



Project Management



Introduction

BIM 360 supports project management workflows on the jobsite and in the office. These workflows help to reduce rework by getting critical information into the hands of those in the field by combining mobile technology on the jobsite with cloud-based collaboration and reporting. Essential project management workflows such as RFIs and Submittals are supported, with defined approval workflows between contractors, subcontractors and designers, and the ability to combine submittal items into packages.

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

Autodesk BIM 360

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

Visit BIM 360 Site 

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



Table of Contents

1

Suggested Workflows

- Meeting Minutes
- RFI
- Submittal

2

Project Controls Capabilities

- Meeting Minutes
- RFI Management
- Submittal Management

3

Prediction & Analytics Capabilities

4

Additional Capabilities

- Account Admin
- Mobile Access
- Integration Partners



Suggested Workflows

Meeting Minutes Workflow

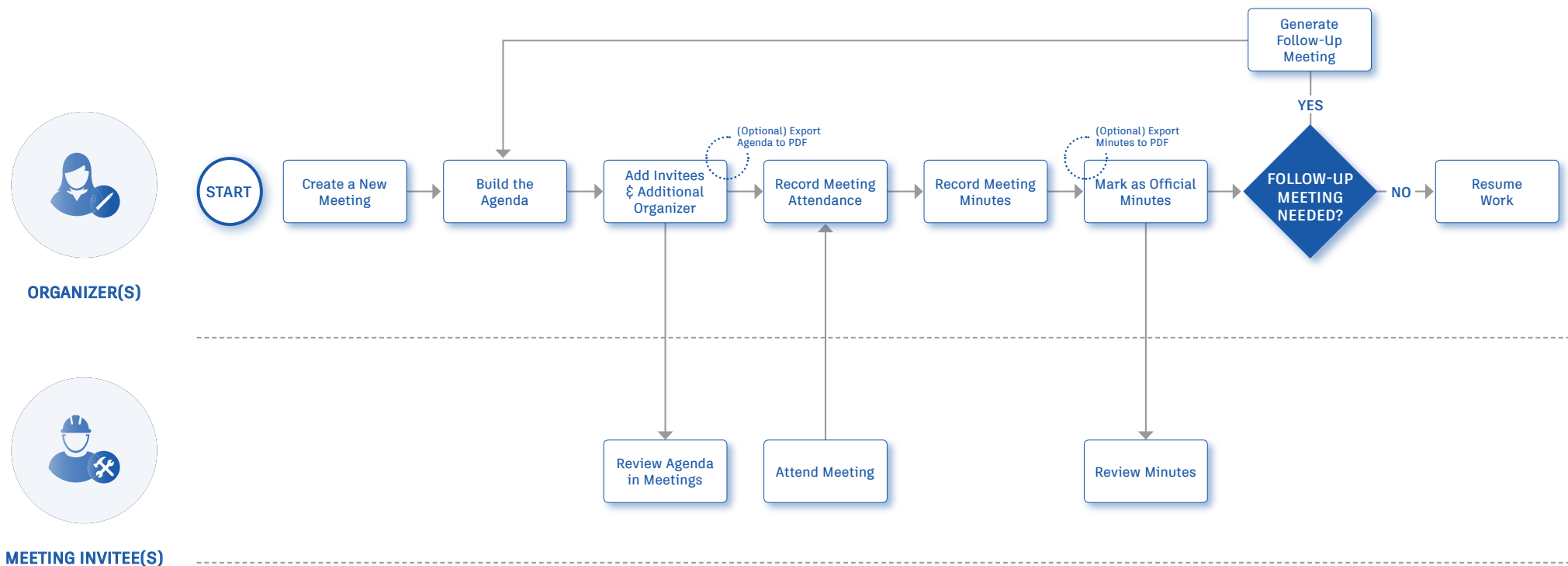
Simplify the RFI process by creating a standardized workflow that maintains transparency for the entire team. The graphic below outlines the suggested RFI workflow using BIM 360.

Why follow this workflow?

- Easily create agendas & add meeting invitees.
- Capture decisions made & assign individuals to specific action items.
- Automatically generate follow-up meetings.
- All meeting records are centralized, organized, & accessible to meeting invitees.

BIM 360 capabilities used

- Meeting minute toolset



RFI Workflow

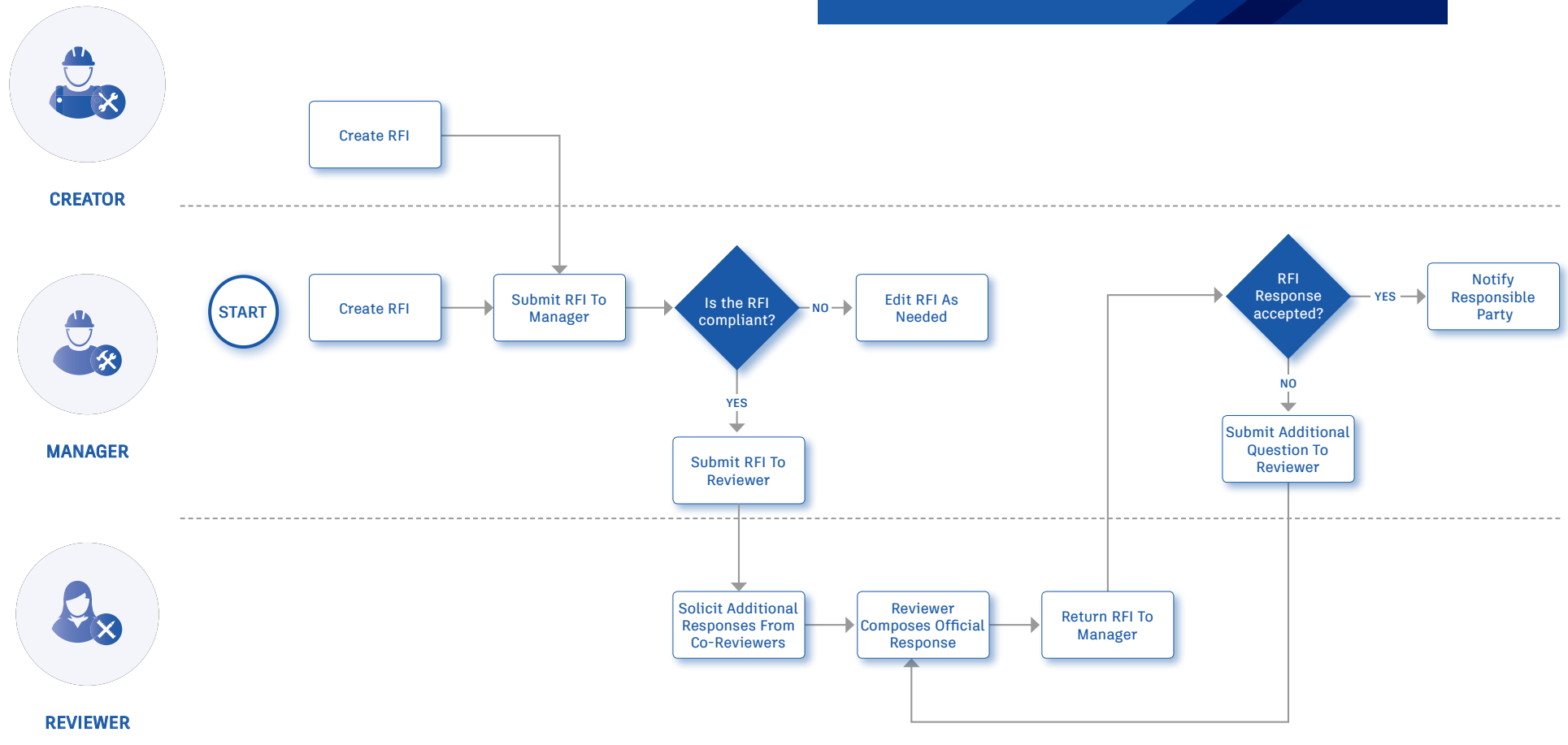
Simplify the RFI process by creating a standardized workflow that maintains transparency for the entire team. The graphic below outlines the suggested RFI workflow using BIM 360.

Why follow this workflow?

- Easily track and review project RFIs
- Control the reviewer and approver permissions
- Allow team members to create RFIs both on a mobile device from the field or from a desktop

BIM 360 capabilities used

- RFI management



Submittal Workflow

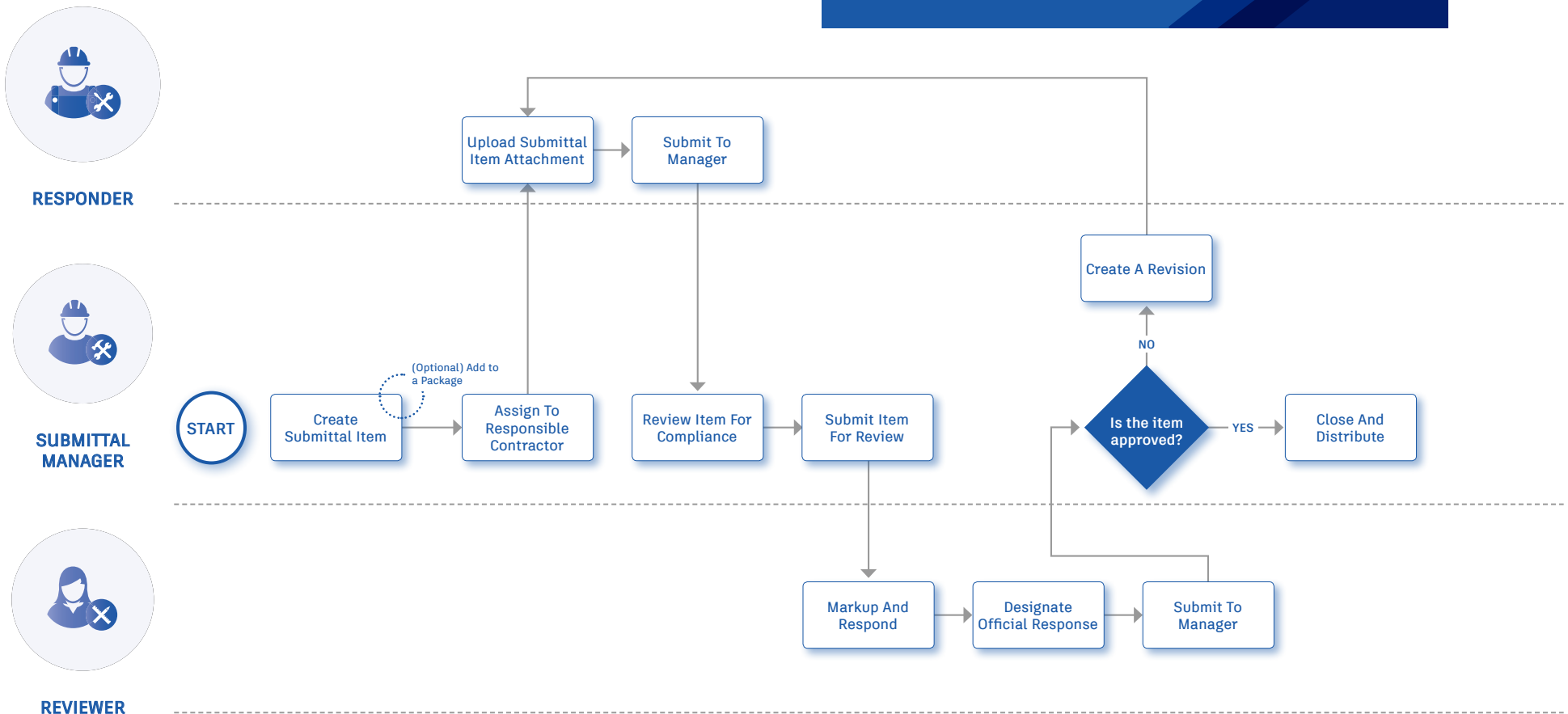
Create submittals packages, track the flow of approval processes, and manage all information in a single document library. The graphic below outlines the suggested submittal workflow using BIM 360.

Why follow this workflow?

- Full flexibility to package items as desired
- Easily track & review the status of submittal items
- Distribute & control reviewer privileges

BIM 360 capabilities used

- Submittal management



Project Management Capabilities

Meeting Minutes

No more hunting for lost meeting minutes, questioning accountability, or running the risk of unanswerable claims! With Meetings, a new tab and toolset in the BIM 360 Project Management module, BIM 360 makes meeting management effortless with clear visibility into the commitments made and provides an organized, easily accessible history of all meeting records.



1 Accessing Meetings

- Within the Project Management module select the Meetings tab to access BIM 360's meeting minute toolset.
- In the Meetings list view, you can quickly distinguish between agendas and official minutes via the colored badges. Agendas are orange, and minutes are blue.
- Project Admins have access to view all agendas and minutes.
- Meeting Organizers can only view and edit agendas and minutes they've created.
- Meeting Invitees can only view agendas and minutes they have been invited to.
- Use the calendar to filter the list by date or range to quickly find the information needed.

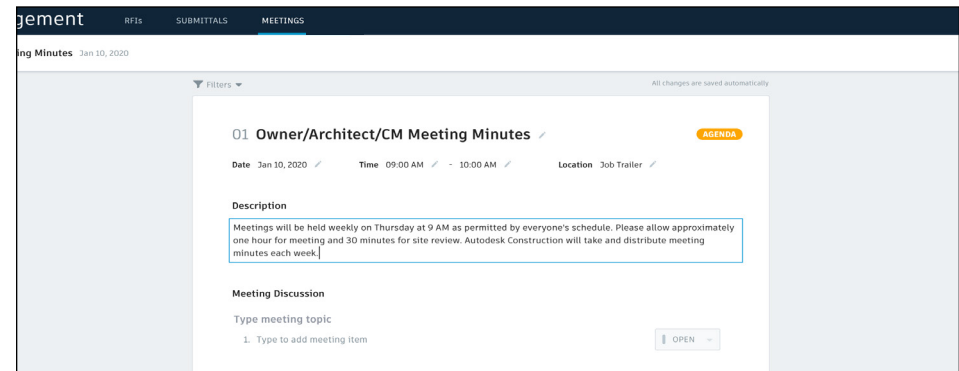
A screenshot of the BIM 360 Project Management Meetings tab interface. The interface shows a calendar on the left for January 2020 and a list of meetings on the right. The meetings list has columns for Title, Date, Time, Location, and Follow-up. Meetings are color-coded: orange for agendas and blue for minutes. A 'Create new meeting' button is in the top right.

