The BIM 360 Surgery Live – 45 Tips in 45 Minutes

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Learning Objectives

- Discover 45 tips and tricks in BIM 360.
- Learn how to set up BIM 360 for maximum productivity.
- Learn how to use the latest features of BIM 360.
- Learn how to complete BIM 360 tasks in fewer steps.

Description

As an extension to the popular BIM 360 Surgery YouTube series comes the live session where you’ll learn 45 tips for working and configuring BIM 360 software. Discover some top-secret BIM 360 software features that will cut the tedium and boost your ability in using BIM 360. This class will cover all BIM 360 modules, from BIM 360 Docs software right through to BIM 360 Build software.

Speaker(s)

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General Tips

1 Google Chrome Profiles

The ability to use multiple profiles can come in handy if you have more than one account, and you want to keep your things separate especially if you are an account admin.

- Open Google Chrome.
- Click the Profile button on the top-right corner.
- Click the Manage people option. Chrome profile settings.
- Click the Add person button. ...
- Type a name for the new profile.
- Select an image to identify the profile.
- Click the Add button.

2 Create Bookmarks

- Open Google Chrome on your Mac or PC and navigate to the web page you want to bookmark.
- Click the star on the right edge of the address bar. A bookmark will be automatically created. ...
- A pop-up box will appear where you can customize the bookmark.
3 Create Project Shortcuts

- Copy project url from BIM 360
- Navigate to the desktop
- Right Click
- Select New > Shortcut
- Paste url into location field
- Next
Setting Notifications for All Project Members

A project administrator must do the following:

- Click the Module Selector Account Admin.
- Select the Settings tab.
- Select View Account ID from the left panel.
  1. This will show your BIM 360 Account ID
• The Account ID is also listed in the BIM 360 url

5 Who is the project administrator?
• Add a word document containing all the account and project administrators details into your resources folder
  1. Give view access to all project members
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BIM 360 Account Admin

6 Role Based Permissions

Within BIM 360, roles are the means of indicating the member's job title within the project or organization, such as Architect, BIM Manager, or Project Manager. Roles can also be leveraged within the services and the two administration modules, Project Admin and Account Admin, to standardize permissions and workflow settings. They provide administrators with fine-grained control to ensure that each member has only the access they need to complete their assigned tasks.

Manage Roles in the Account Admin Module

Account administrators define a set of roles that will be available for an account and configure default module access for each role. The set of roles defined by adding desired custom roles and removing unwanted roles will be available for use for all your projects, both existing and new.

Depending on your company type, you may want to assign a different default access level to a role; for example, an architectural design company may need to grant broader access levels to the Architect role than a construction company.

1. Click the Module Selector ➤ Account Admin.
2. Click the Roles tab.
3. Start entering a role to add, then click on the role in the displayed drop-down list.

   Tip: If the role you searched for doesn't exist, you are prompted to create the role. Click on the "Create [role]" field in the drop-down list.

4. Click Add.

   Tip: The new role is added at the top of the list; however, when you refresh the page, the role appears in the alphabetical order in the list.

5. Click in the columns to change access to each module as needed.

The changes made by account administrators on the Roles tab don't affect module access permissions of existing project members. For a change to take effect, the edited role needs to be assigned to a new or existing project member.

After the role is created, you can quickly assign folder permissions using the role.

Note: Account administrators can only configure module access associated with project-level roles. Account-level roles, such as executives and account administrators, can't be edited. For example, members with an Executive role can access the Executive Overview dashboard in the Insight module, and this access is not configurable.
7 Model Placeholders

Before inviting anyone to the project, save a cloud model into the fresh BIM360 project site and call it “ModelPlaceholder-R21”

- This way the project is then imprinted to that version of Revit and no one will accidentally save the wrong version of the model to the project

8 Bulk Add Members

You can bulk-import multiple members to an account by using a spreadsheet.

