

# Safety



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## Introduction

Construction is a dangerous industry, and sending everyone home safe is the top priority. But safety risks increase when you don't know what to look out for. Executing safety program checklists and site observations from your mobile device can help avoid safety blind spots and risky situations.

Because the better you can see it, the safer you can build it.

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

#### Autodesk BIM 360

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



Please note that the capabilities outlined in this guide are reflective as of December 2019 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 <u>BIM 360 Product Release Notes</u>.

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## Additional Capabilities

- Account Admin
- Mobile Access
- Integration Partners

# Suggested Workflow

# Safety Workflow

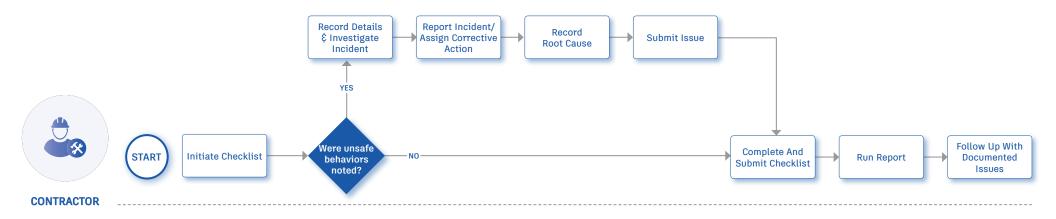
Improve jobsite safety by implementing standardized safety management processes. The graphic below outlines the suggested safety workflow using BIM 360.

#### Why follow this workflow?

- Track and review jobsite safety issues through a single source of truth
- Utilize templates or create custom safety checklists
- Gain visibility and prioritize safety issues

#### BIM 360 capabilities used

- Safety checklists
- Issue management
- Safety reporting



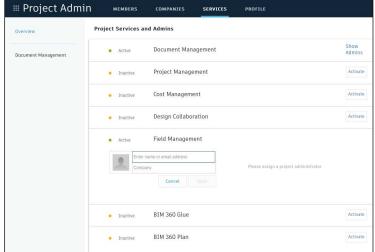
# Safety Capabilities

Sending everyone home safe is top priority. Utilize the checklist workflow to make safety more predictable and gather project safety analytics. With the easy to use checklist builder, you can create safety specific checklist templates, assign them to team members, and track statuses. While in the field use your mobile app to complete the checklist and add notes, attached photos or create an issue reinforcing safety standards. With the filter and reporting features you can identify trends and areas for improvement.



- A project admin needs to activate the Field Management module.
- In the Project Admin module select the Services tab, then "Overview" on the left sidebar.
- In the BIM 360 Field row, select "Field Management" and click "Activate." Designate at least one project admin.

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



#### 2 Designating issue permissions

- In the Project Admin module, select the Services tab.
- On the left sidebar, click "Field Management."
- Here you can designate user-, role-, or company-based permissions using the drop-down list.

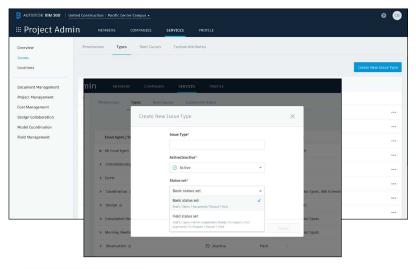
🖩 Project Adm	nin members	COMPANIES SEF	RVICES PROFILE		
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Cost Management Design Collaboration	John Janzen	User	Basic View All	~	Remove
Model Coordination	Liron Zluf	User	Create		Remove
Field Management	AAA Boilermakers	Company	View and Create		Remove
	Alpha Plumbers	Company	Full Control		Remove
	BNIM	Company	Full Control	Full Control	Remove

### 3 Custom issue types

Project admins can control the issue types and sub-types available for selection. To make filtering issues more efficient, they can add custom issue types or sub-types.

- In the Project Admin module, select the Services tab and Issues on the left sidebar.
- Select the Types tab then click "Create New Issue Type." Enter the name to appear in the issue drop-down list
- Optionally, change from Active to Inactive. Inactive keeps the newly created type from being available for use. Select the appropriate status set and click "Create."
- Select the drop-down next to an Issue Type to reveal the sub-types. Add sub-types by clicking "Add Sub-type." Enter the name of the sub-type and click the check-mark. Use the more menu ( ... ) to edit/activate sub-types.