Project Management					
RFIs SUBMITTALS MEETINGS					
Showing all your meetings, select a date or range to filter					
Create new meeting					
	Title	Date	Time	Location	Follow-up
	02 Owner/Architect/CM Meeting Minutes	Fri Jan 17	9:00 AM to 10:00 AM	Job Trailer	
	02 Internal Team Meeting	Fri Jan 17	6:00 AM to 7:00 AM	Job Trailer	
	06 Weekly PM/ Foreman Meeting Minutes	Tue Jan 14	6:00 AM to 7:00 AM	Job Trailer - 2	
	AGENDA 01 Owner/Architect/CM Meeting Minutes	Mon Jan 13	8:00 AM to 9:00 AM	Virtual Meeting (unl...	
	01 Owner/Architect/CM Meeting Minutes	Fri Jan 10	9:00 AM to 10:00 AM	Job Trailer	
	01 Internal Team Meeting	Fri Jan 10	6:00 AM to 7:00 AM	Job Trailer	
	01 Design Review Meeting	Thu Jan 09	10:00 AM to 11:00 AM	Allied Architects Off...	
	05 Weekly PM/ Foreman Meeting Minutes	Tue Jan 07	6:00 AM to 7:00 AM	Job Trailer - Room 4	
	11 Weekly Precon Meeting	Mon Jan 06	8:00 AM to 9:00 AM	Zoom Meeting - http...	
	03 Coordination Meeting Minutes	Mon Jan 06	8:00 AM to 9:00 AM	Virtual Meeting (unl...	
	04 Weekly PM/ Foreman Meeting Minutes	Tue Dec 31, 2019	6:00 AM to 7:00 AM	Job Trailer - Room 4	
	03 Coordination Meeting Minutes	Mon Dec 30, 2019	8:00 AM to 9:00 AM	Virtual Meeting (unl...	

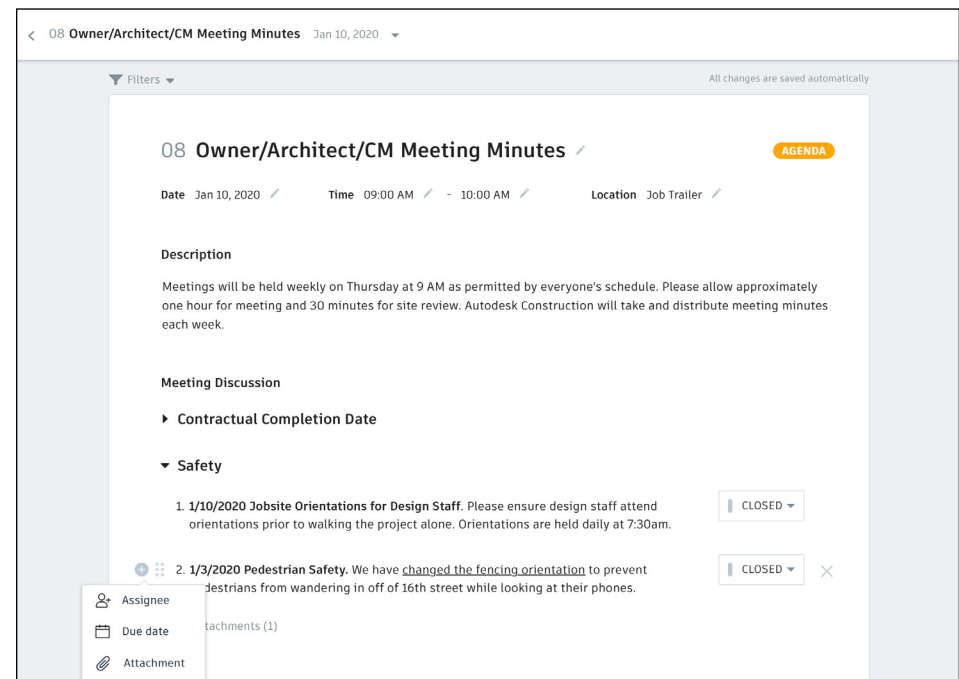
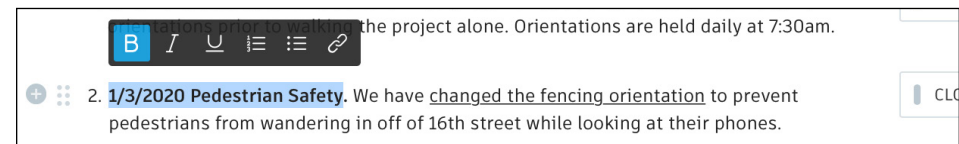
Meeting Minutes

2 Create a new meeting agenda

- Anyone who has access to the Project Management module has access to the Meetings tab and can create an agenda by selecting the Create New Meeting button in the top right corner of the Meetings tab. When you create an agenda, you automatically become the meeting Organizer. As an Organizer you have full control.
- Enter the meeting title, date and time, location, and description. All changes are saved automatically. Note, the meeting title will carry over to any follow-up meetings, and the meeting series will automatically number in sequential order.
- To add the first topic, click, and type within the field where you see “type meeting topic.” Hit enter to add.
- Advanced text editing is available to help you emphasize, highlight, and organize key information.
- To delete a topic, hover over the topic and select the “x” on the right-hand side. If you delete a topic, all items under the topic will be removed from the meeting.
- Beneath the topic, you can add multiple items; they will automatically number in sequential order. To remove an item hover over the item and select the “x” on the right-hand side.
- To add an assignee, due date, or attachment to a specific item, hover to the left of the item name and select the plus icon that appears. Within the drop-down list, select “Assignee,” “Due Date,” or “Attachment.” Attachments are any documents, drawings, or models existing in the BIM 360 Document Management module. Items can also include one or more attachments as well as assignees, but the list of assignees is limited to the list of meeting invitees.

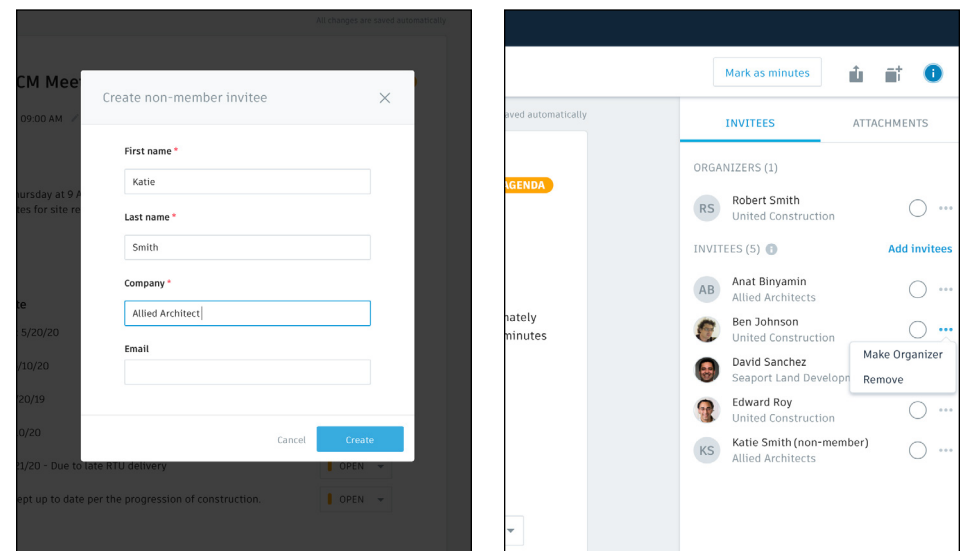
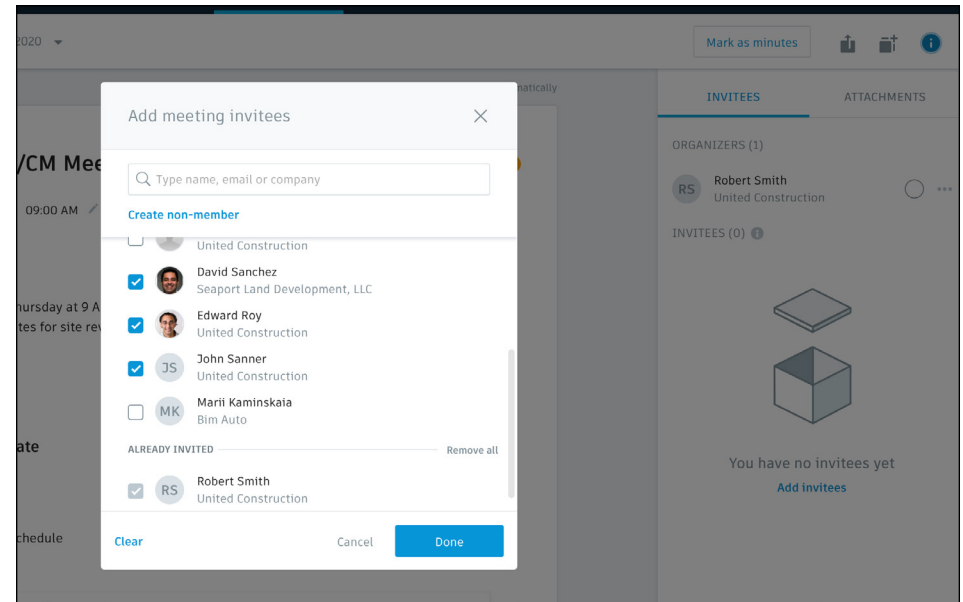


PRO TIP: For a virtual meeting add the join link into the location details.



Meeting Minutes

- To attach a document, drawing, or model to the meeting record, select “Attachments” in the Invitee panel, then “Add Attachment.” In the pop-up window, you can choose a file from your Plans or Project Files folders.
- To add meeting invitees or additional meeting organizers, select the invitees icons to the right of the mark as minutes button.
- In the Invitees flyout panel, select “add invitees.” Use the search field to search by name, email, or company to quickly find the individuals you want to add.
- You can add individuals outside of the BIM 360 project member list by selecting “create non-member” under the search field.
- Adding invitees allows you to track attendance and gives the invitees (only BIM 360 project members) access to the agenda and official minutes from the meeting within the Meetings tab.
- To add a co-organizer(s), select the three dots to the right of the invitees name, then select “make organizer.” Organizers have full control.
- To remove an invitee from the list, select the three dots to the right of the invitees name, then select “remove.”
- To export the agenda to PDF, select the export icon that is to the right of the invitees icon. Any attached documents will be hyperlinked, making it easy for invitees (who are BIM 360 project members) to access the referenced information.

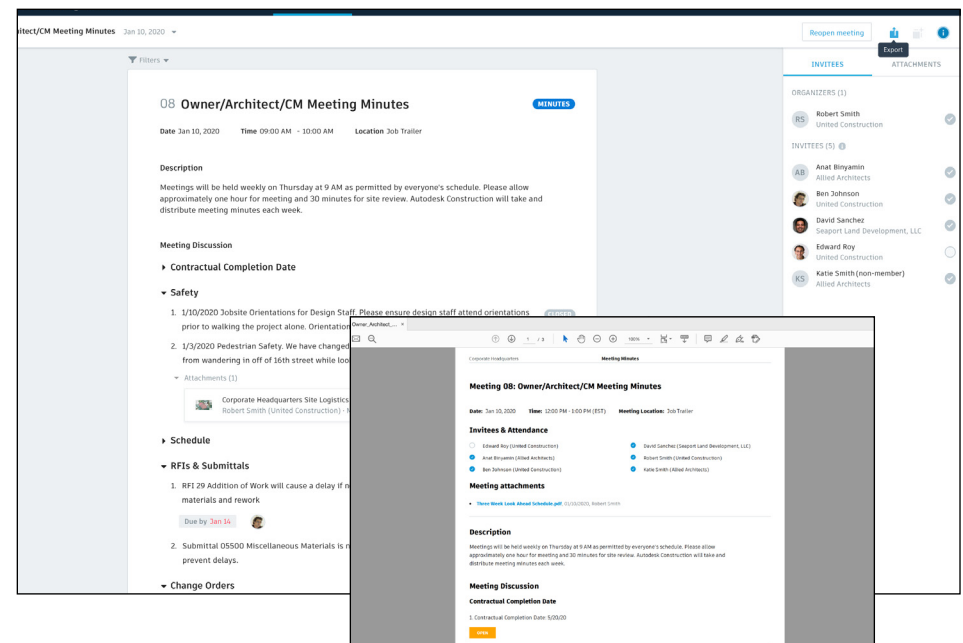
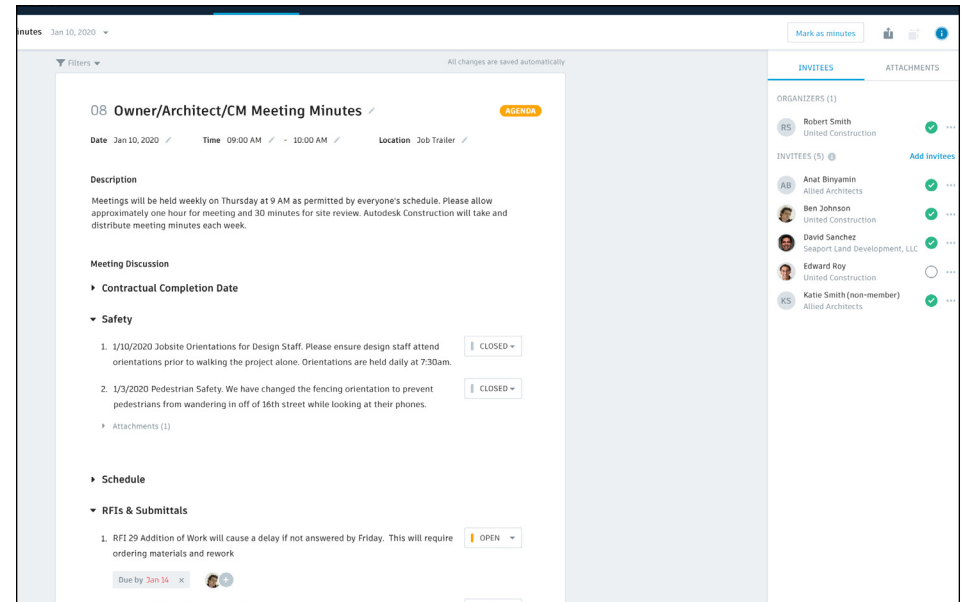


PRO TIP: Emails for non-members can be added at a later date.