1. In account administration, click Members.
2. Click Add > Import Members By Spreadsheet.
3. Do one of the following:
   - For a first-time import, click Download A Member List Template and open it with Excel. In the template, replace the example entries with your actual member details, one member per row, and save the file. Then click Choose File to select the spreadsheet.
   - If you have a properly formatted member list spreadsheet, click Choose File and select the spreadsheet.
4. Click Start Import.
IMPORTANT: When adding someone to the Member Directory, you may choose to assign them a default role, which will determine their admin rights and service level access when they are added to a project. This role, and its associated access rights, may be over-written when inviting people to projects, or at any time from within the Project Members page. For example, assigning a member the role of Superintendent by default will grant them project admin rights for all services. These can be individually changed by clicking the Admin gear icon on or off.

9 Locate Project per User

When managing members and projects, you can view all the projects a member is part of from the member profile screen.

- Account Admin
  1. Select Members tab
  2. Select required member
  3. Select Projects tab
Executive Access

Users with an executive role, such as the VP of Operations, have access to the executive overview in the Insight module. The executive overview provides a view of data across projects, project types, or business units. This data is presented as a series of dashboards in the following tabs:

- Risk
- Design
- Quality
- Safety
To enable executive overview access, edit the member and enable the ‘Executive Overview’ checkbox

Executives can customize dashboards to add, remove or reorganize Insight cards including Partner Cards.
Risk Dashboard (powered by Construction IQ)

The Risk dashboard requires access to Construction IQ. Cards include:

- Safety Risk Factors: A summary of the contributing factors to a project's daily safety risk rating.
- Quality Risk Overview: View the total number of projects with high, medium, or low risk.
- Project Risk Trend: View risk by project through time.
- Project Risk: View risk by project.
- High Risk Quality Issues: Understand risk categories on all quality issues (type = Quality)
- Locations: See where all your projects are located on a map.

Design Dashboard

Understand your design risk across projects, project type, and business units. Cards include:

- Design Issues Status by Project: See the total number of open or answered design issues for each project. Issues that are overdue or due within the next five days are highlighted.
- Approval Reviews by Project: See outstanding approval reviews by due date category (overdue, due within the next five days, or due beyond five days) for each project with active reviews.
- Design Risk Heatmap (powered by Construction IQ): Understand the root cause of design issues for each project, including closed issues. Root causes can be filtered by date. Root causes for critical building components are highlighted.

Safety and Quality Dashboards

Cards include:
• Safety/Quality Checklist Activity: Shows the total number of checklists performed over time.
• Safety/Quality Checklist Conformance: Shows the total percentage of passed or failed checklists over time by project.
• Safety Risk Factors: A summary of the contributing factors to a project's daily safety risk rating. This card is added by default to both the Risk and Safety dashboards.

11 Data Connector
Users with Executive access and run the Data Connector extract. This will provide data for analysis via .csv file. This can then be used in PowerBI for further analytics.
If you are activating services for the first time on your project, you'll have the option to apply a project template. The project template allows you to use settings from an existing project as a template for your new project. Settings included are shown below.

12 Templates

If you are activating services for the first time on your project, you'll have the option to apply a project template. The project template allows you to use settings from an existing project as a template for your new project. Settings included are shown below.

- Document Management
- Folder Structure
- Role Permissions
- Issues
- Issue Types
- Root Causes
- Custom Attributes
- Field Management
- Checklist Templates
- Issue Templates
- Role Based Permissions
13 Project Names

When creating the project name for your BIM 360 project, include the version of Revit that is used.

- Autodesk University Project – R21

**Note:** Once a cloud model is saved (through Revit) into a BIM 360 project, it will then only work with that version of Revit (Imprinted)

The (RVersion) in the name will help others remember what version of Revit to access the project with
Project administrators can set the frequency of email notifications to members or let members set their own email notification settings. The following email notifications can be controlled:

- Issues
- RFIs
- Submittals
- Checklists

There are 3 frequency settings that can be selected in from the drop down:

- Instantly: Sends the email notification as soon as possible.
- Hourly: Sends a digest email about once an hour.
- Daily: Sends a digest email at 4:00 AM in the time zone specified for the project on the project profile.
Setting Notifications for All Project Members

A project administrator must do the following:

- Click the Module Selector Project Admin.
- Select the Services tab.
- Select Notifications from the left panel.
- Use the frequency drop-down menus to select a frequency that members receive emails for each email type.
- You can use the checkbox to allow individuals to control their own settings.