PRO TIP: Custom issue types can not be removed, they can only be turned off by using the more menu ( ... )to select Inactive.



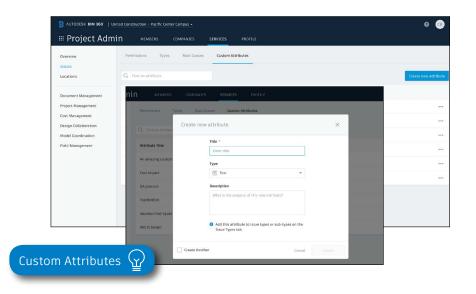
Adding Issue Types & Sub-types



#### Custom issue attributes

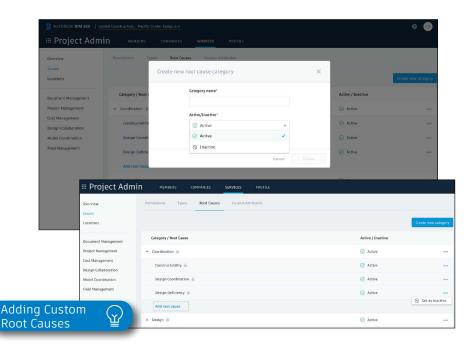
- In the Project Admin module, select the Services tab, Issues on the left sidebar, and then the Custom Attributes tab.
- Once on the Custom Attributes tab click "Create New Attribute." Add a title and use the type drop down to select the field you need (text, dropdown, paragraph or numeric).

PRO TIP: Once the custom attribute has been created, you have the option to map the attribute to Issue Types and Sub Types.



#### 5 Custom root causes

- In the Project Admin module, select the Services tab, Issues on the left sidebar and then the Root Causes tab.
- First you need to create a category. Click "Create New Category" and enter a category name. Optionally, you can set it to inactive to delay usage while creating root causes. Click "Create."
- Once you've created a category you can start creating root causes. Select the drop-down next to a Category to reveal the root causes for that category. Add a root cause by clicking "add root cause." Enter the name of the root cause and click the check-mark. Use the more menu ( ... ) to inactivate root causes.

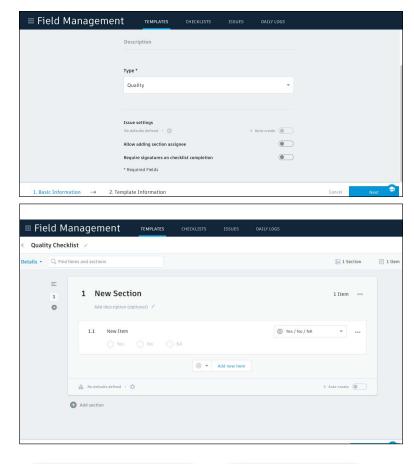


#### 6 Creating checklists

**Creating a checklist template:** Project admins and users designated with "Create" permission can use the template builder to quickly add sections and items to create a new template.

- In the Field Management module, select the Templates tab and click "Create New Template."
- Select the template type (e.g., Quality) using the "Type" drop-down list.
- You can also turn on different settings including "Issue Settings" where you can define if an issue should be autocreated from non-conforming items, "Allow adding section assingee", and "Require signatures".
- Here you will start building out the template. Add in section names such as "general," and click "Add new item" to start populating questions related to that section.
- For each question, click the drop-down list to select the response type and fill in necessary fields. Select (...) to add a description, set as optional, or delete.
- When done, click "Publish." Now the template can be used to create new checklists.

PRO TIP: While generating a checklist template you have the ability to define at the header if signatures are required or not. If a signature is required, a "signature" section is added to the checklist template which allows the checklist template creator to define how many signatures are required. The role and or company of the signatory required can be defined at this state.