Meeting Minutes

3 Capturing Minutes

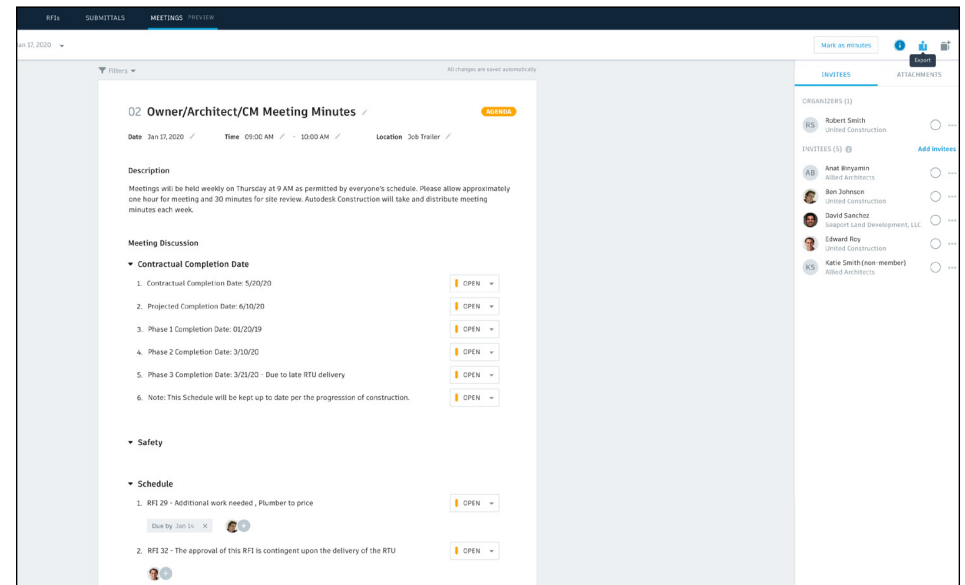
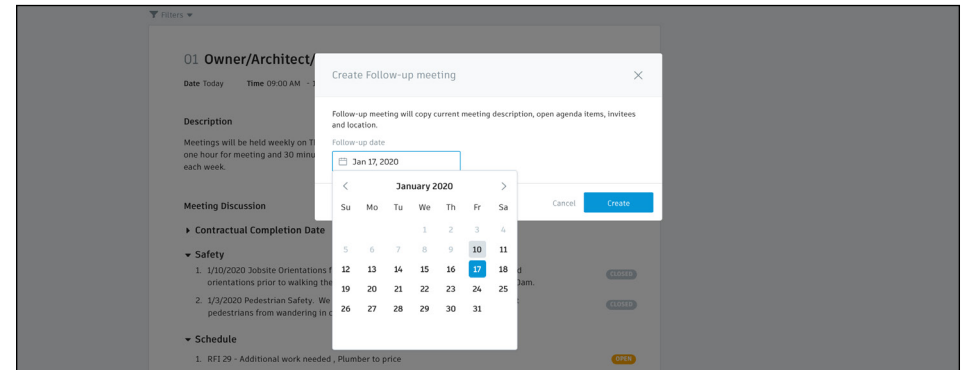
- The Organizer(s) has full control and are the ones capturing the minutes, add/removing invitees, marking attendance, assigning items, adding due dates etc.
- To mark attendance, select the radio button next to the invitees name. You can also add additional invitees by selecting “Add invitees.”
- Similar to creating the agenda, new topics and items can be added/edited during the meeting. To access the assignee and due date options hover to the left of the item name and select the plus icon that appears. An item can include one or more assignees, but the list of assignees is limited to the list of meeting invitees.
- Update the item status from Open to Close using the drop-down list.
- All changes are saved automatically, and invitees can see the current meeting minutes within the Meetings tab in the Project Management module.
- Once the minutes are finalized, select “Mark as minutes.” This locks the minutes and converts the state from agenda to minutes; if you need to make a change unlock the minutes by selecting “Mark as minutes” again.
- To export the official minutes to PDF, select the export icon that is to the right of the invitees icon. Any attached documents will be hyperlinked, making it easy for invitees (who are BIM 360 project members) to access the referenced information.



Meeting Minutes

4 Create a follow-up meeting

- To generate a follow-up meeting, select the follow-up icon that is to the right of the export icon.
- A dialog box will appear informing you the follow-up meeting will copy the current meeting description, open agenda items, invitees, and location. Choose the date for the follow-up meeting via the calendar field and hit "Create."
- As you will see in front of the meeting title, the meeting number has automatically updated and only the open items were carried over.
- Make any necessary updates to the meeting time, location, and description as well as add additional topics and items.
- Review the invitee list and add additional invitees if necessary.
- To export the agenda to PDF, select the export icon that is to the right of the invitees icon.
- To access a previous meeting within the series to the far left of the mark as minutes button, select the drop-down next to the meeting date. Or, within the Meetings tab list view, in the follow-up column, select the icon. A list of all meeting dates within the series will populate, to view the minutes select a date.



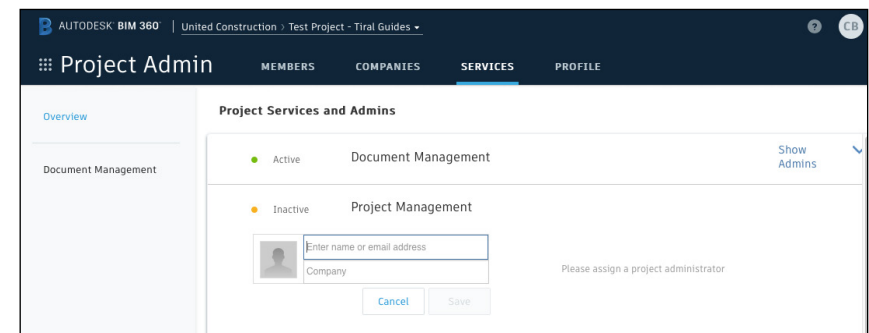
RFI Management

Enhance your RFI workflow and create accountability by designating responsibilities for each step of the RFI process, creating clear accountability, and efficiently moving RFIs through the cycle. From any device, teams can quickly draft a question and initiate the RFI as soon as a discrepancy is found.

1

Activate the Project Management module

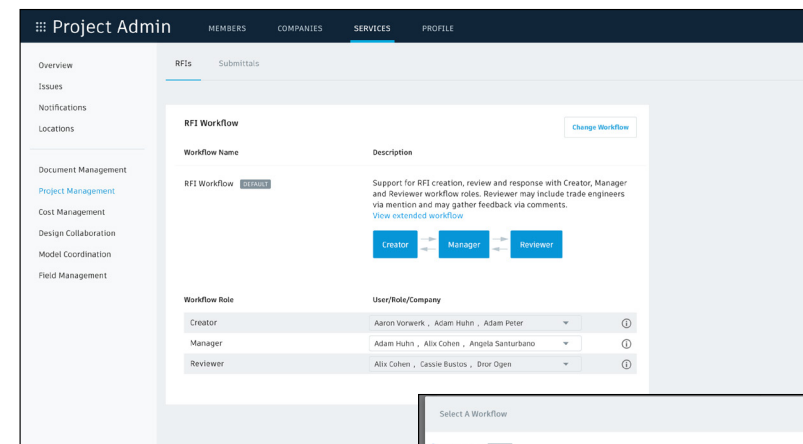
- A Project Admin needs to activate the Project Management module.
- Click the module selector for Project Admin, select the Services tab, and click “Overview” in the left sidebar.
- In the Project Management row select “Activate” and designate at least one Project Admin.



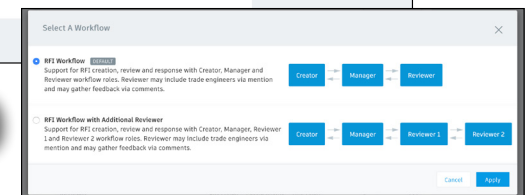
2

Setting up the RFI workflow

- In the Project Admin module, select the Services tab.
- On the left sidebar, click “Project Management” then “RFIs.”
- In the RFI workflow window select “Change Workflow” to select a workflow. The workflow determines the RFI actions for individual project users.
- With your workflow selected use the drop-downs to assign workflow roles by users, role, or company.



Set Up the RFI Workflow



RFI Management

3

Creating RFIs associated with a document or model

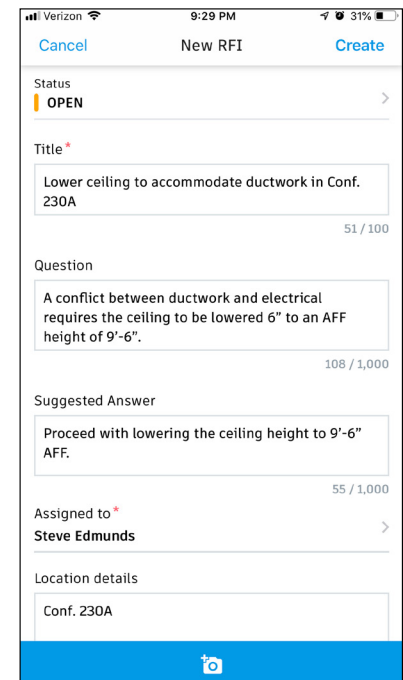
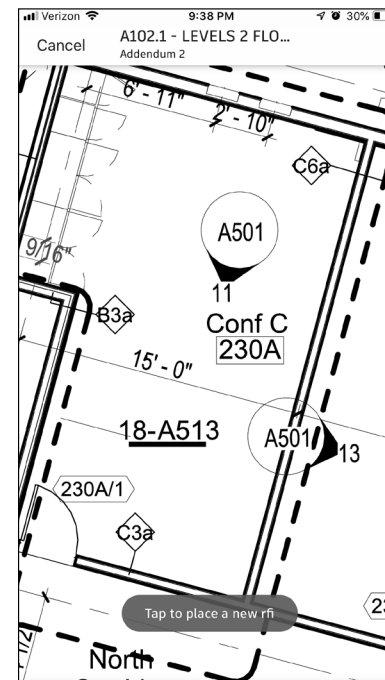
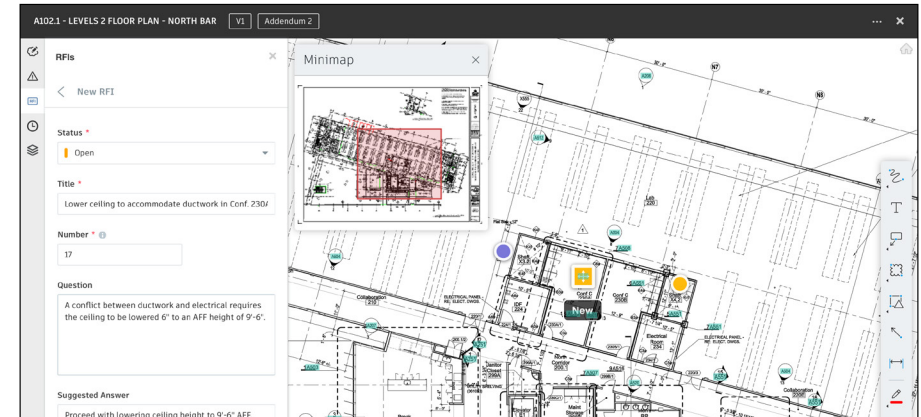
Only users, roles, or companies assigned to the RFI workflow role “Creator” or “Manager” can create an RFI.

Web:

- In the Document Management module open a document or model.
- On the left side panel select “RFI” to open the RFI panel. At the bottom of the RFI panel select “Create RFI.” Click where you want to place the RFI and an RFI push-pin will appear.
- Enter a title and complete all necessary fields such as suggested answer, location, and due date.
- When ready, if you’re a “Creator” assign it to the RFI Manager and select “Create.” The RFI status will update to Submitted.
- If you’re a “Manager” assign it to the Reviewer and select “Create.” The RFI status will update to Open.

Mobile (BIM 360 app - iOS & Android):

- In the BIM 360 app open a document or model within the Documents view. Zoom into the location you want to pin the RFI.
- Tap “RFI” on the bottom menu, you’ll be prompted to tap to place the new RFI push-pin.
- Enter a title and complete all necessary fields such as suggested answer, location, and due date. Take a photo and attach it to provide more context.
- When ready, if you’re a “Creator” assign it to the RFI Manager and select “Create.” The RFI status will update to Submitted.
- If you’re a “Manager” assign it to the Reviewer and select “Create.” The RFI status will update to Open.
- Note: when offline, you can create RFIs, and they will sync once connected back online.



Creating RFIs (web)



PRO TIPS: The RFI number will not appear until the RFI is “Open.” The RFI Manager also has the ability to customize the RFI number.

RFI Management

4 Creating project-level RFIs

Project-level RFIs are RFIs not associated with a document or model.

Web:

- In the Project Management module, select the RFIs tab and click “Create RFI.”
- Enter a title and complete all necessary fields such as suggested answer, location, and due date.
- When ready, if you’re a “Creator” assign it to the RFI Manager and select “Create.” The RFI status will update to Submitted.
- If you’re a “Manager” assign it to the Reviewer and select “Create.” The RFI status will update to Open.

Mobile (BIM 360 app - iOS & Android):

- In the BIM 360 app tap the three dots on the bottom menu then “RFI.”
- In the RFI screen tap the “+”
- Enter a title and complete all necessary fields such as suggested answer, location, and due date. Take a photo and attach it to provide more context.
- When ready, if you’re a “Creator” assign it to the RFI Manager and select “Create.” The RFI status will update to Submitted.
- If you’re a “Manager” assign it to the Reviewer and select “Create.” The RFI status will update to Open.
- Note: when offline, you can create RFIs, and they will sync once connected back online.

RFI Management

5 View & edit RFIs

RFIs in submitted, open, answered, rejected and void states are only visible to the Project Admin and the following RFI workflow roles; Creator, Manager, Reviewer, Co-reviewer, Distribution List Members.

Project Admins and RFI Creator or Manager workflow roles can edit RFIs. Creators can edit RFIs in the Draft state. Admins and Managers can edit both Submitted and Open RFIs.

Web:

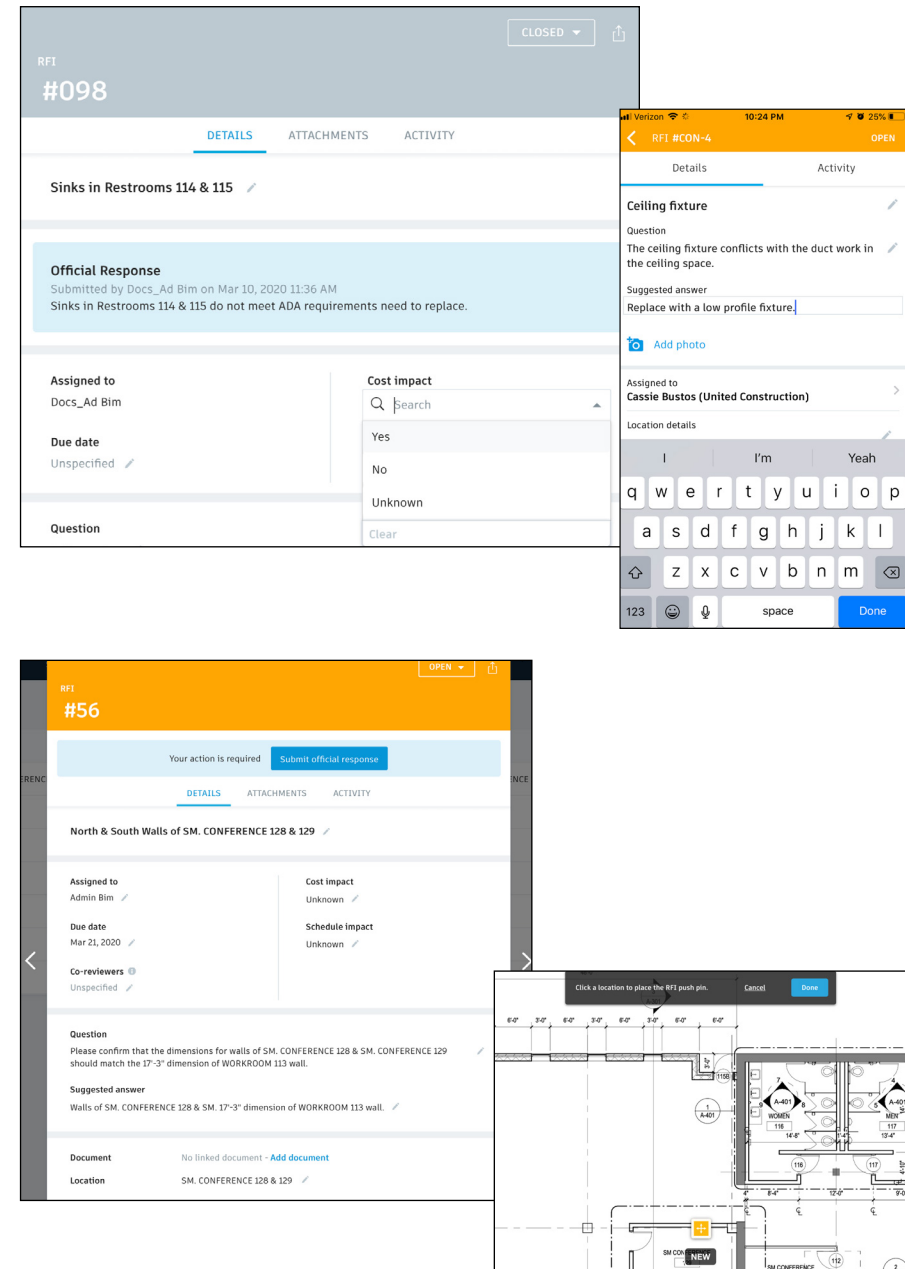
- View all project-level RFIs in the RFIs tab. Click to open an RFI and use the pencil icon to edit any necessary fields.
- For document or model-based RFIs, click the document hyperlinks to open the associated document. Or when viewing a document or model use the RFI panel to navigate to the RFIs.
- Editable fields have a pencil icon, click the icon to edit. Admins can edit additional fields in a closed RFI and add attachments.

