



# Cost Management

The screenshot displays the Autodesk BIM 360 software interface. The main window shows a table of 'Approved Change Orders' with columns for 'Unit', 'Amount', and 'Status'. The table lists various change orders with their respective amounts and statuses. To the right of the table, there is a sidebar with project details, including 'Status: Open', 'Budget Code: 64720010991000000000 - Painting', 'SCOPE OF WORK', 'FINANCIAL' (Award Amount: 565,648.71, Total: 565,648.71, Changes: 0.00, Retention: 0 %), 'SUPPLIER DETAILS' (Name: Select..., Contact: Select...), 'DOCUMENT BY RECIPIENT' (There are no available documents), and 'APPROVAL' (Created By: Ian Turner, Changed By: Ian Turner, Purchased By: Ian Turner, Signed By: Ian Turner).

Unit	Amount	Status
1	1,000.00	Open
2	2,000.00	Open
3	3,000.00	Open
4	4,000.00	Open
5	5,000.00	Open
6	6,000.00	Open
7	7,000.00	Open
8	8,000.00	Open
9	9,000.00	Open
10	10,000.00	Open
11	11,000.00	Open
12	12,000.00	Open
13	13,000.00	Open
14	14,000.00	Open
15	15,000.00	Open
16	16,000.00	Open
17	17,000.00	Open
18	18,000.00	Open
19	19,000.00	Open
20	20,000.00	Open
21	21,000.00	Open
22	22,000.00	Open
23	23,000.00	Open
24	24,000.00	Open
25	25,000.00	Open
26	26,000.00	Open
27	27,000.00	Open
28	28,000.00	Open
29	29,000.00	Open
30	30,000.00	Open
31	31,000.00	Open
32	32,000.00	Open
33	33,000.00	Open
34	34,000.00	Open
35	35,000.00	Open
36	36,000.00	Open
37	37,000.00	Open
38	38,000.00	Open
39	39,000.00	Open
40	40,000.00	Open
41	41,000.00	Open
42	42,000.00	Open
43	43,000.00	Open
44	44,000.00	Open
45	45,000.00	Open
46	46,000.00	Open
47	47,000.00	Open
48	48,000.00	Open
49	49,000.00	Open
50	50,000.00	Open
51	51,000.00	Open
52	52,000.00	Open
53	53,000.00	Open
54	54,000.00	Open
55	55,000.00	Open
56	56,000.00	Open
57	57,000.00	Open
58	58,000.00	Open
59	59,000.00	Open
60	60,000.00	Open
61	61,000.00	Open
62	62,000.00	Open
63	63,000.00	Open
64	64,000.00	Open
65	65,000.00	Open
66	66,000.00	Open
67	67,000.00	Open
68	68,000.00	Open
69	69,000.00	Open
70	70,000.00	Open
71	71,000.00	Open
72	72,000.00	Open
73	73,000.00	Open
74	74,000.00	Open
75	75,000.00	Open
76	76,000.00	Open
77	77,000.00	Open
78	78,000.00	Open
79	79,000.00	Open
80	80,000.00	Open
81	81,000.00	Open
82	82,000.00	Open
83	83,000.00	Open
84	84,000.00	Open
85	85,000.00	Open
86	86,000.00	Open
87	87,000.00	Open
88	88,000.00	Open
89	89,000.00	Open
90	90,000.00	Open
91	91,000.00	Open
92	92,000.00	Open
93	93,000.00	Open
94	94,000.00	Open
95	95,000.00	Open
96	96,000.00	Open
97	97,000.00	Open
98	98,000.00	Open
99	99,000.00	Open
100	100,000.00	Open

# Introduction

Tracking costs, managing risk, and keeping a project on budget can be one of the biggest hurdles in a construction project, and finding efficiencies in this area can make all the difference in delivering a project on time and on budget.

But with the new BIM 360 Cost Management module bringing powerful cost control, change management, and pay application

workflows to the BIM 360 platform teams can minimize risk by managing all cost related construction activities in a single software.

The following guide introduces the BIM 360 suggested cost management 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 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 September 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

- Cost & Change Management
- Payment Applications

2

## Cost Management Capabilities

- Settings & Permissions
- Budget Code Setup
- Custom Attributes
- Document Templates
- Financial Markup Formulas
- Module Overview & Fundamental Forecasting
- Change Order Management
- Expenses
- Payment Applications

3

## Additional Capabilities

- Account Admin
- Integration Partners



# Suggested Workflow



# Cost & Change Management Workflow

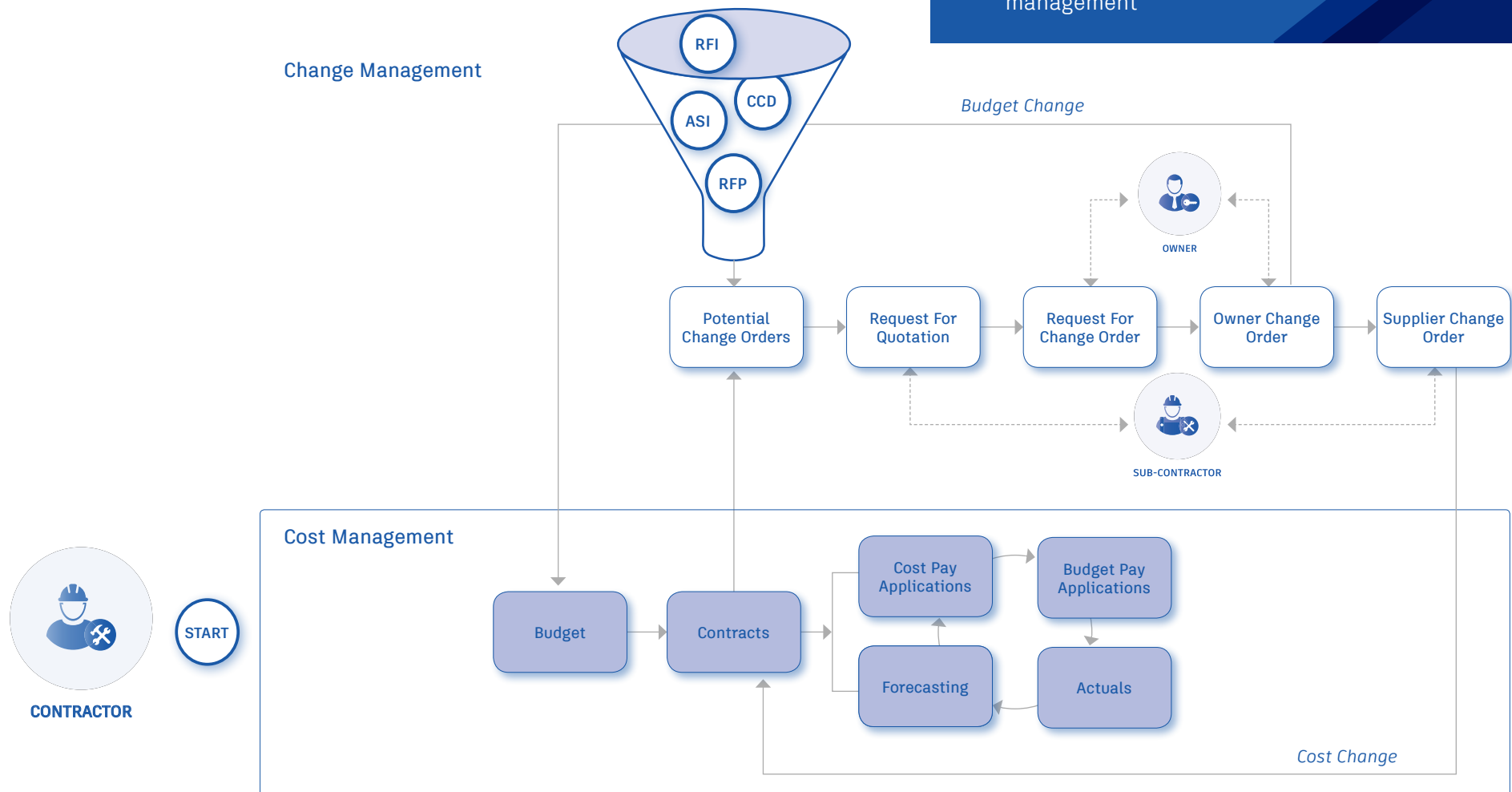
Used to help control cost and confirm all changes are accounted for and managed effectively to maintain positive cash flow, reduce risk and maximize profit. The graphic below outlines the suggested cost management workflow using BIM 360.

## Why follow this workflow?

- Customizable to suit users needs and preferences
- Provides a real-time summary view of all budget items and contracts
- Streamlines upstream and downstream change order workflows

## BIM 360 capabilities used

- Budget management
- Contract management
- Change order management
- Pay applications
- Forecasting
- Actuals



# Payment Application Workflow

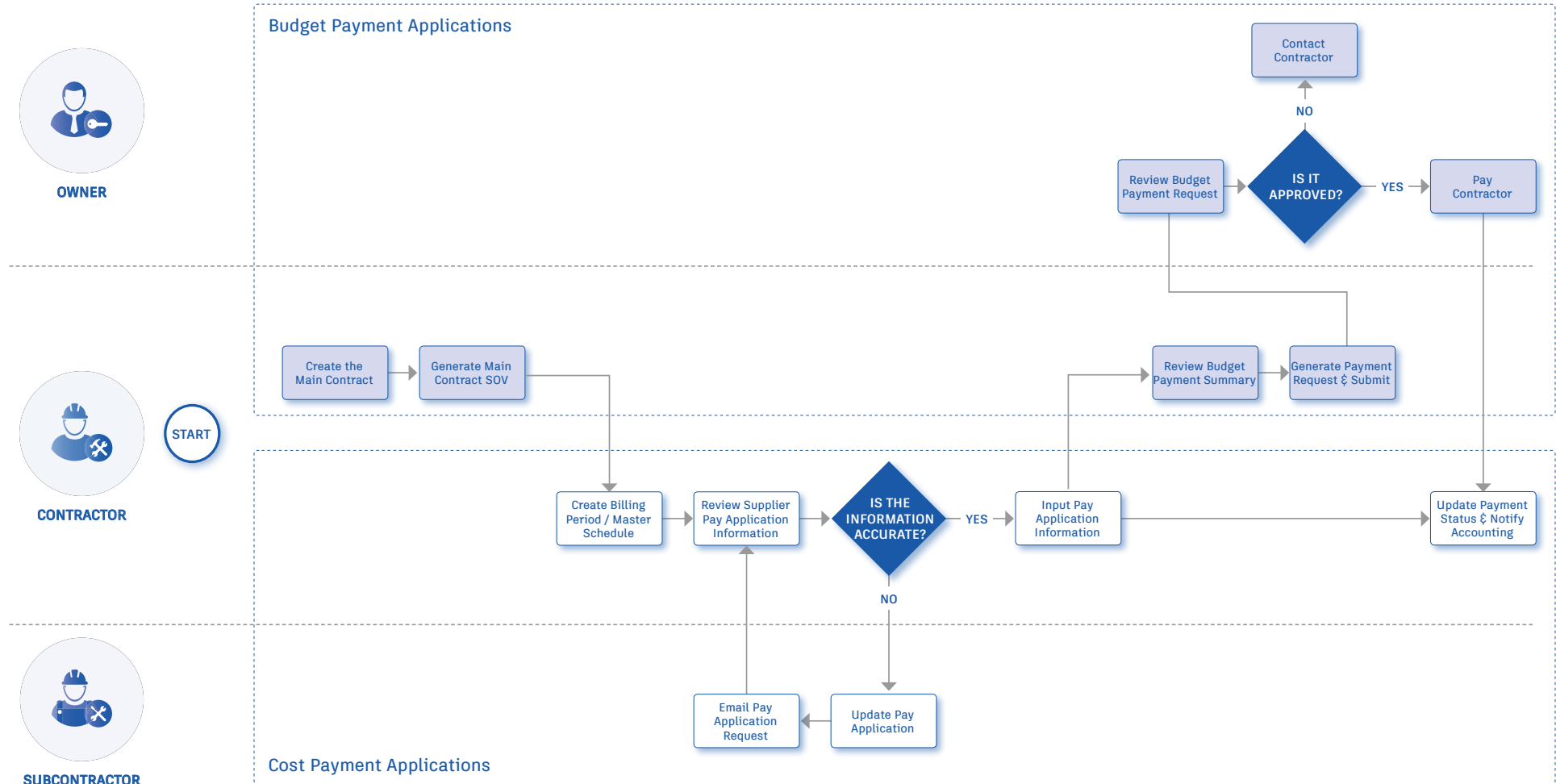
Used to help effectively manage incremental pay applications to automate tasks and gain a real-time view of the financial health of the project. The graphic below outlines the suggested pay application workflow using BIM 360.

## Why follow this workflow?

- Adds a level of automation
- Easy to manage and track
- Provides a real-time summary view of all cost and budget payments

## BIM 360 capabilities used

- Main contract & budget items
- Budget payment applications
- Cost payment applications



# Cost Management Capabilities

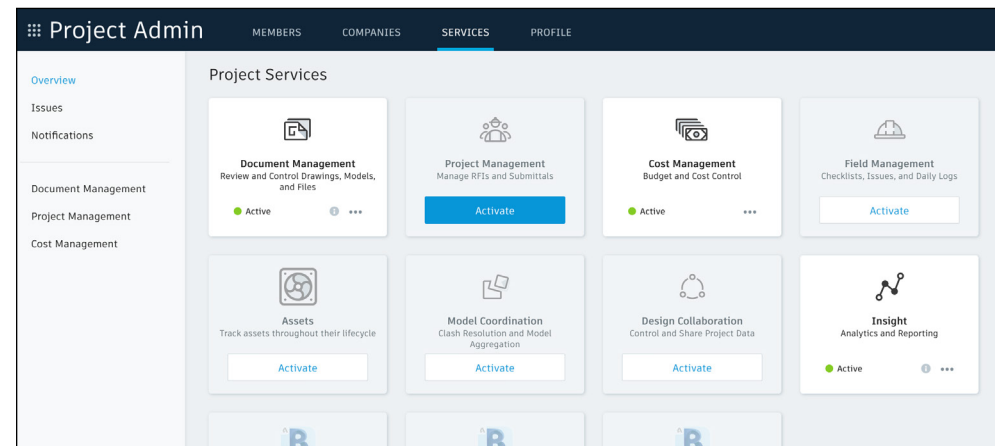


# Settings & Permissions

Cost Management is flexible and customizable. Configurable features allow teams to customize the software to suit their needs and preferences. Teams can also ensure the right information stays in the right hands by setting permission levels for each tab within Cost Management.

## 1 Activate the Cost Management Module

- A project admin needs to activate the Cost Management module.
- In the Project Admin module select the “Services” tab, then the “Activate” button for Cost Management.

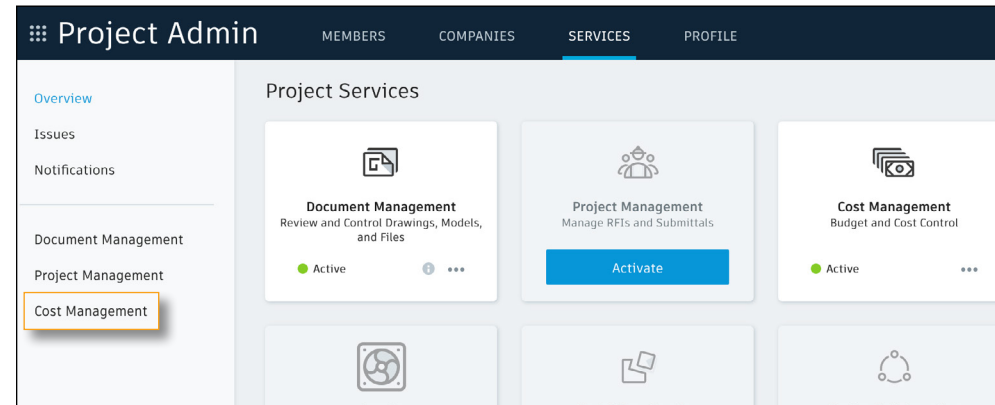


PRO TIP: The Document Management module needs to be activated first.

# Settings & Permissions

## 2 Accessing Settings

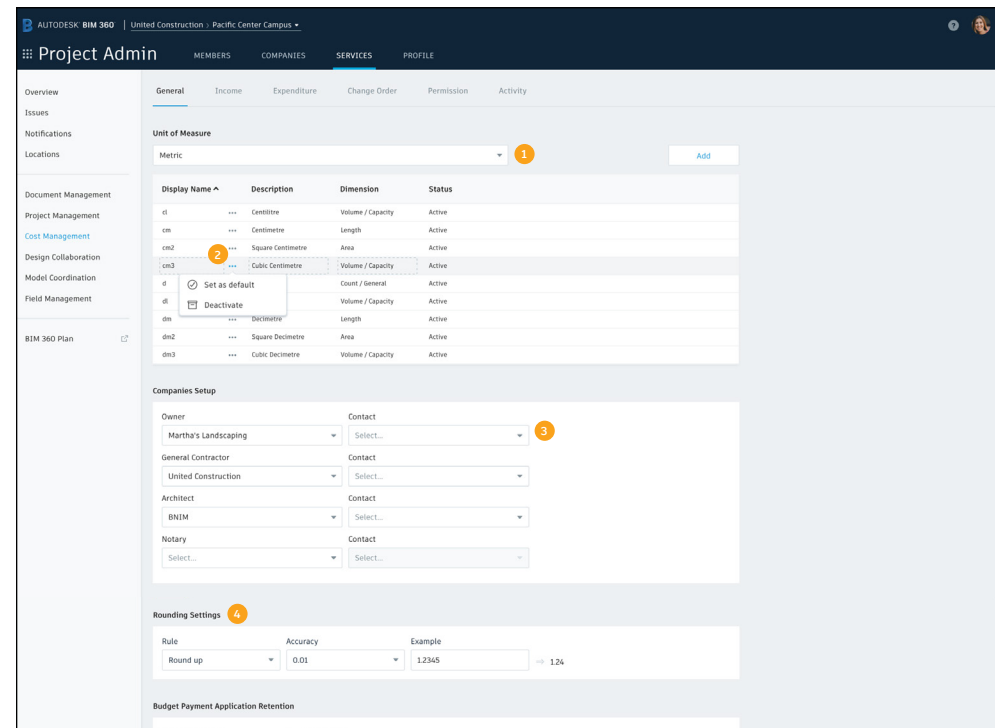
- Project Admins are the only individuals who have permission to access and edit the modules settings.
- In the “Project Admin” module, select the “Services” tab.
- On the left sidebar select “Cost Management,” you will now be able to access the modules general settings and settings for each individual tab (e.g. Change Order).



## 3 General Settings

Select the “General” tab.

1. **Unit of Measure:** select imperial or metric.
2. **Unit of Measure List:** set specific dimension as default of deactivate certain units from the list. Click “Add” to manually add additional dimensions
3. **Companies Setup:** identify the project Owner, General Contractor and Architect. Use the drop-down to select the correct contact or add a new contact.
4. **Round Settings:** select the “Rule” (Half Up, Round Up, Round Down) and “Accuracy” (1, 0.1, 0.01, 0.05). In the example field you can test the settings.



# Settings & Permissions

## General Settings (continued)

**Retention:** allows you to put in a default retention amount for completed work and materials on site. This will automatically be added to every line item, but can be edited/removed per line.

- Budget Payment Application Retention:** allows you to put in a specific retention % for completed work and materials on site.
- Cost Payment Application Retention:** allows you to put in a specific retention % for completed work and materials on site.
- Document and Attachments:** allows you to choose to store generated documents and uploaded attachments in both Cost Management and Document Management.

- If you choose to store the files in Document Management follow the steps in the bottom image.
- This creates a single repository of all generated documents specific to each company for future audit purposes, and if desired, the folder can be shared with other project members to access the information.

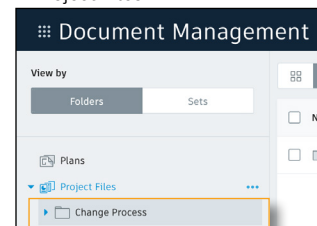
- Custom Tab Names:** allows you to customize the names of the main tabs (Income, Expenditure, Change Order) and the subtabs within each (e.g., Cost Item, PCO, RFQ, etc.) to better suit your needs. To change the display order of the subtabs in each section, select the three dots. You can also turn off unused tables from the three dot menu by selecting “Deactivate.”

The screenshot shows the 'General Settings' page with four main sections:

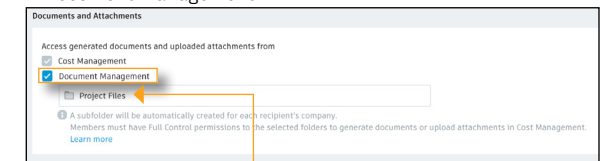
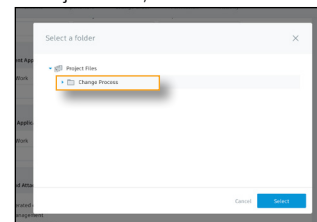
- Budget Payment Application Retention (5):** Two input fields for 'Completed Work' and 'Materials on Site' with percentage signs.
- Cost Payment Application Retention (6):** Similar two input fields for 'Completed Work' and 'Materials on Site'.
- Documents and Attachments (7):** Two checkboxes, 'Cost Management' and 'Document Management'. Below them, a note states: 'A subfolder will be automatically created for each recipient's company. Members must have Full Control permissions to the selected folders to generate documents or upload attachments to Cost Management.' A 'Learn more' link is present.
- Tab Names and Order (8):** A table with two columns: 'Original' and 'Customized'. The 'Original' column lists tabs like Income, Budget, Main Contract, Budget Payment Application, Expenditure, Contract, Cost Payment Application, Expense, Change Order, Cost Item, PCO, RFQ, etc. The 'Customized' column shows a list of these tabs with a three-dot menu next to each. A 'Deactivate' button is visible next to the 'Expenditure' tab.

### Setup Steps for Storing Documents & Attachments in Document Management:

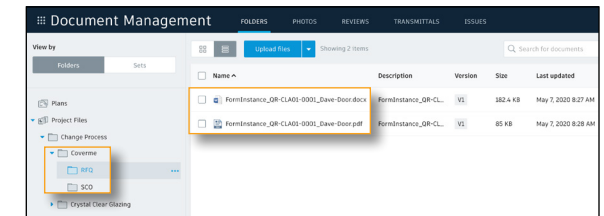
1. In Docs create a subfolder in Project Files
2. Within the General settings choose the option to save to Document Management



4. Choose the folder you create in Project Files, click “select”



3. Click “Project Files”
5. A subfolder auto create per supplier. As docs are generated a new folder for each document type auto creates, both Word & PDF docs save.





