

DON SIMPSON: Good afternoon, everybody. Welcome to day one of Autodesk University and to BIM 360 Administration Made Easy. My name is Don Simpson. I'm product support specialist for Autodesk. And I'll be your instructor today.

So this class will focus on administration of BIM 360 at an account level as well as administration of BIM 360 Field. BIM 360 Field is one of the services within BIM 360. Rough estimate, we'll probably spend about 2/3 of our time in the administration tool. I'll point out some areas in Field particularly as it relates to account administration, point out some key areas and show you a lot of other resource, so we can get more information.

I am around this week. I'll probably be around the construction zone. You'll see me floating around if you other questions while you're here. You know, feel free to reach out to me.

Key learning objectives, as seen in your handout, understand how an Autodesk account, BIM 360 Account Administration, and the BIM 360 Services, Field being one of those, all work together, gain understanding of the common workflows that are typically used, learn how to troubleshoot common roadblocks both from other admins and from project users, and learn some best practices. Lots of material we can cover. We have, obviously, hour, hour and a half or so. Can't cover everything, but I'll go pretty deeply into the account administration side and those other key points.

And I'll leave about 15 minutes or so for questions at the end. So please hold on to questions. And we'll leave some time for that.

About me, I'm a product support specialist for Autodesk and BIM 360. I work out of the Boston, Massachusetts office. I began supporting the BIM 360 products with BIM 360 Field six years ago at Vela Systems. So Vela was the startup company that built what's now IBM 360 Field.

My current role, in addition to being a support rep, I'm also one of the key point people within support. So I work closely with product management and with development. Something comes up, doesn't look right or some workflow or something that someone brings my attention, I meet with them regularly and bring that feedback over.

As part of the roles, I get involved in support issues, but a lot of the priority support items. I develop training content, do training. This being, obviously, an example of that. And my

background prior to that, I supported software and software as a service products for many years now, about 15 years in that and other customer service functions.

On a more personal note, I'm from the Boston area originally. I've lived in Boston my whole life. Hopefully, you can understand me. I've been told I sometimes talk fast, have a funny accent. So you know, I'll try to go easy on you. If you don't understand me, let me know.

AUDIENCE: [INAUDIBLE]

DON SIMPSON: All right, great. I'm a happily married father of a two-year-old daughter. And I would say I'm probably perfect for the Boston area. I like history. I like sea coast. I like food and beer. And it's a great area.

If I had to give you a couple of life goals, I'd say seeing all 50 states-- I'm about halfway there, or a little more than halfway there-- and learning another language. I picked Spanish. So bonus points, can anybody name-- not the guy from New Hampshire. But can anybody name the guy in the middle there?

He's a brewer and a patriot. That would be Sam Adams. So go with the Boston connections here, we have Fenway Park on the left. We have Sam Adams in the middle. And we have sea coast here in Massachusetts where I proposed to my wife. So it covers the whole gamut there.

So enough about me. How about BIM 360? So when I'm talking about BIM 360 today, we're going to be talking about one of four different individual services as it exists today in addition to the account admin tool. So for those who aren't familiar, that's BIM 360 Field, BIM 360 Glue, BIM 360 Plan, BIM 360 Docs, Docs being one of the newer application services for BIM 360.

Just as a quick refresher, Field is construction management in the field as the name would imply. Glue is more a clash detection. Plan is planning vertical construction, leading construction practices. And then Docs is a document management tool.

Tying those all together is a consolidated admin tool, BIM 360 Account Administration. So the question there is, well, why do we have a consolidated BIM 360 Account Administration tool? Well, prior to what's now BIM 360 Account Admin, we had Field. We had Glue.

Field and Glue were separate applications, had their own administration, had data that was essentially in a silo of different companies. You know, it became obvious that the data wasn't doing all that it could. It caused more training and set up time. As we were building more

services, would you need to administer account information in a different way in each individual product?

So the BIM 360 Account Admin tool was developed. And so that that becomes a central point to manage account level data, so projects, companies, users. It eliminates data redundancy. And for that reason, it streams set up time and training time.

And finally, it provides the framework for improved reporting options. So maybe things are not there yet, but things will be one place where that data can be pulled. The next question, well, how do you get invited to the BIM 360 Account Administrator?

So your accounts are created basically one of two ways. You can sign up for a trial. Or, you could have our account fulfillment group set up the account. So if you've made a purchase, you're a reseller, you're getting going with BIM 360, Cloud Fulfillment would set things up.

Otherwise, you'd sign up for a 30 day trial that may eventually be turned into a live account, quote unquote "live account." The accounts that are set up, we do a few different things. You select one of two hosting regions, so Americas or the EU.

That doesn't mean you have to be in the EU to have your data in the EU. It doesn't mean that people in the EU wouldn't have data stored in the Americas, so just a point to keep in mind. The BIM 360 account is provisioned with all of BIM 360 services that your company has purchased or agreed to use.

And I'll show this in a bit. You can use one URL to log in, and you'll see a button for each of those places you've been invited to. But it's all tied to one account. An account type and member limits are set. If you've purchased a member limit that's tied to the account, that's done with and set up.

And finally, account administrators are added. So there's an initial administrator or administrators that are set up initially. You, as an account admin, have the option to add other people. You can add any number people you want it up to if you have a member limit.

It's account level data. So you might want to take that into consideration. How many people do you want to have access and control and be able to change and modify things at an account level? But there's no restriction on how many account admins you could have.

So you've had an account set up whether you've signed up for a trial or whether our fulfillment

group has gone in and set up the account. They put you on an account. Account invite goes out.

Account invite would be an email. In the email would be a Get Started button. You click the Get Started button, and you're brought to a Sign In page. It prompts you to either sign in or create an account, create an account being an Autodesk account.

