

BLD353156: How to Manage a Large Portfolio of Buildings in BIM 360 Ops

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Get Started Now!

- Scan the barcode OR
- Visit <https://ops.bim360ops.com>

(or download **BIM 360 Ops** from the App Store)

- Enter your email address and join the portfolio **AU2019**.
- Confirm your email address and enter a phone #
- You are now an occupant of this portfolio
- Add tickets with questions, comments, feedback etc.!
- Create your own portfolio and start managing your own building.



How to Manage a Large Portfolio of Buildings in BIM 360 Ops

This class will share strategies for managing a large portfolio of buildings in BIM 360 Ops software. Owners, project managers, and facilities managers will gain tips to simplify and manage buildings globally and then locally. Attendees will learn which standards matter, how to best administrate scheduled tasks for a diverse global team, and how to report for effective management.

Scan me!





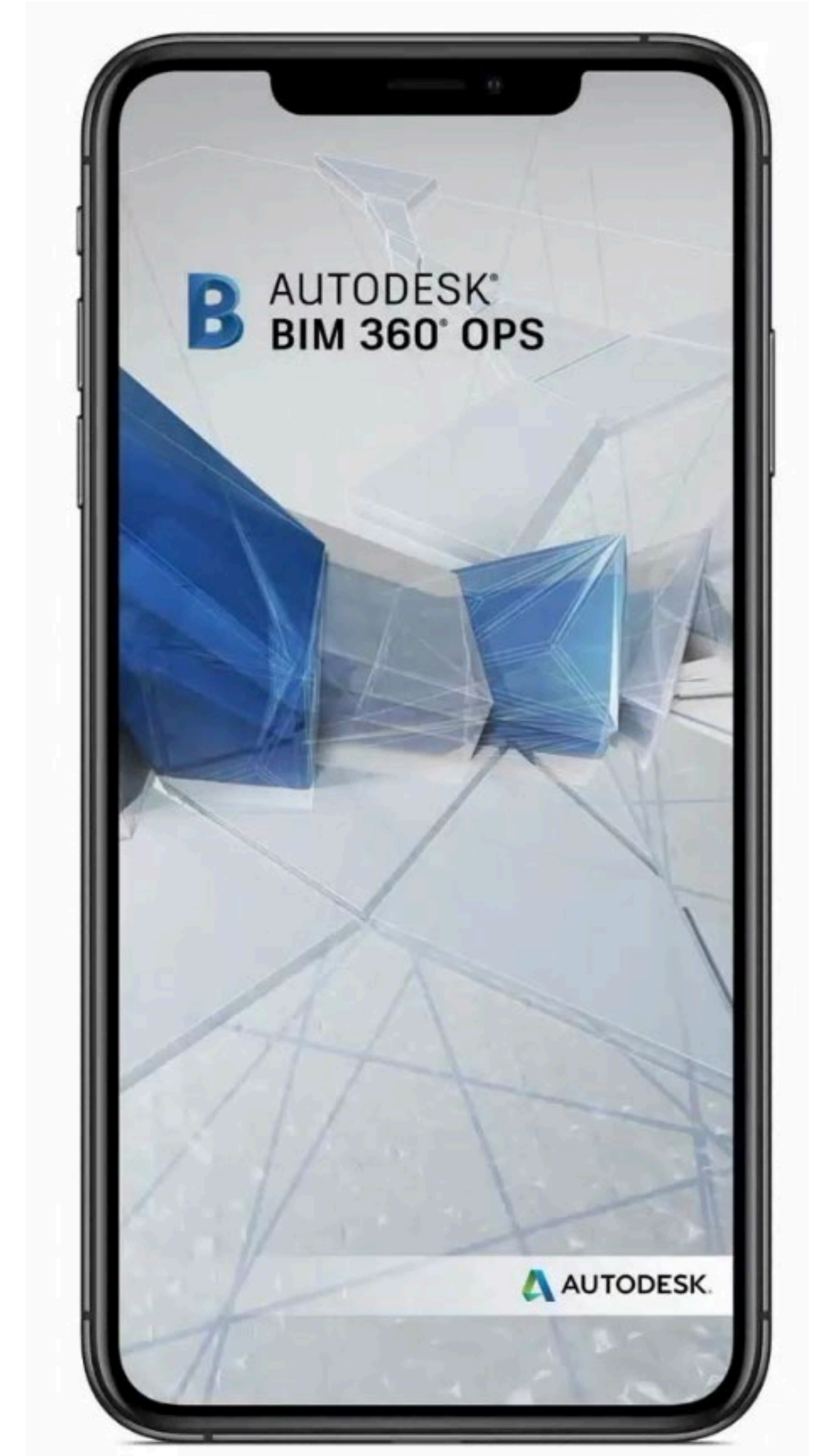
About Me!

I'm Jess

And I'm the Global BIM 360 Ops Coordinator for Autodesk based out of Boston, MA. While my role is multifaceted, my primary responsibility is providing technical support to Autodesk users using BIM 360 Ops and maintaining the Autodesk BIM 360 Ops portfolio.

What is Autodesk BIM 360 Ops?

- **Easy to use, mobile-first** maintenance management solution with web and mobile clients
- For maintenance managers, **technicians**, and building occupants
- Connects **BIM asset data** to the people who need it most, when they need it, where they need it
- Creates actionable tickets from **building sensors**
- Provides **indoor maps** to locate tickets and assets, do wayfinding for technicians, and enable more effective ticket triaging and analysis



What Are the Benefits of BIM 360 Ops?

- **Enables owners to begin operations on day one** with a turnkey maintenance and asset management solution
- **Helps owners realize the operating potential of their buildings** and reduce expenses from unmaintained equipment
- **Offers a simple and elegant mobile and responsive web interface** that meets the needs of the mobile maintenance workforce
- **Improves the facility team efficiency by delivering indoor maps** that make ticket and asset data immediately actionable and contextually relevant

BIM 360 Ops Classes at AU 2019

Session ID	Title	Day and Time
BLD322234	Getting Started with BIM 360 Ops	Tuesday 1:30
BLD322245	Indoor Mapping for Facility Operations	Tuesday 2:45
BLD322176	Revit to BIM 360 Ops—Exporting Asset and Location Data for Facilities Management	Tuesday 4:30
BLD323807	Autodesk Facilities and BIM 360 Ops: How We Integrated Our Systems and Why	Wednesday 8:00
BLD322056	Maintaining Models with Value: What OSU Learned Moving to BIM	Wednesday 9:15
BLD334451	Leveraging Apple Indoor Maps Program for Building Operations	Wednesday 10:30
BLD322039	FM—with the End in Mind	Wednesday 1:30
BLD323156	How to Manage a Large Portfolio of Buildings in BIM 360 Ops	Wednesday 2:45
BLD322704	BIM 360 Ops for Data Centers: An Application Review	Wednesday 4:30
BLD323162	Existing to Expansion—BIM 360 Ops for the Fayetteville Public Library System	Thursday 8:00
CS323783	Getting Real with BIM 360: A Case Study of Autodesk’s Boston Office	Thursday 10:30
CS322863	Enhanced Workflows to Successfully Implement BIM 360 Ops	Thursday 1:30
BLD322830	How to Write an Awesome Facilities Management Data Specification	Thursday 2:45

Facilities Transitions to Ops

- At the time CREFTS (now WP&T) was using Service Now, we couldn't utilize it properly
- Don't need the weight that competitors offer → simplicity
- March 2017 - Started with 25 Buildings; end of 2017 – All buildings
- Went to the teams and asked them to manually collect the asset information based on the standard provided
- Engaged EH&S on Scheduled Tasks

