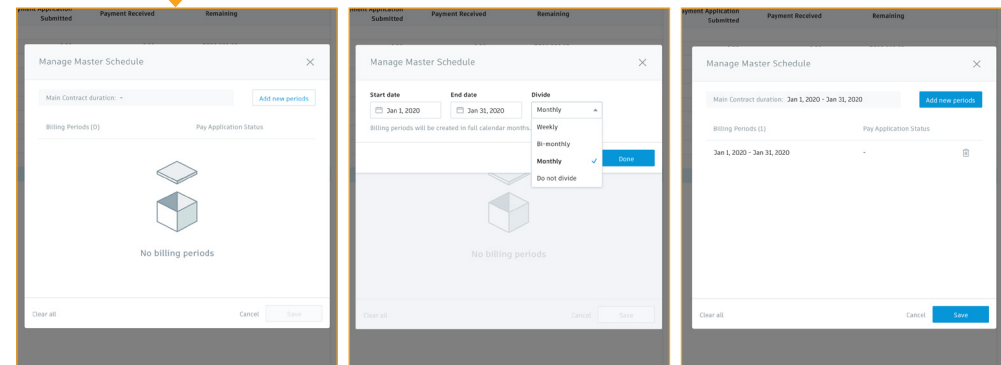
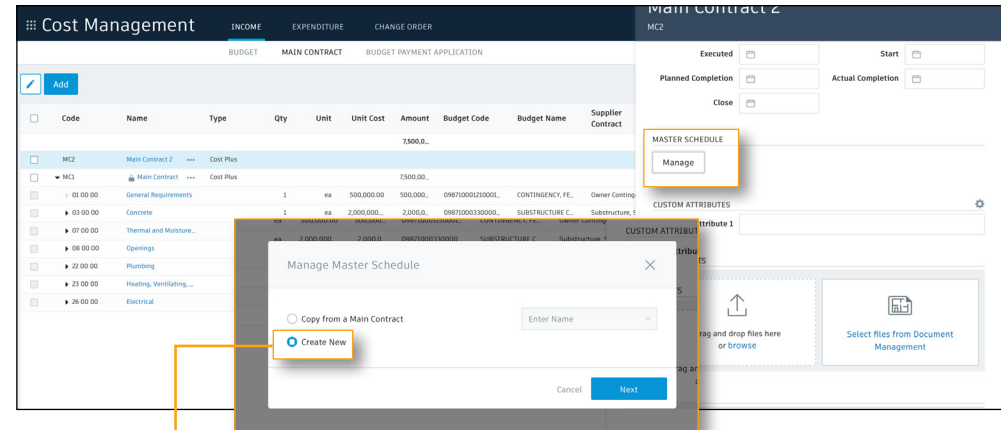
## Creating billing periods/master schedule

You can either setup your billing periods from the main contracts details flyout panel or within the Budget Payment Application tab.

### From Main Contract Details Flyout Panel:

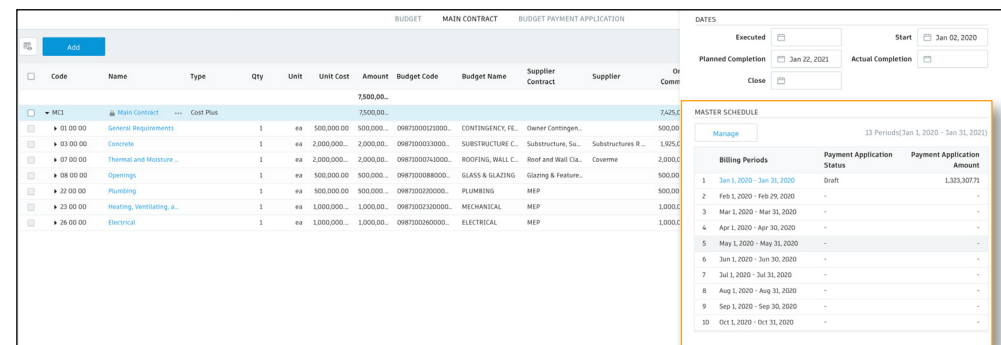
- Select the main contract to open the details flyout panel. Within the panel, scroll to the Master Schedule section and select the “Manage” button.
- In the Manage Master Schedule dialog box, you can either copy billing periods from another main contract using the drop-down menu or manually create new periods.
- Once your billing periods are created, you can manage them within the details flyout panel under the Master Schedule section. In this view, you can also see payment application statuses and amounts for each period.