So if you're here today, you probably have already created an Autodesk account, an Autodesk ID. So you log in without it or create one. Upon creating the account, so I'd click the Sign In button. I'd do the create an account or sign in. Once I've signed in, I'll be brought to a page similar to this.

So that is the account administration tool. So there's only a few people, probably, that are going to be account administrators on your account, so a small fraction of people. And you can go in and invite other project admins, add other users.

The direct links to the account administration tool are right over that screenshot. These are direct links. There's a unified log in that will ultimately allow you to remember less links. And for reference, you manage your Autodesk ID-- sorry-- at accounts.autodesk.com

Before I go further, I've gone around the room a little bit. How many people were familiar with BIM 360 before coming here today or our account? OK. Great. Show of hands. That's awesome.

How many people are accounted administrators? Wow. About half. The people that are account administrators and familiar with the BIM 360 services, are these products that are services that you use on a regular basis? Or, are you the account admin putting in data for other people to use?

AUDIENCE: Putting in data [INAUDIBLE]

DON SIMPSON: OK. You could be both.

AUDIENCE: Correct.

DON SIMPSON: So I've logged in initially. I'm activating the account. So I can go to that direct link on the previous slide. Or, I can use these unified log in links.

I'll show this in a little bit. But the benefit here, again, is I can click this link, this unified log in

link. There's one for the US, the Americas hosting region, this one to the EU. And that would bring me a list of buttons of the services that I've been activated on.

So then I click one of the buttons for the respective service. And I go into that BIM 360 service. Don't have to remember all the individual links. But there are other separate individual links, too, that would get you to the same place.

Important point here also is that the options will differ depending on what people have been invited to. So even if I'm a user on an account that has all of the services or any combination of services, I may not be invited. I may not have been activated on all these individual services.

Or, perhaps, my project, my account didn't purchase all the services. So you wouldn't necessarily see a screen with those options. And the options could differ from user to user.

I'm going to go between the PowerPoint slide. And we'll go into the product. So I'll go back and forth to show you this. One of the first things I would recommend, especially for new accounts that are set up, take a look at the Account Details area.

So the Account Details area is going to show you the account administrators and give you an option to review the account name, to review the account logo, to set one if one doesn't exist. Pretty easy, just a few mouse clicks. There's also a Service Settings button. I'll cover that a little bit later. That's specific to Field. That's also in the Account Details area.

So, again, I can set an account logo. I can review and change the account name. I'm an account administrator. I can do that from my account. Wherever that account name shows up, that would change it.

So within Field, there's an area where you can see a project name. If I change it there, it's going to propagate out of any project that it's tied to. I can create business units. If I want to organize the projects that are associated with my account, I can create business units and, upon set up, assign the project into that business unit. So let's demo some of this.

So I've been invited as an account administrator. I click the Get Started button. In my case, I already have an Autodesk account. This Autodesk account is going to have the same user ID and password from just about everywhere else within Autodesk that I've used the account. So community forums, other products, other SaaS products, going into the Account Admin area itself, same user ID, same password.

In Account Details, this account name that was set up upon account creation, if I want to change that, I can simply click on the name. We'll call it change. We'll make it easy. If I want to change a logo, I would simply click on the logo, browse through logo.

And it gives you instructions and a guideline right above for what type of files we except and file size. So essentially, I would browse through that location, upload the logo. It would change here. If I want to add another account admin, click on the Plus button, type in an email address, hit save. And invite would go out similar to what I just showed.

So that could be someone that already exists on the account. And I'm essentially promoting them to be an account admin. Or, I could add somebody new from that button. And it would show up in the Members area.

And business units, so if I want to set up business units, I can add a top level unit, call it whatever I like, or move a unit, or create subunits within the unit. So maybe I have a region of-

AUDIENCE: What if you have projects in there that [INAUDIBLE] business units?

DON SIMPSON: Should be able to. So we've done a review of basic account set up, adding account admins, adding a logo, adding an account name, pretty basic stuff. Well, what about the other areas?

So we'll start with members. So within the BIM 360 Account Admin area, there's a Members button. One of the buttons on the left side of the screen looks like a human profile. I click on that button. I'll see a list of all the members that have been added.

So a few notes about members, I can add a list of members. The members could simply exist. They don't have to be on a project. They don't have to be activated on any service. They could just be there for admin's use later on.

Or, I can add them. But I don't have to. I can add the users in a few different ways. I can click on the Plus Add button that's right within the member directory. I can import members.

So there's a More Actions button within the directory. I click on the button. I'll have a list of options. One is Import Members. So it's an Excel spreadsheet, Very simple. I'll show that in a bit. Add some users and import.

I can add a member within a BIM 360 project. If I add a member from BIM 360 project, once that and invite goes out, that member's going to show up in the account admin tool. I don't have to take another action to add somebody.

Finally, and I'll point the resources out at the end of the class. But we have BIM 360 APIs, Application Programming Interface. So there's APIs that can do things like add members, set up projects, add companies. So that might be another way that I can add people.

To set up a member, all I need is an email address. There's other values I can put with that. But at a bare minimum, that's it. That's all I need.

I can set a default company. Default company would imply it should be the default company when someone's added to a BIM 360 service that uses companies. So I think that's every BIM 360 service with the exception of Glue.

Within Field, I can additionally change the default company. And in Field I can change the company assignment for that user without it affecting the default company. So in other words, maybe there's a joint venture that the user's associated with. Or, they're working with some other entity within my company. And I want to associated them specifically with that company, that entity, whatever you would consider it in your head, without changing what the default company is in the account admin tool. I would have the ability to do that in Field.

Members own their own identity. This is an important point and something that I think confuses a lot of people that are newer to BIM 360. I can be prompted to put a first and last name value in as an account admin or as a project admin. But I don't really ultimately have control over the first and last name value or really any other profile information.

That's controlled and owned by the individual user. The users own their own identity. So in this example here, I've added the users associated with don.ipad@vela.com, Donald Duck.