Where to Start with Ops



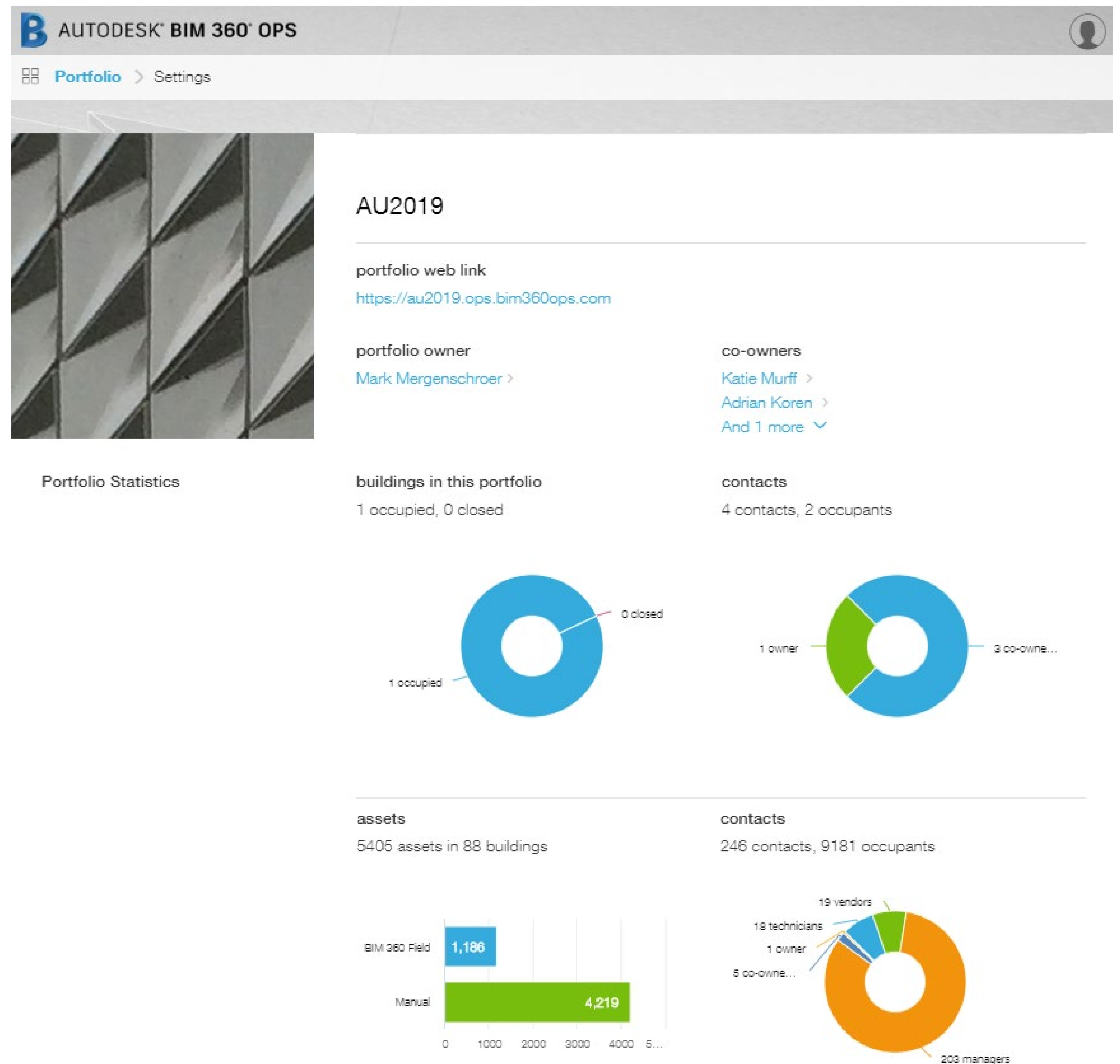
Where to begin and what to consider

- What are the needs of your users?
 - What type of access will various users have: Co-Owner (Admin role), Manager, Technician, Vendor, or Occupant
 - What type of equipment do they need to track?
 - What info/data are you looking to gather
- Who will be the admin
 - They manage user access
 - Performs audits/reviews of what is in the portfolio
 - One point of contact for questions
 - Make any necessary changes to Scheduled Tasks
- Create a Portfolio and add a building(s)!



Portfolio Settings

- Summarizes your portfolio information
- Tells who is in charge of the portfolio; your owners and co-owners



Portfolio Settings (continued)

- **Allowed Occupant Domains:** can any one submit a ticket or do you want just your company to submit tickets?
- **Work Schedule**
 - **Workdays:** what days of the week do you operate?
 - **Workday hours:** when are you open or when are tickets being worked on?
- **Ticket Configuration**
 - **Priorities and Due Dates:** Set number of days a ticket is due based on the priority
 - **Needs attention:**
 - You can customize these
 - Why is the ticket not completed? Ex: Requires Vendor, Could not Access Space, Awaiting Parts
 - **SLAs:** check out the blog
<https://bim360ops.autodesk.com/blog/getting-started-with-sl原因>
 - **Occupant Quick Tickets:**
 - You can customize these
 - What are your most common submitted tickets by occupants? Ex: I'm too hot, I'm too cold, I lost my badge

Allowed Occupant Domains	occupants can join from autodesk.com Add domain.com >	
Work Schedule	workdays S M T W T F S	workday hours 7:00 AM - 5:00 PM
Ticket Configuration	priorities and due dates 3 >	needs attention reasons Awaiting parts View more >
	service level agreement groups Add >	occupant quick tickets 4 >

Portfolio Settings (continued)

- **Email Configurations**: when occupants reply to an email from BIM 360 Ops, it goes to Kim
- **Category Configurations**
 - **Categories**: List of all the categories for your portfolio
 - **Edit categories**:
 - **Here Only**: Only Admins can make changes to categories and only allows your designated list to be added to a ticket
 - **Anywhere**: free for all! anyone, anywhere can add any category they want to tickets or Scheduled Tasks
 - **Category groups**
- **Task Configuration**: who can edit tasks?
 - If you have legal or compliance requirements for PMs or any inspections, it is recommended only admins (Owner and Co-Owners) can edit Tasks
- **Add-Ins** Airtable!

Email Configuration	email notifications come from Kim and the BIM 360 Ops team	
Category Configuration	categories 21 >	edit categories Here only >
	category groups 2 >	
Task Configuration	edit tasks Owner, Co-owners >	
Add-Ins	Autodesk BIM 360 Ops Add-in for Revit Download >	
	connect to Airtable ? Airtable connected v	sync existing tickets to Airtable Sync tickets created this month >
		Sync to Airtable

Categories



Determine Categories

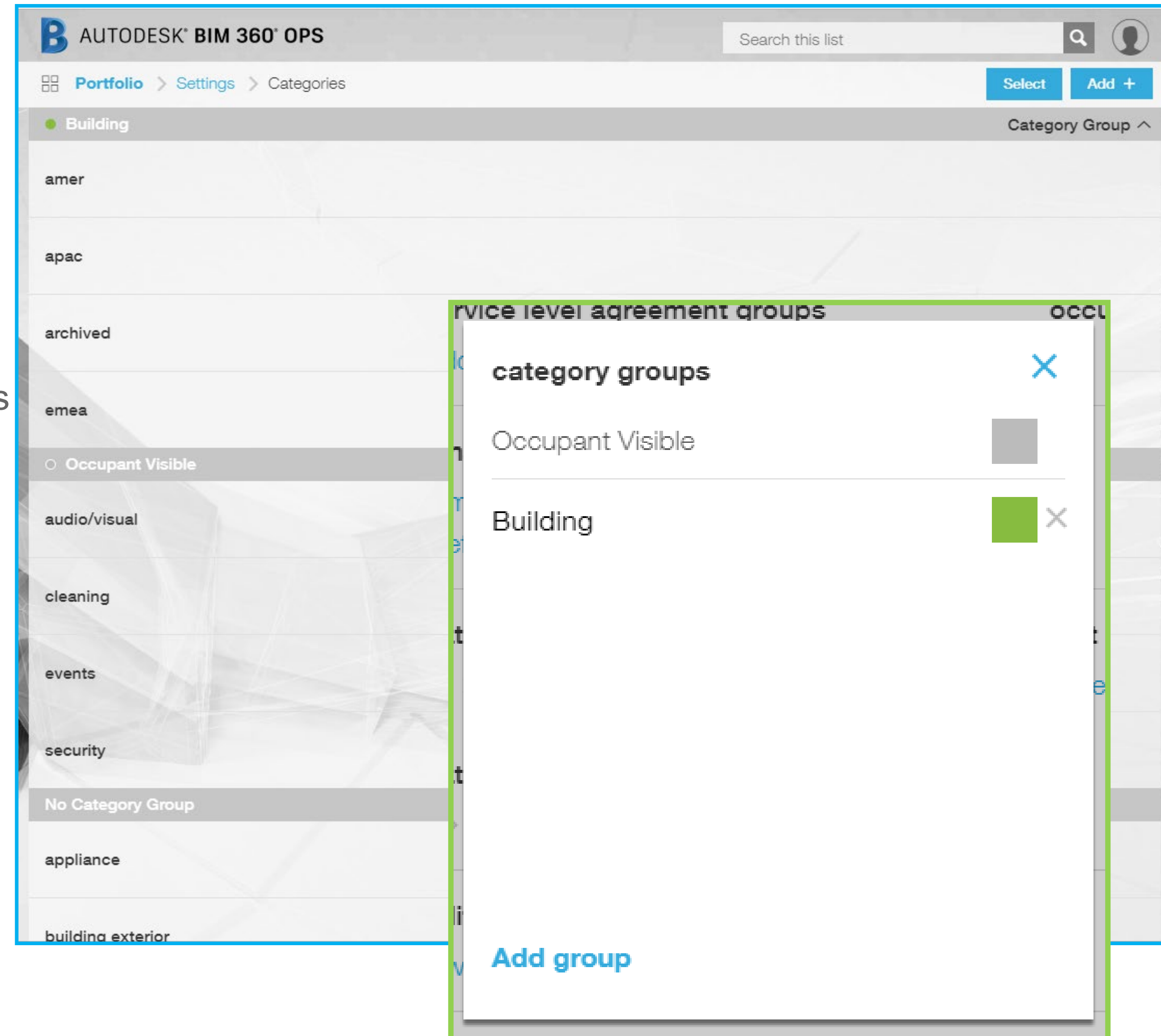
- What are the most commonly submitted tickets?
- What do the buildings need?
- Does a department need it's own category?
 - Security
 - EH&S
- When in doubt use *other*
- Categories Blog Post:
<https://bim360ops.autodesk.com/blog/using-action-categories>

