# BIM 360 Design® QuickGuide

Key Features

BIM 360 Design® is a service provided by Autodesk® which enables teams to work collaboratively. The activation of a site is required for each project. BIM 360 Design® is a cloud-based platform that allows anyone to participate for free with an Autodesk® ID.; although team members using Revit® through BIM 360 Design® must have additional entitlements.

Getting Started

BIM 360 Design® functionality is divided into several modules.

Document Management: The default module provides unlimited storage for projects and supports all file types. It is the single source of truth for project files.
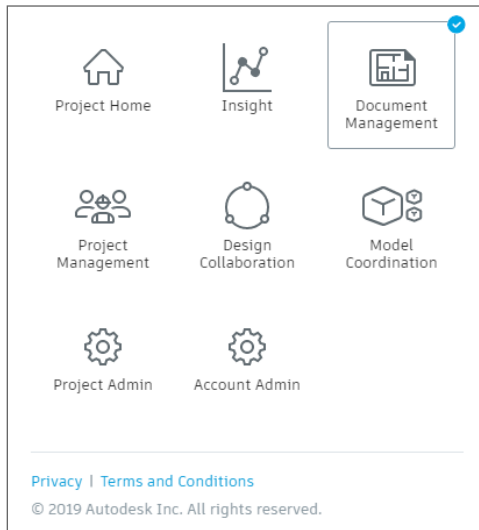
Project Home: The dashboard of the project.

Insight: Provides data, analytics, and reporting.

Project Management: Provides RFI and submittal workflows.

Design Collaboration: Allows multiple team members from multiple offices to collaborate within Revit® models in the cloud. The central model is accessible for editing from anywhere in the world via the internet.

Model Coordination: Provides the ability to publish, review, and run clashes to resolve conflicts.

Field Management: Allows users to manage checklists, project issues, and daily logs.

Project Admin: Project-level control of project members, modules, and permission levels.
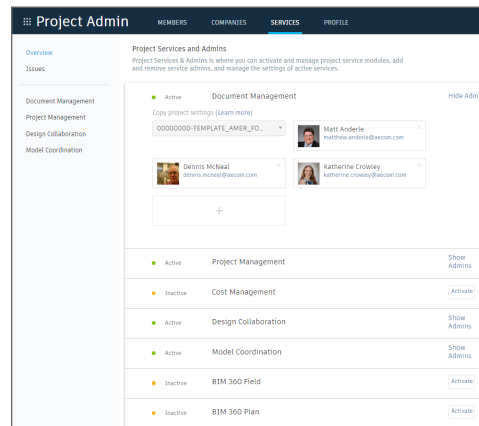
Account Admin: Account-level control of company hub and project set-up, member management, company directory, and app integrations.

Cost Management: Tracks, manages, and forecasts budgets and costs.
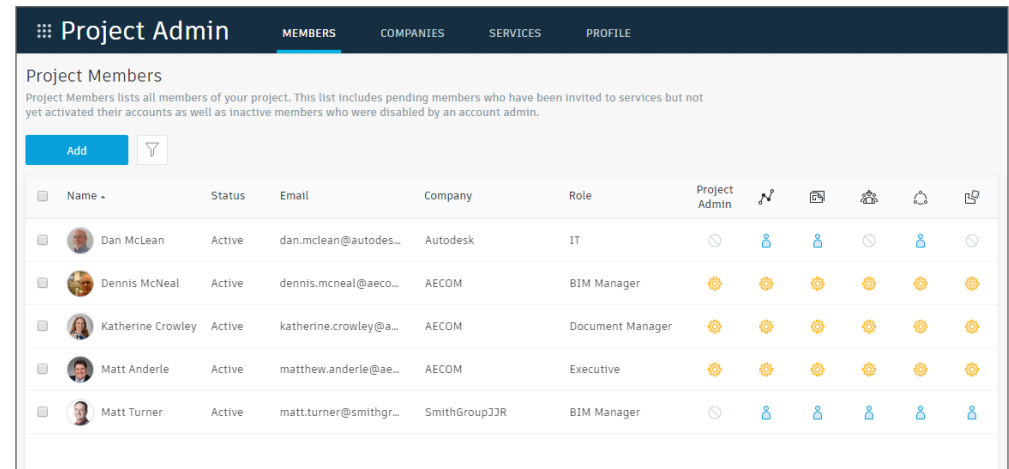
Project Admin

Configuring a Site

Manage project service modules, add and remove service administrators, and manage the settings of active services.