So Donald Duck got added to the account. Well, he showed up as Don iPad. Because that's the first and last name value that that member associated with that email address has set in their Autodesk account.

And I can't change that as an admin. I would have to have the user go in and change it themselves or prompt them to change it. This other contact information, maybe there's a phone number I want to have put in, I can't do that either. The individual members own their own identity. It's all done within accounts.autodesk.com.

We have a series of buttons to manage and search for users. You can change the status of a user, enable or disable. You could send an invitation out to a user. You could import or export members. And there's different search options.

So if I have a small account, I could probably just scroll through the grid and click on someone. If I'm in a large account, has a lot of users, maybe there's hundreds, maybe there's thousands, not going to be particularly efficient. So I have the option to search by email address or name, by the project, one of the products they're associated with, or the default company settings.

Resend invitation does just that. It resends an invitation. My opinion, it's more useful for account admins that haven't logged in yet. You could reinvite users that are associated with projects.

But it's probably more straightforward and clear to do that within the individual services. And the project admins have the ability to resend invitations to users from the individual services. So I'd probably use it just for the account admins.

As a project admin within the account admin tool resending invites out admins, if there's other users that need to have the invitation resent, that's done within the individual project associated with the individual service. So I set up a project for BIM 360 Field, for instance. And one or the other users that's not an admin needs to get the invite. I would resend the invite from the project, from that Field service and from that project.

Exporting members, this is a good way to review who has been set up in my project-- or, I'm sorry-- in BIM 360 account. I can see the email address, the name values that are set, any default companies. I can see a list of projects that they're associated with and status.

So, again, a few other things about members. So I am not required. I add a member into the BIM 360 account. I'm not required to add them to a project. Account admins can add themselves to a project.

But they're not set up with those projects, even ones that they create. They're not users on that. But they control the account level data, so they can add themselves.

Members are assigned to user roles by the project admin from within the BIM 360 service. So there's preset user roles within the BIM 360 services. Field has contractor, architect,

owner, engineer, subcontractor. That's all set within that those Field projects.

And as I mentioned, if I add a member from BIM 360 or the other services, they ultimately populate into the account admin tool. Users can sign in with their email address. So their email address basically is going to be the default user name.

That can be changed, as you're probably aware. That can be changed to whatever I set within accounts.autodesk. You should be able to log in to the web and iPad application for any of the BIM 360 services with either the email address or the username if it's different.

So let's add some members. So I'm in the Member Directory. If I wanted to edit a member, I could double click on it. Again, I can't change profile information. As you can see, it's all greyed out.

I can change the status. I can delete the member. I can change the status, so enable or disable. And we see the other button for Resend Invitation. If I wanted to import members, click on Import Members, download the member list.

We have an Excel spreadsheet that I would then use the import into the BIM 360 account. So, again, the only thing I'm required to add is the email address. I can add other values. I can add a default company. Or, I can choose not to.

And I can export members. So from that Export button, I've exported a list of all the members that are in my account. I can see their email address, their first and last name values, the default companies, and a listing of all the projects they're associated with.

So I've set my account information, high level account details, set some members. The next logical step might be to add companies. So similar to members, I can add companies by clicking on a Plus Company button.

I can import members through the BIM 360 API if I'm using that. With the exception possibly of Field, I can also add companies as a project admin within the BIM 360 service. The companies, again, would populate up into the account admin.

I have companies. I have users. I want to get going on projects. Similar to the other buttons, there's a Projects button, second button on the left. To add a new project, I'd click the Plus. Within the Account Admin area, I can click on the Plus Add button or add projects, again, if I'm using the BIM 360 API.

In similar to the other areas in account admin tool, I could double click on the existing project to edit it. We require a handful of project profile information. At minimum, you would need a name, type, project value, start and end date.

Address isn't required. I would probably recommend adding that. And one of the reasons I would recommend adding that is if you use BIM 360 Field and you're using weather information or you use daily updates that pulls in weather information. If that's important to you, which I think is to the majority of BIM 360 Field projects, the weather information is pulled off the address that's set up in the project profile.

There's a time zone. There will be a default time zone setting. That time zone setting will be used in any of the time values for any services that's activated on the BIM 360 project. So verify that that's correct. And you could change within the project profile if need be.

Verify the language. The language option is specific to BIM 360 Field. I'll go into a little more detail there in a moment. And one of the most important points, the project profile information can only be edited by the account admin.

So if I go in BIM 360 Field, and I'm a project admin, and I see the address is wrong or maybe the time zone needs to be set, that information is going to greyed out. I'm not going to be able to change that. I won't have any control over that unless I happen to be an account admin. But if I'm not an account admin, I would have to contact the account admin and have them make those changes. And even the account admin would do that within the account admin tool.

So a little bit more about languages, the BIM 360 products are localized in different languages. Account admin tool itself is localized in German and English. The Language button there doesn't control the localization if you're German or English. That's done within the browser settings of whatever web browser that you're using, which is largely true for BIM 360 Docs and BIM 360 Field as well.

BIM 360 Field is localized in German and English. Docs is, obviously, a few other languages in addition to German and English, French, Spanish, Brazilian Portuguese, Chinese, and Japanese. For BIM 360 Docs, that's completely controlled within the browser and iPad settings. So there's no other place within the profile set up that I have to go in and make any kind of setting change.

Within Field, it's largely controlled by the iPad and web browser settings as well with the exception of things that you might hear referred to as seed data. So that's things like drop down options, filter names, some other customizable names. So that being said, users can add information in pretty much any language and be able to work with data in that local language.

Now, it may not look pretty necessarily. It's not localized in languages beyond English and German. But you could work with that. And we have projects that have been successful for many years in Israel and in China just to name a few. That's step one. I'm setting up a project. I'm putting in profile information.