Autodesk's Categories

- Mechanical
- Electrical
- Plumbing
- Building Interior
- Building Exterior
- Appliance
- Audio/Visual
- Copy/Print
- Cleaning
- Events
- Furniture
- Move/Add/Change
- Security
- Shipping
- EH&S
- Signage
- Other

Categories

- You add these based on what you have determined is needed
- What tickets and Scheduled Tasks are categorized as
- **Category Groups**
 - **Occupant Visible Categories:** Categories Occupants have the option to select when submitting a (reactive) ticket
 - **Building Categories:** what types of buildings do you have? How are your buildings grouped?
- Lock them down!!!
 - This will only benefit you
 - Is what will bring value to reporting
 - Can work against you if you don't.....



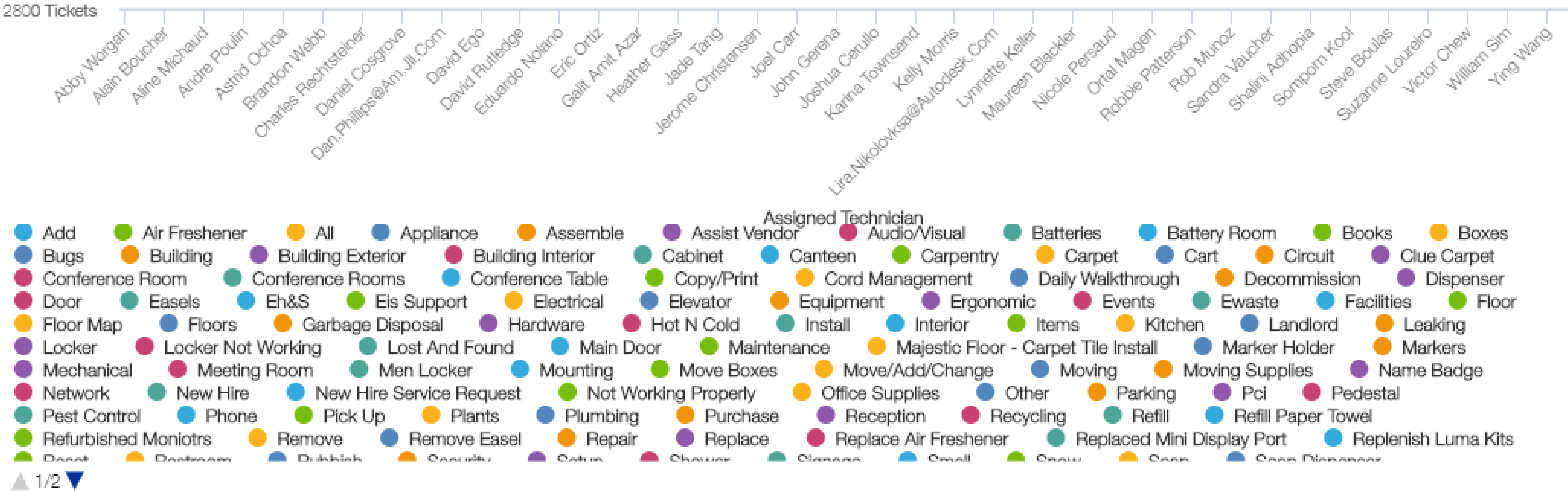
Show me [number of tickets](#) over [Feb 1, 2017 to Jul 31, 2017](#) compared to [none](#)

Break down graph by [Category](#)

Number of Tickets

Number of Tickets by Assigned Technician and Category

Showing data for 8722 tickets. Filters: OpenClosed and Feb 1, 2017 to Jul 31, 2017.



Saved Views

Number of Tickets by

Number of Tickets by

Number of Tickets by

Number of Tickets by

Category Explosion

- You really want to avoid this...😞
- The graph doesn't generate any viable or useful information
- You can merge them BUT
 - You can't edit categories on closed tickets
 - Some ticket may end up with categories that don't apply to the ticket
 - Will effect your reporting. Ex: hours worked by category will not be accurate
- You export to .csv and edit categories, cannot be reuploaded to Ops to correct categories

Locations



Locations

- Upload/setup first
- When uploading from csv, Revit, or BIM 360 Field list the room number only
- Tells you how many associated tickets, associated assets, and associated schedules are connected to the space
- Currently have a project underway which will integrate with FM: Systems with the Ops API
 - Locations that are in FMS will be listed in the locations for Ops

	A	B	C	D	E	
	Floor	Room Number	Name	Description	Barcode	
	3	3-1001	Exhibition Lounge			
	3	3-1002	Entrance			
	3	3-1003	Thinking Studio	All Hands		
	3	3-1004	Timber A	Training Room		
	3	3-1005	Ashlar	Conference Room		
	3	3-1006	Gravel	Conference Room		

