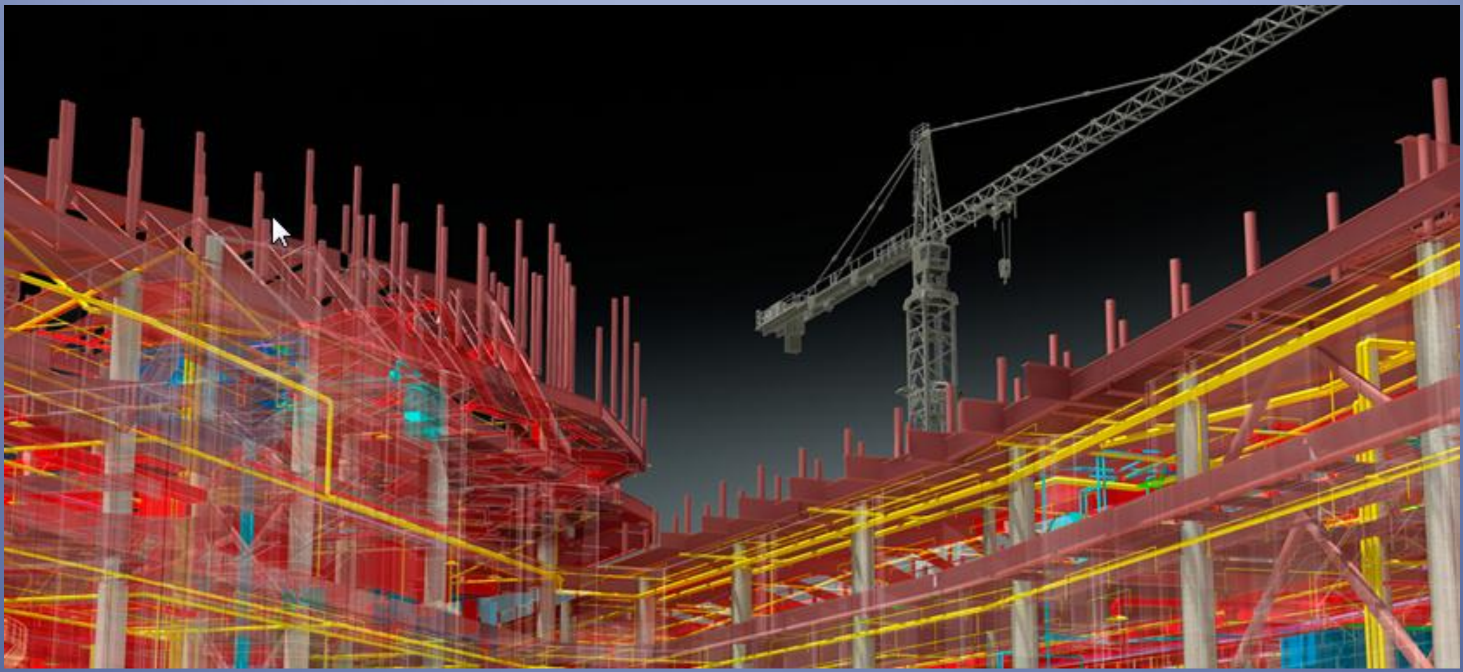
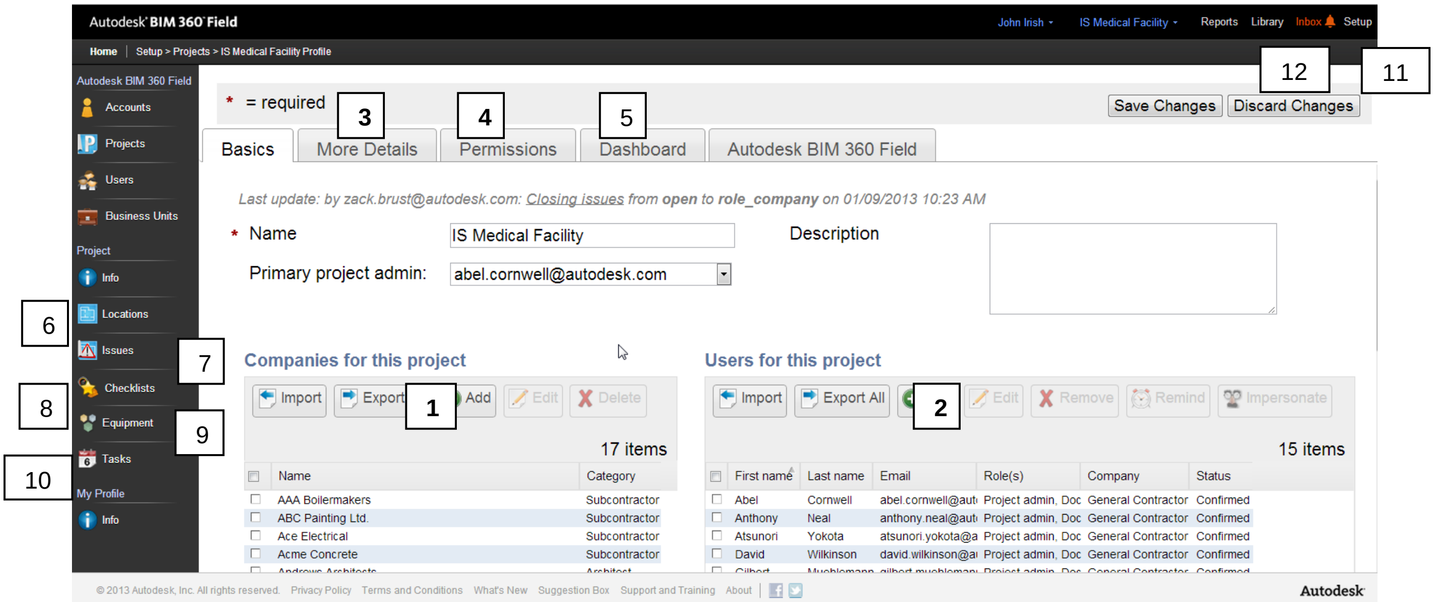