Step two is that I'm actually activating the services on that project. So activating the services, what does that mean? That means that I'm going in to the Activate Services window. I'm choosing the BIM 360 services that are activated depending on the needs of the job and what I have available on my account.

And I'm setting a project admin for each service, at least one. But it could be any number of project admins. And they would get an invite similar to what I got as an account admin.

Additionally, Field gives an option to copy in project settings. And that's a really powerful feature within Field. So within Field, a common workflow for many projects, many accounts, that I have a project that set up within the Account Admin area that's essentially a template project.

So I have standard information that's going to be used over and over and over again on pretty much every project. Or, maybe there's different variations. But there's a handful of template projects.

I can do that within Account Admin area as an account admin. I can do that within Field as a project admin. Once I start adding data, then that option is going to go away within Field. Once the project's activated it's going to go away within the admin tool.

But I could do that in either place. So here's a listing of the data that's copied, again, basic information, the project details area, template types, et cetera. Additionally, I have the option to copy in companies or locations.

Why that's optional? It's probably optional, because that's probably more likely to change from project to project, from job to job. But I could do it if I wanted to.

AUDIENCE: [INAUDIBLE]

DON SIMPSON: Sure.

AUDIENCE: You can copy a project if it's [INAUDIBLE] a [INAUDIBLE] project [INAUDIBLE] but you can't create [INAUDIBLE]

DON SIMPSON: The project itself, the profile would have to be created by the account admin.

AUDIENCE: That's what I'm saying. You can't [INAUDIBLE] project from the admin. But you can copy. Once that's created, you can copy that template [INAUDIBLE]

DON SIMPSON: Yes.

AUDIENCE: As soon as you add data to it, the project then cannot [INAUDIBLE]

DON SIMPSON: Right. And once that project is copied-- so the project has to exist. So it has to exist whether the account admin creates it, and then copies in the data from some other project into the new project themselves or whether the project admin does that within the Field application. It has to exist.

When I copy something in, so I'm using at template project, that's a copy. So if I later on change something in the template project, it's not going to affect what's already been copied. If you're in an account that uses English and German, probably best practice is to maintain a project template in English and a project copy in German. That's best practice. Not saying it may not work, but that's what I would recommend.

AUDIENCE: So the project manager can't copy a project [INAUDIBLE] Is that correct? [INAUDIBLE]

DON SIMPSON: They could copy any project. And I'll show that a little bit. They'll see a list of options that's on the account to which they're associated. So they could copy in the project.

But if they're in a new project-- so if the question is what options am I going to see, as a project admin, am I only going to see the ones that are quote unquote, "template projects?" Well, no. I would see a list of any project. So I theoretically could use any project in the account to copy in data to my new project. But in the new project, I'm only going to be able to use the project copy feature if data hasn't been added.

AUDIENCE: [INAUDIBLE]

DON SIMPSON: You're welcome. This slide is just a reference on project status. And there's a link here within the handout. So probably the important point there is a project is active if at least one project service has been activated. If not, it's in this inactive pending state.

And users themselves would have access to active and inactive projects. And its status is not going to change in those projects unless the account admin goes in and changes it. So even if it reaches the end date, it's not going to disappear from the drop down. It's not going to change its status.

A last area within the admin tool is the account dashboard. It's high level information. It's the start and renewal date, number of activated members, et cetera. One panel that I'll point out that I think is important is this panel upper right-hand corner, Members By Service or Member Limits By Service.

So for projects that don't have a member limit, they would see a Members By Service that would simply show them how many users have been activated by service. The difference between that and a Member Limits By Service is it's going to show me more of a status bar. So a top number of how many people have been activated over the number of people than the usual limit that I have for that individual service.

So at the time of this screenshot, I could have had up to 10 people on the BIM 360 Docs. I only had one activated. If you happen to have users that are associated with projects tied to multiple accounts and one of those reaches the expiration date, those projects will disappear from the drop down list. So that's a common point for confusion for some people.

They log in some day. And, you know, if the accounts expire completely, they probably can't log in. They'll probably get some kind of error page. If they're invited, so maybe they're on like a test project and a live project and one of them's expired, they could go in and see a fraction of the projects that they were expecting. And that's probably the reason for that.

If that account's been activated with BIM 360 Glue in addition to the standard dashboard, there's a Glue Metrics button. And the Glue Metrics button will show activity member data. So you can see from the screenshot. And with activities, I can choose the time period, week, month, or total.

So let's do a quick demo of companies, projects and the account dashboard. So I want to set

up a new project. So I can click the Plus Add button.

I have to choose a project type. That's the only thing that's required and project value, project value and project start and end date. My apologies. And I have a large number of currency options that are available.

Now, I don't have to fill any of this other information out. I might want to for future reporting purposes. I probably want to put in the address again if I'm in Field and I'm using daily updates and that weather information is important to me.

Time zone, well, we're not in Eastern time. So let me change that to Pacific. So I've set the project profile information. Now, we need to activate the services.

As I start typing within this box, I'll see a list of options that match what I've typed. So I can choose from the list. Or, I can keep typing.

So I've chosen account admin. Once I click Save, project' been activated. That project invite's going to go out to me. It will go out to that member.

Within Field, I have the option-- so I could just activate. I could just do the same thing out of project admin. Hit Save, it's activated. Or, I can choose to copy in data.

In this case, I'm going to use companies and locations. If I try to go beyond that, I'm going to get an error message prompting me to add a project admin. And then finally, I'm going to click Finish.

So in a very short amount of time, I should get a project invite email. So we'll go back here in just a little bit. So I'm going to log in. When I log in, I should see a button for any of the services on which I've been activated.

If I click Field, I'll be inside the Field service. This list is a list of all the projects that this user, Don's.AU.test, is currently associate with. The one that appears at the top of the drop down is the active project.