Floor 6

6-1003

Kitchenette 1

amer

add category

description

Kitchen

barcode / QR code

floor

associated assets

Add >

6 >

7 >

associated tickets

associated schedules

history

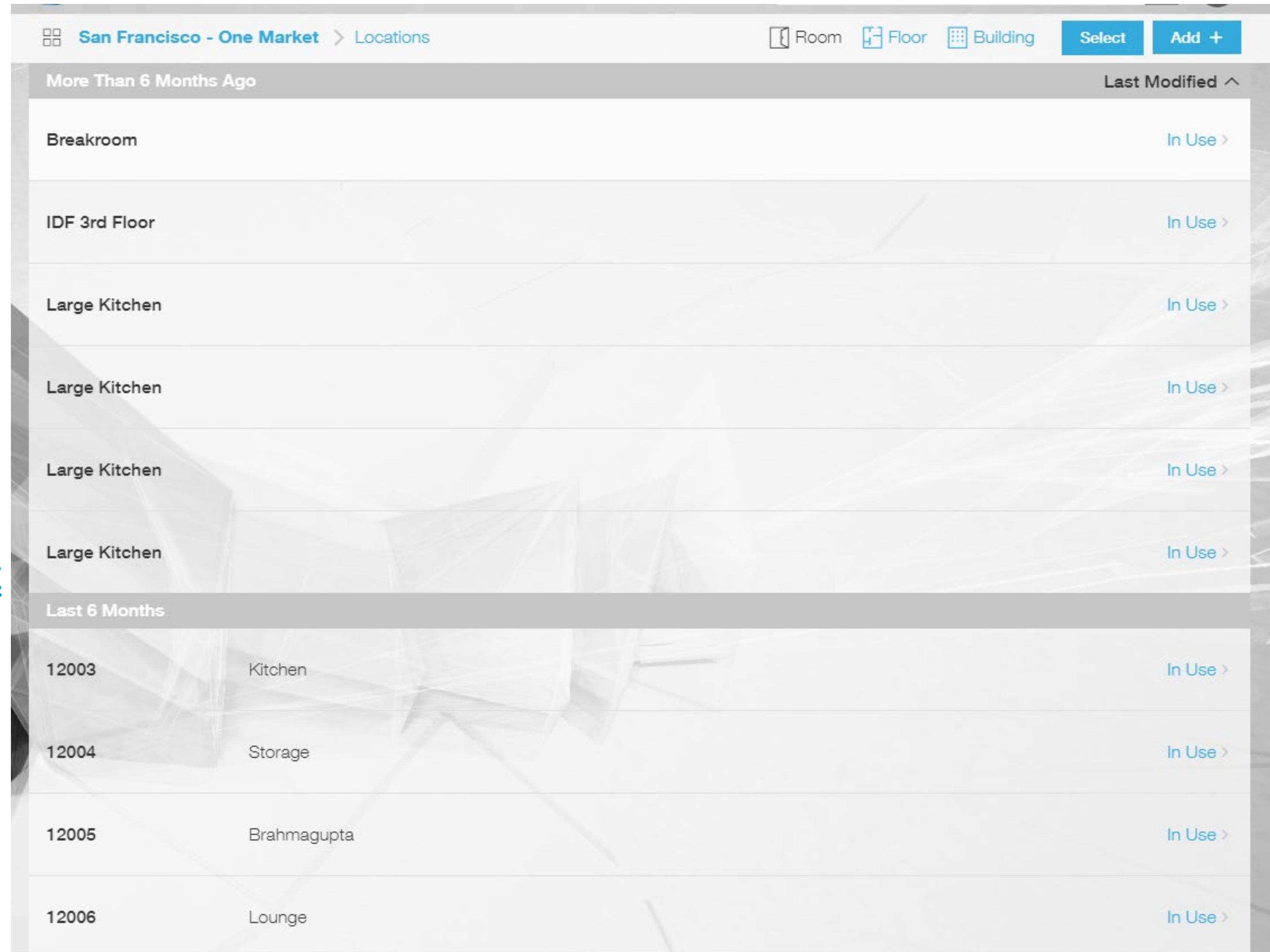
19 >

None

View >

Locations

- The list of locations will not be easy to understand
- You'll likely end up with duplicate spaces and not realize it
- Can't delete spaces until there are no assets or Scheduled Tasks associated
- Read more about using Locations:
<https://bim360ops.autodesk.com/blog/autodesk-crefts-how-we-use-locations>



The screenshot shows the 'Locations' page in the Autodesk BIM 360 interface for the project 'San Francisco - One Market'. The interface includes a breadcrumb trail, filters for 'Room', 'Floor', and 'Building', and buttons for 'Select' and 'Add +'. The main content area is divided into two sections: 'More Than 6 Months Ago' and 'Last 6 Months'. The 'More Than 6 Months Ago' section lists five locations, all labeled 'In Use >'. The 'Last 6 Months' section lists four locations, also labeled 'In Use >'. The background features a faint architectural rendering of a building.

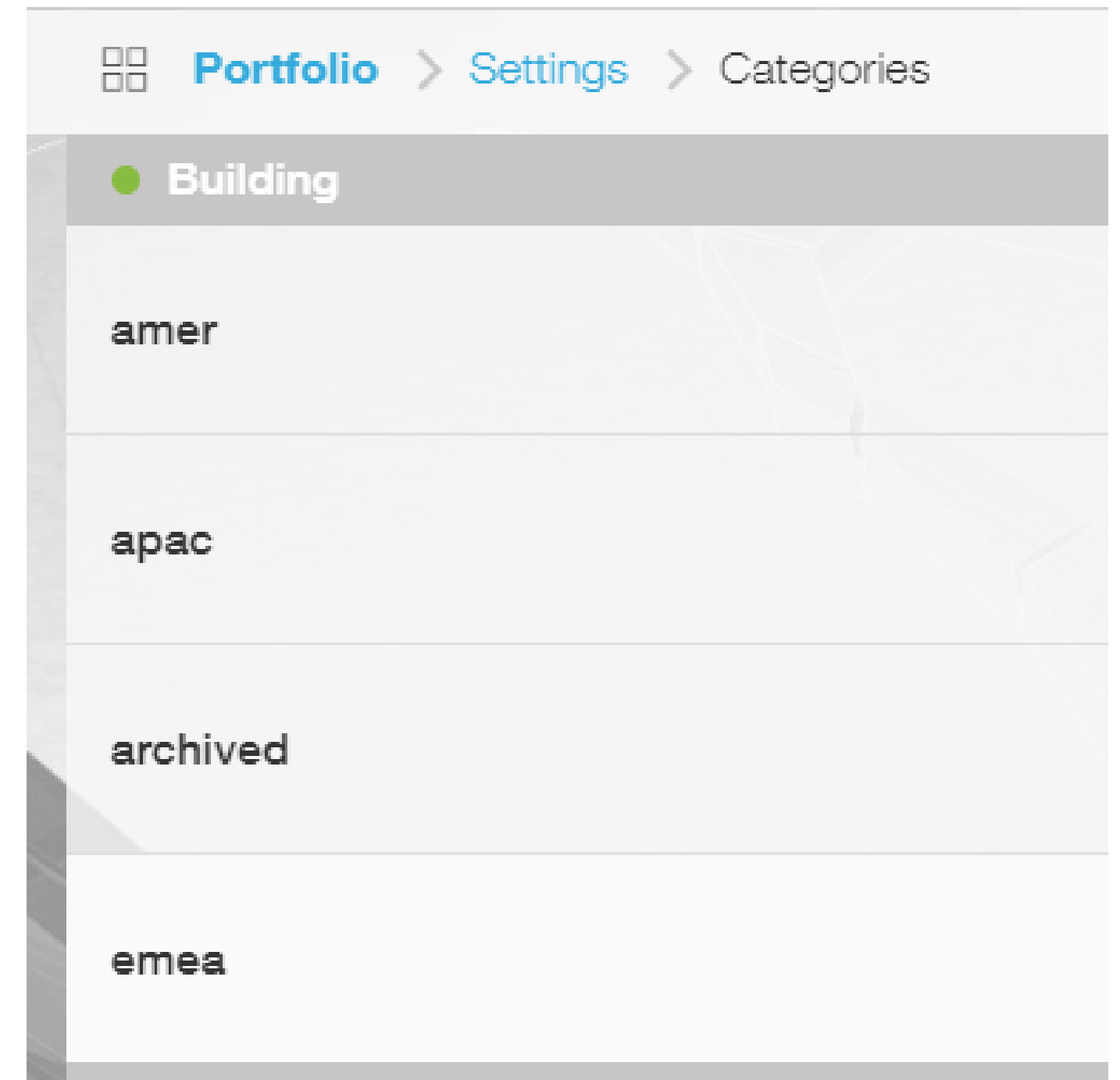
San Francisco - One Market > Locations		Room	Floor	Building	Select	Add +
More Than 6 Months Ago						
Breakroom						In Use >
IDF 3rd Floor						In Use >
Large Kitchen						In Use >
Large Kitchen						In Use >
Large Kitchen						In Use >
Large Kitchen						In Use >
Last 6 Months						
12003	Kitchen					In Use >
12004	Storage					In Use >
12005	Brahmagupta					In Use >
12006	Lounge					In Use >