15 Share Documents Publicly

Share a link to documents or folders with project members or members of the public. Project member recipients need view permissions to view the shared documents. Only documents in the Project Files folder can be shared with the public. Before documents can be shared publicly, a project administrator must enable public sharing. To do so:

- Use the Module Selector to switch to the Project Admin module.
- On the Services tab click Document Management from the left panel.
- On the Advanced Settings tab, turn on Public link for project.
Note: When sharing with the public, anyone receiving the link may access, download, or further share the linked document.

- Select the check boxes of the documents or folders you want to share.

- Click [Share] to open the Share Link dialog.

- From the drop-down menu, select whether you want to share with project members or with the public.

- If sharing with the public:
  - Click [ ] to specify the date you want the links to expire.

- Note: The maximum expiration date is 90 days after the share date.
Select from the drop-down menu at the bottom-left to specify the document versions being shared:

- Select **Latest** to generate a link to the document versions that are set as current at the time of opening.
- Select **Fixed** to generate a link to the versions that are current at the time of sharing.

- **Note:** When sharing documents with project members, the latest version is always shared.
- Use the tabs to select whether to share by email or by generating links.
  - If you choose to share by email, enter the recipient's email address, add a note as needed, and click Send.
- **Tip:** If you are sharing with project members, click in the text field to search for members, roles, or companies.
  - If you choose to generate links, click Copy or Copy All to copy the links to your clipboard and then send them to your recipients using your preferred method.

- **To revoke the publicly shared links:**
  - Hover your cursor over the shared document.
  - Move your cursor to the Shared column while still hovering over the shared document.
  - In the tooltip that appears, click Delete link.

**Note:** The shared link becomes invalid after **1000** downloads.

### 16 Show Folder Path

Using the show folder path will enable project members to see the full folder path for folders they don't have permission to view, as long as they have permissions for at least one subfolder.

- Use the Module Selector to switch to the Project Admin module.
- On the Services tab click Document Management from the left panel.
- On the Advanced Settings tab, turn on **Show folder path**
Note: Ensure you have set the correct permissions for project members so they have view permissions to view at least one subfolder.

17 Project Model Cards
Add, remove, or rearrange cards using the Customize Dashboard in Project Home and the tabs in Insight.

1. Click either the Project Home module or on a tab in Insight.

2. Click Customize at the top-right or, if your project has both Classic Field and Field Management activated, click ☰ then click Customize.

The Customize Dashboard is displayed, and the cards become moveable.
3. To add cards, click Card Library.

4. Use the search and filter features to find cards.

   Note: The cards available to you depend on your project module access. The Card Library currently includes a wide range of cards, including some Partner Cards based on 3rd party applications, but is continually being expanded. If you can't see cards you think you should have access to, keep checking for the latest updates.

5. Select the checkboxes of the desired cards, and click Add Card.

6. If you have added any Partner Cards, click Configure and enter the URL provided by the partner company for each one. Optionally, edit the title of the cards.

   Note: If the URL you received from the partner company doesn't work, contact our support team.

7. If you have added any Project Design cards, to embed a project model or drawing from Document Management, click Configure and enter the URL for each one. Optionally, edit the title of the cards.

   Tip: To get the URL required to add a Project Design card, open the model or project in the viewer in Document Management, and copy the URL from the address bar.

8. To remove a card, click Hide card.

9. Click and drag the new cards to reorder them as required.

   Tip: You can also choose the Hide card option outside of the Customize Dashboard. The changes are saved automatically.

10. When finished, click Save.
18 Hit Enter to Add Members
When adding members, just hit enter to add the member rather than using select
19 Custom Attributes

Customize your document information by adding attributes such as Page Count, Date, or Description.

**Note:** Attributes are version-specific, meaning that each document version can have different attributes assigned to it. For example, when setting a previous document version as the current one, the attribute value of the new current version overwrites the value specified in the previous version. If the new current version doesn't have a defined value, then the value of the previous version is applied. Also note that when copying and uploading documents, the attribute value of the most recently copied or uploaded document version overwrites the value specified previously.

