Making the Switch—How Customers Can Move from Classic BIM 360 Field to BIM 360

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AUTODESK UNIVERSITY
YOU CAN HAVE MY BIM 360 FIELD

WHEN YOU PRY IT FROM MY COLD DEAD HANDS!
BIM 360 Field Elements

- Project Overview
- Issues
- Tasks
- Checklists
- Daily Updates
- Equipment
- Library
- Photos
- Reports
BIM 360 Modules

- Project Home
- Insight
- Document Management
- Project Management
- Cost Management
- Model Coordination
- Field Management
- Project Admin
- Account Admin
How Do The Two Platforms Compare?

<table>
<thead>
<tr>
<th><strong>SHARED FUNCTIONALITY</strong></th>
<th><strong>BIM 360 FIELD ONLY FUNCTIONALITY</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Issues</td>
<td>Equipment/Asset Tracking</td>
</tr>
<tr>
<td>Checklists</td>
<td>Tasks</td>
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<tr>
<td>Document Library</td>
<td>Barcode Reading (Locations and Equipment)</td>
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<tr>
<td>Daily Reports</td>
<td>Photo Module</td>
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<td><strong>BIM 360 FUNCTIONALITY</strong></td>
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<td>Document Compare</td>
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<td>RFI's</td>
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<td></td>
<td>Hyperlinking Drawings</td>
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<td>Control of Data via roles</td>
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</table>
What Solution Works Best for You?
**Document Library**

**PROS**
- Simple
- Can Easily Move Files and Folders
- Drawings Can be Linked to a Location
- Data Available off Line as soon as project is sync’d

**CONS**
- Only Supports PDF’s
- No Office 365 Integration
- Does not Auto Slip Sheet
- Not available on Android
- Not Available on Phones
- Does not have folder permissions

**PROS**
- Supports Revit Files to Extract Pages and Includes Object Details
- Bulk Uploading and Versioning
- Automatically Hyperlinks
- Folders Permissions Controlled by Roles
- Supports a wide variety of file types: Office, .DWG, PDF, and more.
- Mobile Viewing on phones on both iOS and Android
- No need to sync as long as data connection is live information is readily available.
- Move and access files from desktop via desktop connector

**CONS**
- Off Line viewing user must download file
- Role Structure can be confusing if not properly set up
- Drawing Mark-ups need stricter permission settings
- Plans vs Project files takes some time getting use to
**Issues**

**PROS**
- Rigid Approval Workflow and hold points
- Attachments can come from sources outside of platform
- Set Location to speed up creation process
- Users can create Issue Templates
- Attachments can be edited after uploaded

**CONS**
- Cannot assign issue to multiple parties
- Does not work on Android
- Model Push Pins cannot be filtered
- Not integrated with Document Library

**PROS**
- Issues supported across multiple platforms and file types
- Issues can be assigned to multiple parties using roles
- Works on iOS and Android, fully mobile

**CONS**
- Issue workflow lacks rigid approval permissions
- Can only link attachments from inside BIM360 Docs
- Cannot edit attachments after saving them
- Cannot automatically associate with locations
- Cannot create issue templates
**Checklists**

**PROS**
- Can embed attachments and instructions
- Attachments can come from sources outside of platform
- Custom Attributes
- Attachments can be edited after uploaded
- Can pull templates from any project past or present

**CONS**
- Cannot assign issue to multiple parties
- Does not work on Android
- Model Push Pins cannot be filtered
- Not integrated with Document Library

**PROS**
- Templates can be pushed down from account level
- Ability to assign sections to different parties on same checklist
- Can schedule completion of section assignments
- Can Require signatures for checklist closure

**CONS**
- Issue workflow lacks rigid approval permissions
- Can only link attachments from inside BIM360 Docs
- Cannot edit attachments after saving them
- Cannot automatically associate with locations
Daily Reports

**PROS**
- Automatically Pulls Weather based on location
- Calculates total work hours
- Copy from previous day's information
- Standard Question/Details can be added to general notes and copied to all new reports.
- Reports automatically sync when connected to wifi
- Enterprise level reporting options while limited, exist

**CONS**
- Cannot be completed on phone
- Does not work on Android
- Only Author can edit (No multi-user edit)
- Does not create a single merged report for each day

**PROS**
- Can be completed on phone in field
- Straight forward and basic

**CONS**
- Weather has to be manually retrieved via in app link
- Cannot push template information to general notes
- Does not have a calculate function
- Reporting options are very limited
- Enterprise reporting option not yet available
- Does not create a single merged report for each day
Why Make The Switch?
BIM 360 PLATFORM

ANALYTICS & INSIGHT

Design
Clash
2D/3D
Task/Defects
Quality Forms
HSE
PM
Planning
Cost
Handover

DOCUMENT MANAGEMENT

Cloud Storage
Access Control
Collaboration & Communication
Data Storage
Model Viewing
Drawing Viewing
Issue Management
Version Control
Approval Workflows
Transmittals
Document Sets
Reporting

PROJECT DATA

AUTODESK FORGE
<table>
<thead>
<tr>
<th>BIM360 Document Management</th>
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<tr>
<th></th>
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<tbody>
<tr>
<td><img src="image1.png" alt="Image" /></td>
<td><img src="image2.png" alt="Image" /></td>
<td><img src="image3.png" alt="Image" /></td>
<td><img src="image4.png" alt="Image" /></td>
</tr>
<tr>
<td>Sheets/Titleblocks</td>
<td>Versioning/Activity log</td>
<td>Mobile Access</td>
<td>Review Workflow</td>
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<tr>
<td><img src="image5.png" alt="Image" /></td>
<td><img src="image6.png" alt="Image" /></td>
<td><img src="image7.png" alt="Image" /></td>
<td><img src="image8.png" alt="Image" /></td>
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Document Management

Features

- Folders/Sets
  - Plans vs. Project Files
  - Permissions

- Drawings
  - Uploads
  - Navigation
  - Markups
  - Comparison

- Reviews

- Transmittals

- Issues
Project Management: RFIs

**Question**
The air register in 505 Men's room conflicts with light fixture location. Please provide an alternate location for register.