So if I do work, if I get a data, or if I make changes, that's where it's going right now. If I want to switch, simply click on the lists, click on that project. Couple of notes here, I'd be very careful changing the active project from working on the iPad. If I'm working on the iPad, I'd be careful about changing the active project.

I also wouldn't recommend opening up an additional window and logging in with the same credentials. There could be some data issues there. So as best practice, I would avoid that.

So there's my invite. This is the Docs invite. So this is Docs. But it would be similar to Field. It would simply prompt me to log in.

One thing you may notice with Docs, you have to get that invite. You have to click that Get Started button. Field, you actually don't. It's just a leftover from when the account admin tool was developed.

So if you notice this, this AU test project they just created is actually in my drop down list. I didn't even get the invite yet. So if there's people for some reason that have lost the invite, they probably don't even need to get the invite resent to them.

I'd probably recommend that as a best practice to go through the invite. I think that will lessen the chance of there being any issues. So taking a look at the AU test project that we just set up, if clicking on the Profile button, I have a button for Account Admin and Project Admin.

Not all users will see this. I'm seeing the Account Admin button, because I'm an account admin. I see the Project Admin button, because I've been added as a project admin.

And there is all my profile information. Again, I can't change it here. In this case, I copied in users. If I wanted to edit a user, I can click on the name of the user. I can associate them with a different user role, make them a doc manager having the ability to manage documents, project admin, photo viewer in addition to other controls within the member area.

So what can account admins do that project admins can't do? So account admins, they're editing. They control account level data, again, things like the users, companies, members, projects. They're activating services for projects. They're editing project info.

They're the only ones that can edit project info. The Field service in particular, they have the option to copy in data from a project that has been set up to a new project. Although, the project admins can do that also. A little bit different workflow, but they can do it.

Within Field, they have some additional reporting options. There's a slide that I'll reference in a little bit for what those are. They can resend invites to other account admins. The project admins, they're most likely going to be people that are close to the day to day activities.

They're likely the main point of contact in the project. They can also copy in data. They may or may not be able to edit companies. So within Field, that can be controlled and locked down.

For Glue, they could share a model from use from Glue to Field. And they can resend invites for any project user. They're also the people that are controlling the user role assignments and those additional privileges in Field, like doc manager and photo viewer and other areas.

So for training, so we have a learnbim360.autodesk.com link. There's different training modules. There's three currently for Field including a project admin course and modules for the other BIM 360 services. Definitely would recommend, particularly if you're not familiar with the 360 services, great starting point.

Within the Field project admin course in particular, there's a Field execution plan. So the Field execution plan will prompt you for what type of data you're looking to capture, workflows. And it's a pretty detailed outline for the project.

So let's go back into Field. And I'll show a few more areas of Field. There's those training courses. There's help content and other support content available as well.

So as a project admin, we've seen the Project Admin area. I can set up primary project admin. So among the project admins, maybe there's someone that's the main point of contact, the person that's going to get more of the questions or I want to get more of the questions to. I can set them there.

Include In Reports, that's important if I want to run cross-project reports. There's a few reports that are available to report on data across projects and reports that are specific for account admins. By clicking this button, that data's available for that.

Daily Updates, that typically would default to imperial units. If I wanted to change to metric units or some combination of imperial and metric, I would do that here. I've been mentioning about user roles.

So within Field, the Permissions button, the last button on the left-hand side, there's a list of project user roles. These are things that are customizable for the needs of the project by the project admin. If you add an edit up to none. So there's option for that.

I can lock down who can close issues. A point of confusion for many project admins is users that can't close even their own issues. First, is it restricted? OK. Yeah. Same role and

company as author, but he created it.

Well, that's the role and author at the time of creation. So if I have a user that was a contractor and changed to something else, that's going to restrict them. And that's a very common point of confusion for many people.

Subcontractors, it's not listed specifically in this set of user roles. A subcontractor, there have to be a subcontractor type company. It's someone that's assigned to the subcontractor user role. It's a very restricted subset user role.

They can't edit issues. They can add a note. They can change an issue status from work to open and do a few other things. I have the option as a project admin to expand out what they can do. And I would do that here.

Companies, well, I copied the list of companies over. If I hadn't copied the list of companies, nothing would be populated here. If I want to add another company, well, I'd probably want to work and make sure that I'm adding something. And this is where that restriction would come in.

If I let project admins add their own company values, well, they might not search thoroughly or have something that's close or just copy and paste something and create a lot of garbage data. And I know many people have had project admins that have done that and just create a lot of what are essentially duplicates. And, again, as I start typing-- let's see.

So I want to add Ralph's Wreckers of Reno. Well, I can add them. They already exist in the account. I'm bringing them into this project and using it. If I have another company, I can add them. As soon as I add them, they're going to show up in the account admin area.

And there they are. Locations, I brought in the list of locations. I can import similar to the members. It's the Import button. There's a spreadsheet. I would always recommend going to the spreadsheet.

I can add locations and associate them with a location. It's in part of the tree. So if I wanted to at a new location to building a floor two-- no, it's not unique. Already exists, I got an error message. So let me change that. That location's been added.

Additionally, there's buttons for all the other object types. I won't go into much detail here. Types, standard and custom properties, we give you a set of standard properties that you can

work with. You can create others as need be.

You can create or destroy different data types, numeric values, date values, drop down options. You could even have a signature or just standard text property. That's similar for all the object types. And similarly, members, so I could add a member here that doesn't exist. And they would populate up just like a company value would. Or, I can work with an existing member.

So just a few points here, so I'm mentioning about daily updates. Click in the Daily Update. This weather information, again, is pulled from the address. I can add other labor information. So there's a list of company values that would be available to me based on the companies I have added.

I can select how many workers were on the job site that day, default value of eight. But I can change the hours that each individual worked had worked, calculate that out, add other notes as needed, and either save that way or publish it. So I haven't published it yet. If I published it, the color would change. So now, it's green instead of-- what was it-- white, light green.