1. In the folder tree, right-click a folder ➤ Add Attributes.
Tip: You can also click the Gear icon in the List view, and then click Add Attribute.

1. Enter an Attribute name.

2. In the Attribute type field, select an option from:
   - **Text Field.** Specify any name or title.
   - **Date Picker.** This option adds a calendar date picker into each document entry in the list view, beneath the column header.
   - **Drop List.** Add a drop-down list. You can specify each entry on the list by adding individual Value List entries.

3. Press Enter and then Add. The attributes you created now appear in the List view column headers.

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**BIM 360 Document Management**

**20 2D Sheet Color**

Settings: Use the tabs on the Settings dialog box to customize the viewer. You can edit the performance and display settings, navigational tools, visual quality, and change the image environment and lighting. A description of each setting is displayed on the dialog.
Tip: Click the Restore all default settings button to restore the default settings across all of the tabs. These settings provide the recommended balance between visual quality and viewer performance.

21 Print Sheets

Print a document or image from Preview mode.

- If the file has multiple versions, the version visible in the preview is printed.
- If the document contains markups, the markups are baked into the drawing.
- Documents with push pins or hyperlinks will print, but the push pins and hyperlinks won't be visible.

1. Click a document or image to open the preview.

2. In the top right corner above the preview, click the More menu ➤ Print.

3. Make a note of the recommended printing size, and click Print to open the standard print dialog for your computer.
22 Thumbnails

1. Click Thumbnail view or List view.
2. Select the document you want to preview.
   
   Note: Click the left and right arrows while in Preview mode to move through the documents in the active folder.
23 Image Compare

1. Open a pdf file with images

2. From the toolbar at the bottom of the screen, click Compare.

3. Use the version drop-down to select a different version of the same document or click Change to select a different document altogether.

4. After the two documents or versions have been selected, click Compare.
24 View File Activities
File activities allow you to see the actions done on a file such as viewing, moving, or editing. You can filter the activities shown by member, activity, or time period. You can export a csv or have it emailed to you.

Note:
If a filter is active the report only has the filtered entries. For example, if a filter is in place for editing the file the only entries in the report are edits made to the file.

Access File Activities
To access the file activities:

1. Hover over a file to show the More menu.
2. Click the More menu.
3. Select View file activities.
25 Toggle Gravity
When viewing a 3D document in first person mode, use Spacebar to toggle gravity.
26 Quickly Create Folders
Using the desktop connector you can quickly copy a folder structure from your local drive direct into a project.

27 Downloading Files
When downloading files, sometimes they download as a .rvt and sometimes a .zip. Here’s why:

- If a model to be downloaded has links whose latest version(s) has/have been published, the model is downloaded as an .RVT file.
- If a model to be downloaded has links whose latest version(s) has/have not been published, the model is downloaded as a .ZIP file including the .RVT file of the host model and the .RVT file(s) of any linked model(s) whose latest version have not been published.

BIM 360 Design Collaboration
28 Revit Homescreen Icons
When viewing files from Revit Home, you can see various symbols to denote the file status with regards worksharing and cloud hosting.

- Cloud Model
- Workshared Model
29 Package Notifications
Select the email icon to enable notifications every time a package is shared and consumed.

30 Project Status
The Project Status table allows you to view:

- The status of all published models in the project
- Who published the models
- When the models were published

Click on the Project Status icon in the upper right-hand corner of the team space.
To view a model, click on the associated link in the Path column to navigate to its location.

If you want to add a snapshot of the Title block to your Autodesk support ticket, click on the associated link in the Details column.

31 Create Publish Schedule
A publish schedule is only available for Cloud Workshared Revit models, not for models uploaded directly to Document Management.

Project administrators can schedule a regular, automated publish of a team’s work using the Schedule Publish option in the Project Admin module. This allows you to share the latest work from a team without the need to manually publish Cloud Workshared models. Only models with changes since the last publish operation are included in scheduled publish operations.