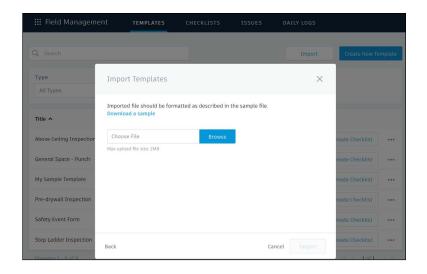
Creating Checklists

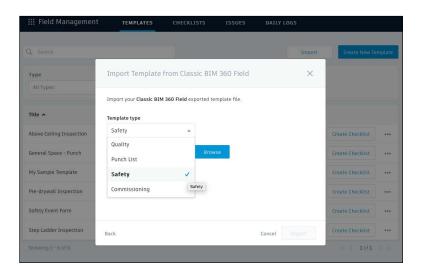
#### Import a template from excel:

- In the Templates tab, select "Import."
- · Check "Import Templates" and click "next."
- 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.
- If you have a properly formatted spreadsheet, select "Browse" to choose the file, then "Import."

#### Import a template from classic BIM 360 Field:

- In classic BIM 360 Field, export from the admin space the checklist template that you want to import. Save it to your computer.
- In the Templates tab, select "Import."
- Check "Import Template from Classic Field" and click "next."
- Specify the template type, click "Browse" to select the file, then "Import."
- Once it is imported, you can edit the template as needed.





Creating Checklist Templates

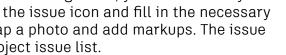


- In the Templates tab, use the search bar or filter by type to find the checklist you need.
- Click "Create Checklist" in the list view, or open the checklist and click "Create Checklist" to add it to the project.
- Once the checklist has been added, a new window will pop up where you will see a details box. Complete all necessary fields.

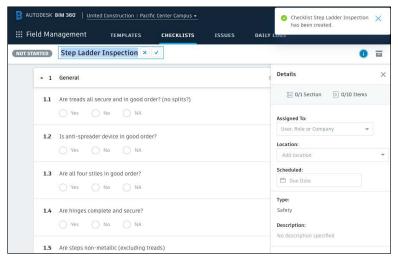
PRO TIP: Add a checklist to the project with the BIM 360 mobile app by tapping "+" in the checklist to select your template.

#### Completing checklists 8

- Complete your checklist in the field with the BIM 360 mobile app or via web browser.
- Tap "Checklists" and select a checklist from the list.
- · As you perform your inspection, review the criteria for each item and enter the appropriate response.
- (Optional) Add a note or photo by tapping the icon under each item. Use the photo markup tools to refer to specific areas in the photo.
- (Optional) If you aren't utilizing the Auto Issue Create function for non-conforming items, you can manually create issues. Tap the issue icon and fill in the necessary fields. You can snap a photo and add markups. The issue is added to the project issue list.



• Tap "Save" when complete.



#### PRO TIP: Using checklist sections will help navigate long checklists by breaking items down into more manageable groupings.

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YES NO	N/A			
		1.5 Are steps non	-metallic (exclud	ling treads)
Che	cklist completed	<b>:</b>	0	Checklist completed



Filter and sort 9

- On a mobile device, tap "Checklists" then use the filter options.
- On a computer select the Field Management module then the Checklists tab to filter with the drop-down lists or sort by clicking the column headers.

### 10 Exporting reports

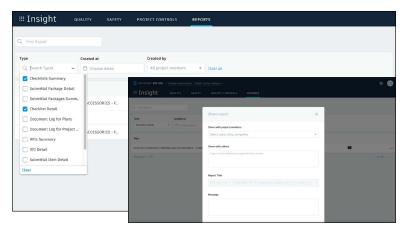
- On a computer select the Field Management module then the Checklists tab.
- To export a summary report of all clicklists click "Export Report." You can optionally edit the report title and add a message. Select "Create Report" and the report will be emailed to you.
- To export a detail report of an individual checklist select to open the checklist. Then click the folder icon in the top right corner. The report will be emailed to you.

PRO TIP: Use the reports tab in the Insight module to access all exported summary and detailed checklist reports. You can filter the reports by type, creation date, and creator in order to quickly find the report you need.

You can download the report or share it with team members by clicking the three dot icon.