# Autodesk – BIM 360 Field

BIM 360 Field – Project Setup User Guide

This guide outlines the steps involved in setting up and configuring a project.  It is intended for use by BIM 360 account administrators and document managers.

# Project Setup User Guide




## Table of Contents

| | Activity | Procedure |
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| **1** | **Info - Basics Tab - Companies** | Select the SETUP icon and then the Project Info Tab to setup your project.<br>***<u>Companies for this project</u>:*** Companies are anyone you are doing business with on the project; subcontractors, architect, engineer, owner, etc.<br>• To add companies manually, click the “Add” button and fill out the required fields (Name and Category).<br>• If you want to categorize the type of subcontractor, select from the Type dropdown values.<br>• To add multiple companies at one time, click “Import”. To add companies from other projects within your account, click on “From Account”. Select the companies you wish to add and click “ Add Companies”.<br>• To add multiple companies using a spreadsheet, click on “From File”, download the sample and save it on your computer. Fill in the required fields and upload the new document using the “Start Import” button.<br>If there are any errors importing the companies, you will either receive an email or view them on the setup screen.<br>Screen: If you are importing a few companies, you will view the error message, if any, directly on the screen. Use the scroll bar on the right to view all the errors.<br>Email : If you are importing a lot of companies, you will receive an email in your mailbox, notifying you of all the errors. |

| | Activity | Procedure |
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| 2 | **Info - Basics Tab – User's** | ***Users for this project***: Users are anyone who will use BIM 360 Field as well as company contacts who will receive emailed reports<br>• To add users manually, click on the "Add" button and enter the user email address, select the appropriate company and role. Multiple users can be added at one time by entering multiple email addresses provided they are of the same company and same role<br><br>Next select the following options that apply to each user:<br>  o Show on subcontractors contact list.<br>  o User's company logo appears on reports run by this user: If you have uploaded the company logo for this user's company, selecting this option will print the company's logo on their reports.<br>  o Junior/Apprentice role on this project (new issues default to Draft status): If you have an intern working on this project, select this option. Any issue that is entered by the user will be assigned a status of "Draft".<br>  o Receives reports for his/her company: user is available to receive reports.<br>• To provide a user Project Administraor permissions place a check in the appropriate box.<br>• To provide a user Document Manager permissions place a check in the appropriate box.<br>• To provide a user Project Administraor permissions place a check in the appropriate box.<br>• To add users from other projects within your account, click on "From Account". Select the users you wish to add and click " Add Users".<br>• To add multiple users at one time using a spreadsheet, click "Import". Click on "From File", download the sample spreadsheet and save it on your computer. Fill in the required fields and upload the new document using the "Start Import" button.<br>• If there are any errors importing the companies, you will either receive an email or view them on the setup screen<br>  o Screen: If you are importing a few users, you will view the error message, if any, directly on the screen. Use the scroll bar on the right to view all the errors.<br>• Email : If you are importing many users, you will receive an email in your mailbox, notifying you of any errors. |