To schedule a regular publish:

1. Make sure the project administrator who is scheduling the publishing operation has a BIM 360 Design subscription assigned to their Autodesk ID.
2. Use the Module selector to switch to Project Admin.
3. Under Services, click Design Collaboration in the left panel.

**Note:** You'll start in this position if you enter the Project Admin module directly from the Design Collaboration module.
4. Enable the checkbox for a team.
5. Click Schedule publish. If a schedule exists for your team, click on the schedule instead.

Note: Currently, only weekly publishing is supported.

6. Click into the Day field and choose the day on which the publish should occur.
7. Click into the Time field and select the hour of day on which the publish should occur.
8. Enable the Schedule publish toggle switch.
9. Click Close to save the changes.
After the schedule is set, the schedule is indicated under the Schedule publish column in the list of teams in the Project Admin module.

**Note:** Even if you schedule a regular publish, you can still publish in the interim using the Update to latest command from the team space in Design Collaboration.

### 32 Team Theming

The Project Model is a fundamental feature in Design Collaboration which allows the ad hoc aggregation of team’s models into one view. Previously, it could be very hard to differentiate between the models from the various teams, as they were all displayed in a similar style. Team Theming gives the ability to highlight models using the team’s color, providing a much clearer understanding of where each of the elements comes from.

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**BIM 360 Project Management**

#### 33 Add Zoom Meetings

All BIM 360 Project Management users have access to the Meetings toolset. Users can only add video conference links to records they have created or records where they have been promoted to Organizer.

1. Within the Meetings module, open one of your meeting records or select ‘Create New Meeting.’

2. In the meeting details, a new field titled ‘Video Conference Link’ is available. Next to the field, select ‘Add Zoom Meeting.’

3. A new window will appear prompting you to sign in to your Zoom account.
4. After successfully signing in to your Zoom account, you will be taken back to the meeting record.

5. The Zoom meeting link will appear in the ‘Video Conference Link’ field.

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34 Create Spec Sections

Managers create submittal packages to group submittal items. When creating these, it's possible to also create a new spec section whilst completing this process.

1. Click the Module Selector ➤ Project Management.

2. Switch to the Submittals tab in the Project Management toolbar.

3. At the top of the screen, click Packages.

4. Select Create New Package.

5. Enter your information:
   - **Spec Section**: Select an existing section or create a new one.

6. When done, click Create.
35 RFI Revision Numbers

It is important to use the RFI revision format .1 when creating revision RFIs to ensure proper sorting.

- Period delimited names for related information requests are the preferred method, such as BID-1.2.
- Letters in between number groups cause sorting problems (rev1 or r1).

- Notice the sort order of the two revisioning methods:
Suggested Numbering

- As an RFI is opened, the suggested number is the number of the last RFI created or renamed increased by one. You can override suggested numbers, but are prevented from creating duplicates.

Sort Order

- Unnumbered RFIs will sort to the top (Draft and Submitted statuses). You can reverse the sort order using the header columns.
BIM 360 Cost Management

36 Include Type in Prefix
Project administrators can control the default display of code formats within the Cost Management module. For example, they can define a prefix, suffix, the number of digits, and the starting number in the sequence for each of the following code types:

- Cost item
- PCO
- RFQ
- RCO
- OCO
- SCO
- Expenses
37 Financial Markup Formulas

After a PCO is created, you can apply a financial markup. An example of a financial markup is an add-on such as a bond, contingency, or fee. These financial markups can be added to the change order for submission to the owner.

Before you can apply a financial markup, a project administrator must create the financial markup formula in the Project Admin module.

1. Click Project Admin.
2. Select the Services tab.
3. Select Cost Management in the left panel.
   Note: If you enter the Project Admin module directly from the Cost Management module, you'll start in this position.
3. Select the Change Order tab.
4. Click Add in the Financial Markups Formulas section.
5. Click Markup or Subtotal from the left panel to add it to the formula.
6. In the editor on the right, enter details about the markup or subtotal.