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Step Ladder Inspection	Safety	Level 2				Nov 1, 2017	-
Step Ladder Inspection	Safety	Level 1 Cancel					_





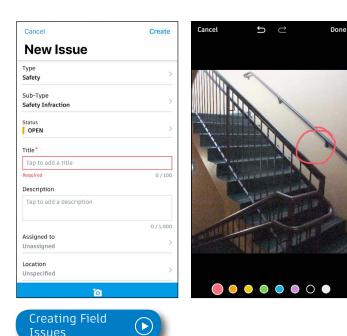
# Issue Management

Don't let problems slow you down. The ability to create, assign, track, and respond to issues on any device is a critical workflow. With the Field Issue Management functionality, you can easily track work to complete, problems to fix, areas to inspect, and more. Add context around the issue resolution by adding photos and collaborating on comment threads. With a central view of all project issues, tracking status and analyzing root causes has never been easier.

#### Creating issues

- On your mobile device, navigate to Filed Issues and tap the plus icon. Or on your computer, in the Field Management module select the Issue tab and click "Create New Issue."
- Identify the issue type, sub-type, status and title. Then complete all desired fields including such as location and root cause. Make sure to assign the issue and select a due date.
- When creating an issue on your mobile device, add more context by including a photo. Click the camera icon to snap a photo or select from your photo library, mark it up, and attach it to the issue.

PRO TIPS: All Issues are unified meaning the same Issue added via the Field Management can also be viewed in the Document Management module.



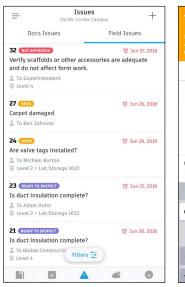
## Issue Management

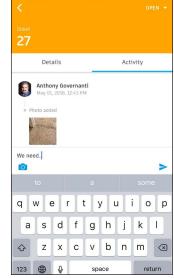


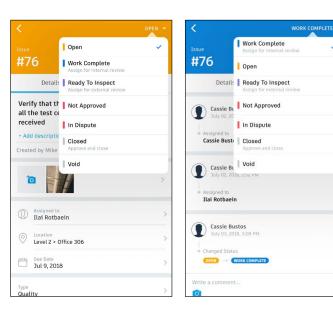
- If you're the assignee, open the email notification and select "View the Issue" to be directed to the issue.
- On your mobile device, navigate to the list of all field issues. Scroll/filter and tap the issue to open. Or on your desktop, in the Field Management module select the Issues tab and search for the issue.
- Once the issue window is open, tap/select "Activity."
- Use the comment box to write a comment. On your mobile device you can click the camera to attach a photo.

#### 3 Changing issue status

- On your mobile device, navigate to the list of all field issues.
- Scroll/filter and tap the issue to open. Or on your desktop, in the Field Management module select the Issues tab and search for the issue.
- Once the issue window is open, tap/select the status drop-down list in the top-right corner to select a new status.
- Only the issue owner or project admin can set the issue to closed after checking for completion of work or that the safety hazard has been remedied.







## Issue Management

- 4 Filter and sort
  - On your mobile device, tap "Issue" then use the filter options to filter by status, assignee, or due date.
  - On a computer select the Field Management module then the Issues tab to filter with the drop-down lists or sort by clicking the column headers.

PRO TIP: You can open a sheet or model to view associated field issues. Once open use the issues viewer on the left panel.

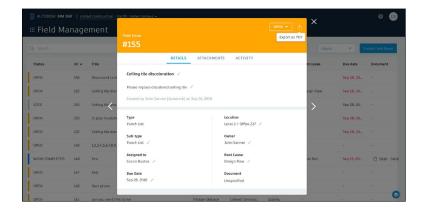
#### 5 Exporting reports

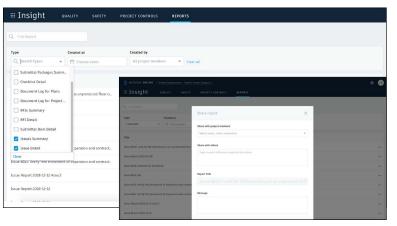
- On a computer select the Field Management module then the Issues tab.
- To export a summary report of all issues click "Export Report" and select PDF or CSV. You can optionally edit the report title and add a message. Select "create Report" and the report will be emailed to you.
- To export a detail report of an individual issue select to open the issue. Then click the folder icon in the top right corner. The report will be emailed to you.

PRO TIP: Use the reports tab in the Insight module to access all exported summary and detailed issue reports. You can filter the reports by type, creation date, and creator in order to quickly find the report you need.