| | Activity | Procedure |
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| **3** | **Info - More Details Tab** | • Enter the basic project information.<br>• Logo: Upload your company account logo. This logo will be the default project logo that will print out on all BIM 360 Field reports.<br>• Sample Project – don't include in Analytic Reports: checking this box will exclude this project data from being included in the analytic reports.<br>• Update library file links when adding new version: Checking this box will update all drawings referenced in BIM 360 Field with the latest version in the library. If you leave this unchecked ,it will affect only new attachments going forward, but older attachments will retain the previous version of the drawing. |

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| **4** | **Info - Permissions** | ***Issue settings:***<br>• Issues due: If you have a company policy in place that gives the subs 'X' number of days to complete the work, add the days here. The number of days is then added to the issue creation date to derive the due date<br>• Closing Issues : Select one of the three options to determine who on the project can close out issues<br>    o Any role can close : Regardless of who entered the issue, anyone can close any issue. I.E. Architect can close contractor issues and vice versa<br>    o Same role as author : Contractors can close contractor issues, architects can close architect issues, etc<br>    o Same role and company as author: Architect A can only close Architect A's issues, Architect B can close Architect B's issues, etc<br>***Subcontractor Settings***:<br>• Can add attachments: Check this box to allow subs to add attachments (i.e. picture of a corrected issue) to issues<br>• Can run reports: Check this box to allow subs to run reports for issues assigned to their company<br>• Can view library: Check this box to allow subs to view the library documents. They cannot edit or delete anything from the library. Read only access.<br>• Allow public links to attachments: Checking this box will make attachment links public. These links can be accessed by anyone , even users that are not part of BIM 360 Field.<br>• Can run checklists: Checking this box will<br>***Permissions:***<br>Permissions may be set for each role (Contractor, Engineer, Architect and Owner) for the different functions within BIM 360 Field (Issues, QAQC, Safety and Equipment). Select one of the following permissions:<br>• None-- the user will have no access. The user will not be able to view any data, edit or add comments within the function.<br>• View -- the user can only view the data and add a comment within the specific function. The user will not have any access to edit or add new data. |

| | Activity | Procedure |
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| | **Info - Permissions (Continued)** | ◦ Issues – the user can view the issues (based on the filters visible) and add a comment to someone else's issue, but cannot add a new issue to the system or edit someone else's issue.<br>◦ QAQC/Safety – the user can view the different checklists, but cannot create new instances of a checklist or edit someone else's checklist.<br>◦ Equipment – the user can view the properties of an equipment, any issues created , checklists filled out for the equipment and also view any attachements. He can add a comment from the "Acitivity tab".<br>• View + Add - the user can view the data, add a comment to someone else's data and add new data. By default, the user has access to edit the information he authored.<br>◦ Issues- the user can view the issues (based on filters visible), add a comment to someone else's issues and add a new issue. The user can also edit the issues that he authored<br>◦ QAQC/Safety- the user can view the different checklists and also create a new instance from a checklist template. The user will be able to edit his own checklists<br>◦ Equipment- the user will be able to view the properties for an equipment but not edit any information. He will have access to fill out a checklist , add an issue or an attachment and edit any information he authored.<br>• View + Add+ Edit - the user will have full access to the function. He can add new data, add a comment or edit someone else's information<br>◦ Issues – the user can view the issues (based on filters visible), add a comment to any issue and also edit any issue.<br>◦ QAQC/Safety – the user can view the different checklists created in the system, create a new instance from a template and also edit any checklist.<br>◦ Equipment – the user can view or edit any properties for the piece of equipment, add issues or edit someone else's issues, add checklists or edit someone else's checklists and add or edit attachements.<br>• Run reports : Check this box for each role to allow the role to run reports in BIM 360 Field.<br>• View library: Check this box for each role to allow the role to view the library.<br>• Assign Tasks: Check this box for each role to allow the role to create and assign Tasks in the Task module. |