# Settings & Permissions

## 4 Income Settings

Select the “Income” tab.

1. **Budget Code Segments:** used to set up your budget code template, refer to the budget code setup section for more details on setting up your budget.
2. **Budget overview columns:** used to create custom calculated budget columns.
3. **Lock Budget:** once the original budget setup is finalized, you may lock it to avoid accidental change.
4. **Allow Internal Budget Transfer:** Turn off if you want to allow users to be able to make an internal budget transfer from the budget summary view.
5. **Main Contract Schedule of Values:** Choose if you want change orders to appear as a line item or as a column.
6. **Main Contract Types:** use the “Add” button to create a list of main contract types. This is the primary contractual agreement entered into directly, for example, between an owner and a general contractor. In edit mode in the Main Contract tab, you can assign a contract type to a line item via a drop-down.

**PRO TIP:** As with all our custom lists system defaults cannot be deleted but they can be deactivated so they will not show up in the user interface.

7. **Document Templates:** used to create standard budget payment application and main contract template formats, the templates are created using fields that automatically populate with data from the system. Refer to the document Templates section to learn how to create document templates.
8. **Custom Attributes:** used to customize portions of the details flyout panel for items in each subtab within the Income tab. Refer to the Custom Attribute section to learn how to create custom attributes.
9. **Default Email Message:** use to create custom default email messages for when a Budget Payment Application is sent.

The screenshot displays the 'Project Admin' interface, specifically the 'Income' settings tab. The page is divided into several sections, each with a numbered callout (1-9) indicating key features:

- 1. Budget Code Segments:** This section allows for defining budget code templates. It includes fields for 'Project #', 'Sub Job', 'CSI', 'Sequence', and 'Cost Type'. Below these are dropdowns for 'Where' (set to 'Info Only'), '# of Digits' (set to '04'), and 'Delimiter' (set to 'None'). A 'Segment code preview' shows '####'. There is an 'Add' button and a 'Segment Code Master List' table with columns for 'Original Code', 'System Code', and 'Description'. The table currently shows one entry: '0987' for '0987'.
- 2. Budget overview columns:** This section shows a table of budget columns. The 'Income' tab is selected. The table has columns: 'Original Budget', 'Internal Budget Transfer', 'Approved Owner Changes', 'Revised Budget', 'Pending Owner Changes', 'Projected Budget', 'Orig. Commitment', 'Approved Change Orders', and 'R Cha'. A 'Manage' button is in the top right.
- 3. Lock Budget:** A toggle switch is currently turned 'On'. Below it, text states: 'Lock your original budget to avoid accidental change. Only project administrators can edit original budgets after it is locked.' There is a 'Lock Budget' button.
- 4. Allow Internal Budget Transfer:** A toggle switch is currently turned 'On'.
- 5. Main Contract Schedule of Values:** A dropdown menu is set to 'As a column'. Below it, text says 'Show change orders'.
- 6. Main Contract Types:** This section has an 'Add' button in the top right. It contains a table with columns 'Type', 'Description', and 'Status'. The table lists three types: 'Cost Plus' (description: 'Work carried out based on actual cost.', status: 'Active'), 'Fixed Price' (description: 'Set out for a fixed sum when...', status: 'Active'), and 'Unit Price' (description: 'Work carried out which will be calcula...', status: 'Active').
- 7. Document Templates:** This section shows two templates: 'Main Contract' (0 documents) and 'Budget Payment Application' (0 documents). Each has an 'Add' button.
- 8. Custom Attributes:** This section shows two attribute sets: 'Budget' (0 attributes) and 'Budget Payment Application' (0 attributes). Each has an 'Add new attribute' button.
- 9. Default Email Message:** This section shows a text area for the default email message. The text reads: 'The messages will be used when you send out the following items. Budget Payment Application - Submit for review. Please review and respond to the payment application.'

# Settings & Permissions

## Income Settings (Budget Overview Columns Functionality)

- From the Income settings tab, Admins can preview the columns visible by default and preview value.
- To create custom calculated budget columns and manage settings, select the “Manage” button.

### Managing Existing Columns

- To change where existing columns appear (group and position), rename them and control which appear by default, select the column name and choose the desired option beneath the list view.

### Creating Custom Calculated Columns

- You can duplicate an existing column and edit the formula by selecting the column name then the “Duplicate” button. To create a new column from scratch, select the “Add new” button.

**Example:** Creating a column next to Approved Change Orders in the Expenditure group titled Recoverable Change Orders that shows what will be paid for by the Owner.

#### How It's Done:

- Select “Add New.”
- Update the column name.
- Choose the column group
- From the left side panel, drag and drop to add the formula item.
- On the right side panel,
- select the value type and enter a value to preview.
- Drag additional formula items as needed and update values.
- Update the column position and visibility option.
- Select “Save.”

### Managing Existing Columns

Manage columns - Budget overview

Income					Expenditure						
Original Budget	Internal Budget Transfer	Approved Owner Changes	Revised Budget	Pending Owner Changes	Projected Budget	Orig. Commitment	Approved Change Orders	Uncommitted Change Orders	Pending Change Orders	Reserves	Projected Cost
10,000.00	1,000.00	200.00	11,200.00	400.00	11,600.00	1,000.00	300.00	0.00	300.00	300.00	1,900.00

Column name: Revised Budget, Column group: Income, Position: 4, Visibility: Visible by default

Drag and drop to add formula item: Base Value, Forecast, Variance, Column Value, Ungrouped

### Creating a Custom Calculated Column Example:

Manage columns - Budget overview

1. Add new

2. Column name: Recoverable Change Orders, Column group: Expenditure

3. Position: 5, Visibility: Visible by default

4. Drag and drop to add formula item: Base Value, Column Value, Number, Parentheses

5. Base Value: Recoverable Change Orders

6. Base Value: Approved Owner Changes: Out of Scope

7. Base Value: Approved Owner Changes: Out of Scope

8. Base Value: Approved Owner Changes: Out of Scope

# Settings & Permissions

## 5 Expenditure Settings

Select the “Expenditure” tab.

1. **Code Format:** you have the option to configure the expense code format by customizing the prefix, suffix, number of digits, and start number. You can choose to also include the type in the prefix.
2. **Contract Types:** use the “Add” button to create a list of contract types. In edit mode in the Contracts tab, you can assign a contract type to a line item via a drop-down.
3. **Expense Types:** use the “Add” button to create a list of expense types. In the Expense tab, you can assign a expense type to a line item via a drop-down.
4. **Actual Cost:** how the actual cost column in the Budget and Contract tabs will populate.
  - **Direct Input:** actual cost value will be entered directly into the Budget via the edit mode view or API.
  - **Expense and Cost Payment Application:** actual cost value will be the sum of Expense and Cost Payment Application value.
5. **Document Templates:** used to create standard cost payment application and contract template formats, the templates are created using fields that automatically populate with data from the system. Refer to the document Templates section to learn how to create document templates.
6. **Custom Attributes:** used to customize portions of the details flyout panel for items in each subtab within the Expenditure tab. Refer to the Custom Attribute section to learn how to create custom attributes.
7. **Default Email Message:** use to create custom default email messages for when Contracts and Cost Payment Application are sent from the system.

The screenshot displays the 'Project Admin' interface with the 'Expenditure' tab selected. The left sidebar contains navigation links: Overview, Issues, Notifications, Locations, Document Management, Project Management, Cost Management, Design Collaboration, Model Coordination, and Field Management. The main content area is divided into several sections, each with a numbered callout:

- 1. Code Format:** A form for configuring the expense code format, including fields for Prefix, Suffix, Number of Digits (set to 4), and Start Number (set to 1). There is a checkbox for 'Include type in prefix'.
- 2. Contract Types:** A table with columns Type, Description, and Status. Existing entries include Consultant, Internal, Purchase Order, and Subcontract, all with an 'Active' status. An 'Add' button is present.
- 3. Expense Types:** A table with columns Type, Description, Prefix Code, and Status. Existing entries include Internal (INT) and Invoice (INV), both with an 'Active' status. An 'Add' button is present.
- 4. Actual Cost:** Radio buttons for 'Direct Input' and 'Expense and Cost Payment Application' (which is selected). A note states: 'Actual cost value will be the sum of Expense and Cost Payment Application value.'
- 5. Document Templates:** Two sections for 'Contract' and 'Cost Payment Application', each showing '0 documents' and an 'Add' button.
- 6. Custom Attributes:** Two sections for 'Contract' and 'Expense', each showing '0 attributes' and an 'Add new attribute' button.
- 7. Default Email Message:** Two text areas for 'Contract - Request Input' and 'Contract - Send'. The 'Send' message includes a placeholder for a signature and date.



# Settings & Permissions

## 6 Change Order Settings

Select the “Change Order” tab.

- Code Format:** you have the option to configure the code format by customizing the prefix, suffix, number of digits, and start number for each component.
  - As a reminder, the component names (Cost Item, PCO, RFQ, RCO, OCO, SCO) can be customized within General settings.
  - This will dictate how the information is displayed in the number column of each tab within the Cost Management module.
  - You can also choose to use Change Order type and Contract code in the coding structure to provide easy grouping and filtering.
- Financial Markup Formulas:** where you can create multiple project level markup configurations to apply to Potential Change Orders (PCOs), Requests for Change Orders (RCOs) or Owner Change Orders (OCOs). Refer to the Financial Markup Formulas chapter to learn how to create custom markups.
- Change Order Types:** use the “Add” button to create a list of change order types. In the Change Orders subtabs, you can assign a type to a line item via a drop-down list. This allows them to be grouped by type and if preferred have different numbering schemes per type.
- Cost Item Types:** use the “Add” button to create a list of cost item types. In the Cost Item tab within Change Orders, you can assign a cost item type to a line item via a drop-down list.

**Code Format**

Component	Prefix	Suffix	Number of Digits	Start Number
Cost Item	CI-		4	1
PCO	P-		4	1
RFQ	QR-		4	1
RCO	R-		4	1
OCO	O-		4	1
SCO	S-		4	1

☒ Include contract code in prefix ☐ Include type in prefix

QR-(Contract Code)-

**Financial Markup Formulas**

Name	Description	Created By	Created At
Standard Markup	Standard Markup	Ian Turner	Oct 1, 2018
New Formula	Insurance Cost	Arun Duraiswamy	Oct 18, 2019
Alternative Markup 1	New Financial Markup Formula	John Sanner	Nov 6, 2018

**Change Order Types**

Type	Description	Prefix Code	Status
Internal Change		INT	Active
Owner Change		OCO	Active
Owner Direct Purchase		ODP	Active
Owner Directive		ODR	Active
Purchase Order Change		POCO	Active
Purchase Order Quotation		PQ	Active
Subcontract Change Order		SCO	Active
Subcontract Quotation		SQ	Active

**Cost Item Types**

Type	Description	Status
Back Charge		Active
Budget Transfer		Active
Contingency		Active
Internal Change		Active
Owner Change Order		Active
Owner Directive		Active

**Change Order List**

Change Order	Description	Status
QR-0028	Metal Panel Addition	Active
QR-0030	Cladding Change	Active

# Settings & Permissions

## Change Order Settings (continued)

5. **PCO Source Types:** use the “Add” button to create a list of PCO source types. In the PCO tab within Change Orders, you can assign a PCO source type to a line item via a drop-down list.
6. **RFQ Response Due:** the default number of days given to respond to an RFQ. Can be edited per RFQ.
7. **Document Templates:** used to create standard Potential Change Order (PCO), Request for Quotation (RFQ), Request for Change Order (RCO), Owner Change Order (OCO), and Supplier Change Order (SCO) template formats. The templates are created using fields that automatically populate with data from the system. Refer to the document Templates section to learn how to create document templates.
  - As a reminder, the names PCO, RFQ, RCO, OCO, and SCO can be customized within General settings.
8. **Custom Attributes:** used to customize portions of the details flyout panel within the Change Order tab. Refer to the Custom Attribute section to learn how to create custom attributes.
9. **Default Email Message:** use to create custom default email messages for when PCOs, RFQs, RCOs, OCOs, and SCOs are sent from the system.

**Default Email Message** 9

The messages will be used when you send out the following items.

PCO - Send via email	RFQ - Request quotation
Please review the associated scope and information and respond accordingly.	Please review the request and associated information and provide pricing by the required date.

RCO - Submit for review	OCO - Submit for review
Please review the request and associated information and respond accordingly.	Please review all associated scope and information, sign and return by the required date.

SCO - Send

Please review all associated scope and information, sign and return by the required date.

**PCO Source Types** 5

Add

Type ^	Description	Status
ASL	Architect's Supplemental Instructions	Active
CCD	Construction Change Directives	Active
INT	Internal	Active
ISSUE	Issue	Active
RFI	Request for Information	Active
RFP	Request for Proposal	Active
T&M	Time and Materials	Active

**RFQ Response Due** 6

RFQ response due in 14 days (1 - 999)

**Document Templates** 7

PCO	RFQ
1 document	1 document
PCO sample document template.docx Jan Turner	RFQ sample document template.docx Jan Turner
Oct 24, 2018	Oct 24, 2018

RCO	OCO
1 document	1 document
RCO sample document template with options.docx Jan Turner	OCO sample document template with options.docx Jan Turner
Oct 24, 2018	Oct 24, 2018

SCO

1 document

SCO sample document template.docx  
Jan Turner

Oct 24, 2018

**Custom Attributes** 8

Cost Item	PCO
0 attributes	0 attributes
Add new attribute	Add

RFQ	RCO
0 attributes	0 attributes
Add new attribute	Add new attribute

OCO	SCO
0 attributes	0 attributes

# Settings & Permissions

## 7 Permissions

Select the “Permissions” tab. You can designate user-, role-, or company-based permissions for each tab within Cost Management. You can also set auto permissions for each tab using role-based settings. Permission levels are:

- **No Access:** can't access the tab
- **Collaborate:** can view & edit limited attributes of items assigned to them in the tab
- **View All:** can view all items within the tab
- **Full Control:** can view and edit all attributes on all items within the tab

1. Use the search field to find the desired user, company or role.
2. Click “Add.”
3. Hover over the permission level and click to access the menu drop-down. Set the appropriate permission level for each column.

### Owner & Supplier Access

- To help streamline workflows and enhance collaboration with Owners and Suppliers, give them Collaborate access to view and interact with certain information.
- The collaborate permission is available for specific tabs within Cost Management, and allows them to only view and edit limited attributes on items assigned to them.
- Note, Owners and Suppliers will need a BIM 360 license.

The screenshot shows the 'Project Admin' interface with the 'Permissions' tab selected. A search bar at the top allows finding users or companies. Below is a table with columns for Name, Type, Cost Payment application, Expense, Cost Item and PCO, RFQ, RCO, OCO, and SCO. A dropdown menu is open for the 'Expense' column, showing options: No Access, Collaborate, View All, and Full Control. The 'Collaborate' option is selected.

Name	Type	Cost Payment application	Expense	Cost Item and PCO	RFQ	RCO	OCO	SCO
Cassie Bustos (Admin)	User	Full Control	Full Control	Full Control	Full Control	Full Control	Full Control	Full Control
Ian Turner (Admin)	User	Full Control	Full Control	Full Control	Full Control	Full Control	Full Control	Full Control
John Samner (Admin)	User	Full Control	Full Control	Full Control	Full Control	Full Control	Full Control	Full Control
Mike Lavette (Admin)	User	Full Control	Full Control	Full Control	Full Control	Full Control	Full Control	Full Control
Todd Aiford (Admin)	User	Full Control	Full Control	Full Control	Full Control	Full Control	Full Control	Full Control
Archie Architect	User	Access	View All	View All	View All	View All	View All	View All
Office Supplies r us	Company	Access	No Access	View All	View All	View All	View All	View All

Example of what a Supplier with RFQ collaborate access sees

The screenshot shows the 'Cost Management' interface with the 'RFQ' tab selected. A table lists RFQs with columns for Number, Name, Type, Contract Name, Supplier, Proposed, Status, Response Due, and Created. A detailed view of a specific RFQ is shown on the right, including details like Number, Name, Description, Status, Type, Schedule Change, Days, Supplier Details, Recipients, Linked References, Scope of Work, and Approval.

Number	Name	Type	Contract Name	Supplier	Proposed	Status	Response Due	Created
QR-SUP02-001	Additional Floor Penetrations Needed i...	Owner Change O...	Superstructure	Frame me	10,000.00	Accepted	Jul 6, 2020	Jun 29, 2



# Settings & Permissions

## Permissions (continued)

What Owner/Supplier with Collaborate permission can do	Related tab in Cost Management
<b>Supplier Request for Quotation (RFQ)</b> <ul style="list-style-type: none"> <li>Provide work breakdown &amp; propose a price</li> <li>Upload/download attachments</li> </ul>	RFQ Tab
<b>Owner Request for Change Order (RCO)</b> <ul style="list-style-type: none"> <li>Accept or reject RCO</li> <li>Download RCO documents</li> <li>Upload/download attachments</li> </ul>	RCO Tab
<b>Owner Change Orders (OCO)</b> <ul style="list-style-type: none"> <li>Approve or reject OCO</li> <li>Download OCO documents</li> <li>Upload/download attachments</li> </ul>	OCO Tab
<b>Supplier Payment Application</b> <ul style="list-style-type: none"> <li>Fill in pay application &amp; submit to contractor</li> <li>View previous applications</li> <li>Generate payment application documents</li> <li>Upload/download attachments</li> </ul>	Cost Payment Application Tab
<b>Owner Payment Application</b> <ul style="list-style-type: none"> <li>Approve or reject pay application</li> <li>View previous applications</li> <li>Download payment application documents</li> <li>Upload/download attachments</li> </ul>	Budget Payment Application Tab
<b>Supplier Contract Exhibits/Attachments</b> <ul style="list-style-type: none"> <li>Upload/download</li> </ul>	Contract Tab
<b>Supplier Schedule of Values</b> <ul style="list-style-type: none"> <li>Provide Schedule of Values breakdown</li> </ul>	Contract Tab

**Project Admin** | MEMBERS | COMPANIES | SERVICES | PROFILE

Overview | Issues | Notifications | Locations | Document Management | Cost Management

General | Income | Expenditure | Change Order | **Permission** | Activity

Enter user, role or company [Add]

Name	Type	1st Payment application	Expense	Cost Item and PCO	RFQ	RCO	OCO	SCO
Cassie Bustos (Admin)	User	Full Control	Full Control	Full Control	Full Control	Full Control	Full Control	Full Control
Ian Turner (Admin)	User	Full Control	Full Control	Full Control	Full Control	Full Control	Full Control	Full Control
John Samner (Admin)	User	Full Control	Full Control	Full Control	Full Control	Full Control	Full Control	Full Control
Mike Lavette (Admin)	User	Full Control	Full Control	Full Control	Full Control	Full Control	Full Control	Full Control
Todd Alford (Admin)	User	Full Control	Full Control	Full Control	Full Control	Full Control	Full Control	Full Control
Archie Architect	User	Access	View All	View All	View All	View All	View All	View All
Office Supplies Inc	Company	Access	No Access	View All	View All	View All	View All	View All

**Collaborate**  
View and edit limited attributes on items assigned to them

**View All**  
View all items

**Full Control**  
View and edit all attributes on all items

PRO TIP: Project Admins set permissions within the project admin module.

The Supplier with RFQ collaborate access can only see their assigned item

**Cost Management** | CHANGE ORDER

RFQ

Number	Name	Type	Contract Name	Supplier	Proposed	Status	Response Due	Created
QR-SUP02-0001	Additional Floor Penetrations Needed in Slab of 2nd Floor	Owner Change Order	Superstructure	Frame me	10,000.00	Accepted	Jul 6, 2020	Jun 28, 2020

**Additional Floor Penetrations Needed i...**  
QR-SUP02-0001 | Accepted

Multiple [v]

**DETAILS**

Number: QR-SUP02-0001

Name: Additional Floor Penetrations Needed in Slab of 2nd Floor

Description: [v]

Status: Accepted | Type: Owner Change

Schedule Change: 0 Days

**SUPPLIER DETAILS**

Contract: SUP02 - Superstructure

Supplier: Frame me

Contact: Freddy Frame

**RECIPIENTS**

QR-SUP02-0001 - Additional Floor Penetrations Needed in Slab of 2nd Floor

Freddy Frame, Frame me (m3303@freemove.com)

Open | Download

**LINKED REFERENCES**

There are no linked references available.

**SCOPE OF WORK**

Please review revised information and advise of any price changes

**APPROVAL**

# Budget Code Setup

Cost Management is customizable to suit your needs and preferences including detailed hierarchical build ups, custom segment options, and master lists.



## 1 Accessing the Budget Code Settings

Project Admins are the only individuals who have permission to access and edit the budget code.

1. In the “Project Admin” module, select the “Services” tab.
2. On the left sidebar select “Cost Management.”
3. You will now be able to access the settings for the different tabs within the module. The Income tab is where the budget code is set up.

A screenshot of the Autodesk BIM 360 Project Admin web application. The top navigation bar shows 'UNITED CONSTRUCTION > Pacific Center Campus'. The main header has tabs for 'MEMBERS', 'COMPANIES', 'SERVICES' (highlighted with an orange box and a '3' icon), and 'PROFILE'. Below the header, there are sub-tabs: 'General' (highlighted with an orange box and a '3' icon), 'Income', 'Expenditure', 'Change Order', 'Permission', and 'Activity'. On the left sidebar, under 'Project Management', the 'Cost Management' option is highlighted with an orange box and a '2' icon. The main content area shows the 'General' tab settings, including a 'Unit of Measure' dropdown set to 'Metric' and a table of units.

Display Name ^	Description	Dimension	Status
cl	*** Centilitre	Volume / Capacity	Active
cm	*** Centimetre	Length	Active
cm2	*** Square Centimetre	Area	Active

# Budget Code Setup

## 2 Budget Code Templates

- Within the Income tab, you can build the budget code format from scratch or by importing an excel list from an accounting system or similar.
- This informs BIM 360 how the budget codes should appear in the Cost Management module.