Mobile (BIM 360 app - iOS & Android):

- In the BIM 360 app tap the three dots on the bottom menu then “RFI.” Tap to open an RFI and use the pencil icon to edit any necessary fields.
- When viewing a document or model tap the RFI push-pin to open the RFI details. Use the pencil icon to edit any necessary fields.
- Editable fields have a pencil icon, click the icon to edit.

Modify RFI Pushpins:

- Admins, Creators, Managers, and Reviewer/Co-reviewers can modify existing RFI pushpins or add pushpins to already created RFI.
- This is done within the RFI record by adding/editing linked documents. When adding a new document, a document viewer will open and prompt you to click a location to place the new RFI pushpin. The activity that takes place is captured in the activity log.



RFI Management

6 Submit to Reviewer

Only users, roles, or companies assigned to the RFI workflow role “Manager” can review Submitted RFIs and send them to the Reviewer for an official response.

- The RFI Manager immediately receives an email notifying them of the RFI.
- They can review the in-email data or access the RFI directly in BIM 360 by selecting “View RFI” at the bottom of the email.
- The Manager is responsible for reviewing and editing the RFI details and attachments to ensure it’s compliant before submitting it to the Reviewer.
- Once the RFI is ready, select “Submit to Reviewer.”
- The Manager can then customize RFI number, assign the Reviewer, Co-Reviewers, and select the due date.
- Co-reviewers can contribute information to the response through comments, but cannot add an official response.
- The RFI status will update to Open.

PRO TIP: Project Admins have permission to add a response to an RFI on behalf of a Reviewer. In the activity log, the action will reflect that the Admin “acted on behalf” of the assigned Reviewer.

Your action is required

Cassie Bustos (Autodesk) **assigned** the following RFI to you for review:

[RFI #CON-46 Lower Ceiling to accommodate ductwork in Conf. C 230C](#)

What's changed

Status	DRAFT → OPEN
Assignee	Cassie Bustos (Autodesk) → John Sanner (United Construction)

Details

Question	A conflict between ductwork and electrical requires the ceiling to be lowered 6" to an AFF height of 9'-6."
Suggested answer	Proceed with lowering ceiling height to 9'-6" AFF.

Status OPEN

Assigned to John Sanner (United Construction)

Due Date November 08, 2019

Linked document [A102.1 - LEVEL 2 - 4 FLOOR PLAN - NORTH BAR](#)

Location Conf. C 230C

RFI #Unspecified

Your action is required

Submit to Reviewer (dropdown menu)

DETAILS | **ATTN** | **Close and distribute**

Missing soffit detail in Reception 100 area

Question
Sheet A202C does not include a sketch for soffits around gypsum ceiling in Reception 100 area. Please include sketch detailing the necessary soffits.

Suggested answer
Add suggested answer

Assigned to Ben Johnson

Location Reception 100 ceiling

Document A202C - FIRST FLOOR REFLECTED CEILING PLAN [v4, current]

Due date Nov 7, 2019

Distribution list
Bill Kagan, Edward Roy

RFI #Unspecified

RFI number * CON - 003

Reviewer * David Sanchez

Co-reviewers Paul Sanderson

Due date Nov 6

Distribution list 2 selected

Submitting to the Reviewer changes the status to OPEN

Submit

Distribution list
Bill Kagan, Edward Roy

RFI Management

7 Submitting the official response

Only users, roles, or companies assigned to the RFI workflow role “Reviewer” can submit an official response.

Co-reviewers can contribute information to the response through comments, but cannot add an official response.

- The Reviewer and Co-Reviewers will receive an email notifying them of the RFI.
- They can review the RFI details and collaborate with others via @mentions within the Activity section.
- @mentions tracks communication and notifies individuals via email to ensure nothing slips through the cracks.
- The Reviewer can attach supporting documents within the Attachments tab. They can drag and drop from their desktop or access documents within BIM 360 Docs.
- When ready select “Submit Official Response.” Use the status drop down to select Answered, add the official response, then click “Submit.”
- If there is an issue with the RFI, the Reviewer can reject it by setting the status to Rejected.

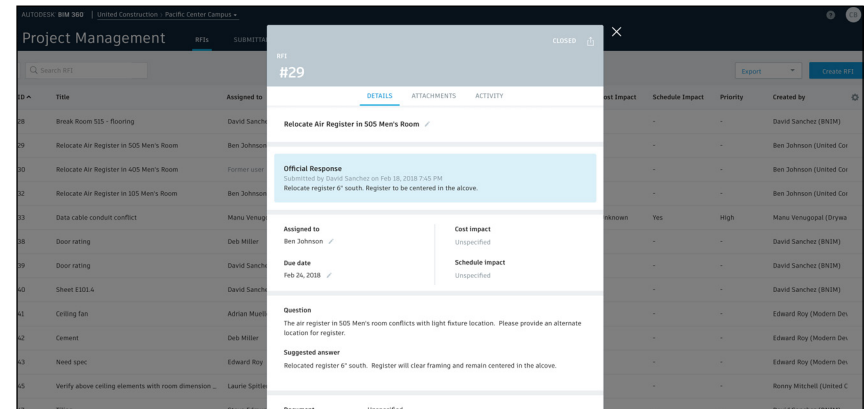
The screenshot shows the RFI #CON-4 details page. At the top, there's a blue header with 'RFI #CON-4' and an 'OPEN' button. Below this, a light blue bar indicates 'Your action is required' with a 'Submit official response' button. The main content area is divided into tabs: 'DETAILS', 'ATTACHMENTS', and 'ACTIVITY'. The 'DETAILS' tab is active, showing a 'Ceiling fixture' question: 'The ceiling fixture conflicts with the duct work in the ceiling space.' A suggested answer is provided: 'Replace with a low profile fixture.' Below this, there's a section for 'Assigned to' (Cassie Bustos), 'Co-reviewers' (Unspecified), 'Due date' (Nov 1, 2019), 'Location' (Office Room 342), and 'Document' (Unspecified). A 'Distribution list' is also shown as 'Unspecified'.

This screenshot shows the same RFI #CON-4 details page, but with the 'Status' dropdown menu open. The menu has three options: 'Answered' (selected with a blue checkmark), 'Answered' (with a blue checkmark), and 'Rejected' (with a red X). Below the menu, a message states: 'Your response will be submitted to Manager'. At the bottom of the page, there are 'Cancel' and 'Submit' buttons. The rest of the page content, including the question and suggested answer, remains the same as in the previous screenshot.

RFI Management

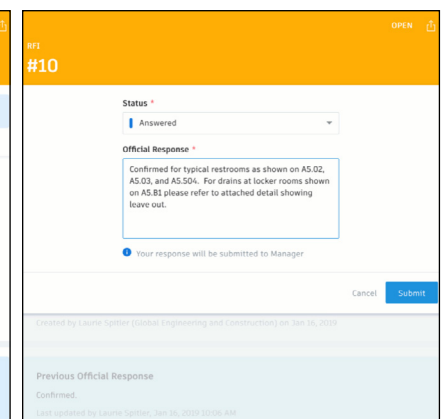
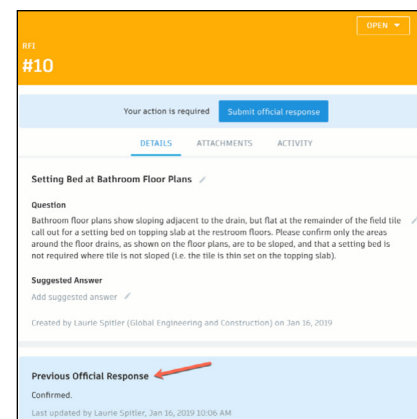
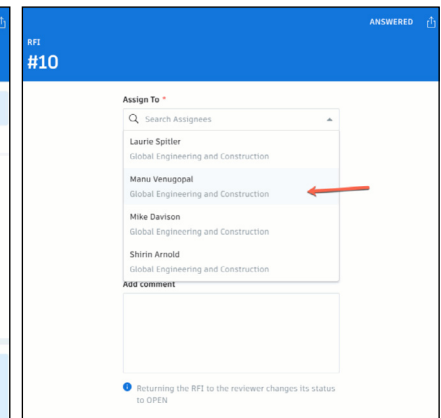
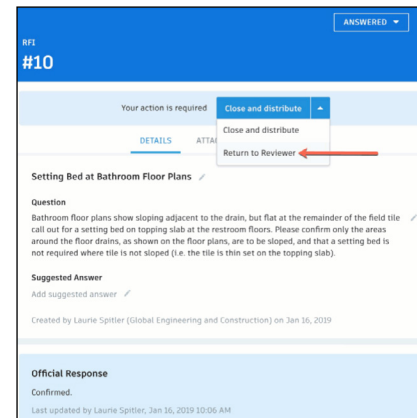
8 Distributing official response

- When the Reviewer submits the official response. The RFI Manager will be notified via email. The Manager is the only role who can close and distribute the response.
- If the answer isn't suitable, the Manager can reopen the RFI and send it back to the Reviewer
- If it is, they can select "Close and Distribute," add comments letting the team know how to proceed, and click to distribute the answered RFI to the entire project team.



9 Re-opening answered RFI

- Re-open RFI is intended as an administrative override to revert an RFI to the Reviewer's court if the answer is incomplete in some way. It is not intended to act as a revision process.
- When an RFI Manager receives a response that is incomplete, they have the option to Return to Reviewer. Use the drop down to select "Return to Reviewer."
- Select who to assign the RFI to. The Reviewer will see the RFI back in their court, and will be able to view the previous official response and select "submit official response" to send a new response to the Manager.



RFI Management

10 Filter / sort / search RFIs

Web:

- In the Project Management module select the RFI tab. Use the funnel icon to filter, sort by clicking the column headers, and customize the column view via the control icon.
- Use the search bar to search for keywords within an RFI title or question field.
- You can also filter and sort directly from a document or model-based RFI via the RFI panel.

Mobile (BIM 360 iOS app):

- Open a document or model to view all RFIs associated with it. Tap on the pushpin to open the RFI details.
- When searching for a particular RFI use the search field in the RFI list view. The search functionality searches text within the RFI title, ID, question, suggested answer, and official answer.
- To filter use the filter option within the RFI list view.

ID	Title	Assigned to	Company	Due date	Location	Document	Cost Impact	Schedule Impact	Priority
CDN-2.2	Lab Room Floor	Aaron Venev	CC Concrete	Nov 15, 2019	035	A, H, S, R	-	-	-
47	Tiling	Steve Edwards	United Construction	Jun 18, 2018	120A	A, H, S, R	-	-	-
63	Door Location in 100 Private rooms	Steve Edwards	United Construction	Jun 12, 2019	100 Private Rooms	A, H, S, R	-	-	-
Pro-107	Staffs Detail	Art Vandelay	BNM	Nov 13, 2019	2nd level RCP	A, H, S, R	-	-	-
30	Relocate Air Register in 405 Main Room	Former user	-	Nov 9, 2018	4th Floor	A, H, S, R	-	-	-
105	Ceiling Fixture	Aaron Venev	CC Concrete	Nov 15, 2019	Breakroom 105	A, H, S, R	-	-	-
18	Lower Ceiling to accommodate ductwork in conference...	John Sawyer	United Construction	Nov 15, 2019	Conf C 230C	A, H, S, R	-	-	-
CDN-46	Lower Ceiling to accommodate ductwork in Conf. C 230C	John Sawyer	United Construction	Nov 15, 2019	Conf. C 230C	A, H, S, R	-	-	-
CDN-4	Floor material	Aaron Venev	CC Concrete	-	Conference Room 311	-	-	-	-
CDN-3	Height of Ceramic Wall Tile	Steve Edwards	United Construction	Nov 15, 2019	First Floor Restrooms	-	-	-	-
33	Data cable conduit conflict	Mona Vimegopol	Drywall Inc.	Nov 25, 2018	Floor 1	-	Unknown	Yes	High
38	Door swing	Erin Miller	Process Engineering	May 9, 2018	Level 5 private rooms	A, H, S, R	-	-	-
19	Bath partition anchorage	-	-	Nov 15, 2017	Office Room 102	-	-	-	-
7	Pinpoint advice on door width	Milo Woods	United Construction	-	Office Room 123	-	-	-	-
CDN-2.3	CF's Tile color	Aaron Venev	CC Concrete	Jun 15, 2018	Open area 100	-	-	-	-
CDN-6	Water proofing details	Aaron Venev	CC Concrete	-	Roof	-	-	-	-
5	Waterproofing details on roof terrace needed	Milo Woods	United Construction	Nov 13, 2019	Roof Terrace	-	Unknown	Unknown	High

11 Exporting reports

- In the Project Management module select the RFIs tab.
- To export a summary report of all RFIs click the “Export” drop-down list. You can optionally edit the report title and add a message. Select “Create Report” and the report will be emailed to you.
- To export a detail report of an individual RFI select to open the RFI. Then click the folder icon in the top right corner. The report will be emailed to you.
- You can also export directly from a document or model-based RFI via the RFI panel.

Type	Run at	Created by	Generated from	Recipient
RFI Summary	Nov 13, 2019 8:37pm	Qin Li	RFI Summary	...
RFI Detail	Nov 13, 2019 8:00am	Krystian Macek	RFI Detail	...
RFI Detail	Nov 13, 2019 3:45am	Tsofi Oz	RFI Detail	...
RFI Detail	Nov 12, 2019 8:00am	Krystian Macek	RFI Detail	...
RFI Detail	Nov 11, 2019 10:46am	Qin Li	RFI Detail	...
RFI Summary	Nov 11, 2019 8:45am	Laurie Spittler	RFI Summary	...