You can download the report or share it with team members by clicking the three dot icon.

III FIE	ld Management	TEMPLATES	CHECKLISTS ISSUES DA	ILY LOGS					
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253	Increase Opening	Level 4	Open	* esign	Documenta	Jan 12, 2019	C Original T1.d	0	
252	Look for fall hazardssuch as unprote	Roof	Location	esign	Fall Protect	Jan 9, 2019	2	1	
251	Look for fall hazardssuch as unprote	Roof	Roof	esign	Fall Protect	Jan 9, 2019		1	
250	Look for fall hazardssuch as unprote	Roof	Level 6     Level 5	* esign	Fall Protect	Jan 10, 2019			
249	Inspect fall protection equipment fo	Level 2 > Off	Level 4	esign		Jan 7, 2019		1	
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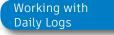
# Daily Logs

Log daily site activities to keep track of your project progress and performance. With the Daily Log workflow, track daily weather conditions to shed light on any delays caused on unforeseen circumstances, track manpower by logging detailed labor information per company, and document any issues or successes that may have occurred throughout the day.

## Creating daily logs

- In the Field Management module, select the Daily Logs tab.
- · Click the calendar icon to select a month and day.
- To add in the daily weather, click the location box to set your location and select "Get Weather." Edit any necessary fields using the pencil icon.
- For Labor, click "Add labor item" and populate the fields. Repeat to add another labor line. The daily labor total will calculate.
- · Add notes and photos from the day that are relevant
- When done, click "Publish."

PRO TIP: Rather than starting each Daily Log from scratch, users have the option of copying information like labor hours from a previous entry.



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Company Name	Work		Hours		
Add labor item					
Notes and Photos					



# Daily Logs

#### 2 Daily Log Permission Settings

- In the Project Admin module, select the Services tab.
- Click "Daily Logs" to view a list of team members
- From here you can set to one of three permission levels by user, company, and role:
  - Manager Users are able to edit and publish Daily Logs
  - Viewer Users are able to only view Daily Logs
  - Not Defined Users without a view permission will not be able to see Daily Logs as a tab option in the Field Management module.

Project Adn	nin members companies	SERVICES PROFILE		
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ost Management esign Collaboration	William Mura (Admin)		user	Manager
odel Coordination	Yossi Alush (Admin)		user	Manager
eld Management	Zach Crumal (Admin)		user	Manager
	Zak Test (Admin)		user	Manager
	Zhigang Yang (Admin)		user	Manager

Daily Logs Permissions

# Prediction \$ Analytics Capabilities

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.

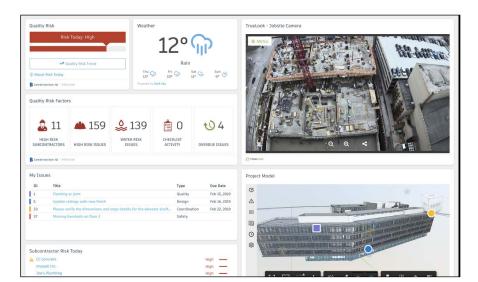
The prediction and analytics ecosystem enhances the BIM 360 platform with a deeper understanding of project performance, prioritized daily activities, and instant visibility into project risk, giving teams the information they need to avoid costly mistakes and further improve risk mitigation.



#### 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.



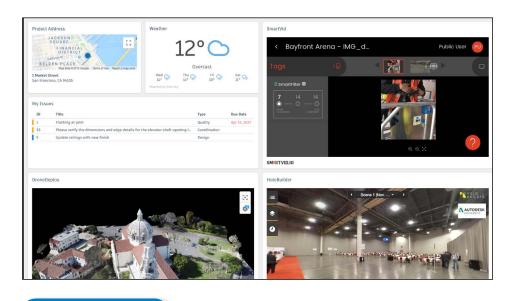
Project Home Overview  $\langle \underline{\Upsilon} \rangle$ 

#### Project Home Blog Post 🕢



- 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.