Minimize your view: Only see what
you want to see



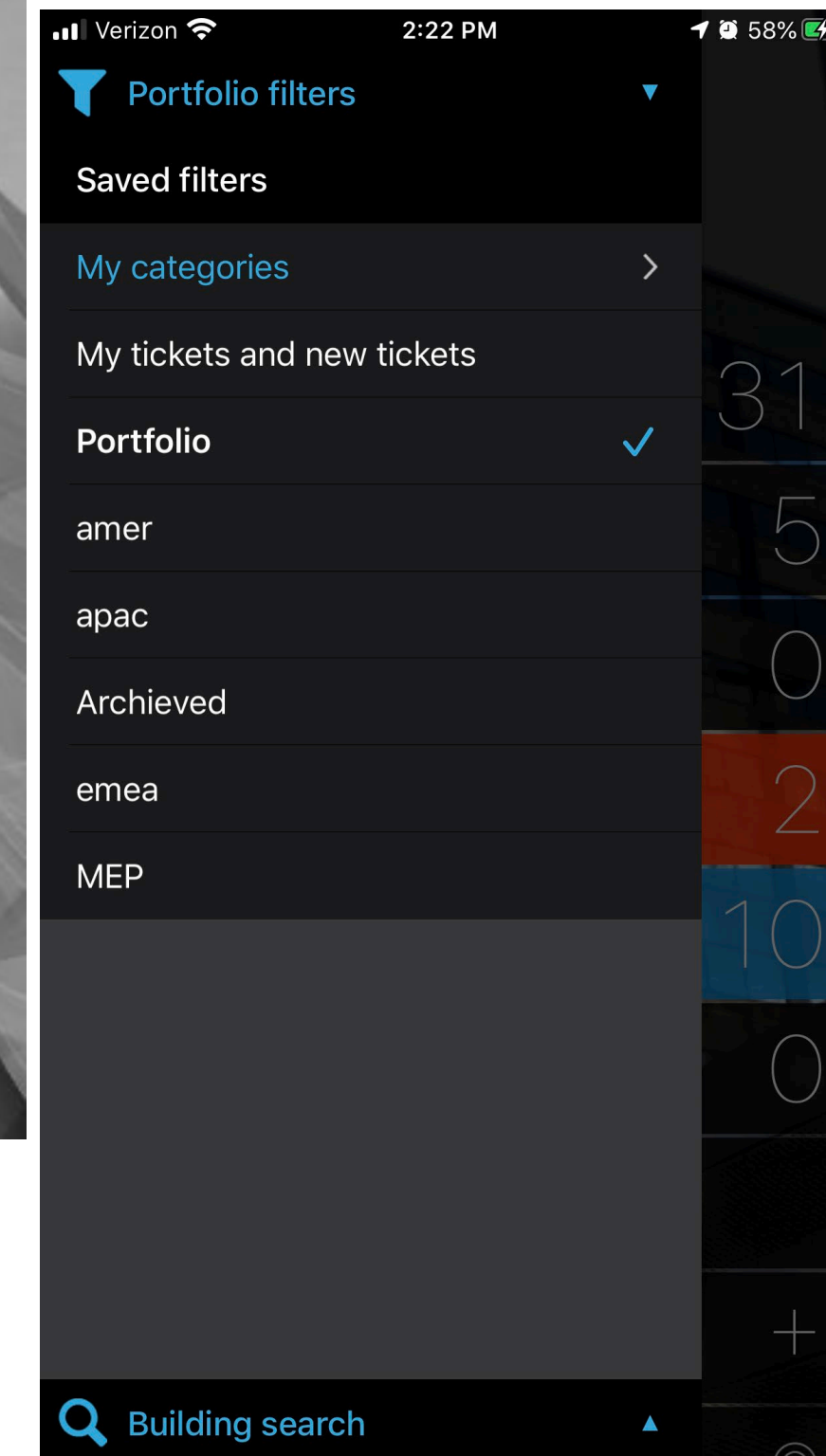
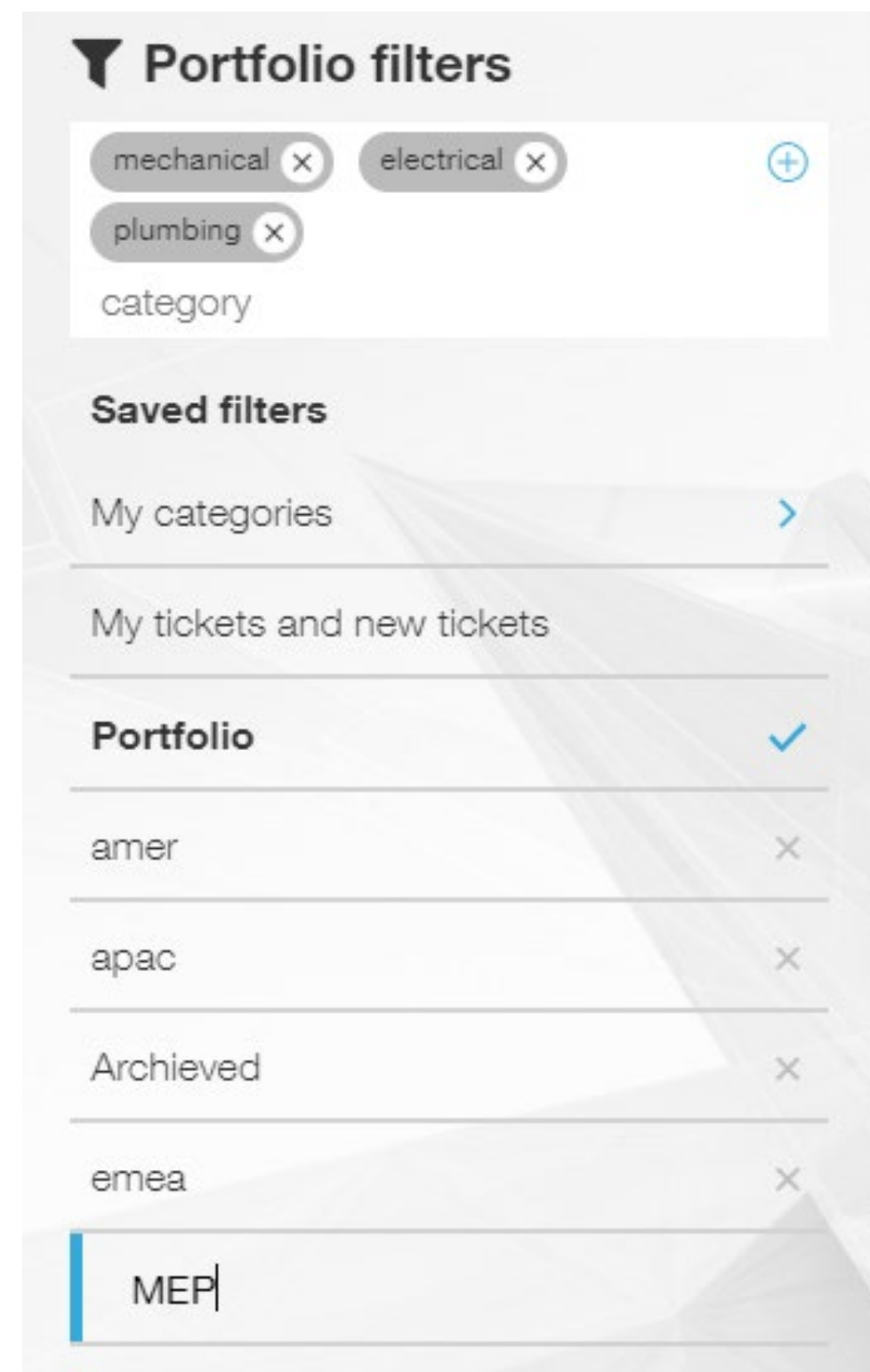
Utilize Building Categories and Statuses

- Categorize your buildings
 - Autodesk categorizes building by GEO
 - Building Type
 - ex: Manufacturing, seating, dorms, lab
- Archived is no longer needed with *Building Statuses* now available
 - Can mark a building as **Occupied** or **Closed**
 - *Only Owners can view buildings marked as Closed**
- These will automatically be added to Reactive and Preventative (Scheduled) tickets
 - Bring more value to reporting



Utilize Portfolio Filters

- Tickets/buildings have to be properly categorized
- Can Customize and save your own Portfolio filters
 - Can add more than one category to a portfolio filter
- Can filter by ticket or building category
- Reduces how much you see to only what you need
- Managers have a “my buildings” portfolio filter
- my categories: Have a technician that only works on HVAC? Mark their contact info with the category for the filter to work



How to make PMs work for you



How can Scheduled Tasks do the work?

- They will generate and include all the info the user(s) need
 - Category already associated
 - Assigned to a technician
 - Assets/locations already indicated → Technician doesn't need to chase down equipment, TIME SAVER
 - Clicking on the associated asset/location pulls up more detailed info on what/where the work is
 - See previous work history on the asset/space
 - Naming Standard – Believe it or not, this has really benefitted Facilities and EH&S
- These steps ultimately saves everyone time and allows technicians to be more self sufficient

Preventive

Ticket Type ^

BOS-07254

AMER - Annual - PM for Eversys Machine

status Assigned >

amer

appliance

add category


created by

priority

location

Heather Gass >

Medium >

6-1003 Kitchenette 1 > 


created

due date (Scheduled)

assigned

Sep 15, 2019 12:01 AM

Dec 6, 2019

Joshua Cerullo > 

Add

checklist

associated assets

follow-up tickets

None >

AMMA07-6F-COF004 >

Add >

history

hours worked

View >

0 hours 0 minutes >

Photos and Videos

Add Photo or Video

Documents and Manuals

Add PDF

Add web link

Comments

Add comment

Add +

140 characters remaining

Naming Standard

- Same Task but different frequency's?
 - For each Frequency, there is one task
 - The *Task Description* part of the naming is the same (makes searching efficient)

Autodesk's Naming Standard

Global – Frequency – Task

GEO – Frequency – Task

Country – Frequency – Task

Building Name – Frequency – Task

1 Month			Frequency ^
TASK-00413	Singapore, Solaris - Monthly	Uninterruptable Power Supply (UPS) preventative maintenance	
3 Months			
TASK-00061	Bangalore - Quarterly	Uninterruptable Power Supply (UPS) preventative maintenance	
TASK-00118	California - Quarterly	UPS Battery Cabinet Maintenance	
TASK-00731	AMER - Quarterly	Uninterruptable Power Supply (UPS) preventative maintenance	
6 Months			
TASK-00107	111 McInnis - Semi-annual	UPS Maintenance	
TASK-00291	Montreal, Duke - Semi-Annual	Uninterruptable Power Supply (UPS) preventative maintenance	
1 Year			

When Setting up a Scheduled Task

- **Description**: Must be filled in, if you have a standard make sure you are using it
- **Category**: If your Task falls under a category be sure to add it. When tickets generate, it will include this category on the ticket for you
- **Created by**: Click the blue pencil to the right and change the created by field.
- ***Repeat Every**: This is the frequency at which tickets will be generated.
- **Checklist**: does this task require a checklist,
- **Create Ticket**: this determines how many days or weeks in advance the ticket is create before the due date