Adding Team Members

Click on the [Members] tab. Click the [Add] button to add team members. Enter the name or email

address of the new team member in the field provided. Click [Select]. Assign a Company name and apply Role(s). Designate module permissions by clicking the appropriate icons, changing from 🚫 to 👤 to activate. Click the [Add to Project] button.

TIP: If the member name is not auto-found, hit the [Enter] key to input a new email address.

Document Management

Folder Structure

Plans: Models are extracted into published views and sheets. PDF sheets are extracted into individual pages. Markups and reviews are conducted within the BIM 360 Design® environment using an integrated set of tools. The Version feature V1 automatically saves a history and identifies the reviewer. The Model Coordination module uses the Plans folder to identify coordination spaces and report clashes.

Project Files: Consistent with cloud-based file storage, the Project Files folder houses work-in-progress documents, which are uploaded as combined sheets.

Integration of Office 365®: Users that have a Microsoft® Office 365® subscription have the ability to edit Office 365® documents within the BIM 360 Design® environment.

Setting Up Folders

Select a folder template or set up a custom folder structure.

Right-click to access the menu system in order to assign folder permissions and add subfolders. Permissions may be assigned to Companies, Role(s), or individual users. Folder permissions cascade. Individual subfolder permissions can be increased but not decreased with relation to the parent folder.

Files can be uploaded by dragging and dropping or using the [Upload] button.

Matthew Anderle
Katherine Crowley

@AECOM
#AECOM_AU2019

AECOM
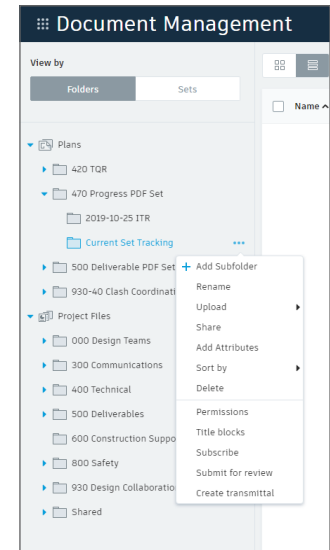
Folder Permissions

It is best to assign permissions at the broadest level – such as Company or Role – which cascade through subfolders, instead of by individual user.

View Only
Can view documents and can add markups/issues, but cannot upload or download content.

View/Download
Can view and download documents and can add markups/issues, but cannot upload content.

Upload Only
Can upload content, but cannot view folder contents.

View/Download+Upload
Can upload, download and view content, and add markups/issues.

View/Download+Upload+Edit
Can review and publish content, as well as edit and delete folder/subfolder content.

Folder Control
Full administrative controls, including managing folder access and title blocks.

Workflow Configuration

Title Blocks

Document Management locates metadata in drawing sheets and extracts information including Sheet Name, Sheet Number, Project Name, Address, and other information using Title Block templates. This feature is available for PDFs in the Plans folder.
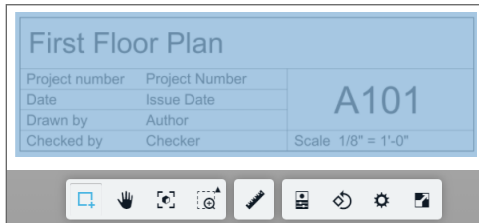
Title Blocks have two default attributes: Title and Number. Users can define additional attributes.
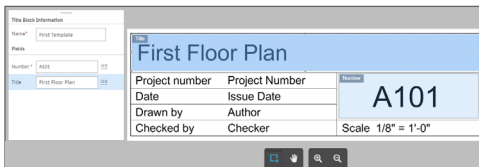

During document upload, each sheet uses the defined Title Block to extract specified data. If an error occurs, the user is prompted to make corrections.
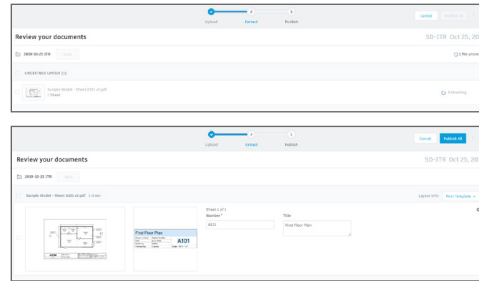

After the documents are published, the extracted data is automatically saved in the system and associated with each sheet or document.