■ Project Home				Card Library				×
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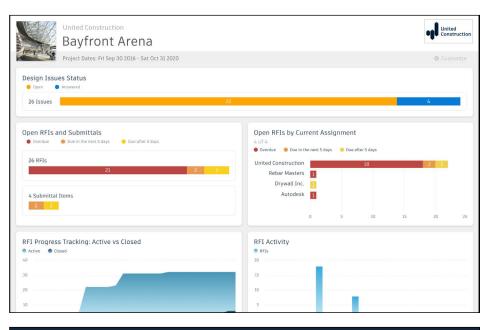


Partner Cards

## 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.

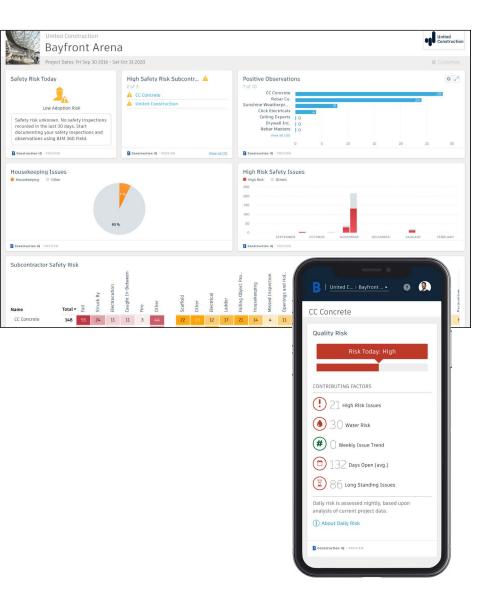




≡ Insight	RISK QUAL	ITY SAFETY	COST I	PROJECT CONTROLS	REPORTS	
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Quality Risk Factors						
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Company	Company Type	Today's Risk	High Ris	sk Issues 🗸	Water Risk	Overdue Issues
United Constructi	General Contractor	High		34	18	0
CC Concrete	Concrete	High		22	31	4
Star Elevators	Conveying Equipm	High		20	8	0
Rebar Co.	Metals   Structura	High		17	19	0

4 Safety Analytics

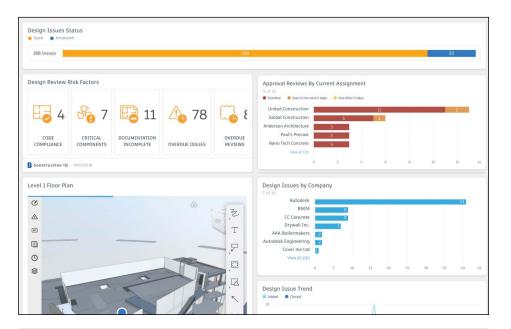
- BIM 360 tracks safety related data like near misses and at-risk behaviors through logged Issues, RFIs, Checklist items, etc.
- Construction IQ analyzes this data as leading indicators and helps predict safety issues before they become serious incidents.
- Data is visualized on the Safety tab within 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:
  - Houskeeping 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.

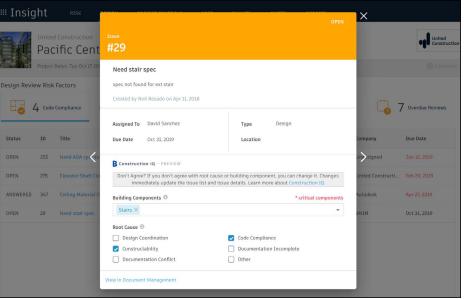


#### 5 Design Analytics

- 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







### 6 Project Controls Analytics

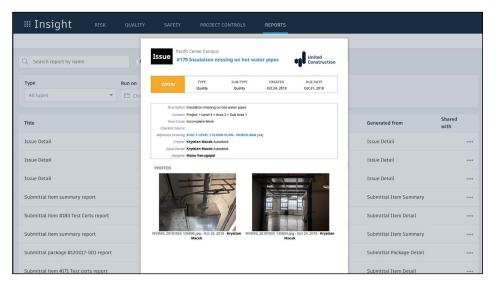
- The Project Controls tab in the Insight module gives visibility into managing a projects RFIs and Submittals as well as oversight of any Design Issues.
- Highlighted Project Control Cards:
  - Open RFIs and Submittals gives a summary of the number of overdue as well as upcoming RFIs and Submittals.
  - 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.