From Main Contract Details Flyout Panel:



### From Budget Payment Application Tab:

- Select the “Set up master schedule” button. Within the Manage Master Schedule dialog box, follow the same step as above.



# Pay Applications

4

## Managing Cost Payment Applications

Supplier payment applications can be managed from the Budget Payment Application tab within the Income menu. They can also be managed in the Cost Payment Application tab within the Expenditure menu.

### From Budget Payment Application Tab:

1. Use the drop-down menu to select the main contract.
2. Use the drop-down menu to choose the correct billing period or use the arrows to navigate between periods.
3. Select "View" next to Associated Cost Payment Applications. This will open the main contract details flyout panel.
4. In the Associated Cost Payment Application section, select "Create" to create a brand new cost payment application or select "Add existing" to connect an existing application to the contract.
5. Once created, the number of cost payments associated to the main contract will auto populate next to Associated Cost Payment Applications.
6. The cost payment application(s) will appear within the Associated Cost Payment Application section of the details flyout panel.
7. To update the cost payment application information, select the cost payment application billing period. This will take you directly to the cost payment application.

### From Budget Payment Application Tab:

Create New: use the drop-down menu to select the supplier.

Add Existing: select the cost pay application from the provided list.

# Pay Applications

## Managing Cost Payment Applications (continued)

### From Cost Payment Application Tab:

1. In the Expenditure menu select the Cost Payment Application tab, use the drop-down menu to select the appropriate supplier.
2. Select "set up billing periods" and choose the appropriate option. If you decide to create from new, follow the same steps covered in section 3, "Creating billing periods/master schedule."
3. Choose the correct billing period or use the arrows to navigate between periods.

### Updating Cost Payment Application Information:

1. Click within the table to make necessary updates. The system will automatically update to reflect the changes.
2. Use the status drop-down to update the status of the pay application.
3. To export to Excel, select the Export button. This is useful if someone does not have access to the system. They can populate data into the yellow highlighted area; then, you can import the information back into the system.
4. To import data select the Import button.
5. To delete the pay application or allow overbilling, click the three-dot menu to access the options.
6. Approved Supplier Change Orders (SCO) will automatically be added based on the approved date. If you don't see one, select "Add change orders" to manually insert it.

### From Cost Payment Application Tab:

### Updating Cost Payment Application Information:

Number	Name	Scheduled Value	From Previous Application	This Period	Materials on Site	Completed and Stored	Percentage of Completed and Stored	Balance	Retention
098710003300005UB	SUBSTRUCTURE CONCR	975,000.00	0.00	425,000.00	0.00	425,000.00	43.59%	550,000.00	42,500.00
A1020.1	Pile Caps	375,000.00		125,000.00		125,000.00	33.33%	250,000.00	12,500.00
A1022.1	Grade Beams	300,000.00		150,000.00		150,000.00	50.00%	150,000.00	15,000.00
A1030.1	Stab on Grade	150,000.00		150,000.00		150,000.00	50.00%	150,000.00	15,000.00
	GRAND TOTAL	975,000.00	0.00	425,000.00	0.00	425,000.00	43.59%	550,000.00	42,500.00

Notice: Please only edit the value of the yellow background cells.

# Pay Applications

## Managing Cost Payment Applications (continued)

### Cost Payment Details Flyout Panel:

Select the payment application name to open the detail flyout panel.

1. Use the drop-down to select the sections you wish to view within the flyout panel.
2. Use the drop-down to update the status.
3. View a concise payment application summary table.
4. View a change order summary.
5. Quickly generate or access generated documents. This feature uses Cost Management document templates capabilities. For more information about this capability refer to the Document Templates chapter.
6. If the cost payment application is associated with a budget payment application you can quickly view the details here. Select the billing period to open the budget payment application.
7. Available custom attributes display within this section. For more information about custom attributes refer to the Custom Attributes chapter.
8. Use these fields to attach relevant information. You can upload information from your computer or select files from BIM 360 Document Management.
9. Use this field to include any important notes.