Looking at one of my other projects, November 12 test, what's a real powerful part of Field is the report area. So we have a lot of options to generate reports. So this is sets of reports for all the different object types and account level reports for account administrators.

So this project had data. It was populated. I wanted to generate reports. So I went in, ran some reports, even scheduled those reports. I can see at a glance, the schedules. I can see the reports that were recently run, actually view the report.

So this is the report that actually was generated and went out. Common question, that I've heard a lot is we send a report email out with every report. We sometimes have an attachment. The attachments would go out if the report's under 5 meg. If the reports over that, you would just get the email with the link to download.

If I've gone in there and changed the report-- so let's say some report went out with information-- information was essentially missing. And I want to know if someone's ever changed it. I can click into History button, and see when that was set up. And if a change was made, it would actually populate here. So if I had by a report that used to send out all data for all dates in the project and it somehow all of a sudden changed, I could see if someone's gone in and changed that report at a couple of clicks of a button.

Lastly, I think this is a real powerful feature within Field and within the issue reports in particular, when I schedule a report. I'm not only scheduling it for a very particular date and time and maybe putting a description or a name that's useful. I can obviously set a list of users. The users that I select would get a report of all the data that meets those parameters.

So if this data for 10 companies, they'll see other people's data for those companies. Without scheduling separate reports for each company, I could simply click this check box to also send each company's users a report of only their issues. So what that would then do is send out one report to the people that are recipients. So in this case, that's just Don's.AUtest, or whoever else in the list. They would get everything.

If I had that box checked, whose-ever company has issues on that report would also get that report. But they would only get their company's issues. So they wouldn't see all that data. And that's controlled by some degree also within the members area.

And I can see each individual report that goes out. So if you look at these reports, this report was generated. And you can even tell by the time stamps, exact same time. This went to Mario Brother's Plumbing. This went to Frankenstein Electrical.

And if I view it, I'm going to see what those people actually got. And I can see which users even got it. So just a couple points about Field reports, we mentioned about run reports. As far as crash project reports, these are the list of report options that are available for cross-project reporting.

I'm running those cross-project reports within a project. So I have to go into a project and run it even though they're cross-project. In addition, as an account admin, I can run a project activity report or a user activity report and get a higher level picture of what people are doing and then Include In Report to see the cross-project data.

So some useful resources, probably familiar with the BIM 360 forums. This is part of the community forum. There is an area for each of the BIM 360 services.

In addition to that, there's a BIM 360 Field and Docs both Release Note and Road Map area. These products released frequently, multiple times a month for Docs and Field. So if you're working with these products, I'd recommend going here. I'd also recommend signing up for the email distribution list.

In addition, there's BIM 360 Ideas. That's an area where you can put in feedback. So if there's a feature you'd like to see, submit your idea. It's public. Other people can go in. They can see what you've put in. They can vote on it.

Something gets more votes than something else probably has a higher likelihood of getting into a release. I'm not going to say that's an exact correlation, but probably has an impact. Product management, UX design teams, development, they look at these requests.

And I should mention that the community is all of you that are using these BIM 360 services. And it's both internal and external people. So if you see a forum post and something you can help out somebody else with, feel free to post that. There may be posts from people in support, maybe product managers, developers. Anybody that uses the 360 services could potentially respond.

Whereas, SaaS product, Software as a Service, there's sometimes maintenance that goes on sometimes little hiccups with the system. The dashboard is a place where you could see what's going on, what's both planned maintenance or any known issues. So at the time this screenshot was taken, collaboration for Revit an A360 team, had some issues. You can see that here.

If you log in with your Autodesk ID, you'll see a button to subscribe. And simply toggle from no to yes. And you'll get updates when there's something posted to the dashboard.

I mentioned about the BIM 360 APIs. There's a few different sets. There's account level APIs that are built on the Forge platform.

Why would you use that? Well, you could use it for a lot of different things. A few examples would be resource planning, integrating with project management solutions or cost estimation. Ultimately, it saves time, improves quality, creates automation.

And there's a link here. Your hand out has some other links as well. Additionally, Field and Glue both have their own APIs that were built before the Forge platform API. There's links here as well.

What I would mention, what I would be careful about, at one point, account level administration was done directly within the product. So there still may be some calls available within Glue and within Field. So I would recommend not using that. If you do use that, you could get yourself into some trouble.

And support for the APIs, there's a BIM 360 API forum. That's available for any of the BIM 360 APIs as well as a stack overflow blog that's specific for Forge in general. Other training and reference, well, there's the Help button.

All of the BIM 360 services have either an Info button or a Profile button. Click on the button. There's a bunch of options. Help is one. There's also a Support link. Help. Easy way to go for help content.

There's also the Autodesk Knowledge Network, help articles, knowledge based content, videos, et cetera. I have a link to past Autodesk University classes. Use that at your discretion. A lot of the content is still valid. But the products do change frequently.

So if you are looking at something that's content posts, I know back a couple of years, at least, some of that may be outdated. Support Portal, again, same user ID and log in. You can both create a new case or view existing cases and do case management all in one place.

And I can demo that if you like. So, you know, how did I do? After class, feel free to submit an evaluation. We want your feedback. You can get that from the API. You can do that online.

That's the end of the presentation. I'll just show a couple things within the forum. And then I'll open it up for any questions that you have.

So I'm directly within the BIM 360 area. If you went from the main forum link, you'd see a list of all the Autodesk products. And you can choose to subscribe into these if you like. If you've logged in, you could use site preferences.

If you want to review previous knowledge based content, well, that's BIM 360 Ideas. You could use that for any of the BIM 360 services including the admin tool. And you could see the requests that people have already submitted, submit an idea.

And then, Help Dashboard. Subscribe [INAUDIBLE] subscription and toggle into anything that's relevant. And finally, Release Notes. I mentioned product releases frequently. There's iPad application and web application releases. They're not always directly within sync.