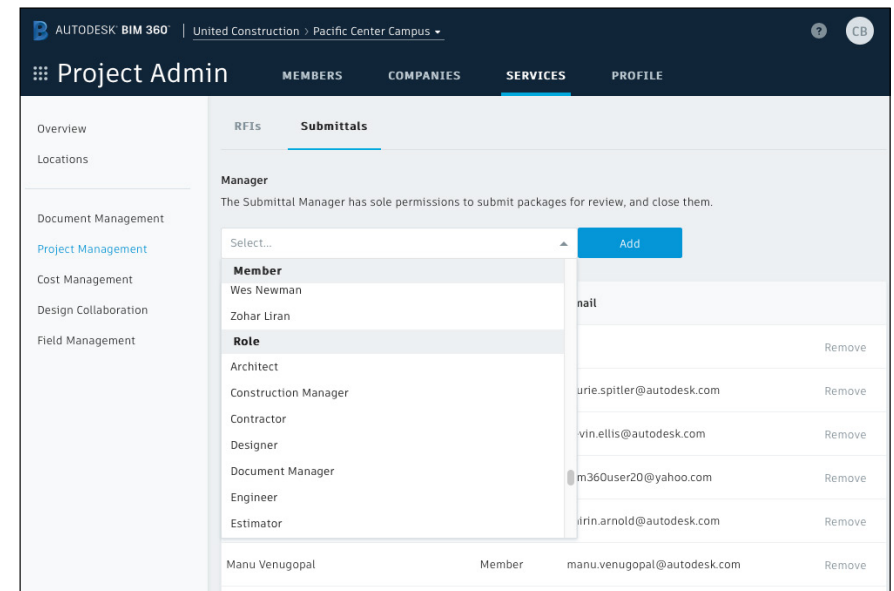
PRO TIP: Use the reports tab in the Insight module to access all exported summary and detailed RFI reports. You can download a report or share them with team members by clicking the three-dot icon. You can also run and schedule reports directly from the Insight module.

Submittal Management

Submittals are an essential part of any construction project, and effectively organizing and managing your submittals is vital. With the BIM 360 Submittals workflow, you can efficiently create, coordinate, and manage all submittals in a single software. As well as initiate requests, manage reviews and approvals, and sync critical information to mobile devices for offline use.

1 Identifying submittal manager

- To identify a Submittal Manager a Project Admin needs to activate the Project Management module.
- Click the module selector then “Project Admin,” select the Services tab, and click “Overview” in the left sidebar.
- In the Project Management row select “Activate” and designate at least one Project Admin.
- Now, to identify a Submittal Manager on the left sidebar, select “Project Management” then “Submittals.”
- Enter member, company, or role to act as the Submittal Manager.



Add a Submittal Manager



Submittal Management

2

Creating submittal items (Submittal Manager)

- In the Project Management module, select the Submittals tab. Within the Items tab, you can manually create Items by selecting “Create new item.” Submittal Managers can import a list of Items using the import button.

Enter all necessary information, including:

- Spec Section:** Select a spec section or create a new one.
- Title:** Enter a descriptive title to identify the item.
- Type:** Select a type. For example, samples or product data.
- Assign to Responsible Contractor:** Select the responsible Subcontractor.
- Dates:** To track items more efficiently, fill in the dates within the tracking section.

Creating
Submittal Items



Importing
Submittal Items



PRO TIP: If you need to create multiple items, check the “create another” check-box to save you from clicking the “create new item” button each time.

3

Creating spec sections (Submittal Manager)

- You can create a spec section when entering a new submittal item by clicking “Create New” above the “Spec Section” drop-down list.
- Or, in the Submittals tab, select “Spec Section” then “Create spec section.”
- Enter the spec number and title, then click “Create.”

Submittal Management

4

Creating submittal packages (Submittal Manager)

- Admins and Submittal Managers can create and delete packages in the “Packages” tab.
- To create a package select “Create new package,” fill in the spec section and package title, then select “Create.”

PRO TIP: If you need to create multiple packages, check the “create another” check-box to save you from clicking the “create new package” button each time.

5

Adding submittal items to package (Submittal Manager)

- Adding items to packages is optional and can be done when the item is in any state within the workflow.
- There are two ways you can add items to packages.
 - From the Packages tab:** In the “Packages” tab, open the package you want to add the item(s) to. If the package is empty, select the blue “Add items” button. If the package contains items, there will be an add items link under the last package. In the pop-up box, use the search field or scroll to find the items you want to add, check the box and select “Done” to add them to the package.
 - At the Item Level:** Open the Item and in the Overview or Details tab select the pencil icon next to “Package.” A drop-down list will appear, search for the package you want to add the Item to.

Status	#	Spec	Rev	Title	Type	Priority
OPEN Submitted	7	05 5213 PIPE AND TUBE ...	0	Pipe and Tube Railings Prod...	Product Data	Normal
OPEN Submitted	4	05 5213 PIPE AND TUBE ...	0	Pipe and Tube Railings Shop...	Shop Drawings	Normal

Showing 1 - 2 of 2

Submittal Management

6

Submitting documents (Responsible Contractor)

- The Responsible Contractor will be notified of the submittal item via email.
- Open the item, review the details and in “Attachments” upload the necessary documents.
- Once attached, the document will appear. Make sure the “For review” box is checked.
- Select “Submit to Manager.”
- The Submittal Manager can now send the item to the Reviewer.

Submittal Item #11-042000

REQUIRED

Waiting for submission

You should submit the submittal.

Submit to Manager

OVERVIEW DETAILS ATTACHMENTS ACTIVITY

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

Attachment	For review	Official response
masonrysampleverification.pdf Cassie Bustos [United Construction] • Today	<input checked="" type="checkbox"/>	<input type="checkbox"/>

7

Submitting item for review (Submittal Manager)

- Open the item and review the attachments.
- If changes need to be made return the item to the Responsible Contractor. If no changes are needed proceed by selecting “Submit to Reviewer.”
- Select the reviewer, add co-reviewers, due date, distribution list members and note if needed.

PRO TIP: If you need to send the item back to the Responsible Contractor select the arrow next to “Submit for Review.”

Submittal Item #11-042000

Submitted

You should submit for review.

Submit to Reviewer

OVERVIEW DETAILS ATTACHMENTS ACTIVITY

Samples for Verification

Spec section 042000 - Unit Masonry

Assigned to Manager Edward Roy [United Construction]

Co-Reviewers

Due date Unspecified

Package Unspecified

Attachments for review

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

Attachment masonrysampleverification.pdf Cassie Bustos [United Construction] • Today

For review

Reviewer Robert Smith

Co-Reviewers

Due date Apr 1

Distribution list

Note

Submittal Management

8

Reviewing submittal item (Reviewer)

- The Reviewer and Co-reviewers will be notified of the submittal item via email. Click to open the item and review the attached documents within “Attachments.”
- Designate official response using the drop-down list at the top.
- If approved, select the official response attachments and click “Done.”
- To send the item back to the Submittal Manager select “Return to Manager.”

PRO TIP: Admins have permission to act on behalf of Reviewers in the Submittal module providing teams with the flexibility of process while allowing the correct Reviewer to be displayed in the Reviewer field and reports. The activity log will show the Admin logged the response.

The screenshots show the 'Submittal Item #11-042000' interface. The top section shows the 'In review' status with a 'Select a response' dropdown menu. The dropdown menu options are: Approved, Approved as noted, Reviewed, Reviewed as noted, For record only, Revise and resubmit, and Rejected. The 'Details' tab is active, showing fields like Spec section, Spec sub section, Title, Description, Type, Package, Assigned to, Due date, and Priority. The 'Attachments' tab shows the 'Official response' dropdown set to 'Approved' and the 'Official response attachments' list containing 'masonrysampleverification.pdf'. The 'Activity' tab shows the 'Official response' section with the response 'Approved' by Robert Smith on Mar 20, 7:50 AM.

9

Distributing official item (Submittal Manager)

- Once the item is approved by the Reviewer, the Submittal Manager needs to close it and distribute it to the Responsible Contractor.
- Open the item and select “Close and Distribute.”
- Include the Responsible Contractor and in the distribution list identify team members who should be aware of the approved submittal item via email.
- Once the item is closed (approved) it will be available for viewing by all project members.

The screenshots show the 'Submittal Item #11-042000' interface for a Submittal Manager. The top section shows the 'Reviewed' status with a 'Close and distribute' button. The 'Attachments' tab is active, showing the 'Attachment' list with 'masonrysampleverification.pdf' and 'Cassie Bustos [United Construction] - Today'. The 'Activity' tab shows the 'Attachment' list with 'masonrysampleverification.pdf' and 'Cassie Bustos [United Construction] - Today'. The 'Official response' section shows the response 'Approved' by Robert Smith on Mar 20, 7:50 AM.

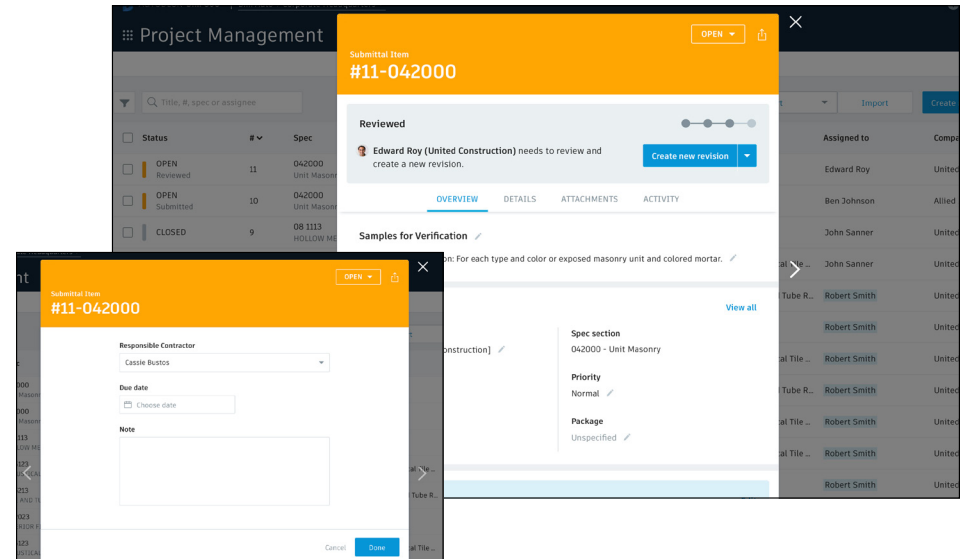
PRO TIP: Admins and Submittal Managers can re-open closed items. With the closed item open, select the arrow next to the “Closed” button in the top right corner, then select “Open.” The item will be re-opened to its latest state and sent to the Manager. Managers and Admins can send it to a Reviewer or close and distribute it.

Submittal Management

10

Creating a revision (Submittal Manager)

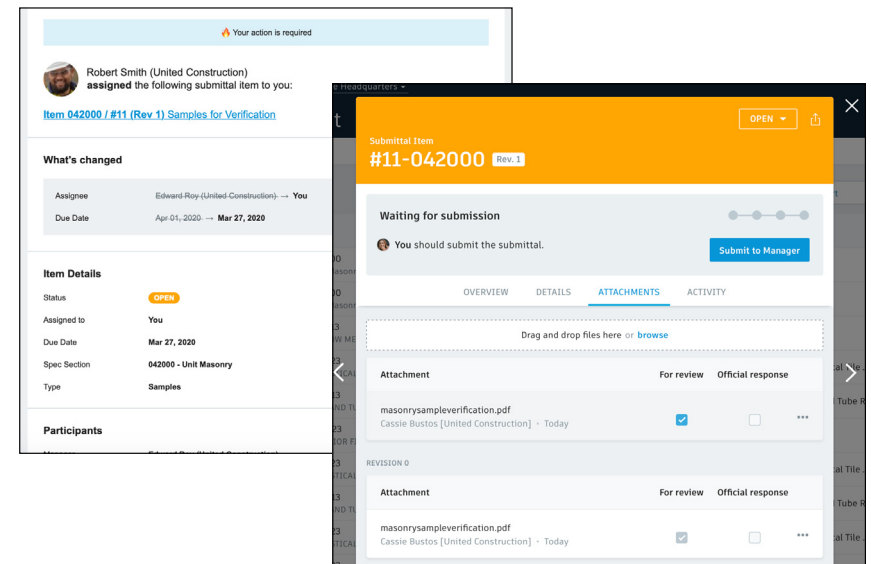
- If a Reviewer responds to a submittal item with “Revise and Resubmit” or “Rejected,” the Submittal Manager needs to create a revision.
- The Submittal Manager needs to open the submittal package and select “Create new revision.”
- Include the Responsible Contractor, due date, and note.
- Select “Done” to send the item back to the Responsible Contractor.



11

Responding to a revision (Responsible Contractor)

- The Responsible Contractor will be notified of the revision request via email.
- Open the item, and in “Attachments” upload the revised documents.
- Once attached, the document will appear above the Revision 0 section. Make sure the “For review” box is checked.
- Select “Submit to Manager.” The Submittal Manager can now send the revised item(s) to the Reviewer.



Submittal Management

12 Viewing submittals on mobile

BIM 360 App:

- Within the BIM 360 app, team members can access a list of Submittal items via the More menu.
- All approved submittal items are accessible to the entire project team. Submittal items in progress are only available to those involved in the submittal process.
- Tap to open an item and reference the details. Tap the download icon to sync attachments for offline viewing.

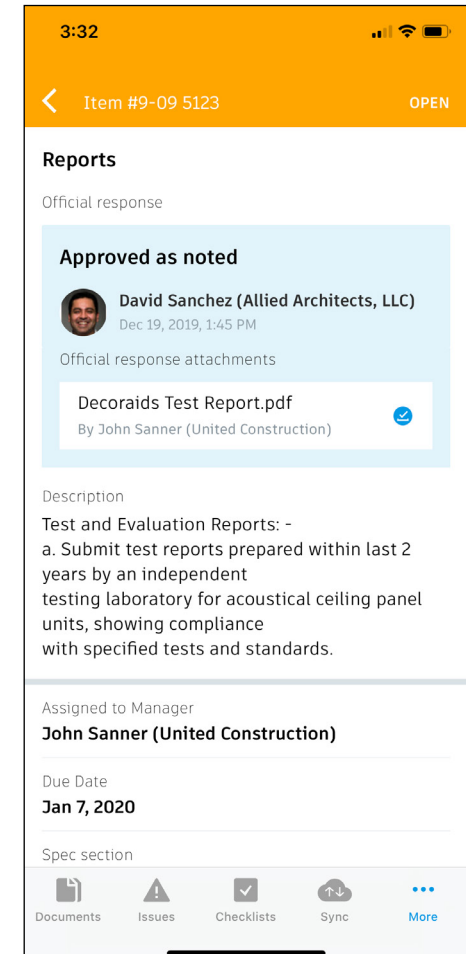
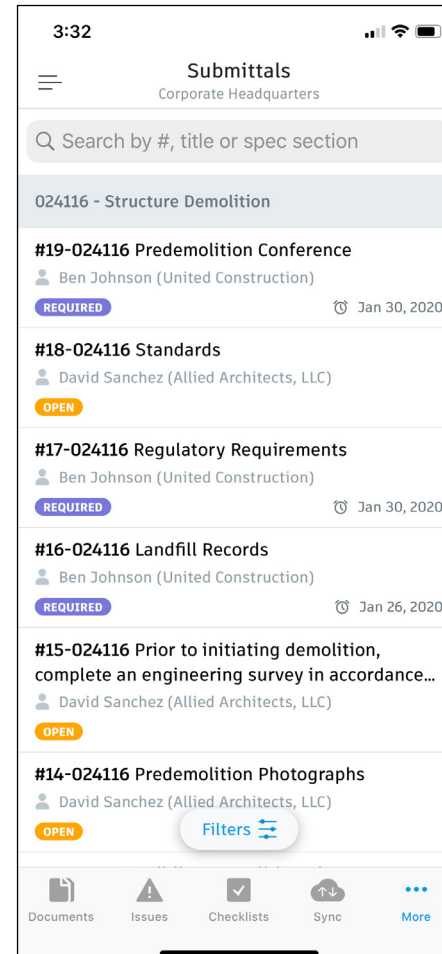
Download the BIM 360 App:

- Go to the App Store or Google Play Store on your mobile device to download the BIM 360 app.
- Within the BIM 360 mobile app you have access to documents & downloads, issues, checklists, daily logs, RFIs, and Submittals.