The screenshot shows the 'Project Admin' interface with the 'Income' tab selected. The 'Budget Code Segments' section is visible, featuring a 'Budget code preview' field and an 'Add New' button. Below this, there are dropdown menus for 'Where' (Set to 'Select...'), '# of Digits' (Set to 'Select...'), and 'Delimiter' (Set to 'Select...'). A 'Segment code preview' field is also present with the placeholder 'Enter example code'. At the bottom, there is a 'Segment Code Master List' table with an 'Add' button and 'Download Template' and 'Import' links.

## 3 Creating Budget Segments

- In the Segment section select “Add New” and double-click to rename the segment.
- At a minimum there must be least one segment, but you can create as many segments as required.
- Click and drag the segment tabs to rearrange.

This screenshot shows the 'Project Admin' interface with the 'Income' tab. The 'Budget Code Segments' section has a 'Segment 0' tab highlighted. An 'Add New' button is visible next to the segment tabs. The 'Where' dropdown is set to 'Code', '# of Digits' is set to '01', and 'Delimiter' is set to 'None'. The 'Segment code preview' field shows '#'. Below the segment tabs, there is an 'Add' button and 'Download Template' and 'Import' links.

## 4 Adding Budget Segment Details

- “Where” informs BIM 360 on how to show the segment:
  - **Code** - as part of the whole budget code.
  - **Column** - in a separate column from the budget code.
  - **Info only** - purely for information and not shown in the budget columns.
- “# of Digits” informs BIM 360 how many digits are expected for that segment.
- “Delimiter” informs BIM 360 how to separate the segments if at all.

This screenshot shows the 'Project Admin' interface with the 'Income' tab. The 'Budget Code Segments' section has a 'Segment 0' tab. The 'Where' dropdown is set to 'Code', '# of Digits' is set to '01', and 'Delimiter' is set to 'None'. The 'Segment code preview' field shows '#####'. Below the segment tabs, there is an 'Add' button and 'Download Template' and 'Import' links. The 'Where' dropdown is open, showing options: 'Code' (checked), 'Column', and 'Info Only'. The '# of Digits' dropdown is open, showing options: '01' (checked), '02', '03', '04', '05', '06', '07', '08', and '09'. The 'Delimiter' dropdown is open, showing options: 'None' (checked), 'Space', 'Point', 'Hyphen', and 'Underscore'.

PRO TIP: You can't edit segments when there are budget items in the project.

# Budget Code Setup

## 5 Adding Segment Values

- Segment values can be added individually by selecting “Add” or by importing a master list.
- When importing a master list you can either drag and drop or browse for an Excel sheet.
- When importing a list first down a template by clicking “Download Template.”
- Hierarchy levels are unlimited. Child levels don’t require a column header; just insert a column for each level of hierarchy.
- Note, every line item can only have one code. When importing make sure you have the correct # of digits set or you will get an error.
- Adding a master list of values for each segment is not a system requirement. It is optional data to add but facilitates creating dynamic grouping in the budget overview and Main Contract set up. Example: if your budget code contains standard data such as work item classifications, cost types, or other default lists of values always used in your projects, this provides the ability for us to look up the code and find the description that matches it and use it in the group naming.

Excel template:

Code	Description
000000	Procurement and Contracting Requirements
001000	Solicitation
001100	Advertisements and Invitations
002000	Instructions for Procurement
002100	Instructions
002200	Supplementary instructions

[Download Setup Templates](#) 

Results in the budget code setup tab:

<input type="checkbox"/>	Code ^	Description
<input type="checkbox"/>	▼ 000000	Procurement and Contracting Requirements
<input type="checkbox"/>	001000	Solicitation
<input type="checkbox"/>	001100	Advertisements and Invitations
<input type="checkbox"/>	002000	Instructions for Procurement
<input type="checkbox"/>	002100	Instructions
<input type="checkbox"/>	002200	Supplementary Instructions

Example budget flyout view where you can see the benefits/ results of the master lists import:

Envelope package		
84720010722000SUB		
BUDGET CODE DETAILS		
Segment Name	Code	Description
Project Code	8472	8472
Sub Job	001	001
CSI	072200	Roof and Deck Insulation
Sequence	0	0
Cost Type	SUB	Subcontractor

# Budget Code Setup

## 6 Deleting Segment Values

- To delete a segment value select the check box next to the line item. Under “Segment Code Master List” the “Add” button will turn into “Delete.” Select “Delete”
- To delete all items select the check box in the header row.

The screenshot shows the 'Project Admin' interface with the 'Income' tab selected. Under 'Budget Code Segments', the 'Segment Code Master List' table is visible. The 'Delete' button is highlighted in the header row of the table.

Original Code	System Code	Description
<input checked="" type="checkbox"/>	FEE	Fees
<input type="checkbox"/>	GEN	General Conditions
<input type="checkbox"/>	INT	Internal
<input type="checkbox"/>	LAB	Labor
<input type="checkbox"/>	MAT	Material
<input type="checkbox"/>	SUB	Subcontractor

## 7 Code Preview

- The “Segment Code Preview” field allows you to input example data to confirm the segment code details are accurate.
- The “Budget Code Preview” displays a preview of the entire budget code as it will be shown in the Cost Management module.
- If you hover over the “Budget Code Preview” a “Full Code Preview” pops up to display the code as it might look when imported into Cost Management from your accounting system.

The screenshot shows the 'Project Admin' interface with the 'Income' tab selected. Under 'Budget Code Segments', the 'Budget code preview' field is highlighted. A 'Full code preview' pop-up is shown, displaying the code as it might look when imported into Cost Management from your accounting system.

Original Code	System Code	Description
<input type="checkbox"/>	1212	1212



# Custom Attributes

The details flyout panel allows users to quickly view detailed information behind any item in multiple tabs within Cost Management. With the Custom Attribute feature teams can customize a portion of the details flyout panel to suit their needs and preferences.



## 1 Accessing Custom Attributes

Project Admins are the only individuals who have permission to create and edit custom attributes.

1. In the “Project Admin” module, select the “Services” tab.
  2. On the left sidebar select “Cost Management.”
  3. You will now be able to access the settings for the different tabs within the module. Custom attributes can be created in the following tabs for each component:
    - **Income:** Budget, Main Contract, & Budget Payment Application
    - **Expenditure:** Contract & Cost Payment Application
    - **Change Order:** Cost Item, PCO, RFQ, RCO, OCO, & SCO
- Note, the main tab and component names can be customized within General Settings.

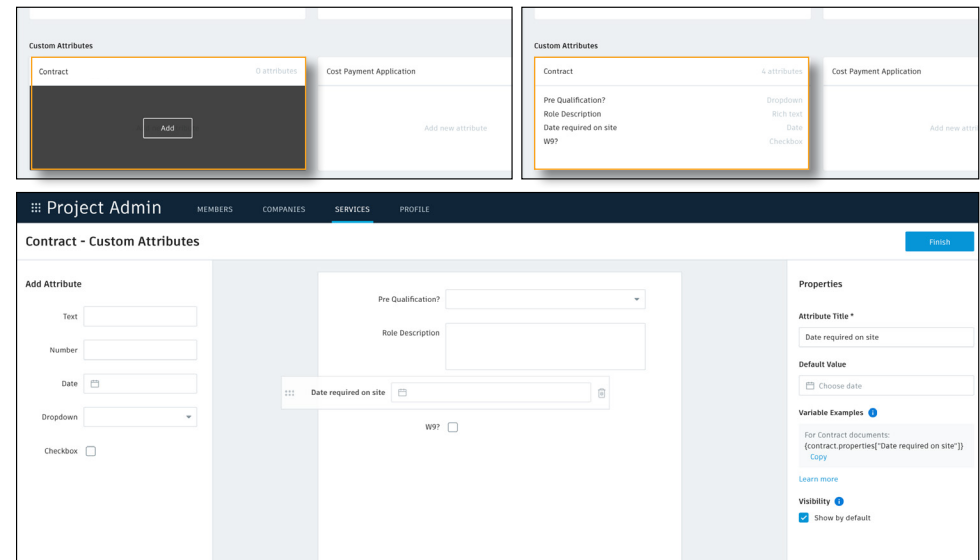
A screenshot of the Autodesk BIM 360 Project Admin interface. The top navigation bar shows the 'SERVICES' tab selected. The left sidebar has 'Cost Management' highlighted. The main content area shows the 'General' tab for the 'Unit of Measure' component, with a table listing units like 'cl', 'cm', and 'cm2'.

Terminology Reference

# Custom Attributes

## 2 Creating a Custom Attribute

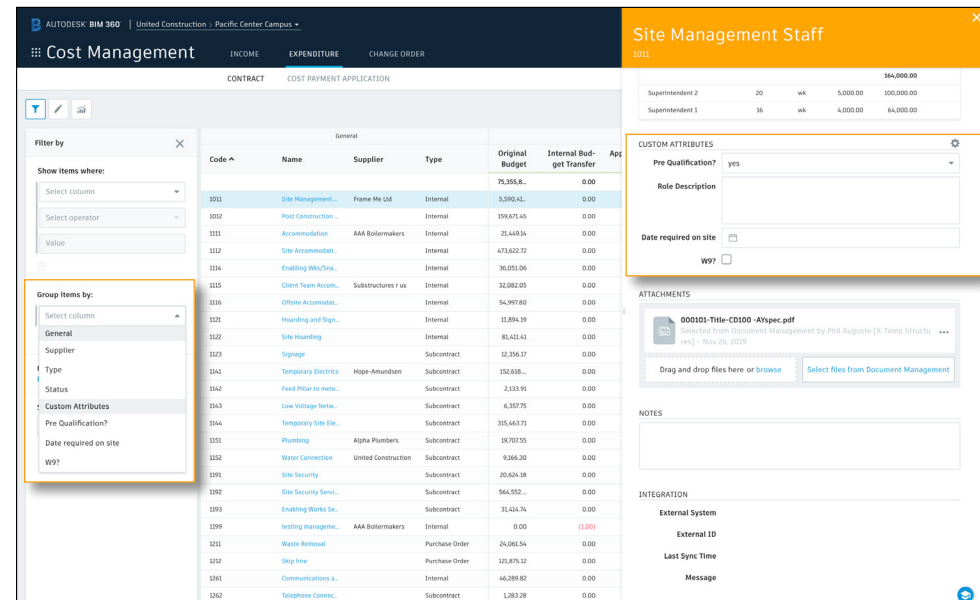
- To create a custom attribute, hover over the component and select “Add.”
- Either click to add or drag and drop the attribute from the left sidebar into the center preview panel.
- Select the attribute to define it in the properties panel on the right.
- Rearrange the attributes by clicking then dragging and dropping the field. Select “Finish” when done.
- The attributes will appear in the component. Like adding, click to edit.



## 3 View Custom Attribute in the Items Details Flyout

- Select a item within any of the Income, Expenditure or Change Order tabs. The details flyout will appear.
- In the details flyout select “Custom Attributes” from the top left drop-down list.
- This will display the custom attributes created in the Project Admin module.

**PRO TIP:** Add your custom attributes to the table view via the control icon. In the table view, you can assign them. You can also use custom attributes for grouping and filtering. To do this, select the filter icon and then choose the attribute from the Group Items By drop-down.



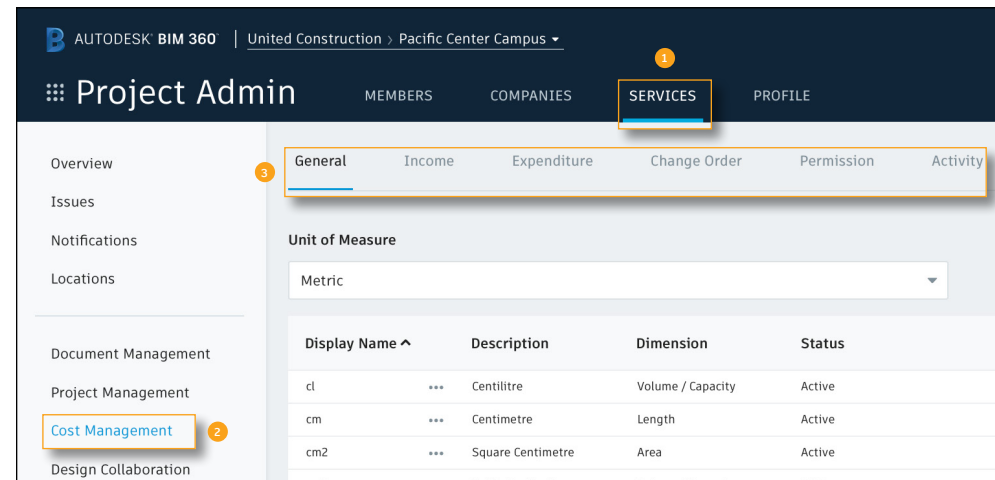
# Document Templates

Easily create standard documentation formats for distribution with Cost Management's Document Templates capabilities. Templates are created using fields that are automatically populated with data from the system when generated.

## 1 Accessing Document Templates

Project Admins are the only individuals who have permission to create and edit document templates.

1. In the "Project Admin" module, select the "Services" tab.
  2. On the left sidebar select "Cost Management."
  3. You will now be able to access the settings for the different tabs within the module. Document templates can be created in the following tabs for each component:
    - **Income:** Main Contract, & Budget Payment Application
    - **Expenditure:** Contract & Cost Payment Application
    - **Change Order:** PCO, RFQ, RCO, OCO, & SCO
- There is no limit to the number of document templates that can be associated with each component.
  - Note, the main tab and component names can be customized within General Settings.

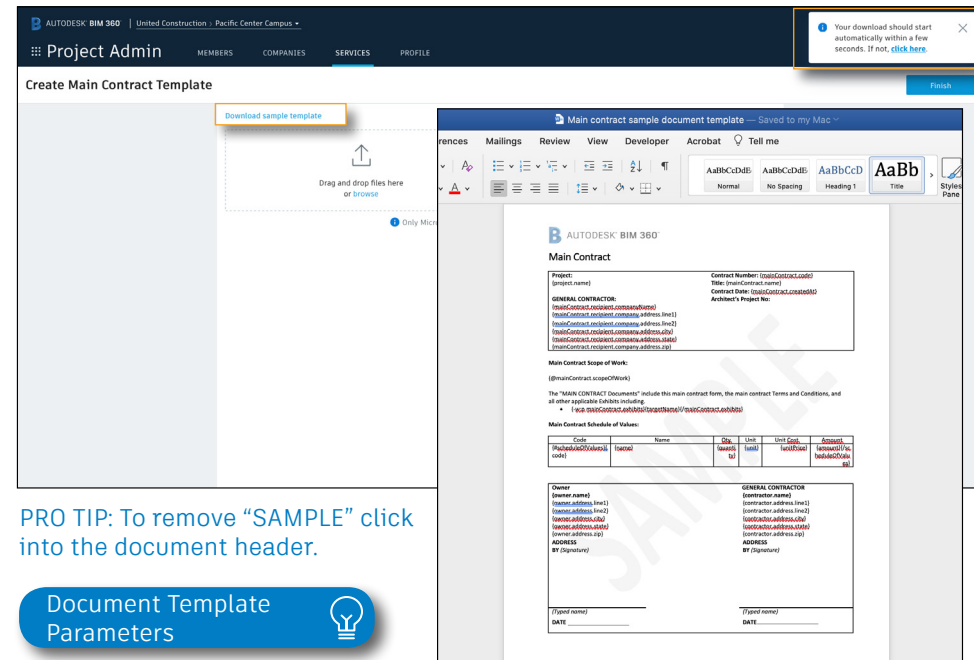


**PRO TIP:** Only Microsoft Word Documents are supported.

# Document Templates

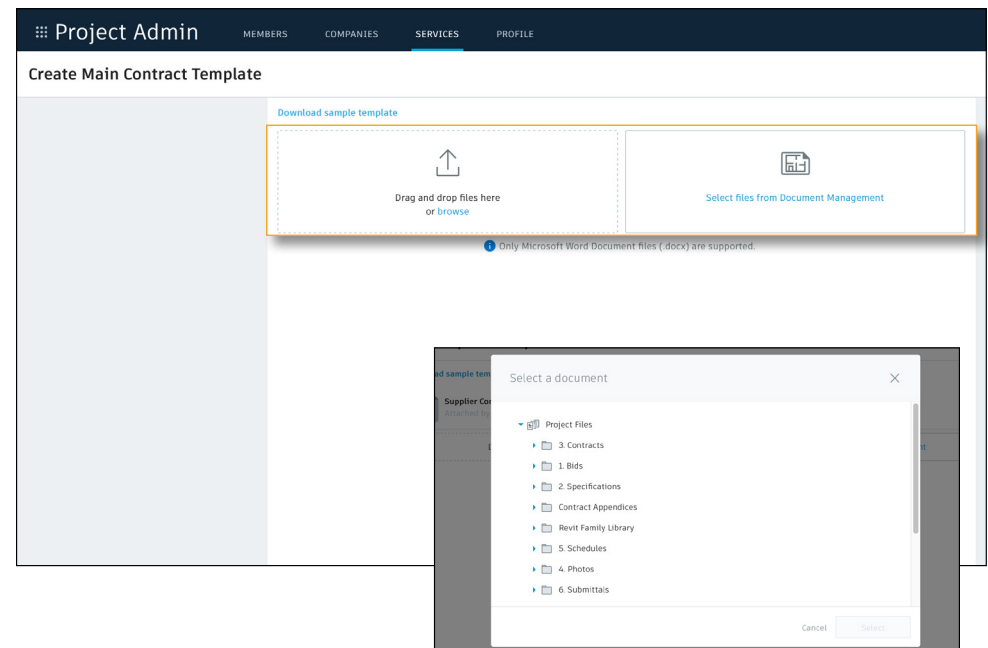
## 2 Downloading a Sample Template

- Within the Document Templates section, select the component you want to add a template to.
- Select “Download sample template,” a Word template will automatically download.
- The downloaded template can be customized to suit your needs. Note, the content within the brackets must stay the same for the module to recognize and to auto-populate it when generating the document.
- Once finalized, update the template name and save.



## 3 Uploading a Document Template

- There are two ways you can upload a document template:
  - **Option 1:** Drag and drop the file or click “browse” to locate the file on your computer for upload.
  - **Option 2:** Select a document from the BIM 360 Document Management module by clicking “Select files from Document Management” and navigating to the correct folder.
- Select “Finish” to save and exit.



# Financial Markup Formulas

Easily create multiple project level markup configurations to apply to Potential Change Orders (PCOs), Requests for Change Orders (RCOs) or Owner Change Orders (OCOs).

## 1 Accessing Financial Markups

Project Admins are the only individuals who have permission to create and edit financial markups.

1. In the “Project Admin” module, select the “Services” tab.
  2. On the left sidebar select “Cost Management.”
  3. You will now be able to access the settings for the different tabs within the module. Financial markups are created in the Change Order tab.
- Multiple markup formulas can be created and any existing formulas will be available in the list.
  - The markups created here can then be applied to either PCOs, RCOs, or OCOs.

The screenshot displays the Autodesk BIM 360 Project Admin interface. The top navigation bar includes the Autodesk BIM 360 logo, the project name 'United Construction > Pacific Center Campus', and tabs for MEMBERS, COMPANIES, SERVICES (highlighted with a red box and a red circle 1), and PROFILE. The left sidebar contains a list of modules: Overview, Issues, Notifications, Locations, Document Management, Project Management, Cost Management (highlighted with a red box and a red circle 2), and Design Collaboration. The main content area shows the 'Change Order' tab (highlighted with a red box and a red circle 3) under the 'General' section. The 'Code Format' section is visible, showing a table for 'Cost Item' with columns for Prefix, Suffix, Number of Digits, and Start Number. The table contains one row with the values 'CI-', an empty field, '4', and '1'. Below this, the 'PCO' and 'RFQ' tabs are visible.

Prefix	Suffix	Number of Digits	Start Number
CI-		4	1

Code Format	Code Format
PCO	RFQ

# Financial Markup Formulas

## 2 Creating a Markup Formula

- Scroll to the Financial Markup Formulas section, select “Add.”
- Select the top “New Formula” field to title the formula.
- To add a description select the pencil icon next to “New Financial Markup Formula.”
- To enter a sample cost basis, which will allow you to check the calculation as you start building the formula, select the pencil icon next to “Sample cost basis.”

### Creating the Formula:

1. Click “Markup” to add a new markup row to the formula or select “Markup” and drag it into the center preview panel.
2. In the Markup edit panel name the markup (e.g. Fee).
3. Select the markup type & amount:
  - “Percentage” for a standard percentage based markup.
  - “Flat” for a flat fee, per PCO.
4. Select the “Cost Basis” from the drop-down.
5. (Optional) add a description of the markup.
6. Search or scroll to select a target budget item for the markup.
7. By default, markups are calculated on all budget items. Using the “Calculate on” fields you can enter rules to only calculate on particular budget codes, cost types etc.

Autodesk BIM 360 | United Construction - Pacific Center Campus

Project Admin MEMBERS COMPANIES SERVICES PROFILE

New Formula

New Financial Markup Formula Sample cost basis 1,000.00

Drag and drop to add formula item

Name	Amount	Cost Basis	Result
Markup	0.00		
Subtotal	0.00		
Grand total			1,000.00

Please note

Autodesk BIM 360 | United Construction - Pacific Center Campus

Project Admin MEMBERS COMPANIES SERVICES PROFILE

Alternative Markup 1

New Financial Markup Formula Sample cost basis 10,000.00

Drag and drop to add formula item

Name	Amount	Cost Basis	Result
Insurance	2.00%	10,000.00	200.00
Insurance			200.00
Contingency	3.00%	10,200.00	306.00
Fee	4.00%	10,506.00	437.75
Contingency & Fee			743.75
Markup total			943.75
Grand total			10,943.75

Please note

Markup edit

Name: Fee

Type & amount: Percentage

Cost Basis: Grand total

Description:

Map markup to budget code: 8472001012101FEE

Calculate on: Select column

Select operator: Value



# Financial Markup Formulas

8. Add a subtotal by selecting “Subtotal” or dragging it into the center preview panel.

- Name the subtotal (e.g. Contingency & Fee).
- Select the appropriate “Cost Basis Revising” option.
  - “Revise Cost Basis” (default) if revising the cost basis for all subsequent markups will be included.
  - “Info Only” to summarize any markups above for information

- Select “Save.”