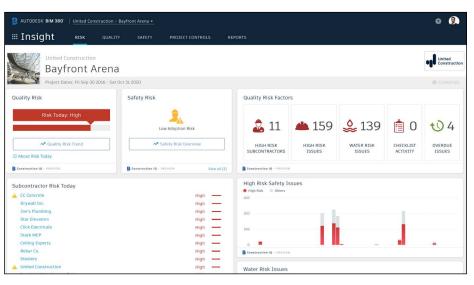
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- 7 Reporting
  - The Report tab within the Insight module shows an aggregated list of generated reports related to Issues, Checklists, Documents, Submittals, and RFIs.
  - Filter reports based on type, date, or creator.
  - · Download or share reports 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.



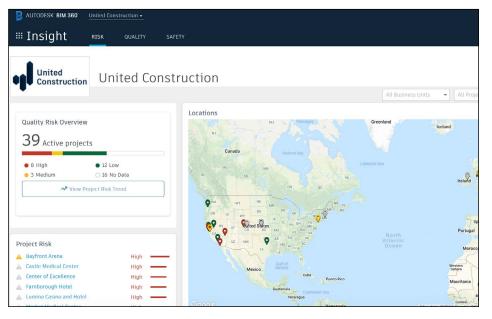


About Construction IQ  $(\underline{\Upsilon})$ 

#### 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.



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# 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.

#### Create a project

- In the Account Admin module, select the Projects tab and click "Add."
- Enter project information and click "Save \$ Continue."



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# 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."

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.

Activate Services Step 2 of 2						
To activate a service, click Activate and a invitation will be sent to the admin. Proj Field project admin can copy projects, cr Hide ▲	ect admins man	age all project	level administrat	ion for their	service. For ex	ample, a BIM 360
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BZ Migration Testing Bayfront Arena Bio Company Tower						Activate
Inactive Design Colla	boration					Activate
BIM 360 Glu	e					Activate

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

nvite Account Admins to manage	your account.		Add
Email	*Default Company	Default Role	Access Level
test@autodesk.com	Autodesk	Select Role	Account Admin 👻
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PRO TIP: You can change the default company and role later if necessary.

# Account Admin

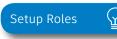
#### 4

# 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).

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olm360user6@yahoo.co	Sparxx Electrical	Engineer *			å	8	å
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Members & Access Levels  $\Im$ 



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.

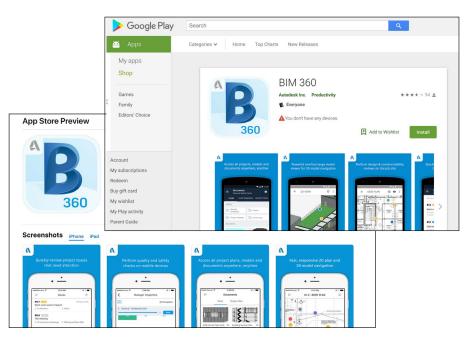
# Mobile Access

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.

#### 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.





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

## Mobile Access

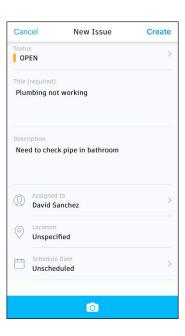
Mobile workflows 2

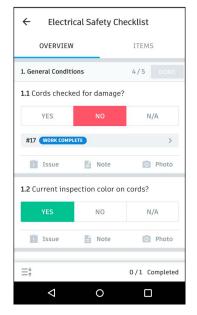
- Several workflow capabilities can be accomplished using the BIM 360 mobile apps, including Checklists, Issue Management, RFI Tracking, Daily Logs, and Markups.
- To see the differences in workflow capabilities for the BIM 360 and BIM 360 Docs apps, click the "BIM 360 Mobile Capabilities" link below.

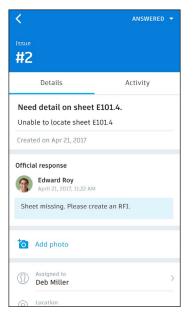


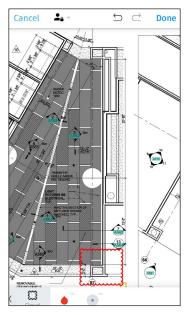
#### 3 Offline sync

- 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.





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