Get the iOS App



Get the Android App



Submittal Management

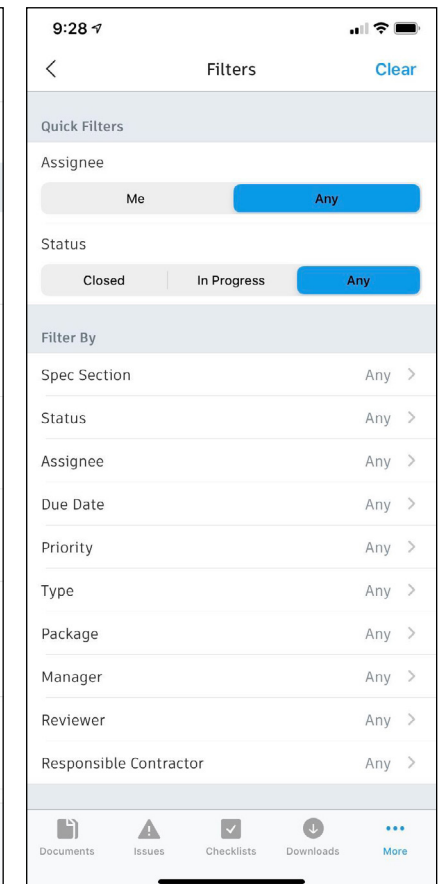
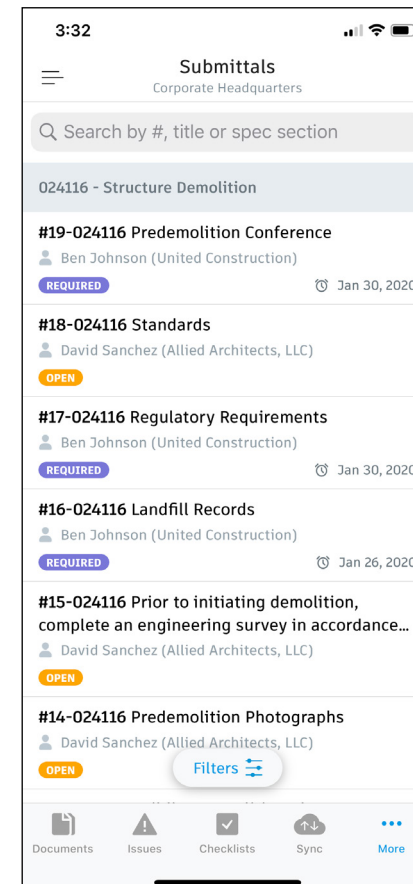
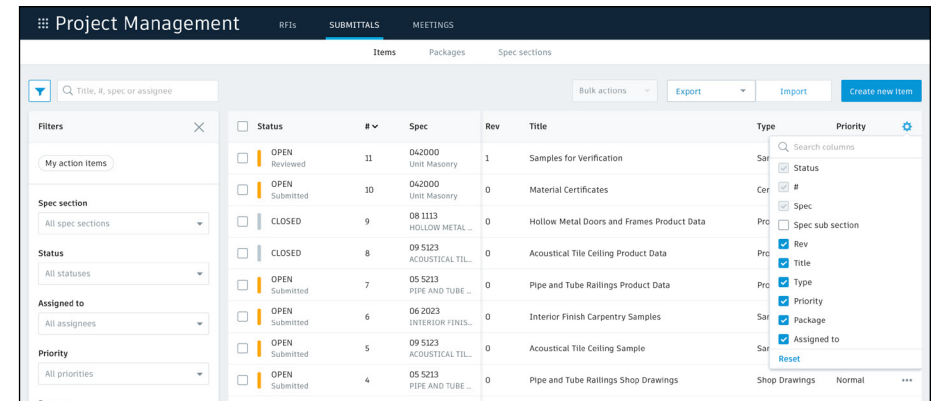
13 Filter / sort / search submittals

Web:

- In the Project Management module select the Submittals tab.
- Within either the Items or Packages tab, select the funnel icon to access the filter options.
- To sort, click the column headers. To customize the columns within the Items list view, select the control icon, then check the items you wish to see.
- To search use the search bar.

Mobile:

- The filter and search functionality is currently only available on iOS.
- To filter within the submittals list on mobile select Filters. Use the quick filters or filter by spec section, status, assignee, due date, priority, type, package, manager, reviewer, or responsible contractor.
- When searching for a particular submittal item use the search field. The search functionality searches by submittal number, title, or spec section.



Submittal Management

14 Exporting reports

- In the Project Management module select Submittals.
- To export a PDF report or Excel export of all items, select the Items tab, then click the export button (only available to Admins and Submittal Managers).
- To export a detailed PDF report of an individual item, open the item, then click the export button.
- To export a PDF report of a package, select the Packages tab, open the package, then click the export button (only available to Admins and Submittal Managers).
- Use the reports tab in the Insight module to access all exported submittal item summary and detailed reports. You can download a report or share them with team members by clicking the three-dot icon. You can also run and schedule reports directly from the Insight module.

The first screenshot shows the 'SUBMITTALS' tab in the Project Management module. The 'Items' sub-tab is selected, and the 'Bulk actions' dropdown menu is open, showing 'Export' as an option. The 'Export' dropdown also shows 'PDF report' and 'XLSX report' as sub-options.

The second screenshot shows the 'Submittal Item #8-09 5123' overview page. The 'OVERVIEW' tab is selected, and the 'Export as PDF' button is visible in the top right corner.

The third screenshot shows the 'Insight' module's 'REPORTS' tab. The 'Select Report Type' dialog is open, showing options for 'RFI Detail', 'RFI Summary', 'Submittal Item Detail', and 'Submittal Item Summary'. The 'Submittal Item Detail' option is selected.

The fourth screenshot shows the 'Insight' module's 'REPORTS' tab with the 'Submittal Item Detail' report selected. The 'Report title' is 'Submittal Item Detail'. The 'Sort by' dropdown is set to 'Spec sections', and the 'Sort order' is 'Ascending'. The 'Filter by' section includes filters for 'Spec', 'Assigned to', 'Status', 'Due date', and 'Created on'.

Prediction & Analytics Capabilities

Prediction & Analytics

At its core, BIM 360 is built to help construction teams better visualize and take daily action to minimize project risk. Whether it is risk associated with safety, quality, or project controls, BIM 360 allows teams to streamline workflows to improve project outcomes.

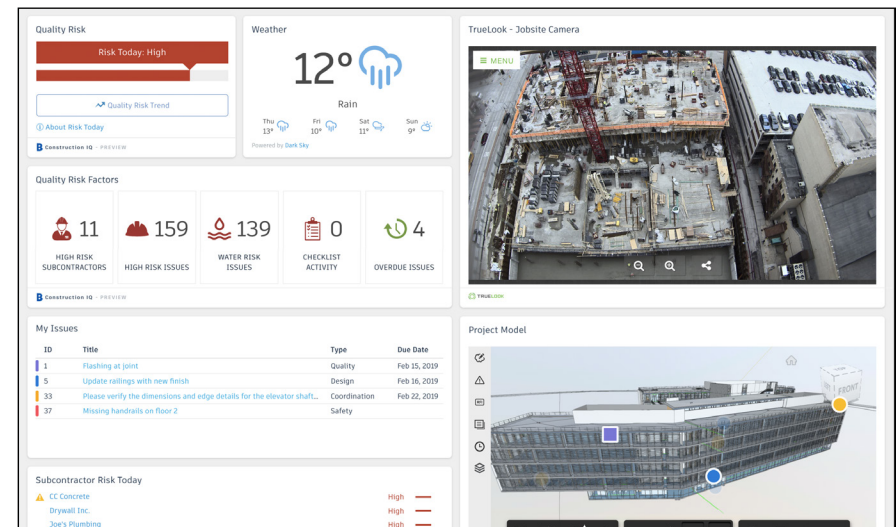
The prediction and analytics ecosystem enhances the BIM 360 platform with a deeper understanding of project performance, prioritized daily activities, and instant visibility into project risk, giving teams the information they need to avoid costly mistakes and further improve risk mitigation.

1

Project Home

- Project members can see a snapshot of a real-time “to do” list as well as leverage risk prediction assistance through the Project Home module.
- Dashboard cards can be personalized depending on your project role by selecting “Customize” on the top left and clicking on the “Card Library.”
- Click any of the links to drill down and get more information on a specific item and take immediate action.
- Use the expand arrows to open the card to full screen to see more information.

PRO TIP: Interact with your projects plans or models through the Project Design card. This card allows you to markup or create and view issues from directly inside the card view and it integrates back to the original file in Document Management.



Project Home Overview



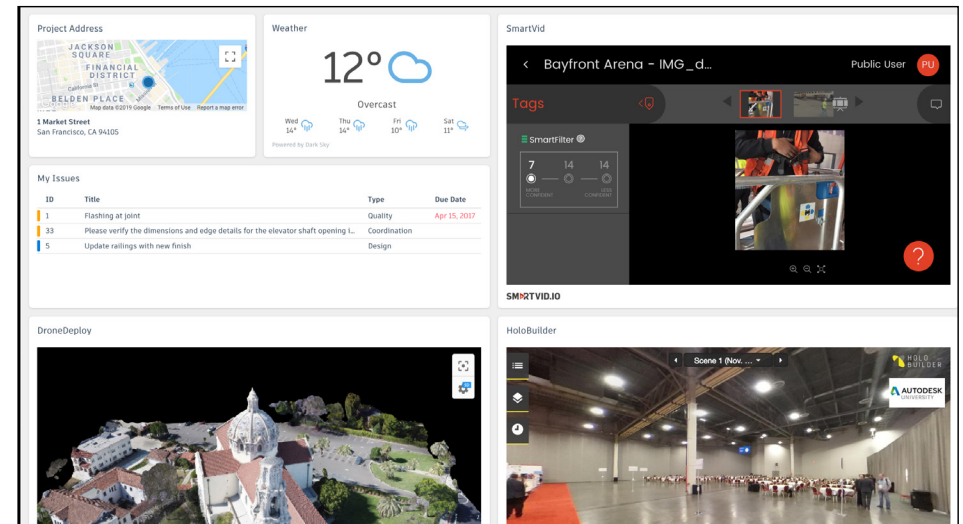
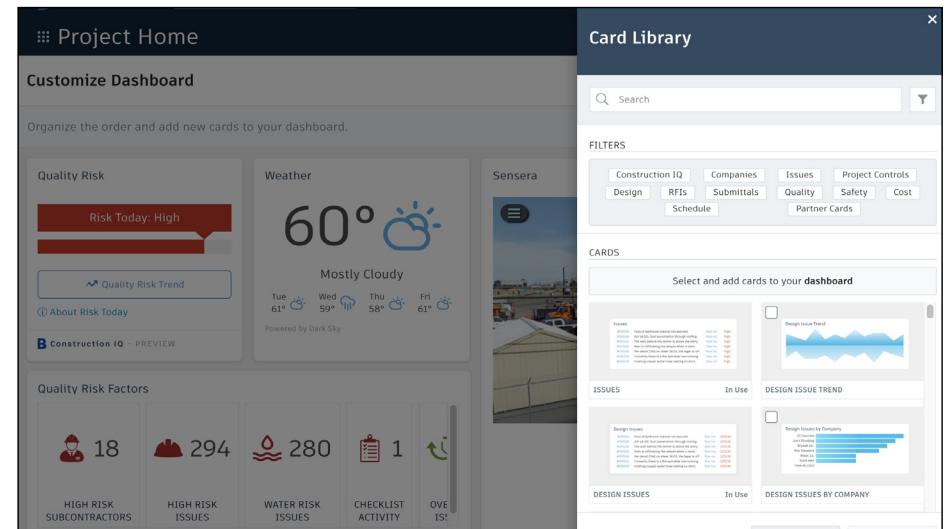
Project Home Blog Post



Prediction & Analytics

2 Card Library & Partner Cards

- The Card Library gives users the ability to show information that is personalized for them.
- Click on the “Customize” icon on the top left to see a view of the Card Library.
- Filter, view, and select cards to be added to your dashboard.
 - Filter by Partner Cards to add data from any of the selected integration partners filter for a single view of all project information.
 - To view and add Construction IQ specific cards filter by Construction IQ.