Portfolio > New Scheduled Task

Cancel Submit

TASK--

Add description for task and tickets created (required)

140 characters remaining

add category

created by Jessica Smith

priority Medium >

repeat every None >

checklist None >

create ticket 1 Week(s) > before

associated assets Add >

associated locations Add >

schedules None

Photos and Videos

Add Photo or Video

Documents and Manuals

Add PDF

Add web link

Setting up a Scheduled Task

- Can only associate either assets, buildings, floors, or rooms.
- Will show total associated assets OR Associated locations
- For more on Scheduled Tasks
 - Blog: <https://bim360ops.autodesk.com/blog/autodesk-crefts-how-to-schedule-maintenance>
 - AU 2018 Presentation: <https://www.autodesk.com/autodesk-university/class/Scheduled-Asset-and-Building-Maintenance-Easily-Implement-Successful-Program-2018>

checklist	create ticket	
None >	1 Week(s) > before	
associated assets	associated locations	schedules
Add >	Add >	None

Photos and Videos

Add Photo or Video

Documents and Manuals

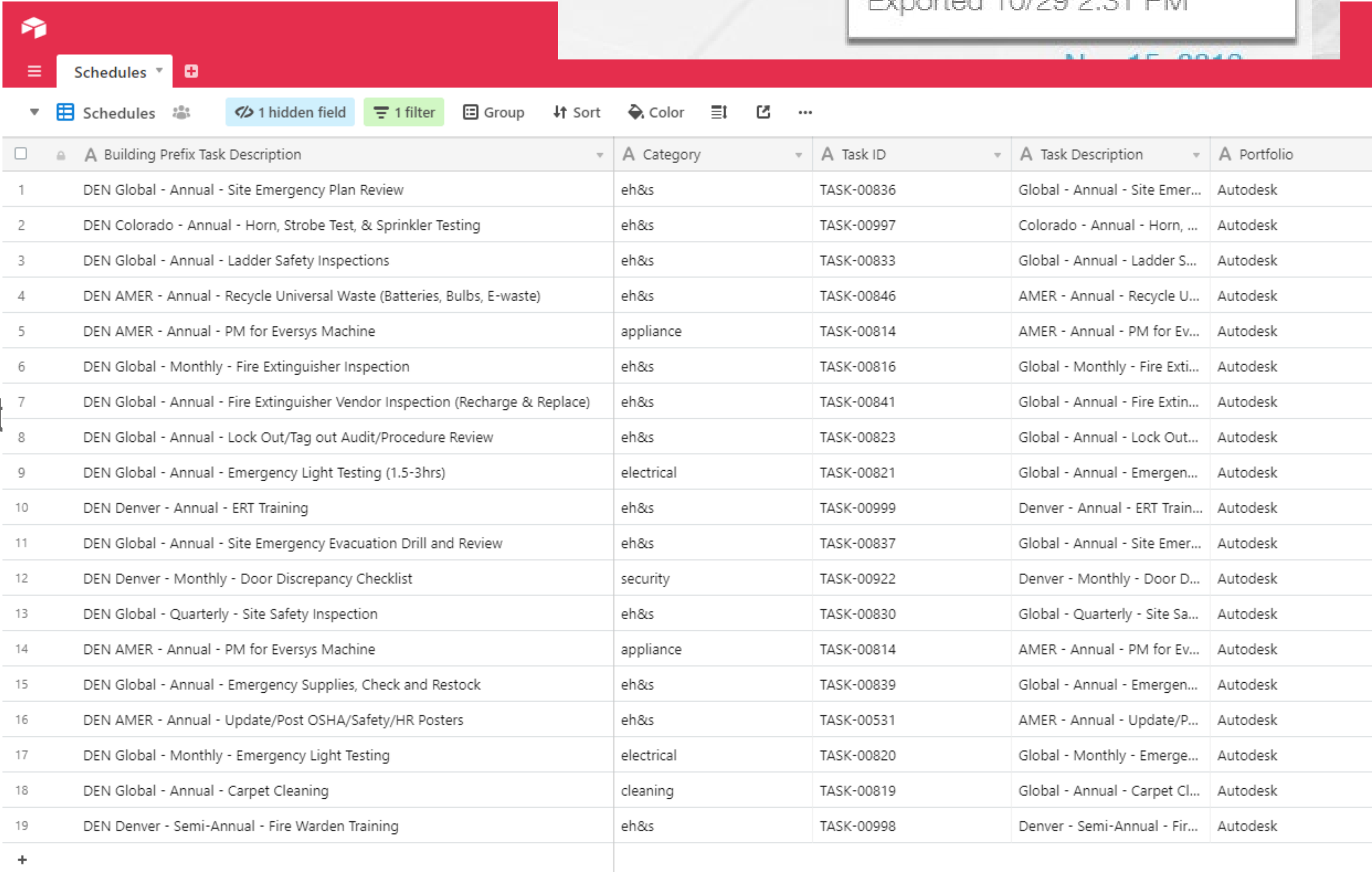
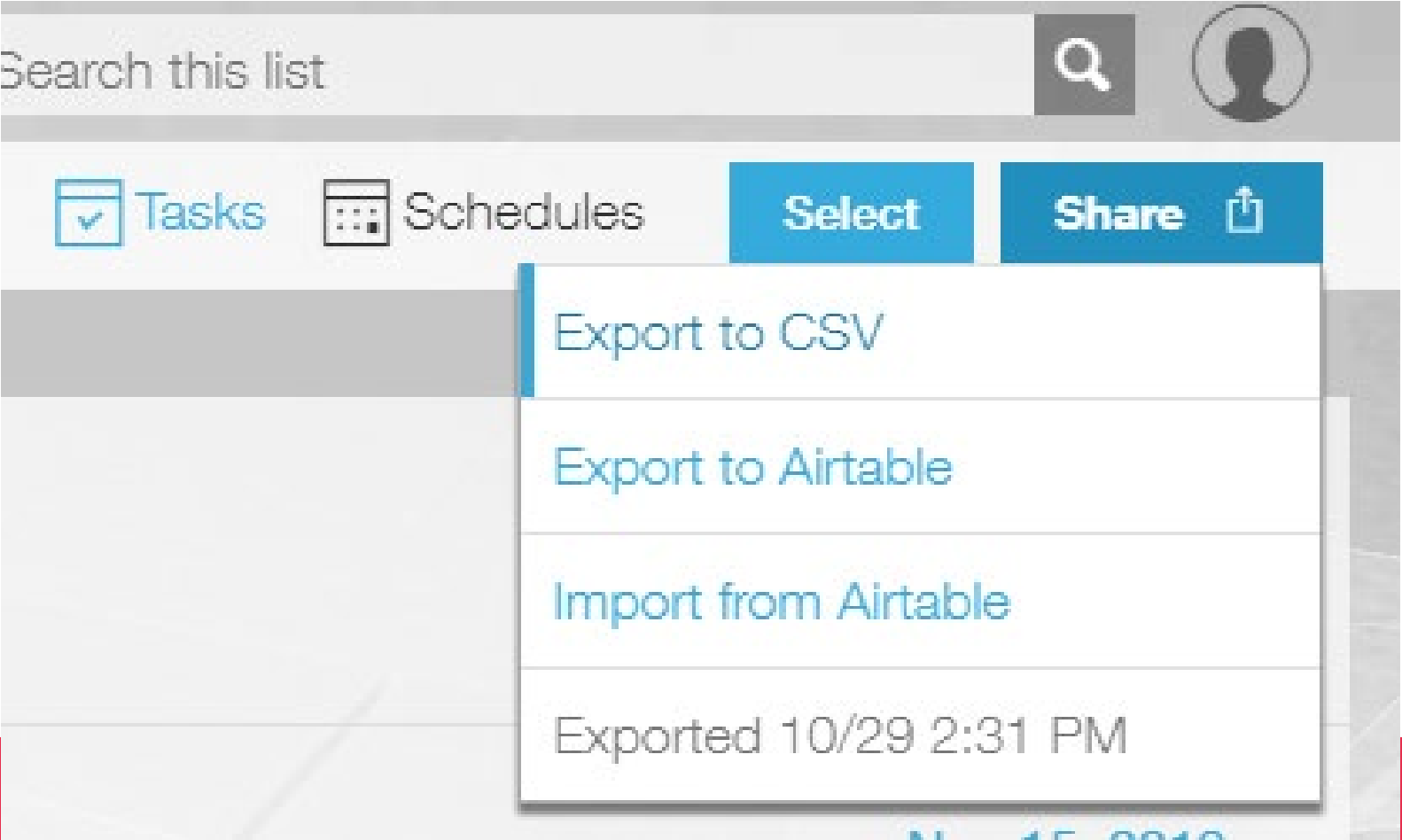
Add PDF