The screenshot shows the 'Alternative Markup 1' configuration screen in the Autodesk BIM 360 Project Admin interface. The interface is divided into several sections:

- Drag and drop to add formula item:** A list of items to be added to the formula, including 'Markup' and 'Subtotal'.
- Table:** A table showing the calculation of the markup formula. The columns are Name, Amount, Cost Basis, and Result.
- Subtotal edit:** A panel on the right for editing the subtotal, including a 'Name' field and a 'Cost basis revising' section with two options: 'Revise cost basis' (selected) and 'Info only'.

Name	Amount	Cost Basis	Result
Insurance	2.00%	10,000.00	200.00
Contingency	3.00%	10,200.00	306.00
Fee	4.00%	10,506.00	437.75
Contingency & Fee			743.75
Markup total			943.75
Grand total			10,943.75

**Subtotal edit**

Name: Contingency & Fee

Cost basis revising

- ☒ Revise cost basis  
Creates a sub total and recalculates the sample "Cost Basis" for subsequent markups.
- ☐ Info only  
Creates a sub total for information purposes without recalculating the "Cost Basis" for subsequent markups.

PRO TIP: Drag and drop markups and subtotals to rearrange if required.

# Module Overview

Cost Management provides a real-time summary view of all budget items and contracts, giving a clear picture of revenue, costs, forecast and variance related to each item. This enables teams to minimize risk by managing all cost-related construction activities in a single software.

## 1 Budget Tab Overview Mode

Open the Cost Management module and select the Income menu.

1. You can select the filter icon to open a flyout panel where you can create and save filters with multiple conditions.
2. The edit icon allows you to toggle between the overview and edit modes.
3. The chart icon allows you to turn charts on or off.
4. You can select the column headers to sort in ascending or descending order.
5. Column settings allows you to select the columns you wish to include in your view.
6. Export button allows you to export a nicely formatted budget report. The Excel report provides the option to include additional historical data. With the PDF report you can choose to export a full report with all columns except custom attributes or an income report with columns in General and Income.

# Module Overview

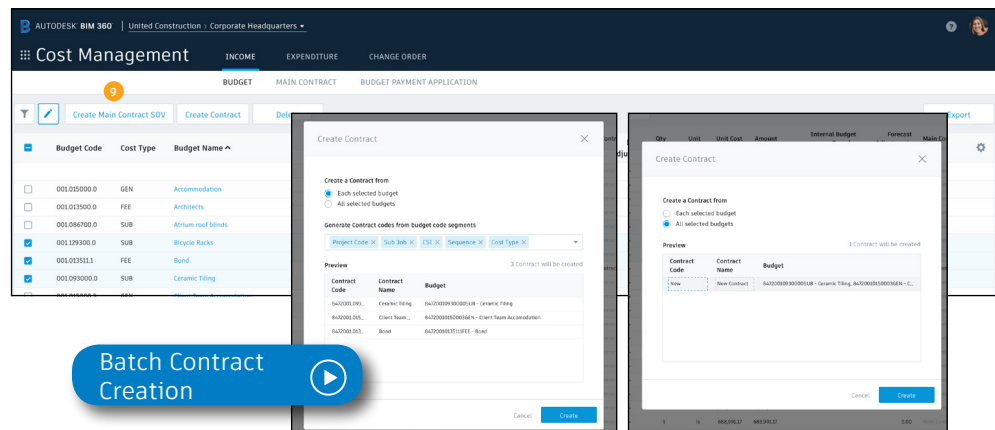
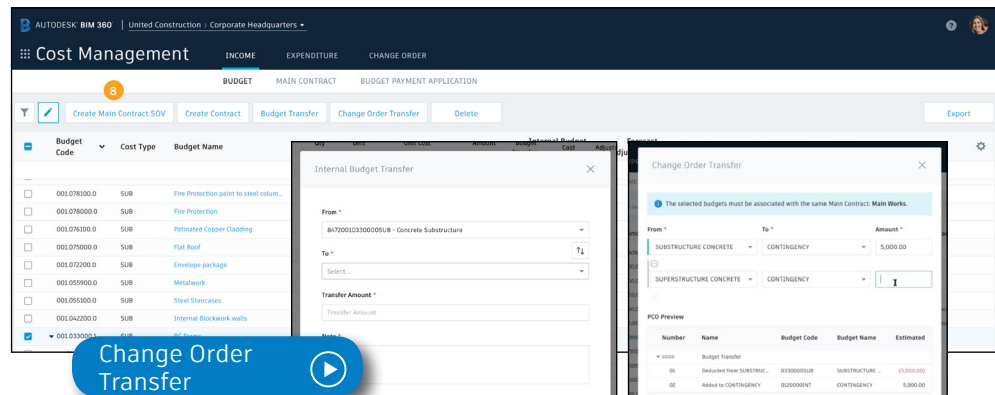
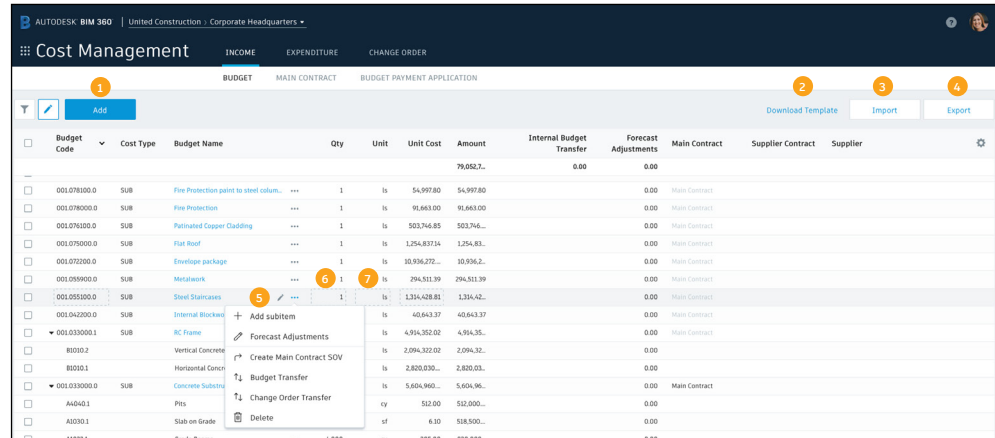
## 2 Budget Tab Edit Mode

In the Budget tab select the edit icon to enable the edit mode.

1. "Add" allows you to manually enter new budget items.
2. "Download Template" will download a budget import template.
3. "Import" allows you to import an Excel file. It works the same as budget template creation.
4. "Export" will provide an Excel export of the budget.
5. Select the budget item's name to open the details flyout panel. Select the pencil icon to edit the budget name and the three-dot menu offers additional actions for that specific budget item.
6. Click within the Qty column to edit the quantity.
7. Click within the Unit column to access a drop-down list of available units, assign the appropriate unit.
8. Like the three-dot menu, a single budget item selected additional actions for that specific budget item will appear at the top.
9. With multiple budget items selected, you can create a Main Contract SOV or Contract for each item chosen or the ability to compile them into one.

There are no restriction on hierarchy levels, and the totals from all child items are rolled up to the parent and divided by the parent qty to provide a unit cost allowing visibility into how the budget number was derived.

**PRO TIP:** If the user has view only permission they will have access to enter the edit mode. However, they will not have access to make edits.

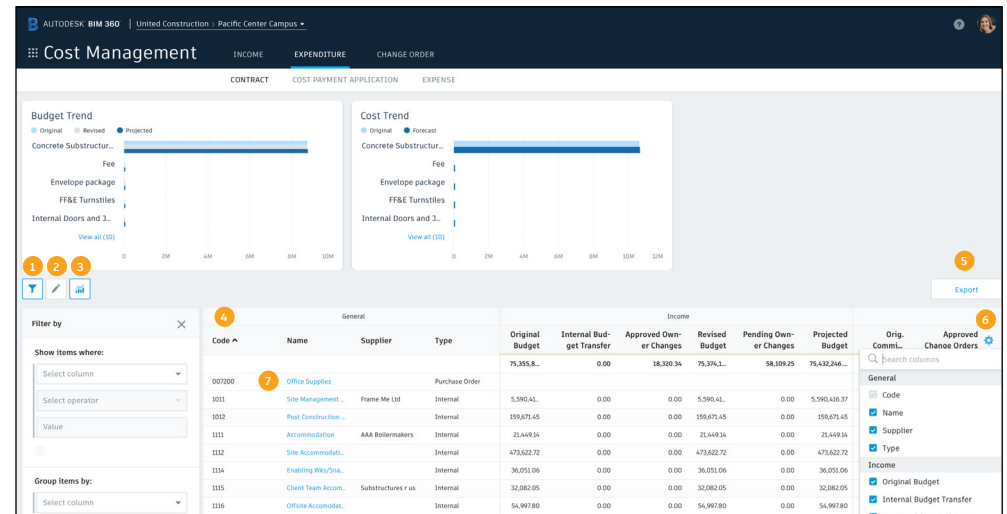


# Module Overview

## 3 Contract Tab Overview Mode

In the Expenditure menu select the Contract tab. The contract overview works the same as the budget overview.

1. You can select the filter icon to open a flyout panel where you can create and save filters with multiple conditions.
2. The edit icon allows you to toggle between the overview and edit modes.
3. The chart icon allows you to turn charts on or off.
4. You can select the column headers to sort in ascending or descending order.
5. Export button allows you to export the contract summary to Excel.
6. Column settings allows you to select the columns you wish to include in your view.
7. Select the contract name to open the details flyout panel.



**PRO TIP:** Though some companies may have the same budget list as they do contracts, having both views is to facilitate having different lists even though the financial data adds up to the same total. This allows for contracts to be made of multiple budget codes and be able to be viewed either way.

## 4 Contract Tab Edit Mode

In the Contract tab select the edit icon to enable the edit mode. This works similarly to the budget edit mode.

1. "Add" allows you to manually enter a contract item.
2. "Download Template" will download a contract import template.
3. "Import" allows you to import an Excel file.
4. "Export" allows you to export a contract report.

Code	Name	Supplier	Type	Budget Code	Budget Name	Awarded Date	Amount	Status	Pre Qualification?	Role Description	Date required on site	W99
007000	Office Supplies		Purchase...				77,225.3...					
1011	Site Management Staff	Frame Mx Ltd	Internal	84720001310001NT	Site Management Staff		5,590.41...	Open	yes			
1012	Post Construction Staff		Internal	3101310001NT	Post Construction Staff		159,671.45	Executed				
1111	Accommodation		Internal	3101500005EN	Accommodation		21,449.14	Open				
1112	Site Accommodation		Internal	3101500001EN	Site Accommodation		473,622.72	Open				
1114	Enabling Wks/Snagging...		Internal	3101500005EN	Enabling Wks/Snagging...		36,051.06	Open				
1115	Client Team Accommodat...	Substructures r us	Internal	3101500003EN	Client Team Accommodat...		32,082.05	Open				
1116	Offsite Accommodation c...		Internal	3101500004EN	Offsite Accommodation co...		54,997.80	Open				
1121	Hoarding and Signage		Internal	847200013100005EN	Hoarding and Signage		11,894.19	Open				
1122	Site Hoarding		Internal	847200013100005EN	Site Hoarding		81,411.41	Open				
1123	Signage		Substruct...	847200013100005EN	Signage		12,356.17	Open				

# Module Overview

## Contract Tab Edit Mode (continued)

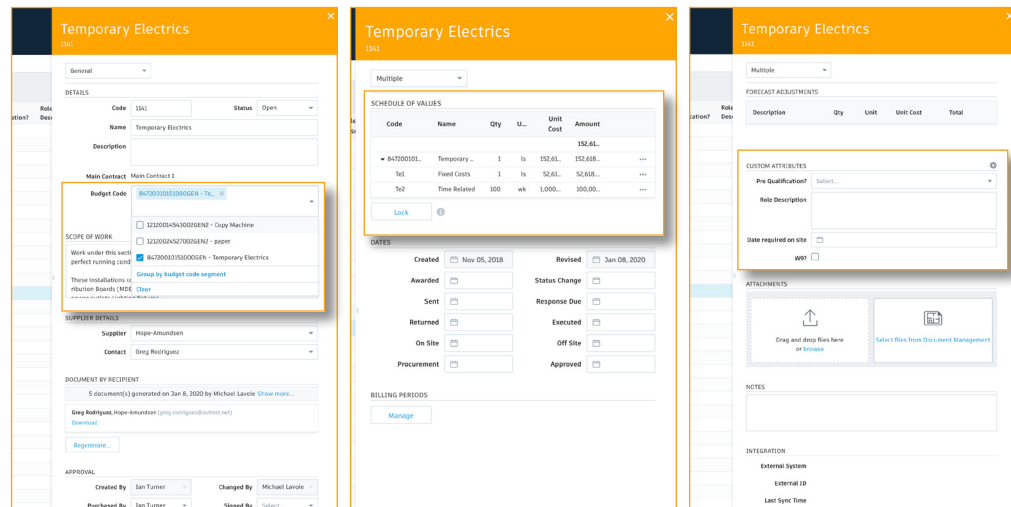
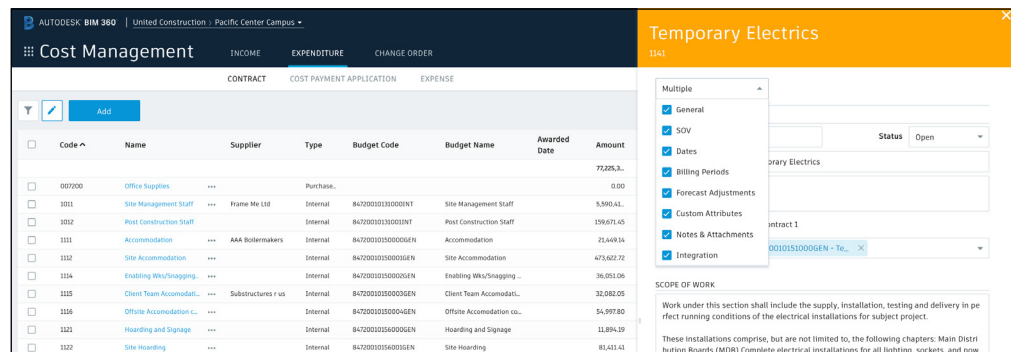
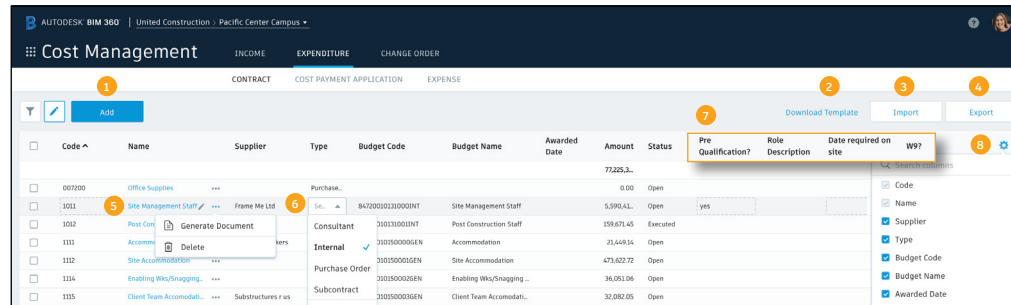
5. Select a contract name to open the details flyout panel. Use the pencil icon to edit the name or select the three-dot menu to generate a document or delete the contract.
6. Click within the Type column to add a contract type to the line item. Project admins create the list of types within expenditure settings in the Project Admin module.
7. Project admins can create custom attributes for contracts within expenditure settings in the Project Admin module.
8. Column settings allows you to select the columns you wish to include in your view.

### Details Flyout Panel

The details flyout panel provides more information and can be used to update/edit contract details. Use the drop-down to select the items to view in the flyout.

#### Key Items:

- Budget Code - Provides a list of all unallocated budget items. Create the connection between contract and budget item by assigning from this list.
- SOV (Schedule of Values) - By default the SOV will inherit any budget item build ups from the connected budget item. They can be removed by right clicking if you want to create a different list of items. They can also be appended or edited and the values overwritten to create the correct award value for the contract.
- Custom Attributes - Allows you to customize the type of information you want to capture for contracts. Steps for creating a custom attribute can be found in the custom attributes section of this guide.



**PRO TIP:** If the user has view only permission they will have access to enter the edit mode. However, they will not have access to make edits.



# Module Overview

## 5 Fundamental Forecasting

New columns have been added to the Budget & Contracts tab as the first step to incorporating forecasting functionality into Cost Management. The columns include:

- Actual Costs
- Forecast Adjustments
- Forecast to Complete
- Forecast Final Cost
- Forecast Variance

### Making Forecast Adjustments

- In the line, you wish to adjust right-click within the Forecast Adjustments column or select the three dots next to the item name to access the Edit Forecast Adjustments window.
- Select “add line item” and fill in the necessary information; you can add multiple list items. To delete an item, select the three dots. Select the “x” to exit back to the tab view.
- The total adjustments will appear in the Forecast Adjustments and Forecast Variance column. The Forecast Cost to Complete and Forecast Final Cost will now reflect the change.

The screenshot displays the 'Cost Management' interface with the 'BUDGET' tab selected. A list of budget items is shown, including 'Copy Mach...', 'paper', 'Fees/Legal/...', 'Solicitors F...', 'Bill Prepara...', 'Testing and...', 'Risk Contin...', '3D Printing', and 'Site Manag...'. A right-click context menu is open over the 'Site Manag...' item, showing options: 'Forecast Adjustments', 'Budget Transfer', and 'Change Order Transfer'. An 'Edit Forecast Adjustments' window is also shown, allowing users to add line items with details like Description, Qty, Unit, Unit Cost, and Total.

The screenshot displays the 'Cost Management' interface with the 'BUDGET' tab selected. A detailed table of budget items is shown, including columns for Revised Budget, Pending Owner Changes, Projected Budget, Orig. Commitment, Uncommitted Change Orders, Approved Change Orders, Pending Change Orders, Reserves, Projected Cost, Actual Cost, Forecast Adjustments, Forecast Cost to Complete, % Complete, Forecast Final Cost, Variance, and Forecast Variance. A right-click context menu is open over a line item, showing options: 'Forecast Adjustments', 'Budget Transfer', and 'Change Order Transfer'.

**PRO TIP:** The forecast adjustments can also be viewed in the details flyout panel by selecting the top drop-down, then “Forecast Adjustments.”

The screenshot displays the 'Forecast Adjustments' window. It shows a table of adjustments with columns: Description, Qty, Unit, Unit Cost, and Total. The total adjustments are 250,000.00.



# Change Order Management

A typical construction project can have dozens of change orders. Improve change order tracking across the entire approval process and view details of cost item impacts as well as historical reference points with Cost Management's change order capabilities.

## 1 Cost Item

Cost items are the individual detailed items for each budget code associated with a potential change. The typical workflow is to create a Potential Change Order (PCO) and add cost items to it. However, in the Cost Items tab in Cost Management, you can easily add cost items or edit existing cost items.

This works similarly to the edit mode in the contract tab.

1. **Add:** allows you to manually enter a cost item.
2. **Export:** allows you to export a PDF or Excel cost item report.
3. **Control Icon:** the column settings allows you to select the columns you wish to include in your view.
4. **Budget Status:** is the current status of the cost item in the budget request workflow.
5. **Accessing Item:** Select the link to open the 'container' for whichever part of the process the cost item is currently in.
6. **Three Dot Menu:** Select the three dots to delete a cost item.
7. **Accessing Details Flyout:** Select a cost item name to open the details flyout panel.

Autodesk

BIM 360

United Construction - Pacific Center Campus

Cost Management

Income

Expenditure

Change Order

1

Cost Item

PCO

RFQ

RCO

OCO

SCO

Y

Add

Export

Number	Name	Scope	Type	Budget Code	Budget Name	Supplier	Estimated	Proposed	Submitted	Approved	Committed	Budget Status	Cost Status	PCO	RFQ	RCO	OCO	
CF-0037	Frame - Additional Floor	...	Out	Owner Chan...	8470003033...	RC Frame	Subtriv...	995,634.07	1,201,746...	1,193,705...	1,165,495...	92,782.00	Accepted	Proposed	P-0041	OR-41		
CF-0038	Revised Signage	...	Out	Owner Direc...	8470003030L...	Signage		10,000.00	11,050.00	11,050.00	11,050.00	2,000.00	Approved	Open	P-0006			
CF-0065	Contingency	...	Out	Owner Direc...	8470003032...	Risk Conting...		450.00	450.00	450.00	450.00	450.00	Approved					
CF-0096	Insurance	...	Out	Owner Direc...	8470003032...	Fees/Legal/Ins.		309.00	309.00	309.00	309.00	309.00	Approved					
CF-0067	Bond	...	Out	Owner Direc...	8470003032...			154.50	154.50	154.50	154.50	154.50	Approved					
CF-0068	Fee	...	Out	Owner Direc...	8470003032...			663.07	663.07	663.07	663.07	663.07	Approved					
CF-0081	Contingency	...	Out	Owner Chan...	8470003032...	Risk Conting...		306.00	0.00	0.00	0.00	0.00	Open					
CF-0082	Fee	...	Out	Owner Chan...	8470003032...	Fees/Legal/Ins.		437.75	0.00	0.00	0.00	0.00	Open					
CF-0084	Stairs - Revised Main E...	...	Out	Owner Chan...	8470003033...	RC Frame	Subtriv...	5,000.00	5,000.00	6,000.00	6,000.00	6,000.00	Open					
CF-0021	Framing - Revised Main...	...	Out	Owner Chan...	8470003033...	RC Frame	Subtriv...	5,000.00	9,000.00	10,000.00	10,000.00	9,000.00	Open					
CF-0047	Cladding Specification...	...	Out	Owner Chan...	8470003033...			800,000.	1,000,000.	1,000,000.	1,000,000.	1,000,000.	Approved	Proposed	P-0020	OR-20	Reset	
CF-0050	ACI #12 Revised Main...	...	Out	Owner Chan...	8470003035...	FF&E Kitchen IL		5,228.00	5,228.00	5,228.00	5,228.00	50.00	Approved	Proposed	P-0023	OR-0513L	R-0001	O-0021
CF-0051	WFL 2028 - Floor slabs L...	...	Out	Owner Chan...	8470003035...	Temporary Pla...	Alpha PL	22,732.00					Approved	Approved	P-0024	OR-0024L	R-0005	O-0009
CF-0052	Metal Panel Additions	...	Out	Owner Chan...	8470003035...	Metalswork		25,000.00	25,000.00	25,000.00	25,000.00	25,000.00	Open	Pricing	P-0025	OR-0028	R-0005	O-0009
CF-0069	Contingency	...	TBD	Internal Cha...	8470003032...	Risk Conting...		750	15.00	30.00	30.00	30.00	Open					
CF-0070	Insurance	...	TBD	Internal Cha...	8470003032...	Fees/Legal/Ins.		5.15	10.30	20.60	20.60	20.60	Open					

3

Search columns

Number

Name

Scope

Type

Budget Code

Budget Name

Supplier

Estimated

Proposed

Submitted

Approved

Committed

Budget Status

Cost Status

PCO

RFQ

RCO

OCO

**PRO TIP:** Project Admins can customize the main menu name (Change Order) and the subtab names (Cost Item, PCO, RFQ, RCO, OCO, SCO) and change the order of the tabs within the general settings in the project admin module. Refer to the Settings & Permission chapter for more details.