### Cost Payment Details Flyout Panel:

Substructure-PA001  
SUB01.1

Multiple 1

DETAILS

Number SUB01.1 Status 2 Search...

Name Substructure-PA001

Description

Contract Substructure

Billing Period Jan 1, 2020 - Jan 31, 2020

Supplier Substructures R Us

Accepted

Approved

Draft ☒

Revise & Resubmit

Submitted

3 PAYMENT APPLICATION SUMMARY

Original Contract Sum	975,000.00
Net Changed By Change Orders	0.00
Contract Sum To Date	975,000.00
Total Completed And Stored To Date	425,000.00
► Total Retention	42,500.00
Total Earned Less Retention	382,500.00
Less Previous Certificates For Payment	0.00
Current Payment Due	382,500.00
Balance To Finish Including Retention	592,500.00

4 CHANGE ORDER SUMMARY

Approved In Previous Periods	-
Approved This Period	0.00
Total	0.00

5 DOCUMENT BY RECIPIENT

1 document(s) generated on Jan 16, 2020 by Ian Turner [Show more...](#)

Archie Architect, Design Partnership (iim360imperium+arch@gmail.com)

[Download](#)

[Regenerate...](#)

6 ASSOCIATED BUDGET PAYMENT APPLICATION

Main Contract	Billing Period	Status
Main Contract	Jan 1, 2020 - Jan 31, 2020	Draft

7 CUSTOM ATTRIBUTES

There are no custom attributes available.

8 ATTACHMENTS

Drag and drop files here or [browse](#)

[Select files from Document Management](#)

9 NOTES

# Pay Applications

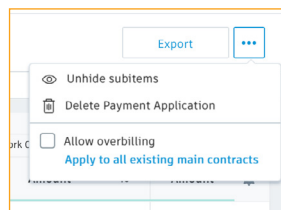
5

## Managing Budget Payment Applications

Owner pay applications can be managed from the Budget Payment Application tab within the Income menu.

### Budget Payment Application Tab:

1. Use the drop-down menu to select the appropriate main contract.
2. Use the drop-down menu to choose the correct billing period or use the arrows to navigate between periods.
3. Column settings allow you to select the columns you wish to include in your view.
4. To unhide sub-items, delete payment application, or allow overbilling, click the three-dot menu to access the options. To export to Excel, select the Export button.



5. Approved owner change orders automatically pull in.
6. To manually insert a change order select "Add change orders" and use the drop-down to select the change order.
7. Use the status drop-down to update the status of the pay application (Draft, Submitted, Approved, Paid, Revise and Resubmit).