Add web link

Scheduled Tasks - Airtable

- Interface is user friendly for those not excel savvy
- Has many different views for users to choose from
- Easy filter capabilities
- Schedules

- Have to tell BIM 360 Ops to export to Airtable from the Portfolio Schedules List
- Have in import from Airtable before you can export again, avoids undoing all the work done in Airtable
- Same interface as for tickets



	A Building Prefix	Task Description	A Category	A Task ID	A Task Description	A Portfolio
1	DEN Global - Annual -	Site Emergency Plan Review	eh&s	TASK-00836	Global - Annual - Site Emer...	Autodesk
2	DEN Colorado - Annual -	Horn, Strobe Test, & Sprinkler Testing	eh&s	TASK-00997	Colorado - Annual - Horn, ...	Autodesk
3	DEN Global - Annual -	Ladder Safety Inspections	eh&s	TASK-00833	Global - Annual - Ladder S...	Autodesk
4	DEN AMER - Annual -	Recycle Universal Waste (Batteries, Bulbs, E-waste)	eh&s	TASK-00846	AMER - Annual - Recycle U...	Autodesk
5	DEN AMER - Annual -	PM for Eversys Machine	appliance	TASK-00814	AMER - Annual - PM for Ev...	Autodesk
6	DEN Global - Monthly -	Fire Extinguisher Inspection	eh&s	TASK-00816	Global - Monthly - Fire Exti...	Autodesk
7	DEN Global - Annual -	Fire Extinguisher Vendor Inspection (Recharge & Replace)	eh&s	TASK-00841	Global - Annual - Fire Extin...	Autodesk
8	DEN Global - Annual -	Lock Out/Tag out Audit/Procedure Review	eh&s	TASK-00823	Global - Annual - Lock Out...	Autodesk
9	DEN Global - Annual -	Emergency Light Testing (1.5-3hrs)	electrical	TASK-00821	Global - Annual - Emergen...	Autodesk
10	DEN Denver - Annual -	ERT Training	eh&s	TASK-00999	Denver - Annual - ERT Train...	Autodesk
11	DEN Global - Annual -	Site Emergency Evacuation Drill and Review	eh&s	TASK-00837	Global - Annual - Site Emer...	Autodesk
12	DEN Denver - Monthly -	Door Discrepancy Checklist	security	TASK-00922	Denver - Monthly - Door D...	Autodesk
13	DEN Global - Quarterly -	Site Safety Inspection	eh&s	TASK-00830	Global - Quarterly - Site Sa...	Autodesk
14	DEN AMER - Annual -	PM for Eversys Machine	appliance	TASK-00814	AMER - Annual - PM for Ev...	Autodesk
15	DEN Global - Annual -	Emergency Supplies, Check and Restock	eh&s	TASK-00839	Global - Annual - Emergen...	Autodesk
16	DEN AMER - Annual -	Update/Post OSHA/Safety/HR Posters	eh&s	TASK-00531	AMER - Annual - Update/P...	Autodesk
17	DEN Global - Monthly -	Emergency Light Testing	electrical	TASK-00820	Global - Monthly - Emerge...	Autodesk
18	DEN Global - Annual -	Carpet Cleaning	cleaning	TASK-00819	Global - Annual - Carpet Cl...	Autodesk
19	DEN Denver - Semi-Annual -	Fire Warden Training	eh&s	TASK-00998	Denver - Semi-Annual - Fir...	Autodesk
+						

Scheduled Tasks - Airtable

Schedules

BIM 360 Ops Schedules Reference Base

HELP

SHARE

BLOCKS

Next Due Date

Using "Next Ticket Due Date" field

Filter

Sort

Color

Today

<

>

November 2019

Month

2 week

Week

3 day

Day

Find a record

All records

Sun	Mon	Tue	Wed	Thu	Fri	Sat
27	28	29	30	31	1	2
3	4	5	6	7	8	9
		1 KIL Global - Monthly - AED Inspe... 3 TOK Global - Monthly - AED Insp... 3 SEO Global - Monthly - AED Insp... +38 more		6:30 BAN Bangalore - Quarterly - fir... 1p PAR Global - Quarterly - First Ai... 1p PAR Paris - Monthly - Door Discr... 5p BOS Global - Quarterly - Site Saf...	3 TOK Tokyo - Monthly - health & s... 4 SYM Singapore, Symbiosis - Mont... 4 SYM Singapore - Monthly - Espre... +19 more	
10	11	12	13	14	15	16
			4 BEI Beijing - Annual - Check Evac... 4 BEI Global - Annual - Emergency ... 4 BEI Global - Annual - Site Emerge... 4 SYM Singapore Symbiosis - Bi-m...		3 TOK Tokyo - Semi-annual - audit ... 4 SHA Shanghai - Monthly - Hand ... 4 SOL Singapore, Solaris - Monthly ... +22 more	
17	18	19	20	21	22	23
	11 PRA Prague - Monthly - Asset S...			8p SR2 111 McInnis - Annual - Vehi...	1 KIL Kilsyth - Monthly - fire alarm ... 4 SYM Singapore - Monthly - Exhau... 4 SOL Global - Monthly - Emergenc... +42 more	
24	25	26	27	28	29	30
	10 MOR Moscow - Monthly - Multif... 10 MOR Moscow - Monthly - Gase... 12p BIR Birmingham - Monthly - e... 12p DUB United Kingdom - Monthl...			1 KIL Kilsyth - Quarterly - HVAC an... 1 KIL Global - Quarterly - Site Safet... 4 SOL Singapore - Quarterly - Fire ... +5 more	1 KIL Kilsyth - Semi-Annual - Emerg... 3 TOK Global - Quarterly - First Aid ... 3 TOK Global - Quarterly - First Aid ... +41 more	