# Change Order Management

## Cost Item (Continued)

### Details Flyout Panel:

- In the details flyout panel use the drop-down to select the sections to view. Sections can be viewed individually or in a scrolling list. Creating and editing cost items will be done in the details flyout panel.
- Under “Cost Summary” you can break down the cost item into a more granular level of detail by selecting “define cost item hierarchy/breakdown.”

### Assigning Cost Items to a PCO:

- Existing or new cost items created directly in the cost item view can be “assigned” to a PCO by selecting the check box next to the cost item or the three dot menu next to the items name.
- Once selected an “assign” button appears. Click the drop down to assign.
- An assign window will pop up where you can type in search criteria to filter the list. Select the PCO to add the cost item.

# Change Order Management

## 2 PCO Sub-Tab

PCO's (Potential Change Orders) are the starting point of any budget or cost change, and used to generate an RFQ, RCO, OCO, or SCO. The PCO tab is within the Change Orders tab in the Cost Management Module.

1. Select "Add" to create a new PCO.
2. "Export" allows you to export a PDF or CSV PCO report.
3. Column settings allows you to select the columns you wish to include in your view.
4. "Type" allows you to select the type of PCO.
5. "Scope" allows you to indicate whether the PCO is an "In" or "Out" scope change. The former meaning a cost change and the latter meaning a budget (and cost) change. It's important to include this as it will define where it's shown in the budget and contracts overview tabs.
6. "Source Type" allows you to select the PCO source.
7. "Source Ref #" is the reference number associated with the type.
8. "Budget Status" is the current status of the PCO in the budget request workflow.
9. "Cost Status" is the current status of the PCO in the cost change workflow.
10. Select the PCO name to open the details flyout panel, the pencil allows you to edit the name, and the three-dot menu provides additional options.

Depending on the budget and cost statuses when you select a PCO, you will be given the option to set it to open, delete it, or generate an RFQ, RCO, OCO or SCO.

Number	Name	Type	Scope	Source Type	Source Ref #	Estimated	Proposed	Submitted	Approved	Committed	Budget Status	Cost Status	Created Date	Main Contract
1	P-0006	Owner Directive	Out	ASI	001	10,943.75	12,092.85	12,092.85	12,092.85	2,000.00	Approved	Proposed	Oct 24, 2018	Main Contract 1
2	P-0007	Owner Directive	Out	ASI	002	10,943.75	12,092.85	12,092.85	12,092.85	2,000.00	Approved	Proposed	Nov 6, 2018	Main Contract 1
3	P-0008	Owner Directive	Out	ASI	001	10,943.75	12,092.85	12,092.85	12,092.85	2,000.00	Approved	Proposed	Nov 6, 2018	Main Contract 1
4	P-0009	Owner Directive	Out	ASI	001	10,943.75	12,092.85	12,092.85	12,092.85	2,000.00	Approved	Proposed	Nov 6, 2018	Main Contract 1
5	P-0010	Owner Directive	Out	ASI	001	10,943.75	12,092.85	12,092.85	12,092.85	2,000.00	Approved	Proposed	Nov 6, 2018	Main Contract 1
6	P-0011	Owner Directive	Out	ASI	001	10,943.75	12,092.85	12,092.85	12,092.85	2,000.00	Approved	Proposed	Nov 6, 2018	Main Contract 1
7	P-0012	Owner Directive	Out	ASI	001	10,943.75	12,092.85	12,092.85	12,092.85	2,000.00	Approved	Proposed	Nov 6, 2018	Main Contract 1
8	P-0013	Owner Directive	Out	ASI	001	10,943.75	12,092.85	12,092.85	12,092.85	2,000.00	Approved	Proposed	Nov 6, 2018	Main Contract 1
9	P-0014	Owner Directive	Out	ASI	001	10,943.75	12,092.85	12,092.85	12,092.85	2,000.00	Approved	Proposed	Nov 6, 2018	Main Contract 1
10	P-0015	Owner Directive	Out	ASI	001	10,943.75	12,092.85	12,092.85	12,092.85	2,000.00	Approved	Proposed	Nov 6, 2018	Main Contract 1

**PRO TIP:** If you see your calculated markups are out of sync select the line item and in the "Apply Markup" drop-down select the necessary markup from the list.

Scope	Type	Source Type	Source Ref #	Budget Status	Cost Status
In	Budget Transfer	ASI	005	Approved	Proposed
Out	Owner Change Order	CCD	001	Submitted	Proposed
Contingency	Owner Direct Purchase	INT		Approved	Proposed
Out	Owner Directive	ISSUE		Submitted	Proposed
Out	Internal Change	RFI		Submitted	Proposed
Out	Contingency	RFP		Submitted	Proposed
Out	Back Charge	T&M		Submitted	Proposed
Out	Subcontract Quotation			Open	Open
Out	Purchase Order Quotation			Open	Draft

**PRO TIP:** PCO Source Types are created/managed by the Project Admin within the Change Order settings in the project admin module.

Number	Name	Type	Scope	Source Type	Source Ref #	Estimated	Proposed	Submitted	Approved	Committed	Budget Status	Cost Status	Created Date	Main Contract
1	P-0006	Owner Directive	Out	ASI	001	10,943.75	12,092.85	12,092.85	12,092.85	2,000.00	Approved	Proposed	Oct 24, 2018	Main Contract 1
2	P-0007	Owner Directive	Out	ASI	002	10,943.75	12,092.85	12,092.85	12,092.85	2,000.00	Approved	Proposed	Nov 6, 2018	Main Contract 1
3	P-0008	Owner Directive	Out	ASI	001	10,943.75	12,092.85	12,092.85	12,092.85	2,000.00	Approved	Proposed	Nov 6, 2018	Main Contract 1
4	P-0009	Owner Directive	Out	ASI	001	10,943.75	12,092.85	12,092.85	12,092.85	2,000.00	Approved	Proposed	Nov 6, 2018	Main Contract 1
5	P-0010	Owner Directive	Out	ASI	001	10,943.75	12,092.85	12,092.85	12,092.85	2,000.00	Approved	Proposed	Nov 6, 2018	Main Contract 1
6	P-0011	Owner Directive	Out	ASI	001	10,943.75	12,092.85	12,092.85	12,092.85	2,000.00	Approved	Proposed	Nov 6, 2018	Main Contract 1
7	P-0012	Owner Directive	Out	ASI	001	10,943.75	12,092.85	12,092.85	12,092.85	2,000.00	Approved	Proposed	Nov 6, 2018	Main Contract 1
8	P-0013	Owner Directive	Out	ASI	001	10,943.75	12,092.85	12,092.85	12,092.85	2,000.00	Approved	Proposed	Nov 6, 2018	Main Contract 1
9	P-0014	Owner Directive	Out	ASI	001	10,943.75	12,092.85	12,092.85	12,092.85	2,000.00	Approved	Proposed	Nov 6, 2018	Main Contract 1
10	P-0015	Owner Directive	Out	ASI	001	10,943.75	12,092.85	12,092.85	12,092.85	2,000.00	Approved	Proposed	Nov 6, 2018	Main Contract 1

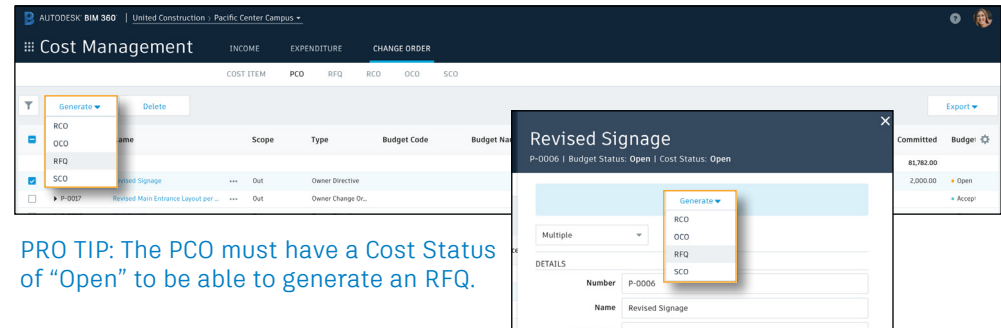
**PRO TIP:** To detach a cost item from a PCO select the item, a detach button will appear.

# Change Order Management

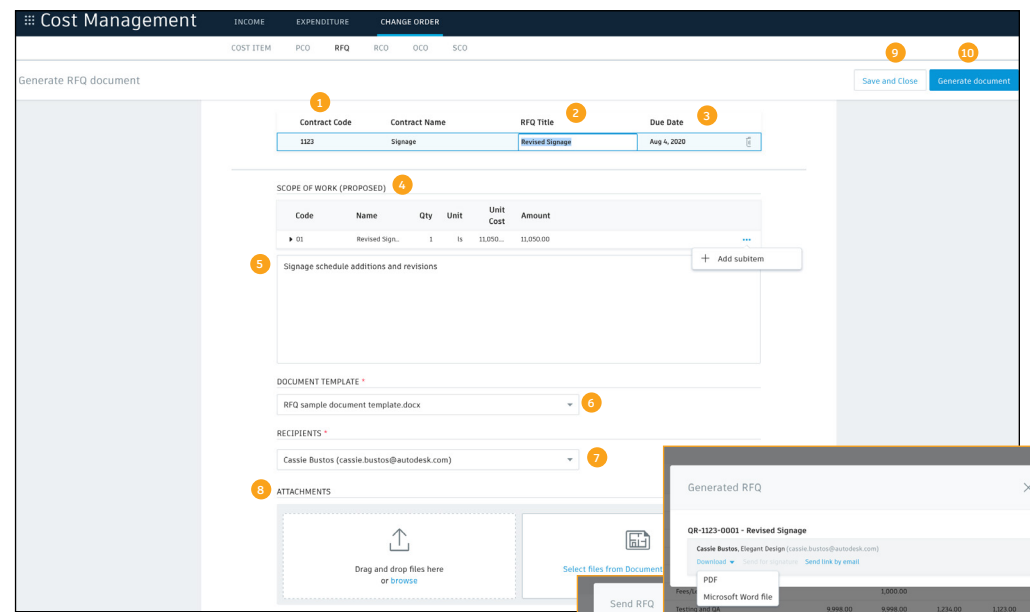
## 3 Generating an RFQ from a PCO

RFQ (Request for Quotation) are the documents you generate to solicit pricing from a supplier. This process utilizes the document templates created in the Project Admin module.

- In the PCO tab, if you want to generate a single RFQ that includes all the associated cost items, select the checkbox next to the PCO or select the PCO name to open the details flyout panel. To generate individual RFQs for specific cost items in the PCO, select that line item.
- A “Generate” drop-down will appear, select RFQ. An RFQ generator window will open.
  - Contract Code and Name are auto-populated by the related budget code.
  - You can customize the RFQ title.
  - Add a due date. By default due date requires a Project Admin permission level, but can be overwritten here.
  - Edit unit cost or add a sub-item.
  - Additional scope description will automatically be populated here from the PCO/Cost Item details flyouts, but can be edited/appended here.
  - Select the desired document template.
  - Search to add additional recipients. The default recipient is auto-populated based on the contract award of the same budget code the cost item is assigned.
  - Additional files can be uploaded from your desktop or selected from the BIM 360 Document Management module.
  - “Save” allows you to save the document in the current state and return to it later to complete.
  - “Generate” allows you to create the document.

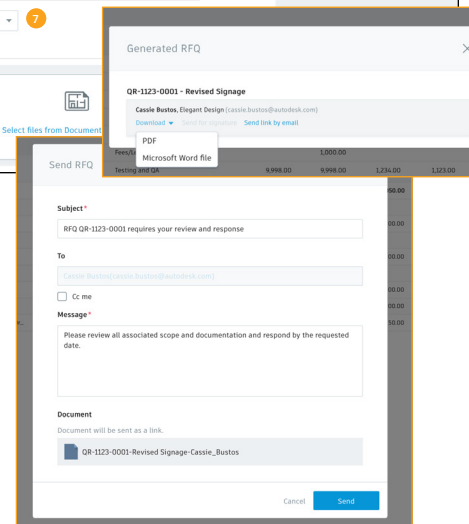


**PRO TIP:** The PCO must have a Cost Status of “Open” to be able to generate an RFQ.



**PRO TIPS:**

- Utilizes the document templates capabilities set up in the Project Admin module.
- If recipients don't populate in the drop-down, go to the contract tab to confirm contract(s) are listed.
- A Word and PDF document will be generated.
- Select “Send link by email” to send the generated PDF to the recipient from the system. Note, the recipient requires a BIM 360 license to access the file via email.



# Change Order Management

## 4 RFQ Sub-Tab

The RFQ tab is within the Change Orders tab in the Cost Management Module.

1. "Status" auto updates to "Open" after a RFQ is generated from a PCO.
  2. "Response Due" will be populated when a date is added in the dates section of the details flyout panel.
  3. "Source Type" can be added by clicking to access the drop-down list.
  4. "Source Ref #" allows you to manually enter a number.
  5. "Detach" allows you to detach as cost item from an RFQ. You need to select a cost item to access the detach button. It will still be part of the PCO.
  6. Select the three-dot menu to update the status, generate/regenerate the document, or delete the RFQ.
  7. Select the name to open the details flyout panel.
- In the details flyout panel like the Contract module, use the drop-down list to select the sections to view. Sections can be viewed individually or in a scrolling list. Editing RFQ items can be done in this view.
  - Selectable workflow- based actions (buttons) will appear to help walk you through the process. For example, when the RFQ status is "Open," you will see a "Request Quotation" button. By selecting it the status color changes and the next options you see are "Set as Proposed" or "Rejected." Once proposed you can choose the next action.
  - When Accepted, select "SCO" to generate a Supplier Change Order. This process is similar to creating an RFQ. Fill in the information, select the document template, choose the recipient(s), attach files, and generate the document.

**Cost Management** INCOME EXPENDITURE **CHANGE ORDER**

COST ITEM PCO RFQ RCO SCO

Detach 5

Number	Name	Contract Name	Supplier	Estimated	Proposed	Submitted	Approved	Committed	Status	Response Due	Created Date	Created By	Source Type	Source Ref #
QR-0007	Additional Floor Openings as per R...		Frame Me...	\$50,226.00	1,063,274.00	1,042,512.00	1,007,461.00	30,050.00	Proposed	Oct 31, 2018	Oct 24, 2018	Ian Turner	RFI	000
QR-0028	Metal Panel Additions			25,000.00	25,000.00	25,000.00	25,000.00		Pricing	Sep 25, 2021	Apr 26, 2019	Tessa Kassl...	ASI	001
QR-0030	Clothing Change		Cover me ...	800,000.00	1,000,000.00	1,000,000.00	1,000,000.00		Pricing	Aug 4, 2020	Jul 21, 2019	Jarrod Krug	CCD	001
QR-1123-0...	Revised Signage		Elegant O...	10,000.00	11,050.00	11,050.00	11,050.00	2,000.00	Pricing			Cassie Bust...		
QR-1703-0...	Revised Signage			10,000.00	11,050.00	11,050.00	11,050.00	2,000.00	Pricing			Ian Turner	INT	
QR-1705-0...	Brick Wall Removal			1,000.00	1,000.00				Proposed	Apr 23, 2020	Apr 9, 2020	Hansen Liu	ISSUE	
QR-1705-0...	Dry wall			9,998.00	9,998.00	1,234.00	1,123.00	2,000.00	Proposed	Apr 24, 2020	Apr 10, 2020	Hansen Liu	RFI	
QR-6442-0...	Door height conflicts with structure		Service R...	1,000.00	1,000.00			1,000.00	Open	Jun 9, 2020	May 26, 2020	Stanley Lei	RFP	
QR-6442-0...	Door height conflicts with structure		Service R...	1,000.00	1,000.00			1,000.00	Executed		May 26, 2020	Stanley Lei	RFP	
QR-6442-0...	Door height conflicts with structure		Service R...	1,000.00	1,000.00			1,000.00	Proposed	Apr 24, 2020	Apr 10, 2020	Hansen Liu	Clear	001

**Revised Signage**  
QR-1123-0001 | Open

Request Quotation

Multiple

DETAILS

Number QR-1123-0001

Name Revised Signage

Description

Main Contract Main Contract 1

Document Template RFQ sample document template.docx

Status Open

Type Owner Direct...

**Revised Signage**  
QR-1123-0001 | Proposed

Accept Revise and Resubmit Reject

Multiple

DETAILS

Number QR-1123-0001

Name Revised Signage

Description

Main Contract Main Contract 1

Document Template RFQ sample document template.docx

Status Proposed

Type Owner Direct...

**Revised Signage**  
QR-1123-0001 | Accepted

Revise and Resubmit Generate

Multiple

DETAILS

Number QR-1123-0001

Name Revised Signage

Description

Main Contract Main Contract 1

Document Template RFQ sample document template.docx

Status Accepted

Type Owner Direct...

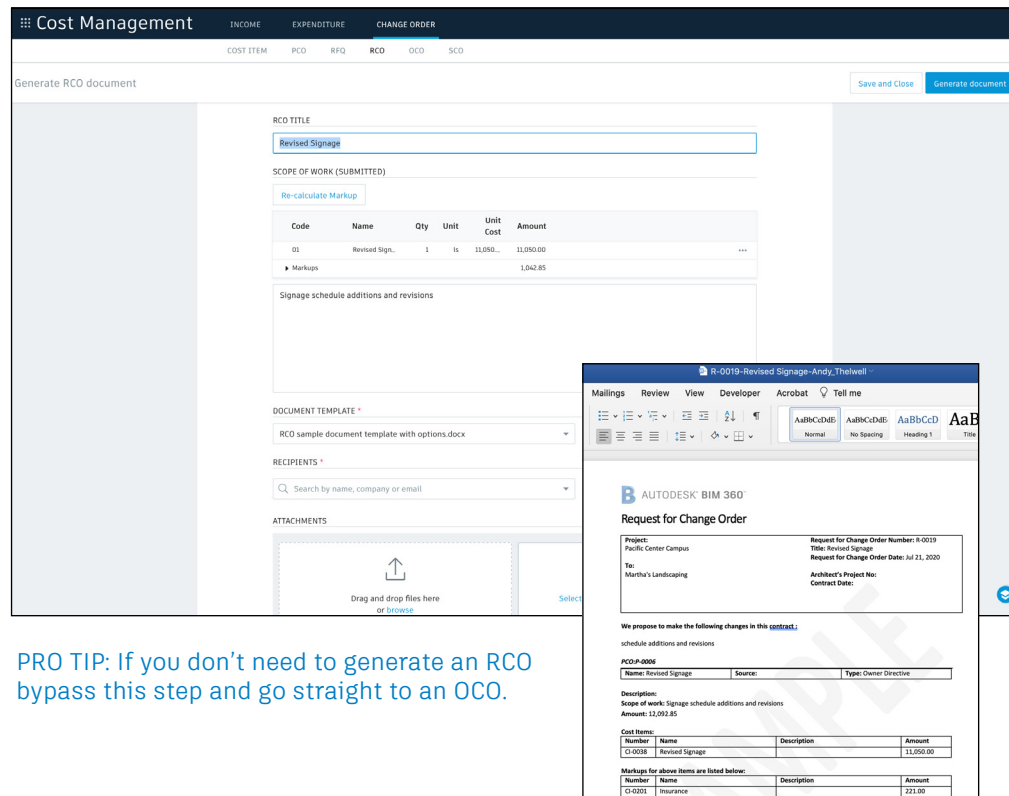
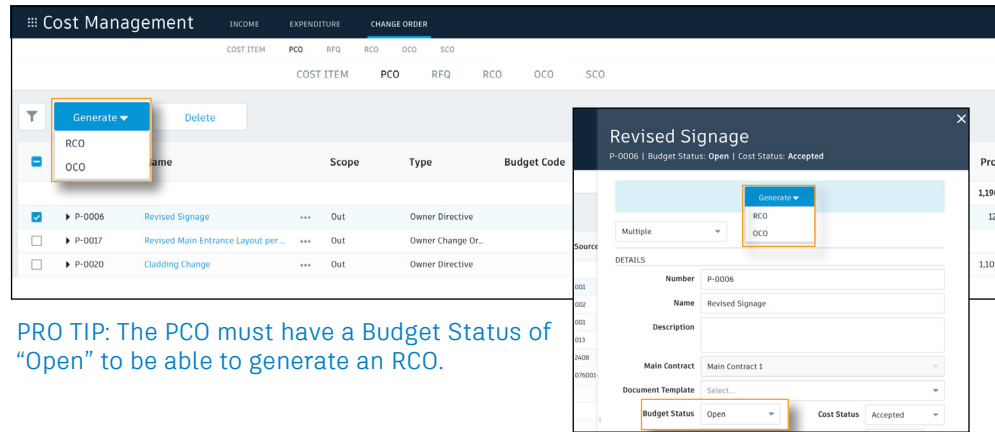


# Change Order Management

## 5 Generating an RCO from a PCO

RCO (Request for Change Order) are upstream budget change orders. They are a means to request a change in the contract between the Owner and the Main Contractor. Typically, the RCO created by the Main Contractor is built from one or more cost items and sent to the Owner.

- In the PCO tab, if you want to generate a RCO select the check-box next to the PCO or select the PCO name to open the details flyout panel.
- A “Generate” drop-down will appear, select RCO. An RCO generator window will open.
- Like an RFQ, scope information is auto-populated. You can re-calculate the markups, select the document template, choose the recipient(s), attach files, and generate the document.
- Multiple PCOs can be rolled up into a single RCO.
- Select the check-box next to multiple PCOs you would like to generate into a single RCO. When the “Generate” drop-down appears select RCO.
- The process is the same as generating a single document. However, the RCO will be a combination of the selected PCOs. The cost items will be combined and the scope is auto-populated but can be adjusted. Select the document template and recipient.