   For markups you can add:
   - Name (required)
• Type and amount. Available options include:
  o **Percentage**: Calculates the markup as a percentage of the cost basis.
  o **Flat**: A fixed amount applied as a total for the markup at the PCO level.
• A cost basis for the Markup. Only available on percentage based markups.
  o **Current cost basis**: Multiplies the percentage and the cost.
  o **Initial cost basis**: Multiplies the initial cost basis and percentage.
  o **Revised cost basis**: Multiplies the following subtotal and percentage.
  o **Grand total**: Multiplies the calculated grand total and the percentage.
  o **Preceding total**: Multiplies the preceding subtotal and percentage.
• Description.
• Budget code to map the markup to.
• Data to calculate on. Select a column, operator, and value combination to apply the markup to.

  **For subtotals you can add:**

• Name (required)
• Cost basis revision. Available options include Revise cost basis or Info only.
  o Revise cost basis creates a subtotal and recalculates the sample cost basis for subsequent markups.
  o Info only creates a subtotal for informational purposes, but does not recalculate the cost basis for subsequent markups.

7. Add additional markups or subtotals as required.
8. Click **Save**.
BIM 360 Model Coordination

38 Create a View

A View is a collection of models saved as a group. Views are useful as they can be easily returned to, viewed, and shared with other project members. They also enable project members to review clashes and issues for a smaller subset of data from a coordination space, such as a floor or specified location:

1. Use the Models or Clashes tab to open up the models you want to save as a view in the viewer.

2. On the Models panel in the viewer, click Add/Remove models to change the models displayed in the view.

3. Click Save view.
4. Use the dialog box to enter a Title and Description, and select a Privacy status.

Tip: There are two privacy statuses for views. Published views are viewable by all project members in the coordination space. Private views are only viewable by the creator and project administrators.

5. Click Save view.

The view is saved on the Views tab.

39 Red v Green

When reviewing model in the model coordination space its important to understand the differences in element color.

- The ‘Red’ Element (Wall) is the ‘source’ of the clashes
• The ‘Green’ Element (Mechanical Unit) is the element being clashed against

40 Use Revit Views

In Revit, Create clash specific views to easily filter elements when looking for clashes in Model coordination.
41 Export BCF

BCF (BIM Collaboration Format) can help. BCF offers a simple way to exchange comments, including all properties and assignments. Even details such as the camera view of the model are included.

Before using BCF export from BIM 360, the Account admin must enable the BCF Export app. After it is enabled, you can export issues from your BIM 360 project in BCF format.
BIM 360 Field Management

42 Link Issue to RFI

Project Management Admins and RFI Managers to create an RFI directly from an Issue in BIM 360 Build, streamlining workflows and creating a bi-directional link between records.

- On the Web, open an existing issue, under references, click “Add Reference, RFI”
• Click “Create New”

• When prompted, add in all RFI details and click “Create” when done
• RFI will be created and there will be a bidirectional link between the Issue and RFI.

43 Import Templates
As a project administrator, you can create checklist templates for specific evaluations. After you set up a checklist template, project members can use it to create and complete checklists as part of their inspections. Use the filter button to sort and view specific checklist templates.

Import a Template from an Excel File
You can download a sample spreadsheet, enter your information, and then import it into Field Management.

1. In BIM 360, Click the Module Selector ➤ Field Management.
2. Click Templates.
3. Click Import.
4. In the dialog, select Import Templates.
5. Click Next.
6. Do one of the following:
   - If you don't have a properly formatted spreadsheet, click Download a Sample and enter your information in the spreadsheet. Rename and save the file. Then click Browse to navigate to the saved spreadsheet.
   - If you have a properly formatted spreadsheet, click Browse.
7. Click Start Import.

44 Multiple Daily Logs
Often one daily log is not enough to capture all the work that has been done on site. Now field users can submit several daily logs for the same day. Teams covering day shifts and night shifts or different areas of the same jobsite no longer need to take the time to consolidate their work into a single daily log. Instead they can submit as many logs as they want for the same day.
And Finally

45 Check out the BIM 360 Surgery

Don’t forget to check out the **BIM 360 Surgery** on **YouTube** every Friday for more tips and tricks

46 Don’t forget to take a look The Big Room and the BIM 360 Forum


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