Set Up a Review Process

BIM 360 Design® provides a variety of workflows – including linear or group – to meet team needs.
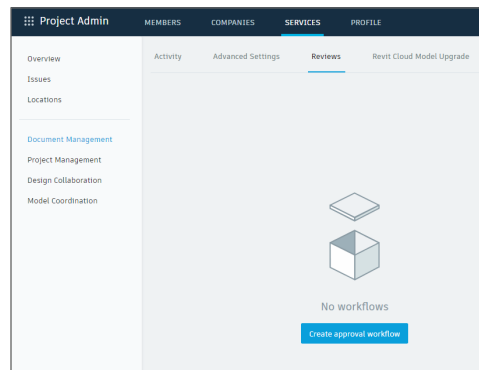
In the Project Admin module under the [Services] tab, click on the [Create Approval Workflow] button. Select an approval workflow from the drop-down menu and assign Roles.
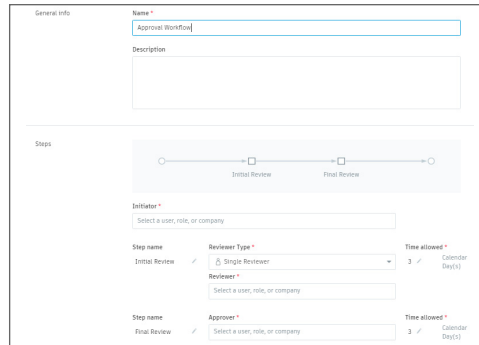

Publish Drawings

Uploading combined PDF sets to the Plans folder requires a multi-step process. When a PDF set is uploaded, a Title Block template must be selected in order for BIM 360 Design® to extract metadata to process the files. At a minimum, Sheet Number and Sheet Name must be identified. BIM 360 Design® then divides the drawing set into individual sheets, allowing the team to evaluate each sheet individually and track Markups and Issues by sheet.

TIP: Larger project sets may require additional processing time; however, publications process in the background. Currently, a PDF set larger than 500 sheets must be divided into smaller, separate uploads.

Markups

Graphical descriptions, or "Markups", can be made to a 2D document or 3D model through the Plans folder of the Document Management module. After selecting a document, click the Markups Icon . Markup functionality provides a variety of tools, styling, and editing capabilities which are tracked by user.
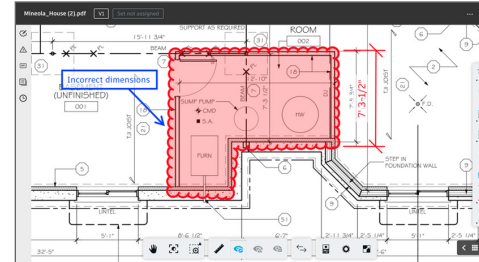

TIP: Be sure to publish Markups so that they are visible to the team.

Issues

Issues related to 2D documents and 3D models can be created and managed at the document or project level. Within the Project Admin module, project administrators can create Issues types and sub-types, create custom attributes, and control Issue permissions.

Project Issues are created through the Plans folder of the Document Management module or within the Model Coordination module. After selecting a document, click the Issues icon , click the [Create Issue] button, input the required information, and click the [Create] button.
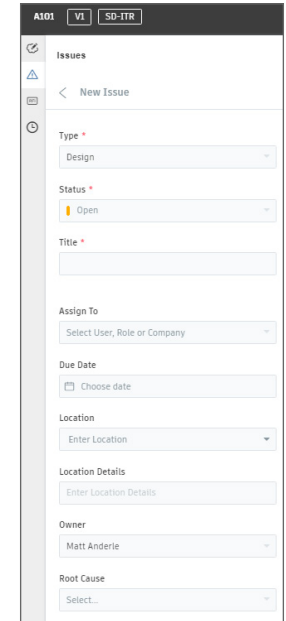
Callout Hyperlinks

Hyperlinks are created automatically when uploading RVT, DWG, DWF 2D sheets, and raster or vector PDFs with metadata that match Sheet Numbers in the same Plans folder.

Matthew Anderle
Katherine Crowley

@AECOM
#AECOM_AU2019

AECOM