# Change Order Management

## 6 RCO Sub-Tab

The RCO tab is within the Change Orders tab in the Cost Management Module.

1. “Status” auto updates to “Open” after a RCO is generated from a PCO.
  2. Select the check-box next to the line item to update the item’s status or access the delete button.
  3. Select the three-dot menu next to a specific item to update the status and access additional option.
  4. Select the name to open the details flyout panel.
- In the details flyout panel use the drop-down list to select the sections to view. Sections can be viewed individually or in a scrolling list. Editing RCO items can be done in this view.
  - Again, selectable workflow-based actions (buttons) will appear to help walk you through the process. For example, when the RCO status is “Submitted,” you will see a “Set as Accepted” and “Set as Rejected” button.
  - By selecting “Set as Accepted” the status color changes and the next options you see are “Set as Rejected,” “Generate” and “Revert to Submitted.”
  - Now, with the status as “Accepted” you will be able to generate an OCO or a SCO. Once you select the appropriate option this process is the same as generating an RFQ or RCO document.

Number	Name	Type	Estimated	Proposed	Submitted	Approved	Committed	Status	Created Date	Created By	Submitted Date
R-0013	Additional Floor Openings as per...	Owner Directive	74,419.24	79,568.34	69,804.34	42,143.34	52,859.00	Submitted	Nov 8, 2019	John Sanner	Nov 8, 2019
R-0011	AST #13 Revised Kit		5,777.49	5,777.49	5,777.49	5,777.49	50.00	Draft	Oct 28, 2019	Cassie Bustos	Nov 8, 2019
R-0018	Brick Wall Removal			1,000.00				Open	Nov 12, 2019	Donr Open	
R-0015	Metal Panel Addition		27,700.00	27,700.00	27,700.00	150.00	25,000.00	Open	Mar 30, 2020	John Sanner	
R-0014	Revised Main Entry							Accepted	Mar 27, 2020	John Sanner	Mar 27, 2020
R-0019	Revised Signage		10,943.75	12,092.85	12,092.85	12,092.85	2,000.00	Open	Jul 21, 2020	Cassie Bustos	
R-0017	Revised Conference		9,998.00	9,998.00	1,234.00	1,232.00	2,000.00	Submitted	Apr 10, 2020	Hansen Liu	Apr 10, 2020
R-0016	Additional cubicles		20,000.00	23,000.00	23,000.00	23,000.00	23,000.00	Accepted	Apr 10, 2020	Hansen Liu	Apr 10, 2020

**Revised Signage**  
R-0019 | Submitted

Buttons: Set as Accepted, Set as Rejected

Committed: 52,859.00

Status: Submitted

DETAILS

Number: R-0019

Name: Revised Signage

Description: [Empty field]

Main Contract: Main Contract 1

Document Template: RCO sample document template with options.docx

Status: Submitted

Type: Owner Direct...

**Revised Signage**  
R-0019 | Accepted

Buttons: Set as Rejected, Generate, Revert to Submitted

Committed: 52,859.00

Status: Accepted

DETAILS

Number: R-0019

Name: Revised Signage

Description: [Empty field]

Main Contract: Main Contract 1

Document Template: RCO sample document template with options.docx

Status: Accepted

Type: Owner Direct...

# Change Order Management

## 7 Generating an OCO from a RCO

OCO (Owner Change Order) represents a change order from the Owner to the Main Contractor/Construction Manager. These documents are built from one or many change requests (RCOs) by processing the RCOs into an OCO. The signed OCO legally amends a contract to affect a change in requirements, cost, or schedule to the previously negotiated contract.

- The RCO status must be “Accepted” to be able to generate an OCO.
- When you select “OCO” in the generate drop-down the process is the same as generating an RFQ or RCO document.
- Like an RCO, scope information is auto-populated. You can select the document template, choose the recipient(s), attached files and generate the document.
- Multiple RCOs can be rolled up into a single OCO.
- Select the check-box next to multiple RCOs you would like to generate into a single OCO. When the “Generate” drop down appears select OCO.
- The process is the same as generating a single document. However, the OCO will be a combination of the selected RCOs. The cost items will be combined and the scope is auto-populated but can be adjusted. Select the document template and recipient.

**Revised Signage**  
R-0019 | Accepted

Set as Rejected | Revert to Submitted

Multiple

Details

Number: R-0011  
Name: ASI #13 Revised Kitchen Equipment Schedules  
Description: RCO sample document template with options.docx  
Status: Accepted | Schedule Change: 0 Days

RECIPIENTS

R-0011 - ASI #13 Revised Kitchen Equipment Schedules  
John Sanner, United Construction (john.sanner@autodesk.com)  
Download

SCOPE OF WORK

**Cost Management**  
INCOME | EXPENDITURE | CHANGE ORDER

Generate OCO: 1

OCO TITLE  
ASI #13 Revised Kitchen Equipment Schedules

SCOPE OF WORK (APPROVED)

Code	Name	Qty	Unit	Unit Cost	Total
C1-0150	ASI #13 Revised...	1	Is	5,228.00	5,228.00
C1-0195	Bond	1	Is	53.85	53.85
C1-0193	Contingency	1	Is	156.84	156.84
C1-0196	Fee	1	Is	231.10	231.10
C1-0194	Insurance	1	Is	107.70	107.70

OCO Document Template

Number: R-0011  
Name: ASI #13 Revised Kitchen Equipment Schedules  
Description: RCO sample document template with options.docx  
Status: Accepted | Schedule Change: 0 Days

RECIPIENTS

R-0011 - ASI #13 Revised Kitchen Equipment Schedules  
John Sanner, United Construction (john.sanner@autodesk.com)  
Download

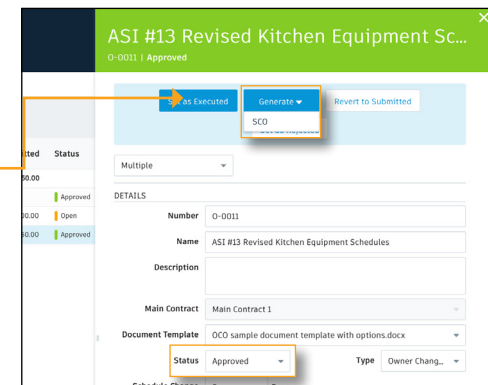
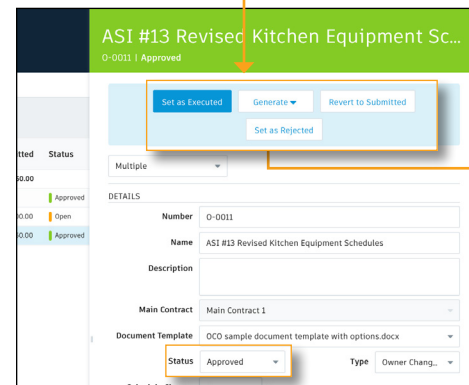
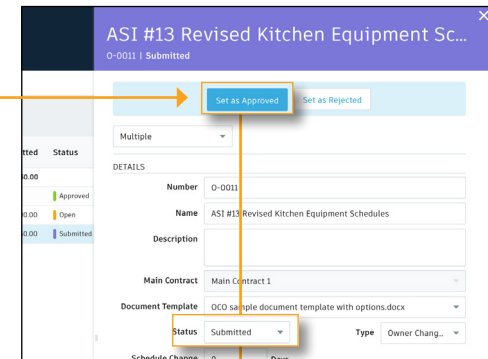
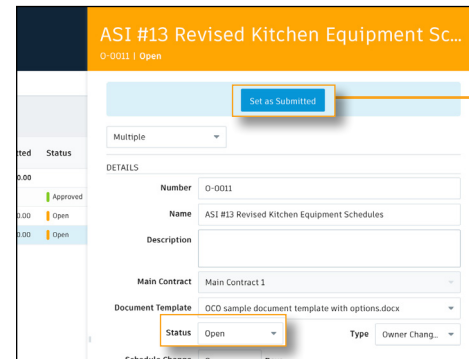
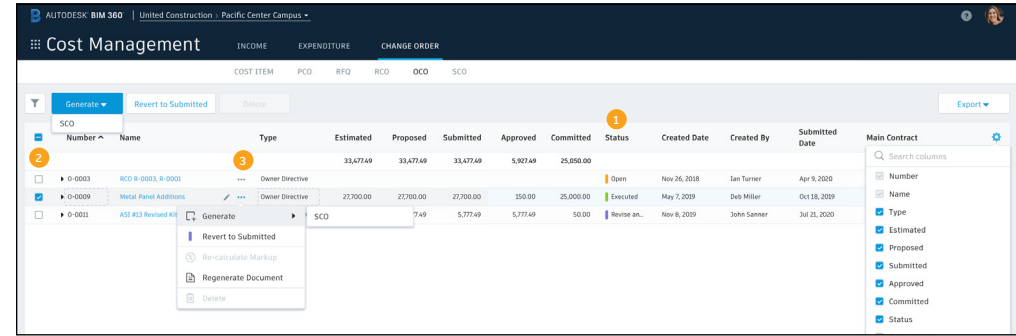
SCOPE OF WORK

# Change Order Management

## 8 OCO Sub-Tab

The OCO tab is within the Change Orders tab in the Cost Management Module.

1. "Status" auto updates to "Open" after a OCO is generated from a RCO.
  2. Select the check-box next to the line item to access the generate, revert, or deleted buttons.
  3. Select the three-dot menu to access the generate option, revert status option, re-calculate markup, generate/regenerate the document, and deleted options.
  4. Select the name to open the details flyout panel.
- In the details flyout panel use the drop-down list to select the sections to view. Sections can be viewed individually or in a scrolling list. Editing OCO items can be done in this view.
  - Again, selectable workflow-based actions (buttons) will appear to help walk you through the process. For example, when the OCO status is "Open," you will see a "Set as Submitted" button. By selecting it the status color changes and the next options you see are "Set as Approved" or "Set as Rejected."
  - Once the status is "Approved" you will be able to generate a SCO. You can either generate it now or select "Set as Executed" and then generate it. The SCO generation process is the same as generating a RFQ, RCO, and OCO.



# Change Order Management

## 9 Generating an SCO

SCO (Supplier Change Order) is a downstream cost change order which amend the original supplier contracts.

There are a few different ways you can generate an SCO:

- From a PCO with a budget status of “Open”, “Approved” or “Executed” and cost status of “Open” or “Proposed.”
- From an RFQ with a status of “Proposed.”
- From an RCO with the status of “Accepted.”
- From an OCO with the status of “Approved” or “Executed.”
- To generate a single SCO consisting of all cost items associated with a ‘parent’ line item, select the check-box next to the parent.
- To create individual SCOs for specific cost items within a “Parent,” select the box next to the cost item.
- You can also select multiple SCOs with multiple ‘parents’ to generate a single SCO from.
- The SCO generation process is the same as generating an RFQ, RCO, and OCO. When the document generator window opens information will be auto-populated. You can select the document template, choose the recipient(s), attach files and generate the document.

The screenshot shows the 'Cost Management' tab with the 'CHANGE ORDER' sub-tab selected. The 'PCO' filter is active. A table lists various cost items, including 'Metal Panel Additions' (P-0025). To the right, a 'Generate' dropdown menu is open, showing 'SCO' as the selected option. Below this, a 'DETAILS' panel for 'Metal Panel Additions' is visible, showing fields for Number, Name, Description, Main Contract, Document Template, Budget Status (Open), Cost Status (Proposed), Type (Owner Direct), and Schedule Change (0 Days).

The screenshot shows the 'Cost Management' tab with the 'CHANGE ORDER' sub-tab selected. The 'RFQ' filter is active. A table lists various cost items, including 'Door height conflicts with structure' (QR-6442-0001). To the right, a 'Generate' dropdown menu is open, showing 'SCO' as the selected option. Below this, a 'DETAILS' panel for 'Door height conflicts with structure' is visible, showing fields for Number, Name, Description, Main Contract, Document Template, Status (Accepted), Type (Select...), and Schedule Change (0 Days).

The screenshot shows the 'Cost Management' tab with the 'CHANGE ORDER' sub-tab selected. The 'OCO' filter is active. A table lists various cost items, including 'Metal Panel Additions' (O-0009). To the right, a 'Generate' dropdown menu is open, showing 'SCO' as the selected option. Below this, a 'DETAILS' panel for 'Metal Panel Additions' is visible, showing fields for Number, Name, Description, Main Contract, Document Template, Status (Approved), Type (Owner Direct), and Schedule Change (0 Days).

**PRO TIP:** If an SCO is being generated from an OCO made up of multiple RCOs the SCO will generate individual documents for each supplier affected by the change.

# Change Order Management

## 10 SCO Sub-Tab

The SCO tab is within the Change Orders tab in the Cost Management Module.

1. "Status" auto updates to "Open" after a SCO is generated.
  2. Select the check-box next to the line item to access the delete button.
  3. Select the three-dot menu to update the item's status, generate/regenerate the document or delete the SCO.
  4. Select the name to open the details flyout panel.
- In the details flyout panel use the drop-down list to select the sections to view. Sections can be viewed individually or in a scrolling list. Editing SCO items can be done in this view.
  - Again, selectable workflow-based actions (buttons) will appear to help walk you through the process. For example, when the SCO status is "Open," you will see a "Set as Sent" button. By selecting it the status color changes and the next option you see is "Set as Executed."

Number	Name	Contract Name	Supplier	Estimated	Proposed	Submitted	Approved	Committed	Status	Created Date	Created By
S-0007	Concrete Works (C01)	Concrete Substr...	Substructures f...	71,226.00	79,226.00	70,462.00	45,351.00	68,050.00	Executed	Nov 29, 2018	San Turner
S-0017	Metal Panel Additions	Concrete Substr...	Substructures f...	5,000.00	9,000.00	10,000.00	10,000.00	9,000.00	Open	Apr 26, 2019	Jesse Kassinger
S-0018	Additional Floor Openings as per R...	Concrete Substr...	Substructures f...	25,000.00	25,000.00	25,000.00	25,000.00	25,000.00	Open	Oct 29, 2019	Cassie Bunkers
S-0020	Doors - Revised Main Entrance La...	Concrete Substr...	Substructures f...	20,000.00	23,000.00	23,000.00	23,000.00	23,000.00	Open	Apr 9, 2020	Hansen Liu
S-0021	AST #13 Revised Kitchen Equipm...	Concrete Substr...	Substructures f...	5,000.00	5,000.00	6,000.00	6,000.00	6,000.00	Open	Apr 9, 2020	Hansen Liu
S-0022	AST #13 Revised Kitchen Equipm...	FRGE Kitchen Lin...	Substructures f...	5,228.00	5,228.00	5,228.00	5,228.00	50.00	Draft	Apr 9, 2020	Hansen Liu

**Metal Panel Additions**  
S-0017 | Open

Multiple

DETAILS

Number S-0017

Name Metal Panel Additions

Description

Document Template SCO sample document template.docx

Budget Code 8472001055900005UB

Status Open

Schedule Change 0 Days

SUPPLIER DETAILS

**Metal Panel Additions**  
S-0017 | Sent

Multiple

DETAILS

Number S-0017

Name Metal Panel Additions

Description

Document Template SCO sample document template.docx

Budget Code 8472001055900005UB

Status Sent

Schedule Change 0 Days

SUPPLIER DETAILS

**Metal Panel Additions**  
S-0017 | Executed

Multiple

DETAILS

Number S-0017

Name Metal Panel Additions

Description

Document Template SCO sample document template.docx

Budget Code 8472001055900005UB

Status Executed

Schedule Change 0 Days

SUPPLIER DETAILS

# Change Order Management

## 11 RFI to PCO

BIM 360 Project Management Admins and RFI Managers who have a Cost Management license with full budget permission control can create a Potential Change Order (PCO) from an RFI or link existing RFIs to PCOs. This process creates a bi-directional link

### Creating a PCO from an RFI:

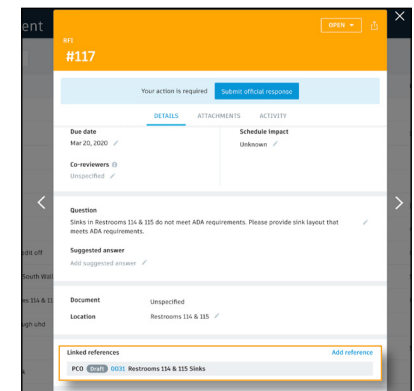
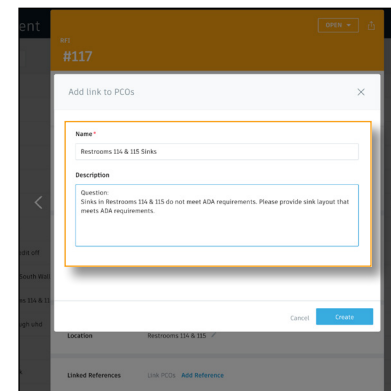
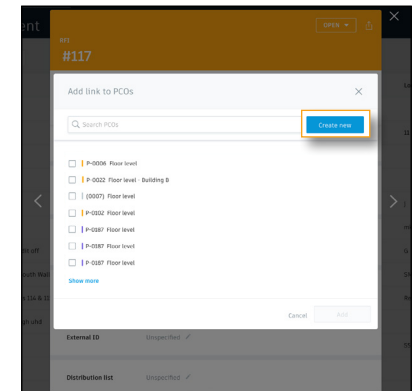
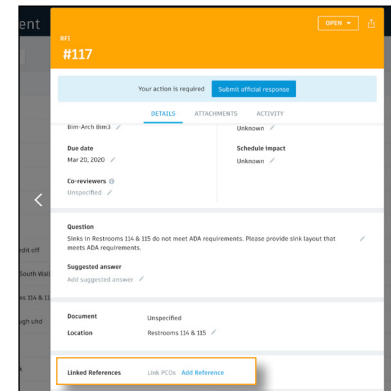
- In the Project Management module, open the RFI record. Within the details tab, scroll to linked references and select “Add reference.”
- A link PCO box will appear, select the “Create new” button.
- A form will open, fill in the PCO name and description, then select “Create PCO.” This information will copy over from the RFI to the PCO, but it can be altered directly in the PCO record.
- Once the PCO is created, a bi-directional relationship between the RFI and PCO is established, and the activity captured in the RFI activity log.

### Linking RFIs to PCOs:

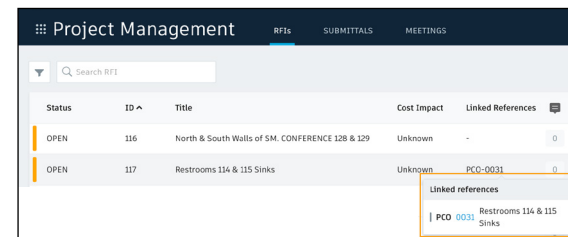
- To link RFIs to PCOs follow the same steps as above. However, when the link PCO box appears, simply select the PCO(s) from the list and click “Add.”
- To unlink a PCO select the “X” and “Unlink.”

### Accessing Linked RFIs & PCOs from the list views:

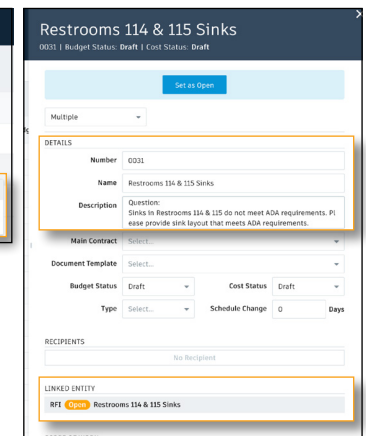
- Only Admins & RFI Managers can view linked PCOs. Within the RFI list view in the linked references column, select the PCO number to open the PCO in the Cost Management module.
- In the Cost Management Module within the PCO details flyout panel, select the RFI to be directed to the RFI in the Project Management module.



### RFI List View



### PCO Created (Details Flyout Panel)





# Expenses

Cost Management includes a robust set of functionality that enables teams to streamline the management of expenses. Not only does it streamline invoice reviews and approvals, but teams can utilize up to date actual cost data for more accurate forecasting and add expense data to Budget Payment Applications.

## 1 Expense Tab

Open the Cost Management module, select the Expenditure tab, then Expenses. This is where users can manage all invoices and expenses outside of pay applications. To add an expense you must have full control permission for this tab. Project Admins control the permission levels within the project admin module.

### 3 Ways to Add Expenses:

- Add from an existing contract
- Manually add
- Use APIs to build an integration with their accounting/ERP system to automatically flow data between the two platforms.

## 2 Adding from an Existing Contract

1. Select the “Add from Contract” button.
2. In the dialog box use the drop-down to find the correct contract.
3. Select “Add.”

### Adding an Expense from an Existing Contract

The screenshot shows the 'Cost Management' interface with the 'EXPENSE' tab selected. A dialog box titled 'Add Expense from Contract' is open. It contains a search bar and a list of contracts. The 'Add' button is highlighted with a red box and a number 3. The list of contracts includes:

- 007200 - Office Supplies
- CLAD1 - Roof and Wall Cladding
- CT01 - Owner Contingency
- CT02 - Fee
- GCD01 - Staff

### Existing Contract in Contract Tab

The screenshot shows the 'Cost Management' interface with the 'CONTRACT' tab selected. The 'Office Supplies' contract is displayed. The contract details include:

- Contract Name: Office Supplies
- Supplier: Office Supplies R...
- Contract Type: Purchase Order
- Original Budget: 10,000.00
- Internal Budget: 0.00
- Approved Budget: 10,000.00
- Approved Change Orders: 0.00
- Uncomm. Chg: 0.00

# Expenses

## Adding from an Existing Contract (continued)

4. Details are automatically brought in. For example, Name, Supplier, Contract, and Amount. The item is also automatically connected to the correct budget code to show liability.
5. **Amount:** By default, the amount is set to full. To change the amount to something less than full, click in the Amount field and update the number.
6. **Scope:** In the Scope column, use the drop-down menu to categorize the payment type, Full or Partial.
7. **Type:** In the Type column, use the drop-down to select the appropriate expense type (e.g., Internal, Invoice, Overhead Cost). Project Admins are the individuals with permission to create the list of expense types in the settings. Refer to the Settings and Permissions chapter to learn how this is done.
8. **Date Issued:** In the Date Issued column, use the calendar to select the appropriate date. For example, the date the invoice was issued.
9. **Reference Number:** To include a reference number, click into the Reference Number field.
10. **Status:** In the Status column, use the drop-down menu to set the appropriate status.
11. **Date Paid:** When the items status is set to paid, the date will automatically populate in the Date Paid field.