### Budget Payment Application Tab:

General		Scheduled Value		Work Completed		Materials		Total	This Period		Total Work Completed		This Application		Materials on Site		Completed and Stored	
Number	Name	Qty	Unit	Unit Cost	Amount	Qty	Unit Cost	Amount	%	Amount	Qty	Unit Cost	Amount	%	Amount	Qty	Unit Cost	Amount
MCI-1	Main Contr.				7,337,000.00								1,466,897.00	19.46				
01 00 00	General Rls.	1	ea	500,000.00	500,000.00	0	-	0	-	-	0	100,000.00	0.00	0	0	-	0.00	0
09870000	CONTEINGL.	1	ea	100,000.00	100,000.00	0	-	0	-	-	0	100,000.00	0.00	0	0	-	0.00	0
09870000	FEE	1	ea	100,000.00	100,000.00	0	-	0	-	-	0	100,000.00	0.00	0	0	-	0.00	0
09870000	STAFF	1	ea	300,000.00	300,000.00	0	-	0	-	-	0	300,000.00	0.00	0	0	-	0.00	0
03 00 00	Concrete	1	ea	2,000,000.00	2,000,000.00	0	-	0	-	-	0.72	2,000,000.00	1,435,897.00	71.79	0.72	2,000,000.00	1,435,897.00	71.79
09870000	SUBSTRUC.	1	ea	1,000,000.00	1,000,000.00	0	-	0	-	-	0.44	1,000,000.00	435,897.46	43.59	0.44	1,000,000.00	435,897.46	43.59
09870000	SUPERSTR.	1	ea	1,000,000.00	1,000,000.00	0	-	0	-	-	1	1,000,000.00	1,000,000.00	100	1	1,000,000.00	1,000,000.00	100
07 00 00	Thermal an.	1	ea	2,000,000.00	2,000,000.00	0	-	0	-	-	0	2,000,000.00	0.00	0	0	-	0.00	0
09870000	ROOFING	1	ea	1,000,000.00	1,000,000.00	0	-	0	-	-	0	1,000,000.00	0.00	0	0	-	0.00	0
09870000	WALL CLAD.	1	ea	1,000,000.00	1,000,000.00	0	-	0	-	-	0	1,000,000.00	0.00	0	0	-	0.00	0
08 00 00	Openings	1	ea	500,000.00	500,000.00	0	-	0	-	-	0	500,000.00	0.00	0	0	-	0.00	0
09870000	GLASS & GL.	1	ea	500,000.00	500,000.00	0	-	0	-	-	0	500,000.00	0.00	0	0	-	0.00	0
22 00 00	Plumbing	1	ea	500,000.00	500,000.00	0	-	0	-	-	0	500,000.00	0.00	0	0	-	0.00	0
09870000	PLUMBING	1	ea	500,000.00	500,000.00	0	-	0	-	-	0	500,000.00	0.00	0	0	-	0.00	0
23 00 00	Heating, Wh.	1	ea	1,000,000.00	1,000,000.00	0	-	0	-	-	0	1,000,000.00	0.00	0	0	-	0.00	0
09870000	MECHANIC.	1	ea	1,000,000.00	1,000,000.00	0	-	0	-	-	0	1,000,000.00	0.00	0	0	-	0.00	0
26 00 00	Electrical	1	ea	1,000,000.00	1,000,000.00	0	-	0	-	-	0	1,000,000.00	0.00	0	0	-	0.00	0
09870000	ELECTRICAL	1	ea	1,000,000.00	1,000,000.00	0	-	0	-	-	0	1,000,000.00	0.00	0	0	-	0.00	0
Change Orders					31,000.00							31,000.00	83.78				31,000.00	83.78
0-0001	RCI #...	1	14	31,000.00	31,000.00	0	-	0	-	-	0.84	31,000.00	31,000.00	83.78	0.84	31,000.00	31,000.00	83.78
01	Additional	1	14	22,000.00	22,000.00	0	-	0	-	-	1	22,000.00	22,000.00	100	1	22,000.00	22,000.00	100
02	Plumbing - R.	1	14	9,000.00	9,000.00	0	-	0	-	-	1	9,000.00	9,000.00	100	1	9,000.00	9,000.00	100
03	Stems - Rev.	1	14	6,000.00	6,000.00	0	-	0	-	-	0	6,000.00	0.00	0	0	-	0.00	0



# Pay Applications

## Managing Budget Payment Applications (continued)

### Main Contract Details Flyout Panel:

Select the main contract to open the detail flyout panel.

1. Use the drop-down to select the sections you wish to view within the flyout panel.
2. Use the drop-down to update the status.
3. View a concise payment application summary table.
4. View a summary of the change orders.
5. Quickly generate or access generated documents. This feature uses Cost Management document templates capabilities. For more information about this capability refer to the Document Templates chapter.
6. Create or add existing cost payment applications. To quickly access the cost payment application details, select the billing period. The cost payment application will open.
7. Select the “Add existing” button to associate expenses.
8. Select the update button to update values in work completed this period from associated cost payment applications and expenses. Note, Associated Expense must have a status of ‘Approved’ in order to update.
9. Available custom attributes display within this section. For more information about custom attributes refer to the Custom Attributes chapter.
10. Use these fields to attach relevant information. You can upload information from your computer or select files from BIM 360 Document Management.
11. Use this field to include any important notes.

### Main Contract Details Flyout Panel:

**Main Contract-PA001**  
MCI-1

Multiple (1)

**DETAILS** (2)

Number: MCI-1 Status: Search... (2)

Name: Main Contract-PA001 Approved

Description: Draft

Main Contract: Main Contract

Billing Period: Jan 1, 2020 - Jan 31, 2020

Revised & Resubmitted

**3 PAYMENT APPLICATION SUMMARY**

Original Main Contract Sum	7,500,000.05
Net Changed By Change Orders	37,000.00
Main Contract Sum To Date	7,537,000.05
Total Completed And Stored To Date	1,466,897.46
Total Retention	143,589.75
Total Earned Less Retention	1,323,307.71
Less Previous Certificates For Payment	0.00
Current Payment Due	1,323,307.71
Balance To Finish Including Retention	6,213,692.34

**4 CHANGE ORDER SUMMARY**

Approved In Previous Periods	-
Approved This Period	37,000.00
Total	37,000.00

**5 DOCUMENT BY RECIPIENT**

There are no available documents.