| | Activity | Procedure |
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| 5 | **Info - Dashboard** | ***<u>Home Page View:</u>***<br>You may configure the initial home page view (i.e. dashboards) for each of the five primary roles (i.e. Constractor, Architect, Engineer, Owner or Inspector). Each role may be set one of the following settings:<br>• Cannot See – roles set to this permission cannot see or configure any dashboard reports.<br>• Can only View – roles set to this permission may only view dashboard reports as configured by the Project Administrator.<br>• Can View and Edit – roles set to this permission may view dashboard reports as configured by the Project Administrator or edit the dashboard reports to their personal requirements |

| | Activity | Procedure |
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| **6** | **Locations** | • Click on the “Locations” tab on the left to add or edit locations for your project<br>Locations define different areas within your project where work will be conducted.<br>• To add Locations manually, click on “Add”, fill out the required fields, then click on “Add Location” button.<br>o Parent is the highest level under which you add lower levels of locations (EX. Building/Floor/Room). The top Level in this example is Building.<br>o Name is what is shown throughout the application: EX. Floor 01.<br>o ID is optional and is a unique identifier for the location which can be the same as the name.<br>• To import multiple locations using a spreadsheet, click on “Import”, download the sample and save it on your computer. Fill in the required fields and upload the new document using the “Start Import” button.<br>o Path- defines the hierarchy of the project locations from the top level (parent) to the lowest level .<br>o EX. Building 1> Floor 01> Room 101<br>o EX. Building 1> Floor 01> Room 102<br>• The higher levels need to be defined before the lower levels when adding to the spreadsheet.<br>o EX. Building 1<br>o Building 1>Floor 01<br>o Building1> Floor 01>Room 101 |

| | Activity | Procedure |
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| **7** | **Issues – Types Tab** | • Click on the “Issues” tab to the left and then select the Issues Tab to add or delete issue types. Issue types define the origin of the issue such as safety or QA inspection, work to complete, pre-punch, etc<br>• To add an issue type, select the category under which you want to add an issue type by selecting the dropdown box below “Field Process”. Enter the custom issue type and click on the “(+)” button<br>• To delete an issue type, select the category under which you want to delete an issue type by selecting the dropdown box below “Field Process”. All the existing issue types will appear in the box. Select the issue type you want to delete and click on the “X”<br>• To move the order of the issue types, select the category under which you want to reorder the types. Select the specific issue type and move the “up” or “down” arrow to reorder. |
| | **Issues - Custom Fields Tab** | • Click on the “Custom Fields” tab to add custom fields to any issues. You may add custome fields to ALL Issues types or add them to any single issue type bu selecting that issue type from the available list.<br>• Select the type to which you want to add a custom field.<br>• Click on the “+Add” button and fill in the required fields.<br>    o Label : This is the name of your custom field<br>    o Type: This defines what type of custom field you are adding. Click on the dropdown to define the type.<br>    o Default Value: If you wish to add a default value to the custom field, add it here.<br>    o Required: Checking off this box makes the custom field a required field. To make it optional, uncheck this box.<br>Note: It is best practice to leave fields unrequired on Issue forms fields.<br>• To add additional fields from the delivered fields:<br>    o Click on “Show all Standard fields” to view all the available fields within BIM 360 Field.<br>    o Select all the fields excluding the ones you wish to add to the field group and click “Delete”. |

| | Activity | Procedure |
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| | **Issues - Root Causes Tab** | Root Causes allows project users to define, categorize and measure construction non-conformances and their underlying causes. Once measured, programs may be put in place to improve the number of non-conformances by taking corrective actions. Example root causes might include, “Quality, Safety, Training” etc.<br>• To add Root Cause Categories click on the PENCIL icon<br>o Enter a Category then click on the “+”.<br>o Use the PENCIL icon to edit an entry.<br>o Use the arrow icons to arrange the order of display.<br>• To add Root Causes, select a Root Cause Category from the drop down list.<br>o Enter a Root Cause then click on the “+”.<br>o Use the PENCIL icon to edit an entry.<br>o Use the arrow icons to arrange the order of display. |
| | **Issues – Templates Tab** | Templates are commonly found issues or recurring work items. Groups are a way to categorize the commonly found issues. Grouping could be by trade, responsibility, area or any other way that makes sense to your project team.<br>• Click on the “Issue Templates” tab to the left to add templates.<br>• To add multiple templates and groups at one time, click on the “Import” button (icon with blue arrow on white page). You can add from another project within your company or use the sample spreadsheet:<br>o To add groups/templates from another project in your account, click on “From Account” A list of groups along with the project they were used on will appear on the screen. Check off the groups you wish to import and click on “Import” The templates associated with that group are added as well as the group<br>• To add groups/templates using a spreadsheet<br>o Click on “From File”, download the sample and save it on your computer. Fill in the required fields, browse from your desktop and click “Start Import”<br>• To add a group/template manually<br>o Navigate to the “(+)” button under Groups to create a group. Add the group name and click “Add Group”<br>o To add templates within this group, click on the “(+)” button under Templates to add the Issue description, assign a company and issue type |