Number	Name	Supplier	Contract	Amount	Type	Budget Code	Budget Name	Date Issued	Date Paid	Status	Scope	Reference Number	Main Contract
0001	Office Supplies	Office Supplies R...	Office Sup...	10,000.00		0987000070000...	OFFICE SUPPLIES			Draft	Full		Main/Prime Contr...
0002	OFFICE SUPPL...		Office Sup...	10,000.00		0987000070000...	OFFICE SUPPLIES				Full		Main/Prime Contr...

Number	Name	Supplier	Contract	Amount	Type	Budget Code	Budget Name	Date Issued	Date Paid	Status	Scope	Reference Number	Main Contract
0001	Office Supplies	Office Supplies R...	Office Sup...	10,000.00		0987000070000...	OFFICE SUPPLIES			Draft	Full		Main/Prime Contr...
0002	OFFICE SUPPL...		Office Sup...	10,000.00		0987000070000...	OFFICE SUPPLIES				Full		Main/Prime Contr...

Number	Name	Supplier	Contract	Amount	Type	Budget Code	Budget Name	Date Issued	Date Paid	Status	Scope	Reference Number	Main Contract
0001	Office Supplies	Office Supplies R...	Office Sup...	10,000.00		0987000070000...	OFFICE SUPPLIES			Draft	Full		Main/Prime Contr...
0002	OFFICE SUPPL...		Office Sup...	10,000.00		0987000070000...	OFFICE SUPPLIES				Full		Main/Prime Contr...

Number	Name	Supplier	Contract	Amount	Type	Budget Code	Budget Name	Date Issued	Date Paid	Status	Scope	Reference Number	Main Contract
0001	Office Supplies	Office Supplies R...	Office Sup...	10,000.00		0987000070000...	OFFICE SUPPLIES			Draft	Full		Main/Prime Contr...
0002	OFFICE SUPPL...		Office Sup...	10,000.00		0987000070000...	OFFICE SUPPLIES				Full		Main/Prime Contr...

Number	Name	Supplier	Contract	Amount	Type	Budget Code	Budget Name	Date Issued	Date Paid	Status	Scope	Reference Number	Main Contract
0001	Office Supplies	Office Supplies R...	Office Sup...	10,000.00		0987000070000...	OFFICE SUPPLIES			Draft	Full		Main/Prime Contr...
0002	OFFICE SUPPLIES		Office Sup...	10,000.00		0987000070000...	OFFICE SUPPLIES				Full		Main/Prime Contr...

**PRO TIP:** To delete a subitem or expense, select the three dots in the appropriate row. You can delete an expense or subitem if the expense status is Draft, Pending, Revise and Resubmit, or Rejected.

If connected Cost Management to your Accounting/ERP system as changes are made the information will automatically update in both systems.

# Expenses

## 3 Adding an Expense Manually

If there is no purchase order, you can manually add an expense to be able to track it and show liability against the budget.

1. Select the arrow next to the “Add from Contract” button, then select “Add.”
2. **Name:** In the Name column, type in the name for the expense.
3. **Supplier:** In the Supplier column, use the drop-down menu to choose the appropriate supplier. If it’s not listed you can manually enter it.
4. **Type:** In the Type column, use the drop-down to select the appropriate expense type (e.g., Internal, Invoice, Overhead Cost). Project Admins are the individuals with permission to create the list of expense types in the settings. Refer to the Settings and Permissions chapter to learn how this is done.
5. **Date Issued:** In the Date Issues column, use the calendar to select the appropriate date. For example, the date the invoice was issued.

*Continued on the following page...*

### Adding an Expense Manually

Cost Management

INCOME EXPENDITURE CHANGE ORDER

CONTRACT COST PAYMENT APPLICATION EXPENSE

Add from Contract

Add from Contract

Add

	Supplier	Contract	Amount	Type	Budget Code	Budget Name	Date Issued	Date Paid	Status	Scope
--	----------	----------	--------	------	-------------	-------------	-------------	-----------	--------	-------

Cost Management

INCOME EXPENDITURE CHANGE ORDER

CONTRACT COST PAYMENT APPLICATION EXPENSE

Add from Contract

Number

Name

	Supplier	Contract	Amount	Type	Budget Code	Budget Name	Date Issued	Date Paid	Status	Scope
--	----------	----------	--------	------	-------------	-------------	-------------	-----------	--------	-------

Cost Management

INCOME EXPENDITURE CHANGE ORDER

CONTRACT COST PAYMENT APPLICATION EXPENSE

Add from Contract

Number

Name

Supplier

Contract

Amount

Type

Budget Code

Budget Name

Date Issued

Date Paid

Status

Scope

Mystery PO

Fedex

Enter: Fedex

PRO TIP: If the supplier isn't in the system, type the name in the field and click "Enter:..."

Cost Management

INCOME EXPENDITURE CHANGE ORDER

CONTRACT COST PAYMENT APPLICATION EXPENSE

Add from Contract

Number

Name

Supplier

Contract

Amount

Type

Budget Code

Budget Name

Date Issued

Date Paid

Status

Scope

Internal

Invoice

Cost Management

INCOME EXPENDITURE CHANGE ORDER

CONTRACT COST PAYMENT APPLICATION EXPENSE

Add from Contract

Number

Name

Supplier

Contract

Amount

Type

Budget Code

Budget Name

Date Issued

Date Paid

Status

Scope

Reference Number

Main Contract

Export

July 2020

Su Mo Tu We Th Fr Sa

1 2 3 4

5 6 7 8 9 10 11

12 13 14 15 16 17 18

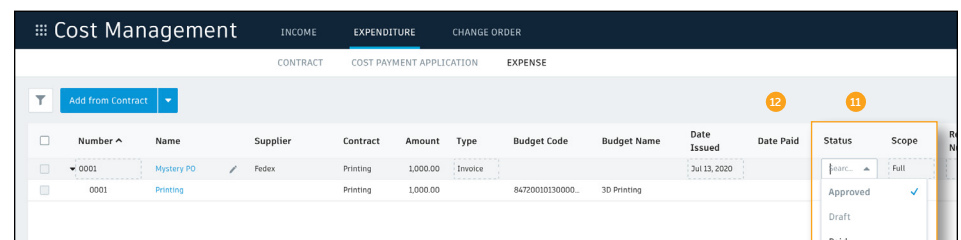
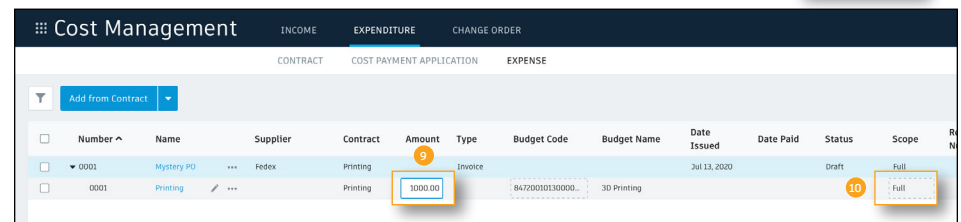
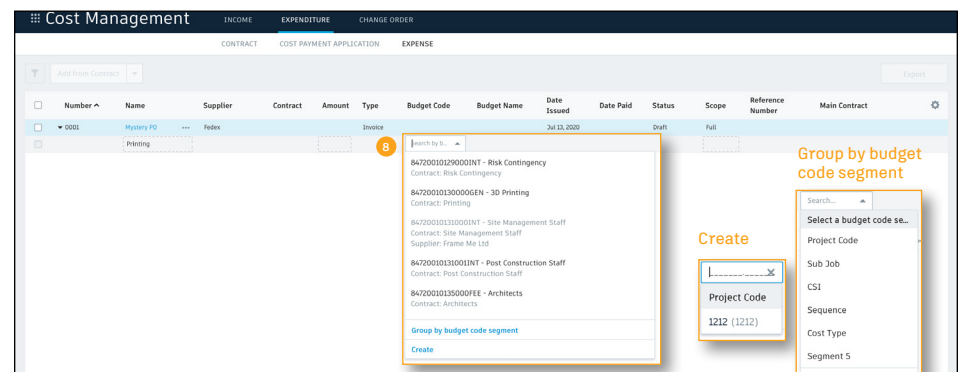
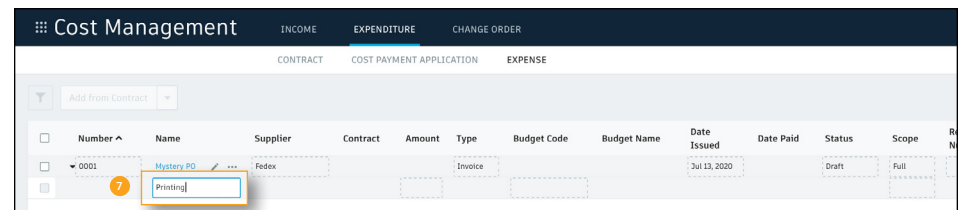
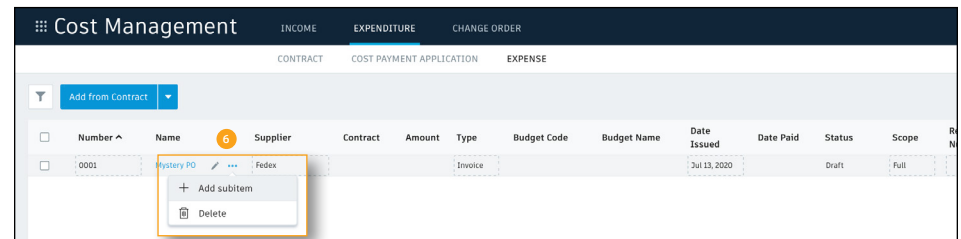
# Expenses

## Adding an Expense Manually (continued)

6. **Add Subitem:** To add cost details, select the three dots to the right of the Expense name. You can add an unlimited number of subitems to a contract as long as the status is Draft.
7. **Name:** In the Name column, click to manually add the name of the item. Then push enter.
8. **Budget Code:** In the Budget Code column, use the drop-down menu to select a budget item. You can type to filter the list and use the group by segment to organize the list as preferred. If the budget code isn't listed, you can choose "Create" it.
  - Note: If creating the code manually, click the field to save it.
9. **Amount:** In the Amount column, click to manually add the amount.
10. **Scope:** In the Scope column, use the drop-down menu to categorize the payment type, Full or Partial. This will automatically update the contracts scope.
11. **Status:** In the Status column, use the drop-down menu to set the appropriate status.
12. **Date Paid:** When the items status is set to paid, the date will automatically populate into the Date Paid field.

**PRO TIP:** To delete a subitem or expense, select the three dots in the appropriate row. You can delete an expense or subitem if the expense status is Draft, Pending, Revise and Resubmit, or Rejected.

If connected Cost Management to your Accounting/ERP system as changes are made the information will automatically update in both systems.



# Expenses

4

## Adding Expenses to Budget Payment Applications

Associating expenses to a budget payment application is a similar process to associating cost payment applications to the budget payment application.

1. In the Income menu navigate to the Budget Payment Application tab.
2. Use the drop-down menu to navigate to the correct contract.
3. Select the contract main to open the details flyout panel.
4. Scroll to the "Associate Expense" section and select "Add existing."
5. A list of approved expenses will populate, select the one(s) you wish to associate.
6. The associated expense will appear in the details flyout panel.

**PRO TIP:** When generating the budget payment application document, you can choose to collate associated expenses, attachments, and Supplier pay applications together for submission to the Owner.

Cost Management

INCOME EXPENDITURE CHANGE ORDER

BUDGET MAIN CONTRACT BUDGET PAYMENT APPLICATION

Main Contract 1 Jan 1, 2019 - Jan 31, 2019 Submitted

Associated Cost Payment Application: 1 View

General		Scheduled Value		From Previous Application		This Period	
Number	Name	Qty	Unit	Unit Cost	Amount	Qty	Unit Cost
MC-1	Main Contract 1 - PA001				79,361.99		
	Main Con.				75,355.81		

MC-1

Total 5,777.49

DOCUMENT BY RECIPIENT

1 document(s) generated on Jul 15, 2020 by Cassie Bustos Show more...

Edward Roy, Modern Developments (tim360user4@yahoo.com)

Download

Regenerate...

ASSOCIATED COST PAYMENT APPLICATION

Create Add existing

Contract	Supplier	Billing Period	Status	Payment Requested
Site Manage...	Frame Me Ltd	Jan 1, 2019 - Jan 31, 2019	Accepted	0.00

ASSOCIATED EXPENSE

Add existing

Update

WORK COMPLETED THIS PERIOD

Update value in Work Completed This Period from associated Cost Payment Application and Expense.

Associated Expense must have a status of 'Approved' in order to update the Budget Payment Application.

Last Updated: Apr 16, 2020 8:27 PM by Hansen Liu

Add Expense

Select Expense

Number	Contract	Supplier	Date Issued	Status	Amount
0001	Printing	Fedex	Jul 13, 2020		1,000.00
0002	Office Su...		Jul 14, 2020		2,300.00

Cancel Add

ASSOCIATED EXPENSE

Add existing

Number	Contract	Supplier	Date Issued	Status	Amount
0001	Printing	Fedex	Jul 13, 2020	Approv...	1,000.00

WORK COMPLETED THIS PERIOD

# Expenses

5

## Viewing Expense Details in the Budget Summary

Similar to approved cost payment application details pulling into the budget summary, approved/paid expenses automatically pull into the budget summary view. This gives you the ability to view actual cost breakdowns and make accurate forecast adjustments.

1. In the Income menu navigate to the Budget tab.
2. Scroll to the right to the Actual Cost column. Expenses with an approved or paid status will display in the list.
3. Select the total in the Actual Cost column to view the cost breakdown.
4. Select the Budget Name to open the details flyout panel for more detailed information.
5. For any budget item, if a forecast adjustment, budget transfer, or change order transfer needs to be made, select the three-dot menu next to the budget item name.

**Cost Management** INCOME EXPENDITURE CHANGE ORDER

BUDGET MAIN CONTRACT BUDGET PAYMENT APPLICATION

General				Income				Expenditure		Forecast	
Budget Code ^	Cost Type	Budget Name	Supplier Contract	Original Budget	Internal Budget Transfer	Approved Owner Changes	Revised Budget	Projected Cost	Actual Cost	Forecast Adjustments	Forecast Cost to Complete
001.454300.2.2	GEN	Copy Machine	---	0.00	0.00	18,320.34	75,374.1...	77,328,306...	3,300.00	164,000.00	77,489,006.4
002.452700.2.2	GEN	paper	---	0.00	0.00	0.00	0.00	0.00	800.00	0.00	(1,500.00)
001.012100.1	FEE	Fees/Legal/L...	Fees/Legal/Insura...	193,633...	1.00	1,043.52	194,677.52	194,633.00	0.00	0.00	194,633.00

**Cost Management** INCOME EXPENDITURE CHANGE ORDER

BUDGET MAIN CONTRACT BUDGET PAYMENT APPLICATION

General				Income				Expenditure		Forecast	
Budget Code ^	Cost Type	Budget Name	Supplier Contract	Original Budget	Internal Budget Transfer	Approved Owner Changes	Revised Budget	Projected Cost	Actual Cost	Forecast Adjustments	Forecast Cost to Complete
001.454300.2.2	GEN	Copy Machine	---	0.00	0.00	18,320.34	75,374.1...	77,328,306...	3,300.00	164,000.00	77,489,006.4
0002		Office Suppliers R...							1,500.00		

12120014543002GEN2

Multiple

DETAILS

Budget Code 1212

Name Cop

Description

BUDGET CODE DETAILS

Segment Name

**Cost Management** INCOME EXPENDITURE CHANGE ORDER

BUDGET MAIN CONTRACT BUDGET PAYMENT APPLICATION

General				Income				Expenditure		Forecast	
Budget Code ^	Cost Type	Budget Name	Supplier Contract	Original Budget	Internal Budget Transfer	Approved Owner Changes	Revised Budget	Projected Cost	Actual Cost	Forecast Adjustments	Forecast Cost to Complete
001.454300.2.2	GEN	Copy Machine	---	0.00	0.00	18,320.34	75,374.1...	77,328,306...	3,300.00	164,000.00	77,489,006.4
0002		Office Suppliers R...							1,500.00		
001.012100.1	FEE	Fees/Legal/L...	Fees/Legal/Insura...	193,633...	1.00	1,043.52	194,677.52	194,633.00	0.00	0.00	194,633.00

Forecast Adjustments

Budget Transfer

Change Order Transfer



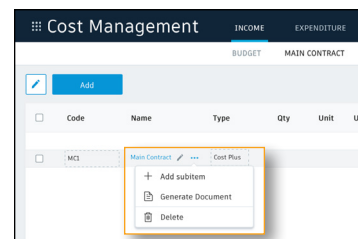
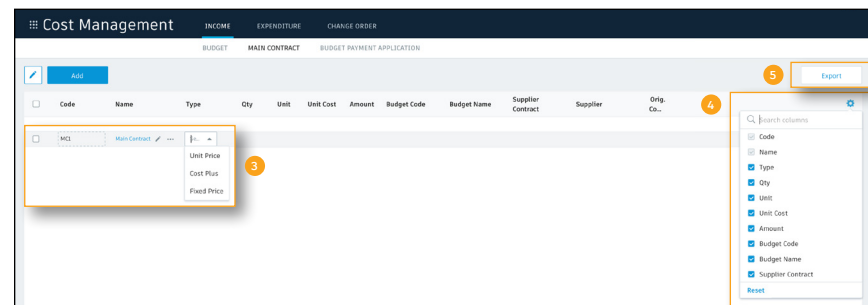
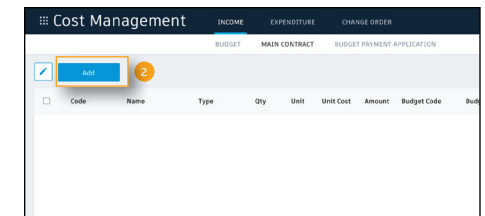
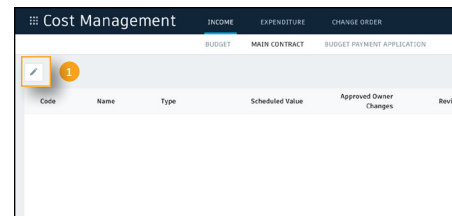
# Payment Applications

Avoid risk and errors resulting from the use of disconnected cost management tools, and benefit from real-time visibility into how payments are affecting the project budget to maintain a real-time view of the financial health of the project.

## 1 Creating main/prime contract(s)

Open the Cost Management module, select the Income menu, then Main Contract. To create a contract you must have full control permission for this tab. Project Admins control the permission levels within the project admin module.

1. Select the edit icon.
2. In edit mode, an “Add” button will appear; select it to create a new main contract(s).
3. Type the contract code, name, and select the type drop-down.
4. Column settings allow you to select the columns you wish to include in your view.
5. The export button allows you to export the information in the Main Contract tab to Excel.



**PRO TIP:** After a contract is created if you wish to edit you need to be in edit mode. If you choose to add a sub-item, generate a document, or delete a contract select the three-dots after the contract name.

# Pay Applications

2

## Creating the main/prime contract schedule of values (SOV)

You can either manually create the SOV or automatically create it from selected items within the Budget tab.

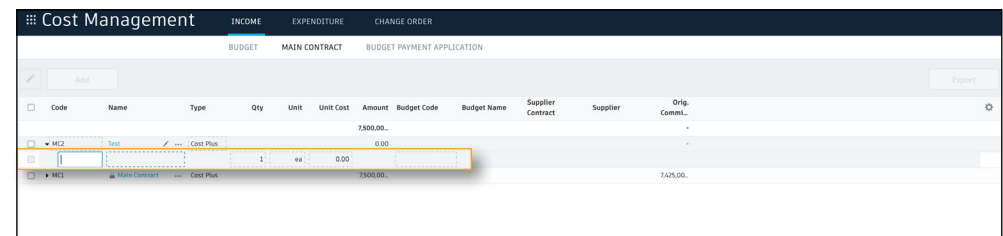
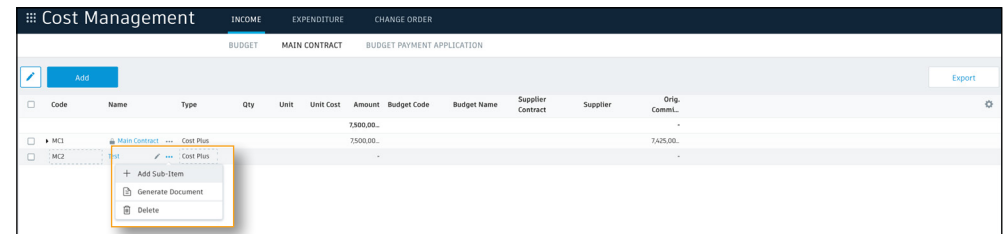
### Manually Creating the SOV:

- In the correct main contract row, select the three-dots then “Add Sub-Item.”
- A new line will appear under the main contract, fill in the necessary information. You can type in a value or associate it to a budget code by selecting within the budget code column; the value will auto-populate.