**Suggested Answer**
Relocate register to south. Register will clear framing and remain centered in the alcove.

Created by Ben Johnson (Quality Construction) on Feb 26, 2020

**Architect**

**CONTRACTOR**

**SUBCONTRACTOR**
The Project Team

- Quality Construction
- Substructures R Us
- Jones & Sons Electrical
- Alpha Plumbers
- ... And more!

- United Construction
- Modern Developments
- BNIM
- Waterproofing, Inc
- ... And more!

- OWNER
- Manager
- Reviewer
- Co-Reviewer
- Process Engineering Reviewer/Co-reviewer
- Waterproofing, Inc
- ... And more!
The Workflow Set Up
Structured Workflows and Clear Responsibilities

<table>
<thead>
<tr>
<th>Creator</th>
<th>Manager</th>
<th>Reviewer</th>
<th>Co-Reviewer(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create RFIs</td>
<td>Create RFIs</td>
<td>Respond to RFI</td>
<td>Add additional information</td>
</tr>
<tr>
<td>Forward to the manager</td>
<td>Edit Creator RFIs</td>
<td>Coordinate co-reviews</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Forward to responsible reviewer</td>
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<tr>
<td></td>
<td>Add co-reviewer</td>
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**RFIs**
- Create RFIs
- Forward to the manager

**SUBMITTALS**
- Respond to assigned submittals
- Create additional submittals
- Forward to the manager

**ADMIN SET UP**

**RFI**
Your RFI configuration is incomplete. Please select a workflow role. Create a workflow for each role.

**Workflow Name**
- Creator
- Manager
- Reviewer
- Co-Reviewer(s)

**Description**
- Support for RFI creation, review, and response with various workflow roles.

**Workflow Role**
- Creator: Select a user, role, or company
- Manager: Select a user, role, or company
- Reviewer: Select a user, role, or company
- Co-Reviewer(s): Add additional information

**SUBMITTALS**
- Review Submittals
- Reassign to another Reviewer
- Coordinate co-reviews

**ADD ITAL Set Up**
- Add additional information

**SUBMITTALS**
- Review Submittals
- Reassign to another Reviewer
- Coordinate co-reviews

**ADD ITAL Set Up**
- Add additional information
Field Management

Features

- Issues
- Checklists
- Daily Logs
Model Coordination

<table>
<thead>
<tr>
<th>Model Name</th>
<th>Clash Groups</th>
<th>Clash Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Default_Arch_Community_Center.rvt</td>
<td>1030</td>
<td>252</td>
</tr>
<tr>
<td>Default_MEP_Community_Center.rvt</td>
<td>623</td>
<td>252</td>
</tr>
<tr>
<td>Default_Struct_Community_Center.rvt</td>
<td>1030</td>
<td>191</td>
</tr>
</tbody>
</table>

517 ELEMENTS WITH CLASHES

Clash Types:
- Rectangular Duct
- Rectangular Elbow - Radius
- Rectangular Duct (200x499)
- Rectangular Elbow - Radius (200x499)
- Rectangular Duct (200x499)
- Rectangular Elbow - Radius (200x499)
How To Get Started

STAGE A
EVALUATE
Figure out which modules your company actually uses and determine their importance level to your business models.

STAGE B
PRODUCT REVIEW
Familiarize yourself with the modules of BIM360. Set up a sandbox project and test out workflows, data input, outputs, and see how they align with your processes.

STAGE C
PILOT PROJECT
Find smaller projects with open minded teams to use the new software and processes and meet with them regularly to further develop your company standards.
(This will be more than one and will take time be patient)

STAGE D
IMPLEMENTATION
Once your processes are worked out, begin larger scale roll out.
Keep in mind, this is not a static process, continuous review and improvement are keys to successful roll out.
Getting Started Panel

Your Progress

- Upload Document
  Your first document has been uploaded and is ready to be shared!
  Learn More

- Add Folders

- Download Mobile App

- Invite Members

- Set Permissions

- Show Quick Tour
  Dismiss the learn panel

Your Progress: 60%

Status | File Name | Number | Date Downloaded
--- | --- | --- | ---
--- | --- | --- | ---
--- | 1-1.1irodation Fl... | 1-1.1 | 1-1.3irodation D... | 1-1.3
--- | 1-1.2irodation Fl... | 1-1.2 | 1-1.3irodation D... | 1-1.3
--- | A-100.pdf | A | A-100.pdf | A
--- | BUVD atLon... | A | BUVD atLon... | A
--- | BUVD atLon... | A | BUVD atLon... | A
--- | BUVD atLon... | A | BUVD atLon... | A
--- | BUVD atLon... | A | BUVD atLon... | A
--- | BUVD atLon... | A | BUVD atLon... | A
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--- | BUVD atLon... | A | BUVD atLon... | A
--- | BUVD atLon... | A | BUVD atLon... | A
--- | BUVD atLon... | A | BUVD atLon... | A
Help Guide

Resources

Release Notes

Resources