| | Activity | Procedure |
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| **8** | **Checklists – QAQC, Safety and Commissioning Tabs** | You may add three types of checklist templates in BIM 360 Field Web: QA/QC, Safety and Commissioning. The first step in adding checklists is to select the appropriate tab:<br>o To add a QAQC Checklist, click on “QA/QC” tab.<br>o To add a Safety Checklist, click on “Safety” tab.<br>o To add a Commissioning Checklist, click on “Commissioning” tab.<br><br>Once you have selected a checklist tab, there are three methods for creating checklists:<br>• To add a checklist template from another project in your account:<br>o Click on the “Import” button under “Checklists.” Go to “From Account” to view a list of checklist templates along with the project on which they were used. Select the checklists you wish to import and click on “Import”.<br>• To add a checklist template using a spreadsheet:<br>o Click on the “Import” button under “Checklists”. Click on “From File”, download the sample and save it on your computer. Fill in the required fields and upload the new document using the “Start Import” button.<br>• To add a checklist manually:<br>o Click the “(+)” button under Checklists to add a checklist header and fill in the required fields. To add checklist items, click on the “+Item” button next to “Checklist Items” and fill in the required fields. |
| | **Checklists - Custom Fields Tab** | • Click on the “Custom Fields” tab to add custom fields to any checklists. You may add custom fields to ALL checklists or add them to any single checklist by selecting that a single checklist from the available list.<br>• Select the type to which you want to add a custom field.<br>• Click on the “+Add” button and fill in the required fields.<br>o Label : This is the name of your custom field<br>o Type: This defines what type of custom field you are adding. Click on the dropdown to define the type.<br>o Default Value: If you wish to add a default value to the custom field, add it here.<br>o Required: Checking off this box makes the custom field a required field. To make it optional, uncheck this box.<br>Note: Signature fields are required fields. |

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| **9** | **Equipment – Categories Tab** | Click on the “Equipment” button to the left to configure equipment for your project.<br><br>• ***To categorize your equipment by adding a “types” field :***<br>  o Select the equipment “Types” tab.<br>  o First add the categories for the pieces of equipment. Click on the edit icon under categories (icon with a pencil), enter in the types and click “Done”<br>  o To add the types under each category, select the category from the drop down. Enter the types in the box next to the “Add” button and click “Add”.<br>. |
| | **Equipment – Statuses Tab** | • ***To add or modify equipment status fields:***<br>  o Select the Equipment “Statuses” tab.<br>  o Equipment Status Preview shows you the current status options available to you.<br>  o To add a new option, type the status in the box next to the “Add” button and click “Add”.<br>  o To remove an existing Status, select the status you wish to remove and click “Delete”.<br>  o You can reorder statuses, by selecting a status and clicking the up or down arrow. |
| | **Equipment – Custom Fields Tab** | • Click on the “Custom Fields” tab to add custom fields to any checklists. You may add custom fields to ALL equipment or add them to any single equipment type by selecting that single equipment type from the available list.<br>• Select the type to which you want to add a custom field.<br>• Click on the “+Add” button and fill in the required fields.<br>  o Label : This is the name of your custom field<br>  o Type: This defines what type of custom field you are adding. Click on the dropdown to define the type.<br>  o Default Value: If you wish to add a default value to the custom field, add it here.<br>  o Required: Checking off this box makes the custom field a required field. To make it optional, uncheck this box.<br>Notes: If you want to add custom fields, be sure to add them before you add the pieces of equipment.<br>Signature fields are required fields. |

**Equipment - continued**

Adding equipment to your project is now done in the application and does not require Project Administrator privileges. It is included in this guide for clarity purposes only.