If you wanted to see the Release Notes posted, so any of the Fields Release Notes web and iPad application would be here. And you can also subscribe. So from Blog Options, I've subscribed. But it would be this button. And that's going to send to the email address that

you've logged in with. Any questions? Yes.

AUDIENCE: So [INAUDIBLE] services that you can activate--

DON SIMPSON: Yes.

AUDIENCE: Well, I remember the layout [INAUDIBLE] on that list [INAUDIBLE].

DON SIMPSON: So layout's more of a-- as far as how it's purchased and provisioned, it's not a BIM 360 service. But essentially, it's a plug-in that works with the Glue application. Whether it's branded that way or associated that way, things like Building Ops that sometimes put-- I mean, even in the learn BIM 360 area, there's a Building Ops module. It's not technically a BIM 360 product.

Yes. **AUDIENCE:** When you [INAUDIBLE] changed colors, does that mean we couldn't have the data [INAUDIBLE] or is that just [INAUDIBLE]?

DON SIMPSON: Its moved it from draft status to publish, so it's available within the project. If you were working on something and you don't want it available, there's-- so within the permissions area, there's a list of the different object types including Daily Update. So in addition to being published or not published, you can restrict who can see it. So you can restrict-- I think it defaults to my company or my own. And you could change it to my company or everything, which is also an important point.

Within the Field web iPad application, I often get a lot of questions on filter options that disappear or people that don't see options they're expecting. All those options that you see on the iPad are saved filters. So the project admin has the ability to go in and create saved filters.

So there's some that are there by default that are set up whenever any project is set up. And then a project admin can go in and create new ones if they need it. And they're controlling which user will actually see the saved filters.

So all these with the exception of subcontractors, which, again, is more restrictive, they see everything for their company. But all of these options here could potentially be visible to users on the iPad. And how would I know which users?

It's anybody assigned to these user roles. That could also have an effect in reporting this. Within the permission area, there's-- let's see how it exactly word it-- enforce roll filters and reports library.

So if you wanted to restrict who can actually see data, maybe you don't want people to see other company's information. And particularly if you've set permissions on the saved filters if the user's not assigned to see all the equivalents-- we'll use this just as an example. If that user role's been assigned to see all issues, well, then that's really not going to have an effect.

But if they're not able to see all issues and you've restricted the other user roles, that's going to take that into account when the report's run. So they would choose from those options when they run the report. And they wouldn't be able to see things outside those saved filters you've given them.

AUDIENCE: [INAUDIBLE]

DON SIMPSON: If you have the option to run reports, you can choose to show attachments or not. So it's not that granular. But you could lock down the issues that they see from the saved filters.

AUDIENCE: [INAUDIBLE]

DON SIMPSON: Yeah.

AUDIENCE: [INAUDIBLE]

DON SIMPSON: I generally recommend starting from blank. If you start from the other option, it's going to use that as a prefilter set basically.

AUDIENCE: [INAUDIBLE]

DON SIMPSON: So if you're creating a new filter, you have the option. I'm in All Issues. So it doesn't matter in this case. But if I was in, say, All Unresolved Issues, and I hit new, if I use from All Unresolved Issues, it's going to start with all unresolved issues. So it's usually simpler to start from a blank, and then put in whatever filter criteria. If I created a filter, I'm going to give it some name, defaults to give all the user rules access, so I can uncheck roles if I want. And then I'm editing this filter criteria.

AUDIENCE: OK. So you're making [INAUDIBLE] right there [INAUDIBLE]

DON SIMPSON: Yeah, exactly. So those names, it's just a name. All issues may not be all issues. If someone's gone in and make an edit and they didn't change the name, that's a common point of confusion for many People Or, why am I not seeing filters?

Well, some project admin could have gone in and deleted filters. And people then go on to the iPad, and they're not seeing filters that they expect to see, because someone's edited it, someone's gotten rid of it. Any other questions? Yes

AUDIENCE: With the EU to [INAUDIBLE] when would that be [INAUDIBLE]?

DON SIMPSON: I would have to check with product manager. That's something we can find out for you. Yes.

AUDIENCE: When you set up project--

DON SIMPSON: Yes.

AUDIENCE: --the business unit option, what [INAUDIBLE]?

DON SIMPSON: It's a way to associate the product in a particular area. So if you had to use, maybe you have projects all over the United States, for instance, and you had some way you wanted to see where those projects were. There isn't a lot of reporting built in right now to be able to report back on that. But you could see that data and organize it.

AUDIENCE: [INAUDIBLE] separate?

DON SIMPSON: Yes. And there was a question if you can take an existing project and move the business unit. So if I go into Profile, Edit, this project was already created. I can simply go in, change it, hit Save.

Within this area were the projects that have been set up already. So I can see the profile information when I go in and edit the project. I can also click on Services and Admins see all the services that have been activated, see the admins on those projects, and see the companies that have been added as well. Yes.

AUDIENCE: When you're setting the time zone setting, if you have projects that are in multiple locations, like [INAUDIBLE] in a multiple location, I would say that, obviously, you would have the decision that [INAUDIBLE] time zone if based on where the project would be constructed. But if you have contributing folks from other time zone, does their time get converted to whatever time [INAUDIBLE]?

DON SIMPSON: If they're in the BIM 360 service, whatever the service is, it's going to pull that time zone setting. So if I'm looking at a project from someone that's on the Pacific Coast, I'm in the East Coast, I'm going to see the Pacific Coast values. I'm going to see whatever's been set for that

project. So it's not going to convert that. It's going to keep that a simple value.

AUDIENCE: OK.

DON SIMPSON: So if you had any question what was set, you could just look at the profile information. So if you're back in Field, if you had any question, you can come here and see the time zone value. I should also mention that the first thing I did was change the account name.