Partner Cards



Prediction & Analytics

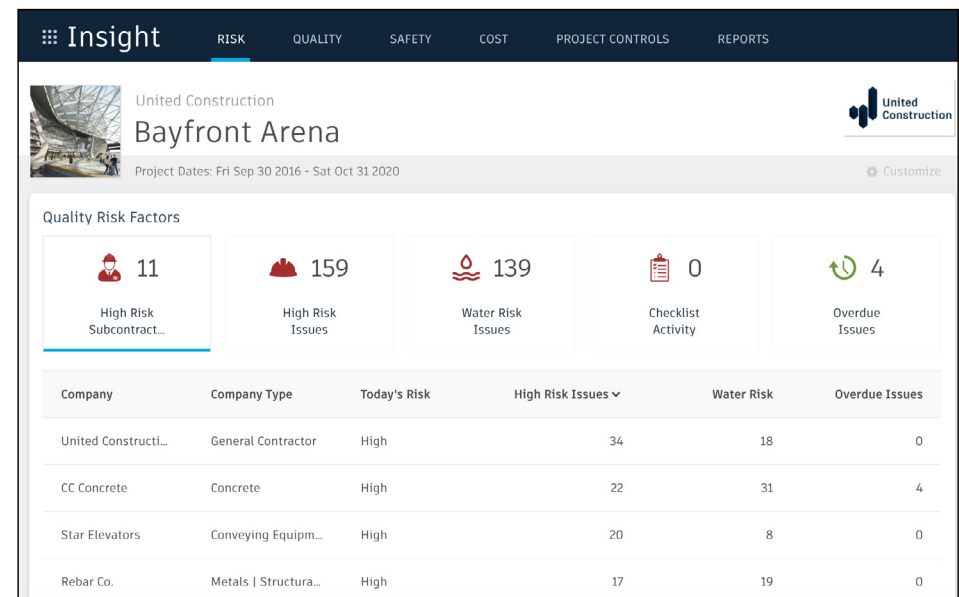
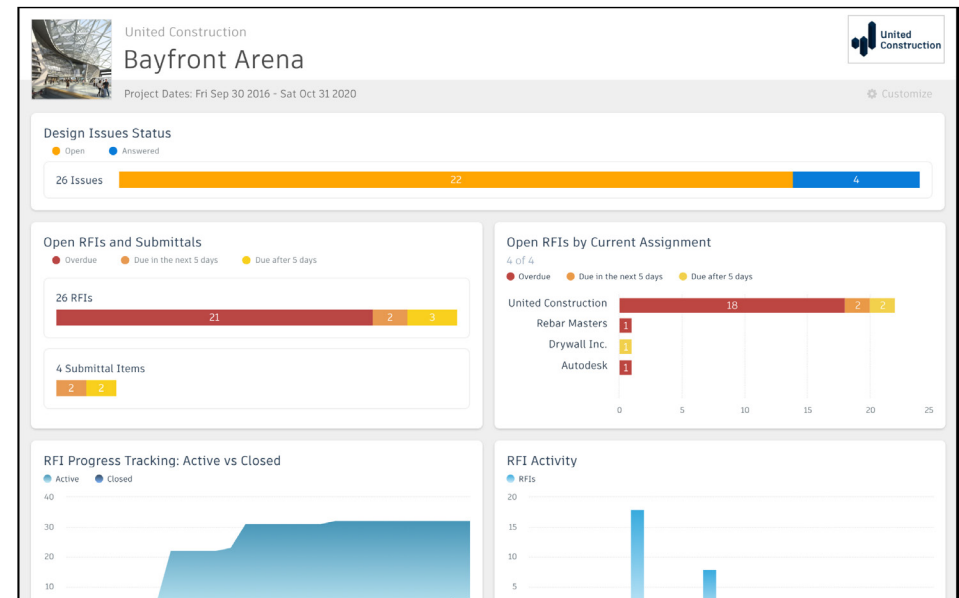
3 Quality Analytics

- BIM 360 helps predict quality related issues by visualizing high risk areas through Construction IQ and providing visibility to project data.
- Quality data is visualized on the Quality tab within the Insight module as well as through select cards in the Card Library in Project Home.
- The Risk Tab in the Insight module shows a summary of subcontractors who have the highest risk based on outstanding issues, a list of high risk issues, water related risk issues, checklist activity, and overdue Issues.
- Click on each of these quality risk factors to drill down and get more detail.

Insights Setup



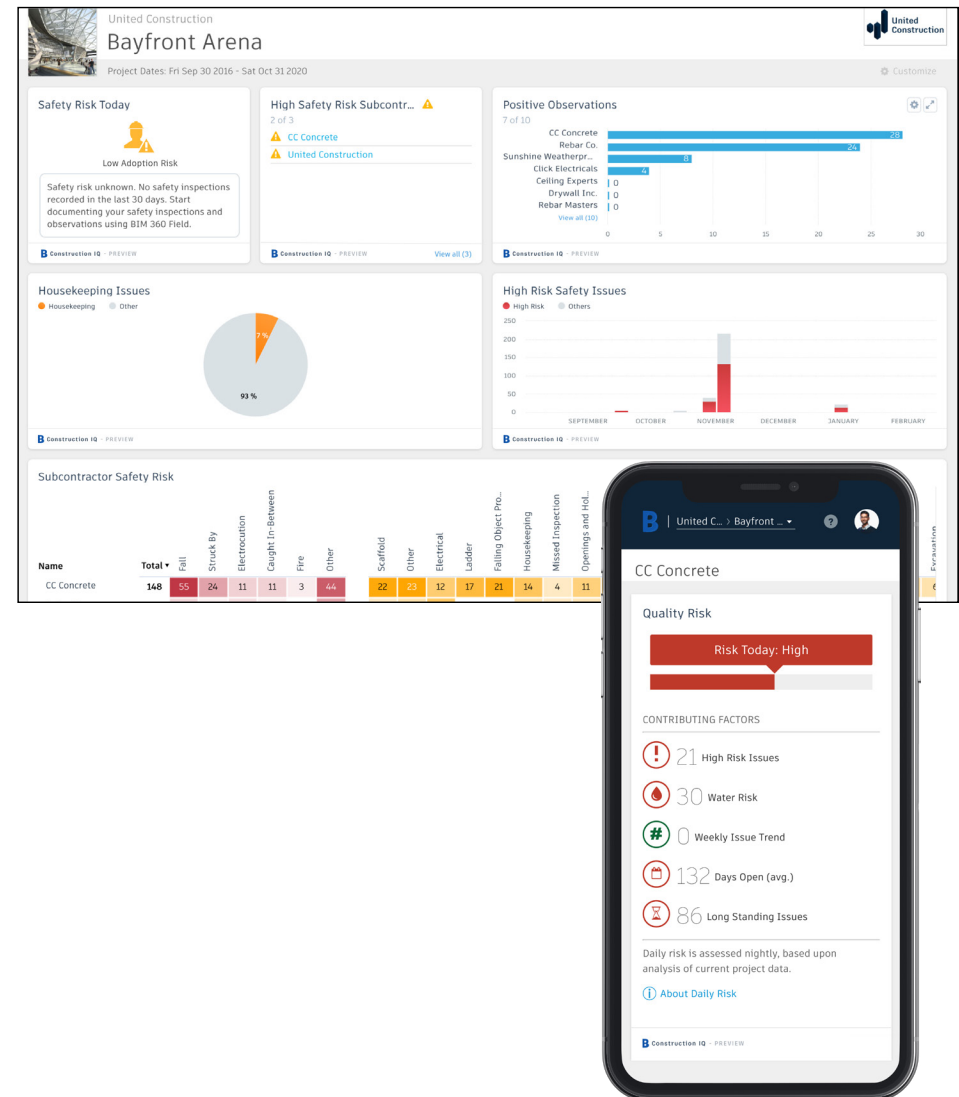
Insight Blog



Prediction & Analytics

4 Safety Analytics

- BIM 360 tracks safety related data like near misses and at-risk behaviors through logged Issues, RFIs, Checklist items, etc.
- Construction IQ analyzes this data as leading indicators and helps predict safety issues before they become serious incidents.
- Data is visualized on the Safety tab within the Insight module as well as through select cards in the Card Library in Project Home.
- Integration Partner Cards also show safety related data insights through site cameras or their own AI based technology.
- **Highlighted Safety Cards:**
 - **Housekeeping Issues** - many safety incidents can be avoided by keeping a clean jobsite.
 - **Fatal Four Safety Issues** - 60% of all construction deaths are due to one of these four issues; fall, caught between, electrocution, struck by. See jobsite Issues that fall into these categories.
 - **Subcontractor Safety Risk** - highlights subcontractors that have issues relating to the “fatal four.”
 - **Subcontractor Risk Summary** - shows subcontractors with the highest risk and drill down to see what those Issues are.



Prediction & Analytics

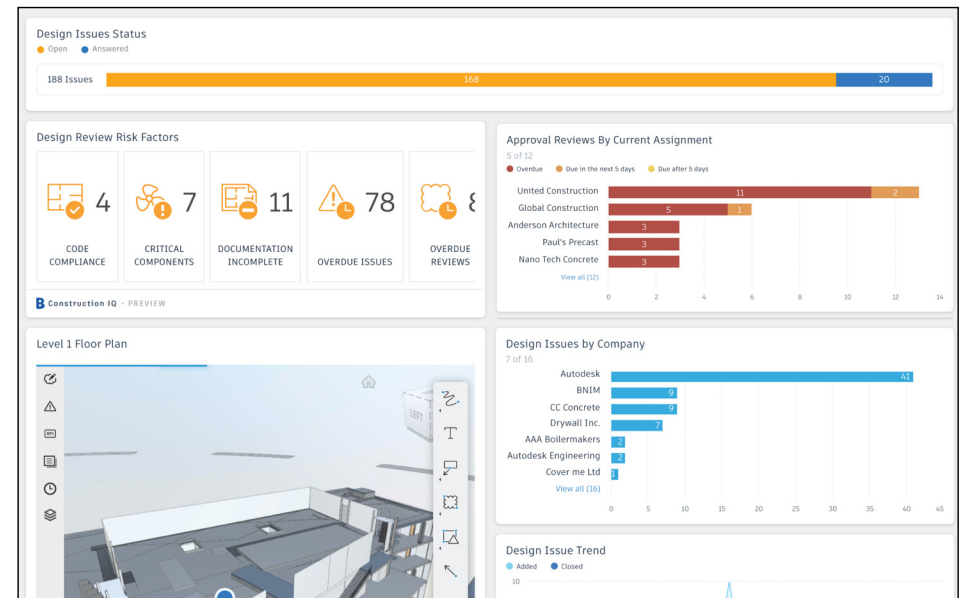
5 Design Analytics

- BIM 360 surfaces design issues through the Design tab in the Insight module
- Through this tab, users get visibility into key design issues and take immediate action to resolve.
- Design Review Risk Factor Card:
 - Powered by Construction IQ
 - Surfaces code compliance design issues
 - Identifies design issues that involve critical building components
 - Highlights documentation errors and omissions
 - Highlights overdue issues and reviews as well as who is responsible
- Approval Reviews by Current Assignment Card:
 - Highlights the status of design reviews by company

Design Risk Blog



Design Risk Demo Video



Issue #29 (Status: OPEN)

Title: Need stair spec

Description: spec not found for ext stair

Created by: Neil Rosado on Apr 11, 2018

Assigned To: David Sanchez

Type: Design

Due Date: Oct 31, 2019

Location:

Building Components: Stairs (Critical components)

Root Cause:

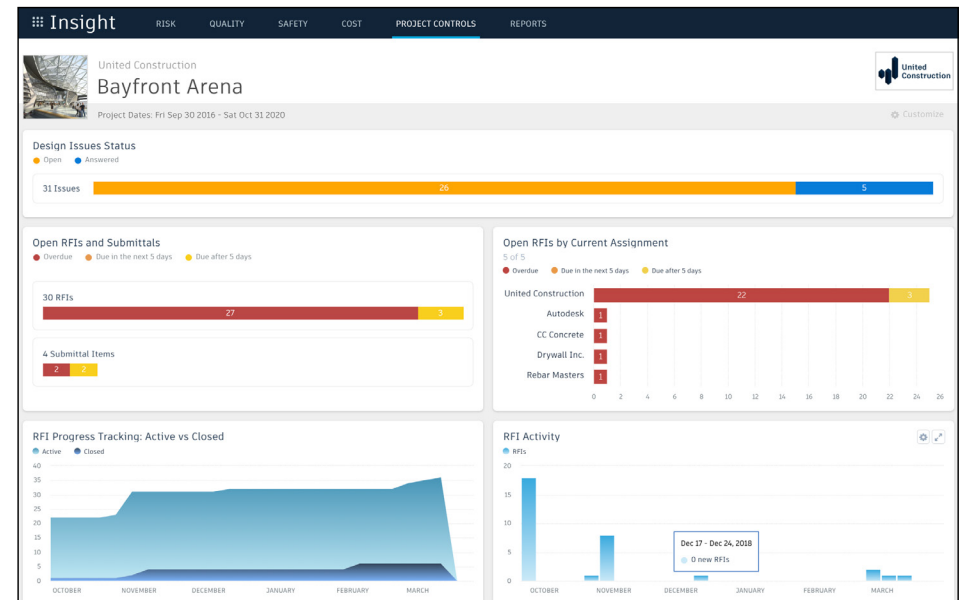
- ☐ Design Coordination
- ☒ Code Compliance
- ☒ Constructability
- ☐ Documentation Incomplete
- ☐ Documentation Conflict
- ☐ Other

[View in Document Management](#)

Prediction & Analytics

6 Project Controls Analytics

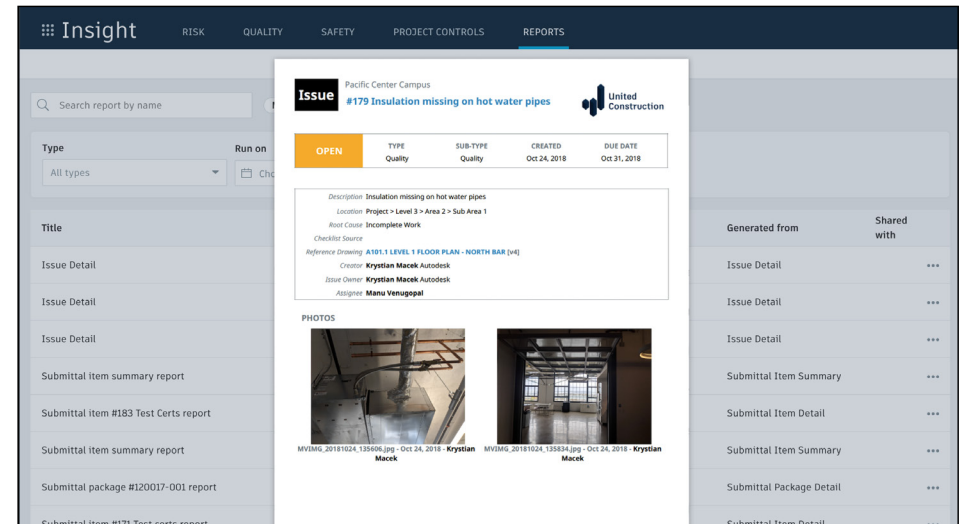
- The Project Controls tab in the Insight module gives visibility into managing a projects RFIs and Submittals as well as oversight of any Design Issues.
- **Highlighted Project Control Cards:**
 - **Open RFIs and Submittals** - gives a summary of the number of overdue as well as upcoming RFIs and Submittals.
 - **Open RFIs by Current Assignment** - shows a list of subcontractors and how many overdue and upcoming RFIs they have.
 - **Design Issues** - shows a summary of open Issues that are design related as well as the number of answered Issues.
- Click on each of these cards to drill down and get more detail.



Prediction & Analytics

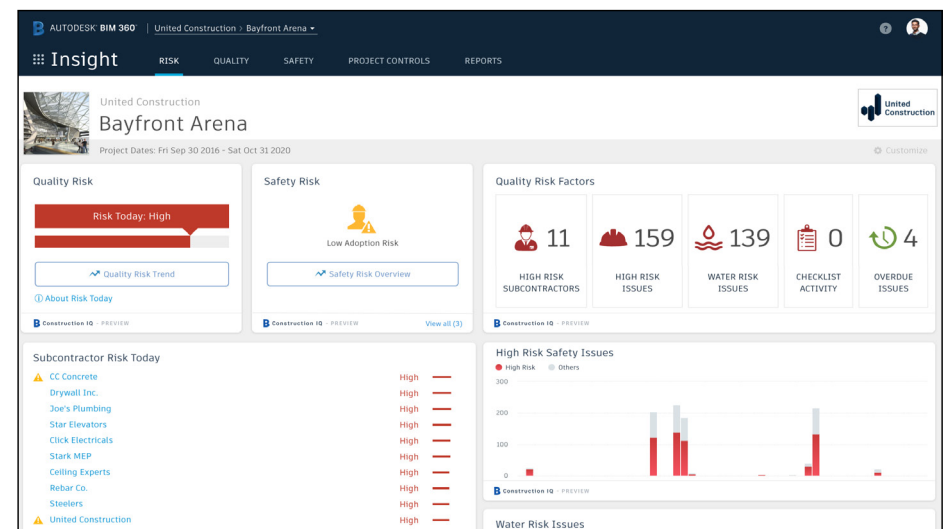
7 Reporting

- The Report tab within the Insight module shows an aggregated list of generated reports related to Issues, Checklists, Documents, Submittals, and RFIs.
- Filter reports based on type, date, or creator.
- Download or share reports with other team members.
- Create and schedule reports based on your filter criteria.