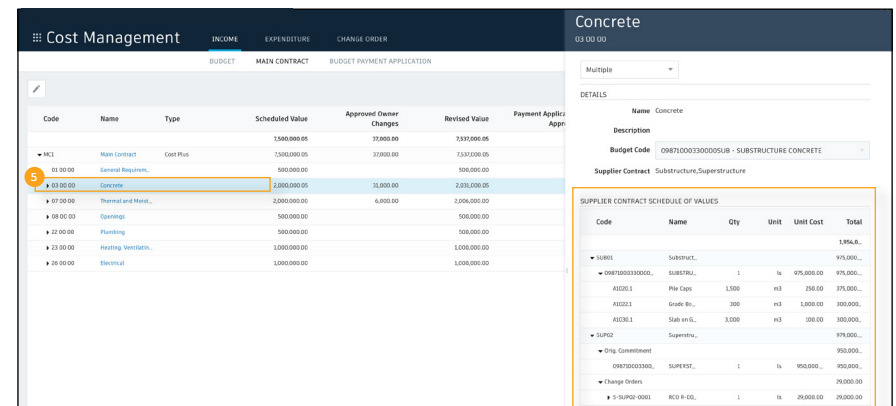
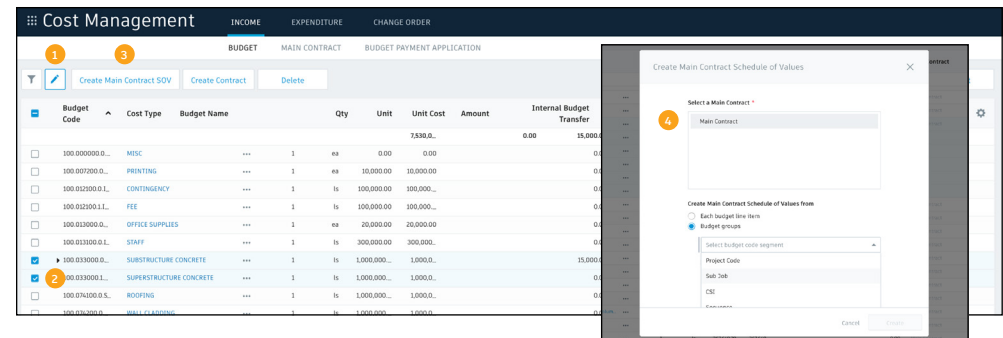
### Automatically Creating the SOV:

1. Within the Budget tab, select the edit icon.
2. Select the budget items you would like to associate with the main contract.
3. A “Create Main Contract SOV” button will appear, select it.
4. Within the Create Main Contract SOV dialog box, select the main contract from the list. Then choose what you want to create the SOV from; when done, click “Create.”
5. The main contract SOV will now be created automatically with links to the budget using the selected settings. This connection allows you to see what you will be paid and what you need to pay your Suppliers.

### Manually Creating the SOV:



### Automatically Adding the SOV:



# Pay Applications

3

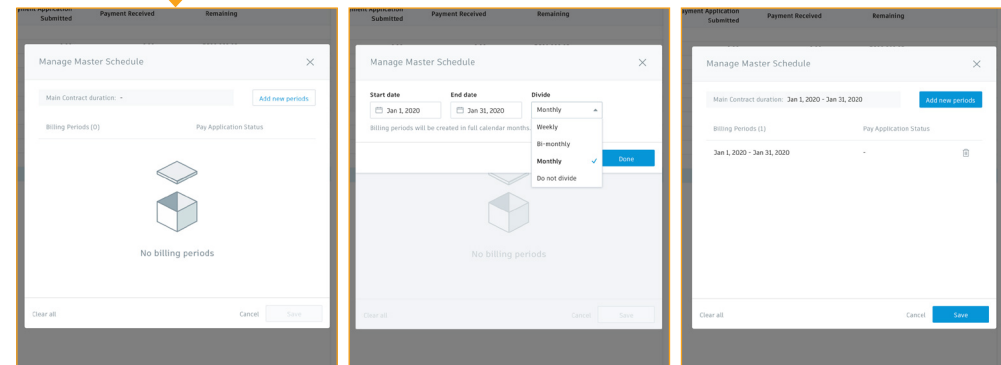
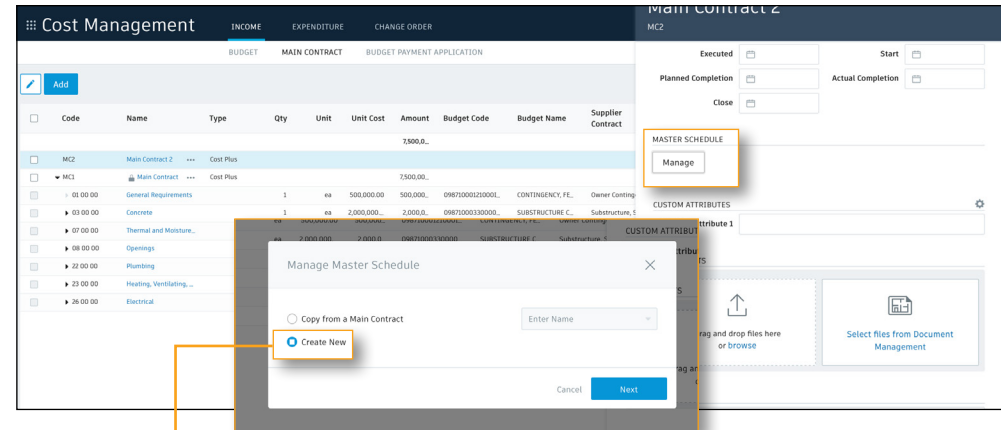
## Creating billing periods/master schedule

You can either setup your billing periods from the main contracts details flyout panel or within the Budget Payment Application tab.

### From Main Contract Details Flyout Panel:

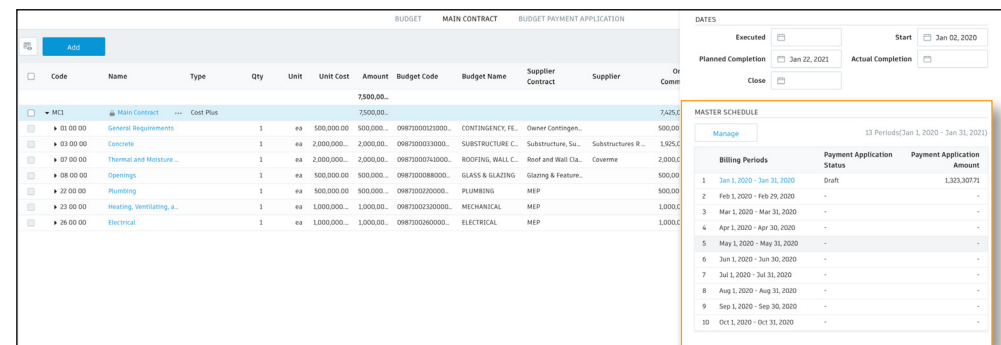
- Select the main contract to open the details flyout panel. Within the panel, scroll to the Master Schedule section and select the “Manage” button.
- In the Manage Master Schedule dialog box, you can either copy billing periods from another main contract using the drop-down menu or manually create new periods.
- Once your billing periods are created, you can manage them within the details flyout panel under the Master Schedule section. In this view, you can also see payment application statuses and amounts for each period.

From Main Contract Details Flyout Panel:



### From Budget Payment Application Tab:

- Select the “Set up master schedule” button. Within the Manage Master Schedule dialog box, follow the same step as above.



# Pay Applications

4

## Managing Cost Payment Applications

Supplier payment applications can be managed from the Budget Payment Application tab within the Income menu. They can also be managed in the Cost Payment Application tab within the Expenditure menu.

### From Budget Payment Application Tab:

1. Use the drop-down menu to select the main contract.
2. Use the drop-down menu to choose the correct billing period or use the arrows to navigate between periods.
3. Select "View" next to Associated Cost Payment Applications. This will open the main contract details flyout panel.
4. In the Associated Cost Payment Application section, select "Create" to create a brand new cost payment application or select "Add existing" to connect an existing application to the contract.
5. Once created, the number of cost payments associated to the main contract will auto populate next to Associated Cost Payment Applications.
6. The cost payment application(s) will appear within the Associated Cost Payment Application section of the details flyout panel.
7. To update the cost payment application information, select the cost payment application billing period. This will take you directly to the cost payment application.

### From Budget Payment Application Tab:

Create New: use the drop-down menu to select the supplier.

Add Existing: select the cost pay application from the provided list.

# Pay Applications

## Managing Cost Payment Applications (continued)

### From Cost Payment Application Tab:

1. In the Expenditure menu select the Cost Payment Application tab, use the drop-down menu to select the appropriate supplier.
2. Select "set up billing periods" and choose the appropriate option. If you decide to create from new, follow the same steps covered in section 3, "Creating billing periods/master schedule."
3. Choose the correct billing period or use the arrows to navigate between periods.

### Updating Cost Payment Application Information:

1. Click within the table to make necessary updates. The system will automatically update to reflect the changes.
2. Use the status drop-down to update the status of the pay application.
3. To export to Excel, select the Export button. This is useful if someone does not have access to the system. They can populate data into the yellow highlighted area; then, you can import the information back into the system.
4. To import data select the Import button.
5. To delete the pay application or allow overbilling, click the three-dot menu to access the options.
6. Approved Supplier Change Orders (SCO) will automatically be added based on the approved date. If you don't see one, select "Add change orders" to manually insert it.

### From Cost Payment Application Tab:

The first screenshot shows the 'Glazing & Feature Entrance' contract with a list of items and their suppliers. The second screenshot shows the 'Manage Billing Periods' dialog box with options to inherit from a master schedule, copy from a contract, or create new.

### Updating Cost Payment Application Information:

The first screenshot shows the 'Substructure' contract with a list of items and their suppliers. The second screenshot shows the 'Payment Application Summary' and 'Change Order Summary' tables.

PAYMENT APPLICATION SUMMARY									
Original Contract Sum									975,000.00
Net Changed By Change Orders									0.00
Contract Sum To Date									975,000.00
Total Completed And Stored To Date									425,000.00
Total Retention									42,500.00
10.00% of Completed Work									42,500.00
0.00% of Stored Material									0.00
Total Earned Less Retention									382,500.00
Less Previous Certificates For Payment									0.00
Current Payment Due									382,500.00
Balance To Finish Including Retention									592,500.00

CHANGE ORDER SUMMARY									
Approved in Previous Periods									0.00
Approved This Period									0.00
Total									0.00

PAYMENT APPLICATION DETAILS									
Number	Name	Scheduled Value	Work Completed			Completed and Stored	Percentage of Completed and Stored	Balance	Retention
			From Previous Application	This Period	Materials on Site				
098710003300005UB	SUBSTRUCTURE CONCR	975,000.00	0.00	425,000.00	0.00	425,000.00	43.59%	550,000.00	42,500.00
A1020.1	Pile Caps	375,000.00		125,000.00		125,000.00	33.33%	250,000.00	12,500.00
A1022.1	Grade Beams	300,000.00		150,000.00		150,000.00	50.00%	150,000.00	15,000.00
A1030.1	Slab on Grade	150,000.00		150,000.00		150,000.00	50.00%	150,000.00	15,000.00
	GRAND TOTAL	975,000.00	0.00	425,000.00	0.00	425,000.00	43.59%	550,000.00	42,500.00

Notice: Please only edit the value of the yellow background cells.

# Pay Applications

## Managing Cost Payment Applications (continued)

### Cost Payment Details Flyout Panel:

Select the payment application name to open the detail flyout panel.

1. Use the drop-down to select the sections you wish to view within the flyout panel.
2. Use the drop-down to update the status.
3. View a concise payment application summary table.
4. View a change order summary.
5. Quickly generate or access generated documents. This feature uses Cost Management document templates capabilities. For more information about this capability refer to the Document Templates chapter.
6. If the cost payment application is associated with a budget payment application you can quickly view the details here. Select the billing period to open the budget payment application.
7. Available custom attributes display within this section. For more information about custom attributes refer to the Custom Attributes chapter.
8. Use these fields to attach relevant information. You can upload information from your computer or select files from BIM 360 Document Management.
9. Use this field to include any important notes.

### Cost Payment Details Flyout Panel:

**Substructure-PA001**  
SUB01.1

Multiple 1

**DETAILS** 2

Number SUB01.1 Status Search...  
Name Substructure-PA001 Accepted  
Description Approved  
Contract Substructure Draft ☒  
Billing Period Jan 1, 2020 - Jan 31, 2020 Revise & Resubmit  
Supplier Substructures R Us Submitted

**3 PAYMENT APPLICATION SUMMARY**

Original Contract Sum	975,000.00
Net Changed By Change Orders	0.00
Contract Sum To Date	975,000.00
Total Completed And Stored To Date	425,000.00
► Total Retention	42,500.00
Total Earned Less Retention	382,500.00
Less Previous Certificates For Payment	0.00
<b>Current Payment Due</b>	<b>382,500.00</b>
Balance To Finish Including Retention	592,500.00

**4 CHANGE ORDER SUMMARY**

Approved In Previous Periods	-
Approved This Period	0.00
Total	0.00

**5 DOCUMENT BY RECIPIENT**

1 document(s) generated on Jan 16, 2020 by Ian Turner [Show more...](#)

Archie Architect, Design Partnership (bim360imperium+arch@gmail.com)  
[Download](#)

[Regenerate...](#)

**6 ASSOCIATED BUDGET PAYMENT APPLICATION**

Main Contract	Billing Period	Status
Main Contract	Jan 1, 2020 - Jan 31, 2020	Draft

**7 CUSTOM ATTRIBUTES**

There are no custom attributes available.

**8 ATTACHMENTS**

Drag and drop files here or [browse](#) [Select files from Document Management](#)

**9 NOTES**



# Pay Applications

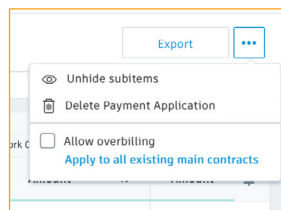
5

## Managing Budget Payment Applications

Owner pay applications can be managed from the Budget Payment Application tab within the Income menu.

### Budget Payment Application Tab:

1. Use the drop-down menu to select the appropriate main contract.
2. Use the drop-down menu to choose the correct billing period or use the arrows to navigate between periods.
3. Column settings allow you to select the columns you wish to include in your view.
4. To unhide sub-items, delete payment application, or allow overbilling, click the three-dot menu to access the options. To export to Excel, select the Export button.



5. Approved owner change orders automatically pull in.
6. To manually insert a change order select "Add change orders" and use the drop-down to select the change order.
7. Use the status drop-down to update the status of the pay application (Draft, Submitted, Approved, Paid, Revise and Resubmit).

### Budget Payment Application Tab:

General	Scheduled Value	Work Completed	Materials	Total	This Period	Total Work Completed	This Application	Materials on Site	Completed and Stored
Number	Name	Qty	Unit	Unit Cost	Amount	Qty	Unit Cost	Amount	%
MC1-1	Main Contr.			7,337,000.00				1,466,897.00	19.46
01 00 00	General R.	1	ea	500,000.00	500,000.00	0	-	0	-
09870000	CONTING.	1	ea	100,000.00	100,000.00	0	-	0	-
09870000	FEE	1	ea	100,000.00	100,000.00	0	-	0	-
09870000	STAFF	1	ea	300,000.00	300,000.00	0	-	0	-
03 00 00	Concrete	1	ea	2,000,000.00	2,000,000.00	0	-	0	-
09870000	SUBSTRUC.	1	ea	1,000,000.00	1,000,000.00	0	-	0	-
09870000	SUPERSTR.	1	ea	1,000,000.00	1,000,000.00	0	-	0	-
07 00 00	Thermal an.	1	ea	2,000,000.00	2,000,000.00	0	-	0	-
09870000	ROOFING	1	ea	1,000,000.00	1,000,000.00	0	-	0	-
09870000	WALL CLAD.	1	ea	1,000,000.00	1,000,000.00	0	-	0	-
08 00 00	Openings	1	ea	500,000.00	500,000.00	0	-	0	-
09870000	GLASS & GL.	1	ea	500,000.00	500,000.00	0	-	0	-
22 00 00	Plumbing	1	ea	500,000.00	500,000.00	0	-	0	-
09870000	PUMPS/INSTR.	1	ea	500,000.00	500,000.00	0	-	0	-
23 00 00	Heating, Wh.	1	ea	1,000,000.00	1,000,000.00	0	-	0	-
09870000	MECHANICAL	1	ea	1,000,000.00	1,000,000.00	0	-	0	-
26 00 00	Electrical	1	ea	1,000,000.00	1,000,000.00	0	-	0	-
09870000	ELECTRICAL	1	ea	1,000,000.00	1,000,000.00	0	-	0	-
Change Orders				31,000.00				31,000.00	83.78
0-0001	RCF #...	1	14	31,000.00	31,000.00	0	-	0	-
01	Additional...	1	14	22,000.00	22,000.00	0	-	0	-
02	Flaming - R.	1	14	9,000.00	9,000.00	0	-	0	-
03	Stems - Rev.	1	14	6,000.00	6,000.00	0	-	0	-

# Pay Applications

## Managing Budget Payment Applications (continued)

### Main Contract Details Flyout Panel:

Select the main contract to open the detail flyout panel.

1. Use the drop-down to select the sections you wish to view within the flyout panel.
2. Use the drop-down to update the status.
3. View a concise payment application summary table.
4. View a summary of the change orders.
5. Quickly generate or access generated documents. This feature uses Cost Management document templates capabilities. For more information about this capability refer to the Document Templates chapter.
6. Create or add existing cost payment applications. To quickly access the cost payment application details, select the billing period. The cost payment application will open.
7. Select the “Add existing” button to associate expenses.
8. Select the update button to update values in work completed this period from associated cost payment applications and expenses. Note, Associated Expense must have a status of ‘Approved’ in order to update.
9. Available custom attributes display within this section. For more information about custom attributes refer to the Custom Attributes chapter.
10. Use these fields to attach relevant information. You can upload information from your computer or select files from BIM 360 Document Management.
11. Use this field to include any important notes.

### Main Contract Details Flyout Panel:

**Main Contract-PA001**  
MCI-1

Multiple (1)

**DETAILS** (2)

Number: MCI-1, Status: Search...  
Name: Main Contract-PA001, Approved  
Description: , Draft ✓  
Main Contract: Main Contract, Paid  
Billing Period: Jan 1, 2020 - Jan 31, 2020, Revise & Resubmit, Submitted

**3 PAYMENT APPLICATION SUMMARY**

Original Main Contract Sum	7,500,000.05
Net Changed By Change Orders	37,000.00
Main Contract Sum To Date	7,537,000.05
Total Completed And Stored To Date	1,446,897.46
Total Retention	143,589.75
Total Earned Less Retention	1,323,307.71
Less Previous Certificates For Payment	0.00
Current Payment Due	1,323,307.71
Balance To Finish Including Retention	6,213,692.34

**4 CHANGE ORDER SUMMARY**

Approved In Previous Periods	-
Approved This Period	37,000.00
Total	37,000.00

**5 DOCUMENT BY RECIPIENT**  
There are no available documents.  
Generate...

**6 ASSOCIATED COST PAYMENT APPLICATIONS**  
Create, Add existing

Contract	Supplier	Billing Period	Status	Payment Requested
Substructure	Substructure...	Jan 1, 2020 - Jan 31, 2020	Draft	1,266,500.00
Superstructure	Frame Me Ltd	Jan 1, 2020 - Jan 31, 2020	Accepted	884,000.00

**7 ASSOCIATED EXPENSE**  
Add existing

**8 WORK COMPLETED THIS PERIOD**  
Update value in Work Completed This Period from associated Cost Payment Application and Expense.  
Update  
Associated Expense must have a status of 'Approved' in order to update the Budget Payment Application.

**9 CUSTOM ATTRIBUTES**  
There are no custom attributes available.

**10 ATTACHMENTS**  
Drag and drop files here or browse, Select files from Document Management

**11 NOTES**

### Associating Cost Payment Applications

**ASSOCIATED COST PAYMENT APPLICATION**  
Create, Add existing

Create Cost Payment Application

Billing Period: Jan 1, 2020 - Jan 31, 2020  
Select Contract: Select from previous period  
Search by Contract or Supplier

Code	Contract	Supplier

Selected: 0

Add Cost Payment Application

Select Cost Payment Application

Contract	Supplier	Billing Period	Status
Concrete Substructure...	Substructure...	Jan 1, 2020 - Jan 31, 2020	Draft

Cancel, Add

### Associating Expenses

**ASSOCIATED EXPENSE**  
Add existing

Add Expense

Select Expense

Number	Contract	Supplier	Date Issued	Status	Amount
0001	Printing	Pedex	Jul 13, 2020		1,000.00

Cancel, Add

**PRO TIP:** Only approved expenses will display in the list.

# Pay Applications

## 6 Document Generation

- Cost Management allows you to create standard documentation formats that automatically populate directly from the system. See the Document Templates chapter of this guide for details on how to access the document templates and create your own.
- For example, you can automatically generate a payment document which provides the information required to populate documents such as the AIA G702-1992 and AIA G703-1992 forms.

### Generating Documents:

1. Within the Main Contract, Cost or Budget Payment Application details flyout panel, scroll to the “Document by Recipient” section and select the “Generate” button.
2. In the Document Generation window, use the search field or drop-down list to select the recipient. Click add and the recipient’s information will appear.
3. You must select a template. The document templates are controlled by the Project Admin, refer to the Document Templates chapter for more information.
4. To attach additional information, either upload files from your computer or select files from BIM 360 Document Management.
5. Choosing Import files from Cost Payment Applications to collate associated expenses, attachments, and Supplier pay applications together for submission to the Owner.
6. When done, select “Generate.”
7. The system automatically generates a Word document for download.
8. Within the details flyout panel you can view the generation date, access the download, or regenerate the document.

### Generating a Budget Payment Document

The screenshots show the following steps:

- Step 1:** A small dialog box titled "DOCUMENT BY RECIPIENT" with the message "There are no available documents." and a "Generate..." button.
- Step 2:** The "Main Contract 1-PA001" flyout panel. The "DOCUMENTS" section is empty. A search field and an "Add" button are visible.
- Step 3:** A modal window titled "Add document by template". It shows a list of templates, with "Budget Payment Document Template.docx" selected.
- Step 4:** The "Main Contract 1-PA001" flyout panel. The "DOCUMENTS" section now shows the selected template. Buttons for "Select a template", "Drag and drop files here or browse", "Select files from Document Management", and "Import files from Cost Payment Application" are visible.
- Step 5:** The "Main Contract 1-PA001" flyout panel. The "DOCUMENTS" section shows the template with a "Generate" button in the top right corner.
- Step 6:** A "Download Budget Payment Application" dialog box showing the generated document for "Edward Roy, Modern Developments" with a "Download" button.

# 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 Compaanv 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 Select Role Architect Construction Manager Contractor Designer Document Manager Engineer Estimator Executive	Account Admin Account Admin Executive Overvie

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 the following columns: Name/Email, Company, Roles, and Project Admin. The Project Admin column contains icons for different access levels: a person icon (selected), a person with a lock icon (grayed out), a person with a key icon (grayed out), a person with a key and lock icon (grayed out), and a person with a key and lock and a plus icon (grayed out).

Name/Email	Company	Roles	Project Admin
Rick Nichols	Aesthetik Interiors	Owner	[Person icon]
Ben Johnson	General Construction	Construction Manager	[Person with lock icon]
bim360user7@yahoo.com	Ace Property Holdings	Construction Manager	[Person with lock icon]
bim360user6@yahoo.co...	Sparxx Electrical	Engineer	[Person with lock icon]
bim360user8@yahoo.oc...	General Construction	Superintendent	[Person with key and lock icon]

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.

# 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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