I changed it to changed, add dash change at the end. It populated here. So when you're in Field, you see that's added by in this value that's after by, that's the name of the account. Now, that's probably not going to make a difference for most people.

You're probably going to have one account. Maybe you'll have some test accounts. But if you had people that were on multiple projects and they came to you with a question and you couldn't find the data, you could go here and see what project or which account it was created for.

If you happen to be an account admin that was added to a different account, you were made an account admin on multiple accounts, when you log into the Account Admin area-- and this is referenced in the hand out-- you would see a button for each of the accounts that you're an account admin. So it's separate. One wouldn't affect the other.

Hand out, also, if anybody is interested or hasn't signed up for a 30 day trial who wants to try all the products, the hand out has a link to a BIM 360 page where you could sign up for those trials. The only thing I would mention there is that if you've already signed up or you've already been invited, so if you've already signed up and the trial's expired or you've been invited as a user in some other project, I don't think that's going to set up the 30 day trial. So if you needed to test that, that would be something we'd take on a case by case basis. But the system probably wouldn't send you that invite out.

AUDIENCE: But an individual would [INAUDIBLE] trial [INAUDIBLE] account admin [INAUDIBLE] add and et cetera, et cetera? Yes, no?

DON SIMPSON: There's links for each of the individual BIM 360 services. So you'd sign up for whatever service you're looking to trial. And you should get a test account that's set up with an invite to the account admin.

At least in Field, I think it sets up at least one test project. And you should get a project invite

for that test project. And you're an account admin, so you could just add whatever other projects you wanted.

AUDIENCE: I guess what I'm saying is for the 30 days, can I be an account admin in a sandbox with all the BIM 360 services, [INAUDIBLE]?

DON SIMPSON: Yes.

AUDIENCE: Is that correct?

DON SIMPSON: Yes. So you should get an account admin invite when the test account's set up. And then you probably would get a project admin invite for the project that's set up when the account's created. So if you were invited simultaneously, for instance, as an account admin on the quote unquote, "live project," when you go log in to the Account Admin area, you'd probably see two buttons. So just look for the names of the buttons.

AUDIENCE: And [INAUDIBLE] company account email on [INAUDIBLE] project, we could do the 30 day trial [INAUDIBLE].

DON SIMPSON: If you were already invited somewhere else or you'd already signed up for a trial that had expired, I don't think the system would send a new invite.

AUDIENCE: [INAUDIBLE] invite to an actual project, that email would be seen as a trial but not [INAUDIBLE]? Is that correct?

DON SIMPSON: I don't think it would set the trial in that case.

AUDIENCE: That's what I'm saying. So I'd use like a personal email that [INAUDIBLE] doesn't recognize.

DON SIMPSON: You could probably do that.

AUDIENCE: I would just be nice to be able to play with all these features.

DON SIMPSON: Yeah. And the hand out has links to the trial areas and other help content. Yes.

AUDIENCE: [INAUDIBLE] covered this or not or if I missed it. But at the project level, is there a way to report on all of the projects that are created in BIM 360 and [INAUDIBLE] products that they're assigned to?

DON SIMPSON: So you could--

AUDIENCE: Because we get that question all the time. Which project are you [INAUDIBLE]? Which project [INAUDIBLE]? Well, how do you just get one list of all the projects [INAUDIBLE]?

DON SIMPSON: So you're looking to see the project that members are assigned to? Or, are you looking--

AUDIENCE: No. Just the product. So if, you know, this is [INAUDIBLE] give me a list of all my projects and tell me what is being activated on each one of those. So which ones are using blue? Which ones are using teal? Which one is using-- because you can activate one or all.

DON SIMPSON: Right.

AUDIENCE: Well, that's the web services on each project.

AUDIENCE: Right, but a list of projects, so that you don't have to go inside each project and look what it is. [INAUDIBLE]

DON SIMPSON: Right. So I don't think that's currently possible. That'd be perfect thing for the Ideas area. You could see it. You could see the list of projects easy enough. You'd have to drill into each project to see the individual services.

AUDIENCE: Yeah, that's why I'm asking.

DON SIMPSON: Yeah. I know.

AUDIENCE: I look into the simple solution.

DON SIMPSON: Right. So as I mentioned at the beginning of the class, I work as a support specialist. Within support, there's people that are kind of the point people for each of the individual projects-- I'm sorry-- each of the individual Autodesk products. So when it comes to the Field product, Account Admin area, I'm starting to get involved in BIM 360 Docs. That would be me.

So these are conversations that-- I speak with development literally daily at least for Field. And I speak with product manager on a regular basis. So things like that I bring to their attention. But even if you logged into support key, even if you get an answer back from Autodesk, I would always, always, always recommend putting it in the Ideas area.

I mean, for one, it's public. And if it's public, we have at least two people in the room that have the same question you do. So if someone else goes into the forum and sees that and you vote it up, that at least has the chance of raising the likelihood that it goes into a release.

It may be something you've already heard. If you find it in the forum, great. You can vote it up. If not, you know, add it. But I would put that there. It's public. And they do look at those.

So we have about three minutes remaining. Any other questions? Did this help?

AUDIENCE: Absolutely. It helped me. Yes.

DON SIMPSON: Great. So if you haven't seen it already, go to the Autodesk site, the PowerPoint presentation as well as the hand out that goes along with the class have both been uploaded. So the slide deck is what I showed today.

I'm not sure. I think they record most of these classes. So the class itself may also be posted online. But the hand out is also another material that's available. It's essentially written as an admin guide.

So there's the content I covered, a little bit more explanation around that and a few other resource links at the end. And always take a look in the Help area and do a search for things. There's content always being created.

All right. Great. So you know, fill out those surveys. Let us know what you thought. And your feedback makes it better for next time.

AUDIENCE: Thanks, Don.

AUDIENCE: Thanks, Don.

DON SIMPSON: Thank you.

[APPLAUSE]