8 Construction IQ

- Construction IQ is a built-in machine learning and AI functionality that leverages data across the entire BIM 360 platform.
- Construction IQ sifts through millions of data points from your construction documents, issues, checklists, related meta-data and historical data, and analyzes it to identify and prioritize risks.
- Construction IQ automatically classifies items and flag issues as “High Risk.”
- “High Risk” issues are items that if left open, will likely lead to bigger more costly issues down the road.
 - EXAMPLE: if flashing was marked as missing on a window, the Issue would be flagged as “High Risk” to avoid bigger water leaking Issues.
- View Construction IQ data through the “Risk” tab within the Insight module as well as by selecting cards tagged as “Construction IQ” in the Card Library.



About Construction IQ



Prediction & Analytics Blog

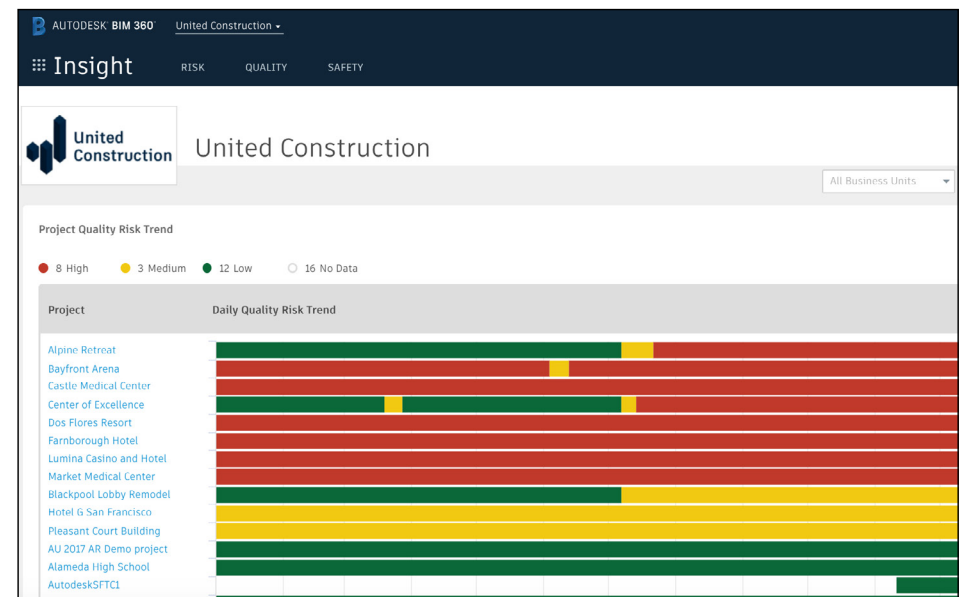
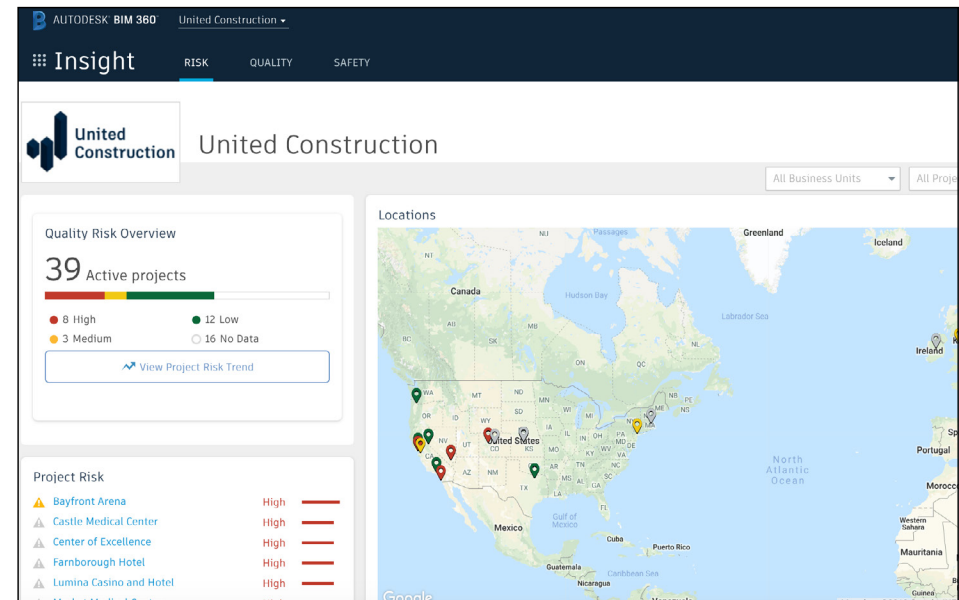


Prediction & Analytics

9 Executive Insight

- With the ability to view company-wide performance data across multiple project, executives and cross-project leaders can make more informed business decisions and gain visibility into overall risk assessment for current as well as future projects.
- Invite users with “executive overview” permission to access this view. This is a separate Insight view geared towards Executives and cross project leaders only.
- **View cross project health across tabs:**
 - **Risk** - shows projects with higher risk scores based on project data and Construction IQ capabilities.
 - **Quality** - overview of quality related checklist activity and conformance.
 - **Safety** - overview by project of safety related issues.

PRO TIP: Through the Risk tab in the Insight module, executives can get instant visibility into which projects have the highest risk levels each day. Assess the project risk overtime to see which projects remained in a “high risk” category over longer periods to determine which projects need executive level support.



Additional Capabilities

Account Admin

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



1

Create a project

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

Getting Started Guide 

Create a Project 

Create Project Profile

Step 1 of 2

* Project Name

Project name is valid.


* Project Type

Construction Type

* Project Value

Project value is valid.

Project Image



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

Browse

Project Address

Account Admin

2 Activating modules

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

Activate Services
Step 2 of 2

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

Document Management
Inactive

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

Select Project

All Projects

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

Please assign a project administrator

Enter name or email address

Company

Cancel Save

Activate

Design Collaboration
Inactive

Activate

BIM 360 Glue
Inactive

Activate

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

3 Add members to directory

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

Invite Account Admin

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

Invite Account Admins to manage your account. Add

Email	*Default Company	Default Role	Access Level
test@autodesk.com	Autodesk	Select Role Architect Construction Manager Contractor Designer Document Manager Engineer Estimator Executive	Account Admin Account Admin Executive Overv

Cancel Invite

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

Account Admin

4 Adding members to a project & assigning access levels

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

The screenshot shows the 'Add Project Members' interface. At the top, there are 'Cancel' and 'Add to Project' buttons. Below them is a search bar labeled 'Enter Names or Email Addresses' with a 'Select' button. The main area is a table with columns: Name/Email, Company, Roles, Project Admin, and several icons for access levels. The table lists five members: Rick Nichols (Aesthetic Interiors, Owner), Ben Johnson (General Construction, Construction Manager), b1m360user7@yahoo.com (Ace Property Holdings, Construction Manager), b1m360user6@yahoo.co... (Sparxx Electrical, Engineer), and b1m360user8@yahoo.oc... (General Construction, Superintendent). The 'Project Admin' column shows icons for each member, and the access level icons are shown in the final column.

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

Members & Access Levels

Setup Roles

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

Mobile Access

Construction doesn't happen behind a desk. Teams need access to project documents and project management tools anytime, anywhere. With the BIM 360 mobile app, teams can execute construction quality and safety workflows, including creating or editing checklists, viewing RFIs, adding or tracking issues, and managing or creating drawing markups, directly from an Android or iOS device.



1

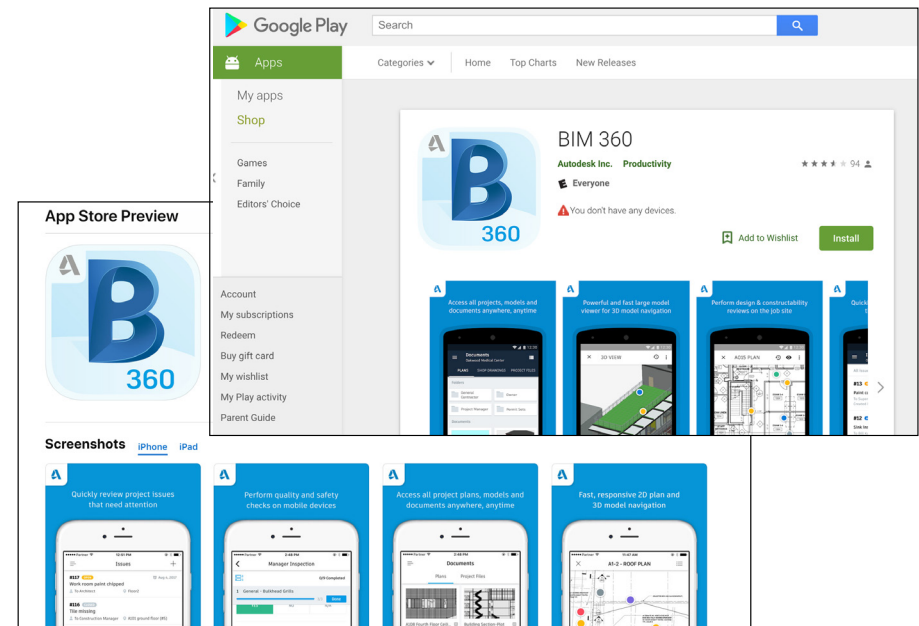
Download the BIM 360 app

- Go to the App store or Google Play store on your mobile device to download the BIM 360 app.
- The BIM 360 mobile app works with all other modules, including Document Management.

Get the iOS App



Get the Android App



PRO TIP: Stay up to date on mobile capabilities through the Autodesk Knowledge Network.

Mobile Access

2 Mobile workflows

- Several workflow capabilities can be accomplished using the BIM 360 mobile apps, including Checklists, Issue Management, RFI Tracking, Daily Logs, and Markups.
- To see the differences in workflow capabilities for the BIM 360 and BIM 360 Docs apps, click the “BIM 360 Mobile Capabilities” link below.

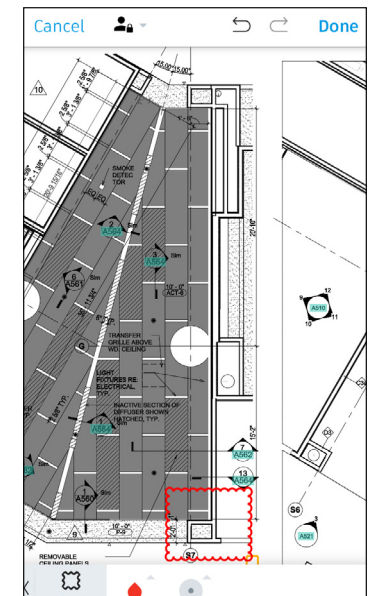
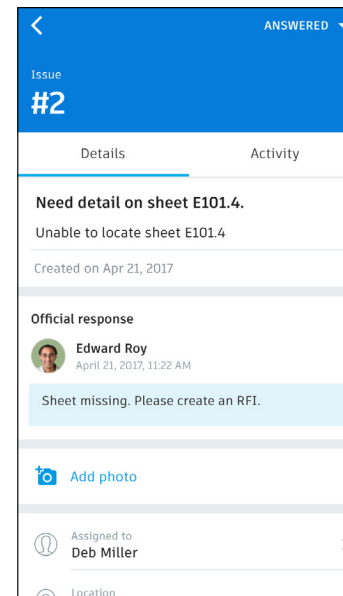
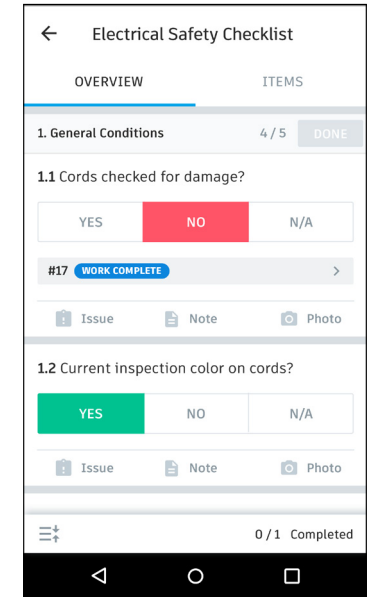
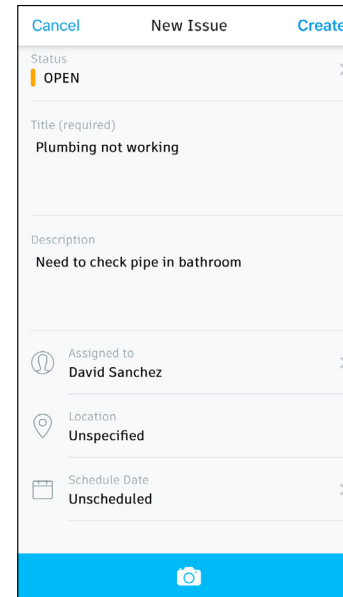
[BIM 360 Mobile Capabilities](#) 

[About the iOS App](#) 

[About the Android App](#) 

3 Offline sync

- Teams are able to work on-site without Internet access.
- Teams can also download individual documents and add markups and comments when working offline. Once back online, all changes will be synced back to the cloud.



Integration Partners

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



Reality Capture

Cost Management

Estimating

Construction Management

Takeoff

Design Checking

Field Management

Layout

Bid Management

Scheduling

Accounting

Data Transfer

[Learn More](#)



3DR

SIGMA
ESTIMATES

eSUB
construction software

Pype

SMARTBID™

EGNYTE

hsbCAD

STRATUS

SITEAWARE

assemble

ManufactOn

triax™

hsbshare

SMARTVID.IO

RM
EX RHUMBIX

HOLO
BUILDER
Winning by Knowing

BECKTECH
INNOVATION IN ALL DIMENSIONS

PRO ProjectReady®



AUTODESK[®]
BIM 360[®]

autodesk.com/bim-360

Autodesk, the Autodesk logo, and BIM 360 are registered trademarks or trademarks of Autodesk, Inc., and/or its subsidiaries and/or affiliates in the USA and/or other countries. All other brand names, product names, or trademarks belong to their respective holders. Autodesk reserves the right to alter product and services offerings, and specifications and pricing at any time without notice, and is not responsible for typographical or graphical errors that may appear in this document. © 2020 Autodesk, Inc.