Generate...

**6 ASSOCIATED COST PAYMENT APPLICATIONS**

Create Add existing

Contract	Supplier	Billing Period	Status	Payment Requested
Substructure	Substructure...	Jan 1, 2020 - Jan 31, 2020	Draft	1,266,500.00
Superstructure	Frame Me Ltd	Jan 1, 2020 - Jan 31, 2020	Accepted	884,000.00

**7 ASSOCIATED EXPENSE**

Add existing

**8 WORK COMPLETED THIS PERIOD**

Update value in Work Completed This Period from associated Cost Payment Application and Expense.

Update

Associated Expense must have a status of 'Approved' in order to update the Budget Payment Application.

**9 CUSTOM ATTRIBUTES**

There are no custom attributes available.

**10 ATTACHMENTS**

Drag and drop files here or browse

Select files from Document Management

**11 NOTES**

### Associating Cost Payment Applications

**ASSOCIATED COST PAYMENT APPLICATION**

Create Add existing

Create Cost Payment Application

Billing Period: Jan 1, 2020 - Jan 31, 2020

Select Contract: Select from previous period

Search by Contract or Supplier

Code	Contract	Supplier

Selected: 0

Add Cost Payment Application

Select Cost Payment Application

Contract	Supplier	Billing Period	Status
Concrete Substructure...	Substructure...	Jan 1, 2020 - Jan 31, 2020	Draft

Cancel Add

### Associating Expenses

**ASSOCIATED EXPENSE**

Add existing

Add Expense

Select Expense

Number	Contract	Supplier	Date Issued	Status	Amount
0001	Printing	Pedex	Jul 13, 2020		1,000.00

Cancel Add

**PRO TIP:** Only approved expenses will display in the list.

# Pay Applications

## 6 Document Generation

- Cost Management allows you to create standard documentation formats that automatically populate directly from the system. See the Document Templates chapter of this guide for details on how to access the document templates and create your own.
- For example, you can automatically generate a payment document which provides the information required to populate documents such as the AIA G702-1992 and AIA G703-1992 forms.

### Generating Documents:

1. Within the Main Contract, Cost or Budget Payment Application details flyout panel, scroll to the “Document by Recipient” section and select the “Generate” button.
2. In the Document Generation window, use the search field or drop-down list to select the recipient. Click add and the recipient’s information will appear.
3. You must select a template. The document templates are controlled by the Project Admin, refer to the Document Templates chapter for more information.
4. To attach additional information, either upload files from your computer or select files from BIM 360 Document Management.
5. Choosing Import files from Cost Payment Applications to collate associated expenses, attachments, and Supplier pay applications together for submission to the Owner.
6. When done, select “Generate.”
7. The system automatically generates a Word document for download.
8. Within the details flyout panel you can view the generation date, access the download, or regenerate the document.

### Generating a Budget Payment Document

The screenshots show the following steps:

- Step 1:** A small dialog box titled "DOCUMENT BY RECIPIENT" with the message "There are no available documents." and a "Generate..." button.
- Step 2:** The "Main Contract 1-PA001" flyout panel. The "DOCUMENTS" section is empty. A search field and an "Add" button are visible.
- Step 3:** A modal window titled "Add document by template". It shows a list of templates, with "Budget Payment Document Template.docx" selected.
- Step 4:** The "Main Contract 1-PA001" flyout panel. The "DOCUMENTS" section now shows the selected template. Buttons for "Select a template", "Drag and drop files here or browse", "Select files from Document Management", and "Import files from Cost Payment Application" are visible.
- Step 5:** The "Main Contract 1-PA001" flyout panel. The "DOCUMENTS" section shows the template with a "Generate" button in the top right corner.
- Step 6:** A "Download Budget Payment Application" dialog box showing the generated document for "Edward Roy, Modern Developments (bin360user4@yahoo.com)".