Select the Equipment tab in the main application. This may be seen by any team members with View permissions.

***Adding Equipment Manually:***

- To add a piece of equipment one at a time, click on the “Add” button.
- Under details: Fill in the required fields and any additional information that you want and select SAVE.

***Importing Equipment using a template:***

- To add multiple pieces of equipment using a spreadsheet, click on “More Actions Import”, download the sample and save it on your computer. Fill in the required fields, browse from your desktop to the file you created and click on “Start Import”.
  Note: be sure custom fields have been created prior to downloading your template. This will ensure that the templated includes you custom fields for import.
- After you import the equipment, you can attach checklists to them. Please reference the next section, “ Adding Checklists”, to add checklists to your project.
- To attach checklists to pieces of equipment
  - Select the piece of equipment to which you wish to attach a checklist by clicking on the checkbox next to the equipment. Then click “Edit”.
  - The details page will display all the information about that piece of equipment (which you added during setup).
  - Toggle over to the tab with the check mark (second tab) and it will display all the checklists for your project (QAQC, Safety, Commissioning).
  - Check off the templates you wish to attach to the equipment and select “Save” when done.

***Importing Equipment using BIM:***

Please refer to the Autodesk user guide titled, “ BIM 360 Field – BIM Setup Guide”.

| | Activity | Procedure |
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| **10** | **Tasks** | ○ Click on “Task Categories” to the left to add or delete Task Categories. Task Categories define the type of Tasks such as inspections, reminders, requests, etc.<br>○ Task Categories allow project users to define, categorize and report on tasks that are scheduled in BIM 360 Field.<br>○ To add Task Categories click on the PENCIL and PAPER icon next to the Task Categories dropdown list.<br>○ Enter a Category then click on the “+”.<br>    ○ All entries are sorted alphabetically automatically.<br>○ To remove a Task Category select the category and then click on the “X” button to delete the category. Categories can be deleted as long as they are not linked to any Task Types.<br>○ Once done adding Task Categories click on the “Done” button.<br>○ To add Task Types under a Task Category, select a Task Category from the drop down list.<br>○ Enter a Task Type in the “Types” text field then click on the “+”.<br>○ To remove a Task Type select the Type and then click on the “X” button to delete the Type. Types can be deleted as long as they are not linked to any Tasks.<br>○ To move the order of the Task types, select the category under which you want to reorder the types. Select the specific task type and move the “up” or “down” arrow to reorder. |
| | **Tasks - Custom Fields** | Click on the “Custom Fields” tab to add custom fields to tasks.<br>• Click on the “+Add” button and fill in the required fields.<br>○ Label : This is the name of your custom field<br>○ Type: This defines what type of custom field you are adding. Click on the dropdown to define the type.<br>○ Default Value: If you wish to add a default value to the custom field, add it here.<br>○ Required: Checking off this box makes the custom field a required field. To make it optional, uncheck this box.<br>Note: Signatures are required fields. |

| | Activity | Procedure |
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| **11** | **My Profile** | The first time you log into BIM 360 Field Web, you will be directed to the user profile page<br>• Under "User Profile", enter name and address information if needed<br>• Under "Email notifications" you can change your current default setting of "Send Daily Summary". You can change to any one of the following:<br>  o Don't notify me: If you select this option, you will not be notified about any changes to your project<br>  o Send daily summary: If you select this option, you will receive an email for the previous day's issues that you created or that are assigned to your company. Notifications include status/company changes and comments<br>  o Send me whenever something changes: If you select this option, you will receive an email for each issue that you created or is assigned to your company. Notifications include status/company changes or comments. |
| **12** | **Library- Import** | Click on "Library" to import folder(s) of document(s).<br>• Click on the "Import" button.<br>• Enter your username and password to login to the BIM 360 Field File Importer.<br>If this is the first time you will be required to download and install Adobe AIR.<br>• Select your Project from the list, then Next.<br>• Select the folder containing subfolders and documents and move it into the "Files to Import" column window, then Next.<br>If Network folder additions are slow you may wish to copy the folder to your local drive prior to import.<br>• Highlight where the imported folders/files should appear in the library then click Next.<br>• Select the "Copy Files" button.<br>Folders/files will be imported into the Library. |