# Additional Capabilities

# Account Admin

With the project administration tools in BIM 360, you can rest assured that your project information is in the right hands. Project admins can easily invite team members to the project and define their access levels on a project-by-project basis with a simple click. BIM 360 has two levels of administration to ensure security and control across your projects: Account admins and project admins. Only account admins can create new projects and assign additional account admins and project admins. Project admins can add and remove members, set permissions, and adjust project details.



## 1

## Create a project

- In the Account Admin module, select the Projects tab and click “Add.”
- Enter project information and click “Save & Continue.”

Getting Started Guide 

Create a Project 

### Create Project Profile

Step 1 of 2

\* Project Name

Project name is valid.

\* Project Type


Construction Type

\* Project Value

USD

Project value is valid.

Project Image



Select image to upload  
JPEG, GIF, PNG, or BMP file  
(4MB max)  
[Browse](#)

Project Address

# Account Admin

## 2 Activating modules

- Click “Activate” for the desired BIM 360 service.
- Assign a project admin for each service. You can add multiple admins.
- (Optional) For Document Management and Field you can copy existing project settings.
- An email invitation will be sent to the assigned project admin(s). They will need to click the link to join the project.
- Click “Finish.”

**Activate Services**  
Step 2 of 2

To activate a service, click Activate and assign at least one project admin to the service. When you assign a project admin, an email invitation will be sent to the admin. Project admins manage all project level administration for their service. For example, a BIM 360 Field project admin can copy projects, create and manage checklists, and invite companies and project team members to their projects.  
[Hide](#)

**Document Management**  
Inactive

Copy project settings ([Learn more](#))

Select Project

**All Projects**

- 01&03
- AU 2017 AR Demo project
- Alameda High School
- Alpine Retreat
- BZ Migration Testing
- Bayfront Arena
- Bio Comanv Tower

Please assign a project administrator

Enter name or email address

Company

Cancel Save

Activate

**Design Collaboration**  
Inactive

Activate

**BIM 360 Glue**  
Inactive

Activate

**PRO TIP:** You have to activate Document Management first, before you can activate other next-gen services.

## 3 Add members to directory

- In the Account Admin module select the Members tab and click “Add.”
- To add an individual member, select “Add People to the Member Directory.”
- To add an account admin, select “Invite Account Admins.”
- To import members from a list, select “Import Members by Spreadsheet.” For a first-time import, download and complete the member list template.

**Invite Account Admin**

To invite new Account Admins to manage your account, enter their email addresses, and select Account Admin in the Access Level dropdown. The Account Admins will receive invitation emails with links to BIM 360 administration.

Invite Account Admins to manage your account. Add

Email	*Default Company	Default Role	Access Level
test@autodesk.com	Autodesk	Select Role Select Role Architect Construction Manager Contractor Designer Document Manager Engineer Estimator Executive	Account Admin <input checked="" type="checkbox"/> Account Admin <input type="checkbox"/> Executive Overv

Cancel Invite

**PRO TIP:** You can change the default company and role later if necessary.

# Account Admin

## 4 Adding members to a project & assigning access levels

- In the “Project Admin” module, select the “Members” tab.
- Click “Add” and use the search bar to search the member directory.
- When you find the member, select them and click “Select.”
- Add their company and role. Note: Role determines their access level to all BIM 360 services.
- Click the icon(s) to overwrite the access level granted by their project role.
- Click “Add to Project.”
- Update existing access levels by clicking the grayed out icon(s).

Name/Email	Company	Roles	Project Admin					
Rick Nichols	Aesthetic Interiors	Owner						
Ben Johnson	General Construction	Construction Manager						
b1m360user7@yahoo.com	Ace Property Holdings	Construction Manager						
b1m360user6@yahoo.co...	Sparxx Electrical	Engineer						
b1m360user8@yahoo.oc...	General Construction	Superintendent						

Members & Access Levels



Setup Roles



**PRO TIP:** You can choose from a list of preset roles or create your own custom roles as well as configure the permission and access levels by each role.



# Integration Partners

Get the most out of construction technology by integrating the software you already use with BIM 360. Built on an open and secure API platform, BIM 360 enables users to easily integrate with various other construction softwares, including drone technology, estimating and bid management, as well as safety management tools.



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