SFO One Market - Quarterly - Site S...
Jan 31, 2020 5:00pm

DUB United Kingdom - Annual - - E...
Oct 30, 2020 1:00pm

BAN Bangalore - Quarterly - Uninte...
Jan 3, 2020 6:30am

BOS Boston - Annual - Respirator Pr...
Oct 2, 2020 5:00pm

SR2 California - 5 years - Arc Flash S...
Jan 11, 2024 8:00pm

MON Montreal, Duke - Semi-Annua...
Apr 3, 2020 5:00pm

SHA Shanghai - Semi-annual - chec...
Dec 13 4:00am

DUB United Kingdom - Semi-annua...
Nov 15 12:00pm

SHA Shanghai - Quarterly - Water D...
Jan 24, 2020 4:00am

SFP Pier 9 - Quarterly - Kitchen Wat...
Dec 27 5:00pm

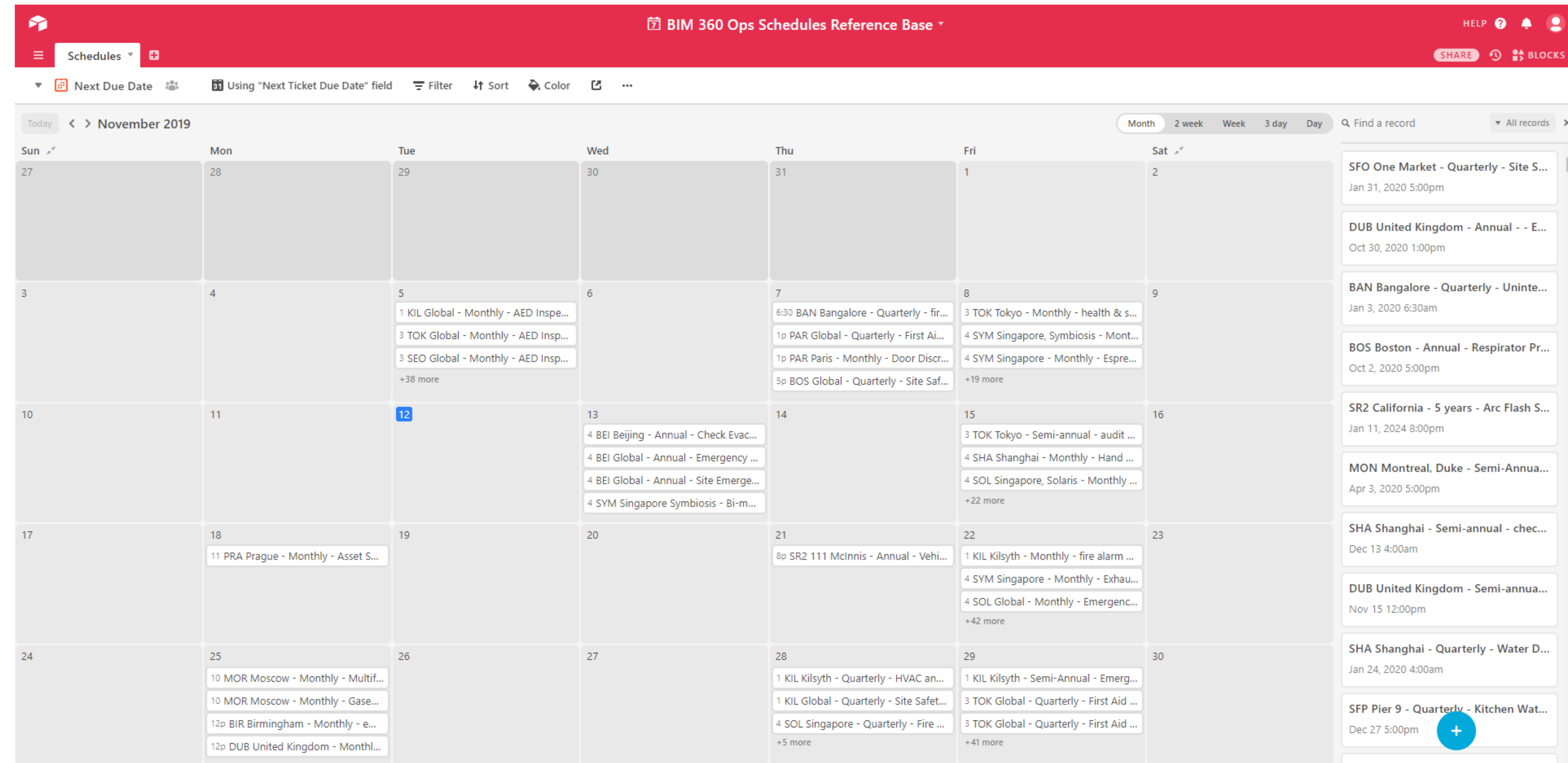
Scheduled Tasks - Airtable

- Schedules

- Can click and drag Schedule to a different day, changes the due date
- **Be sure to “import from Airtable” in Ops once changes are made so both applications are up-to-date
- Easily switch between list and calendar view

- Blog Post:

<https://bim360ops.autodesk.com/blog/export-schedules-to-airtable>

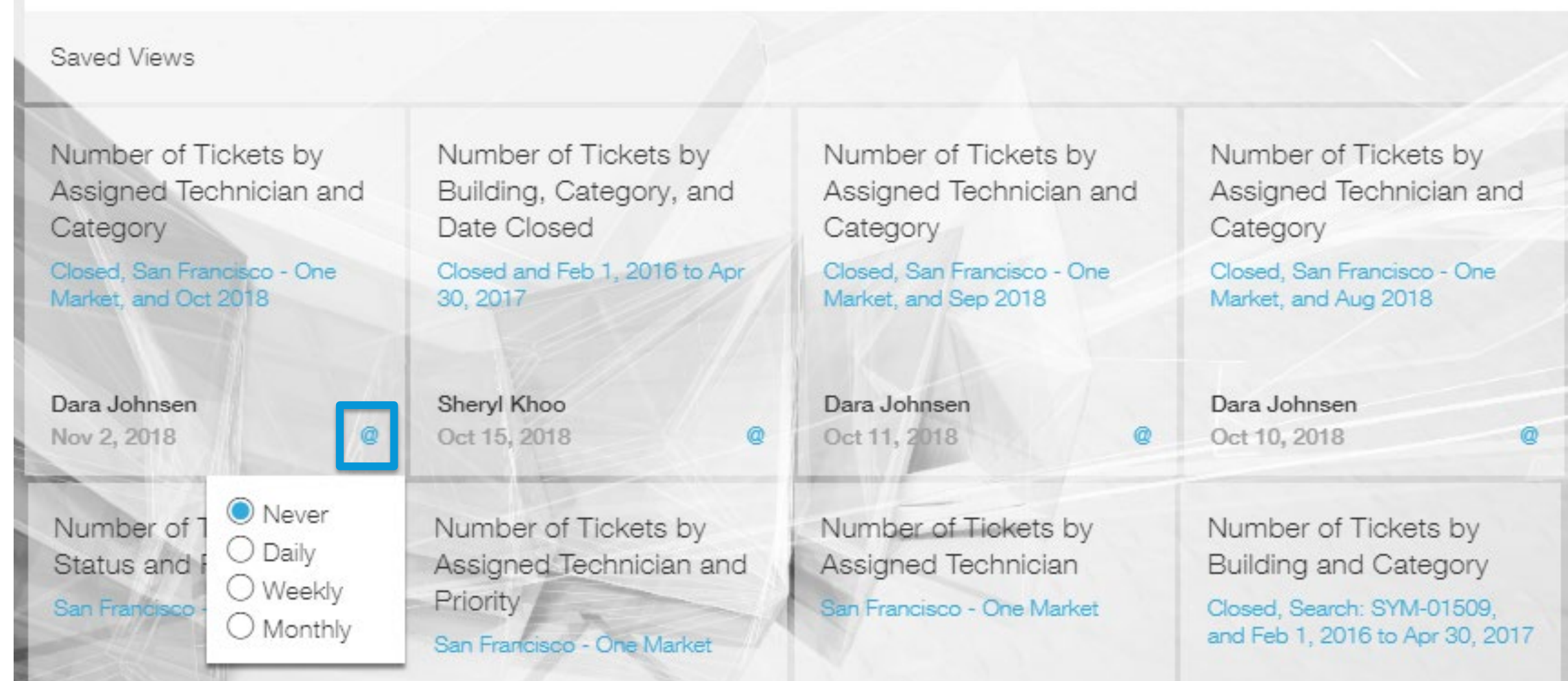
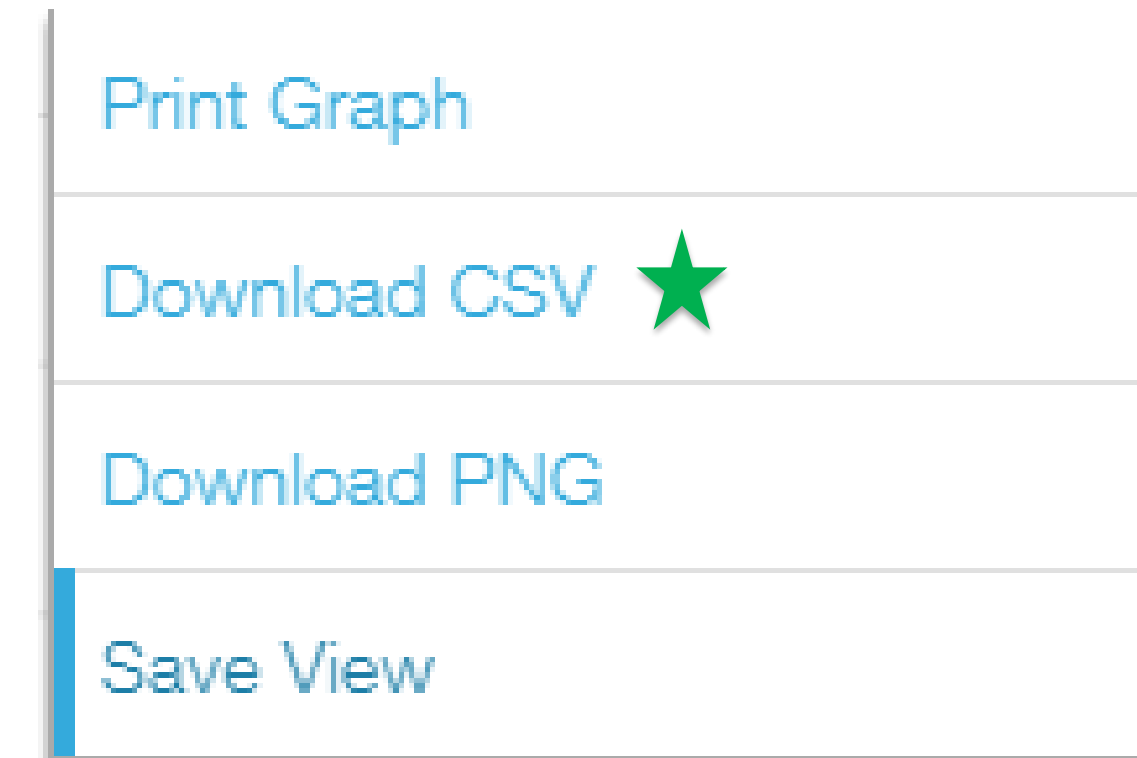


Reporting



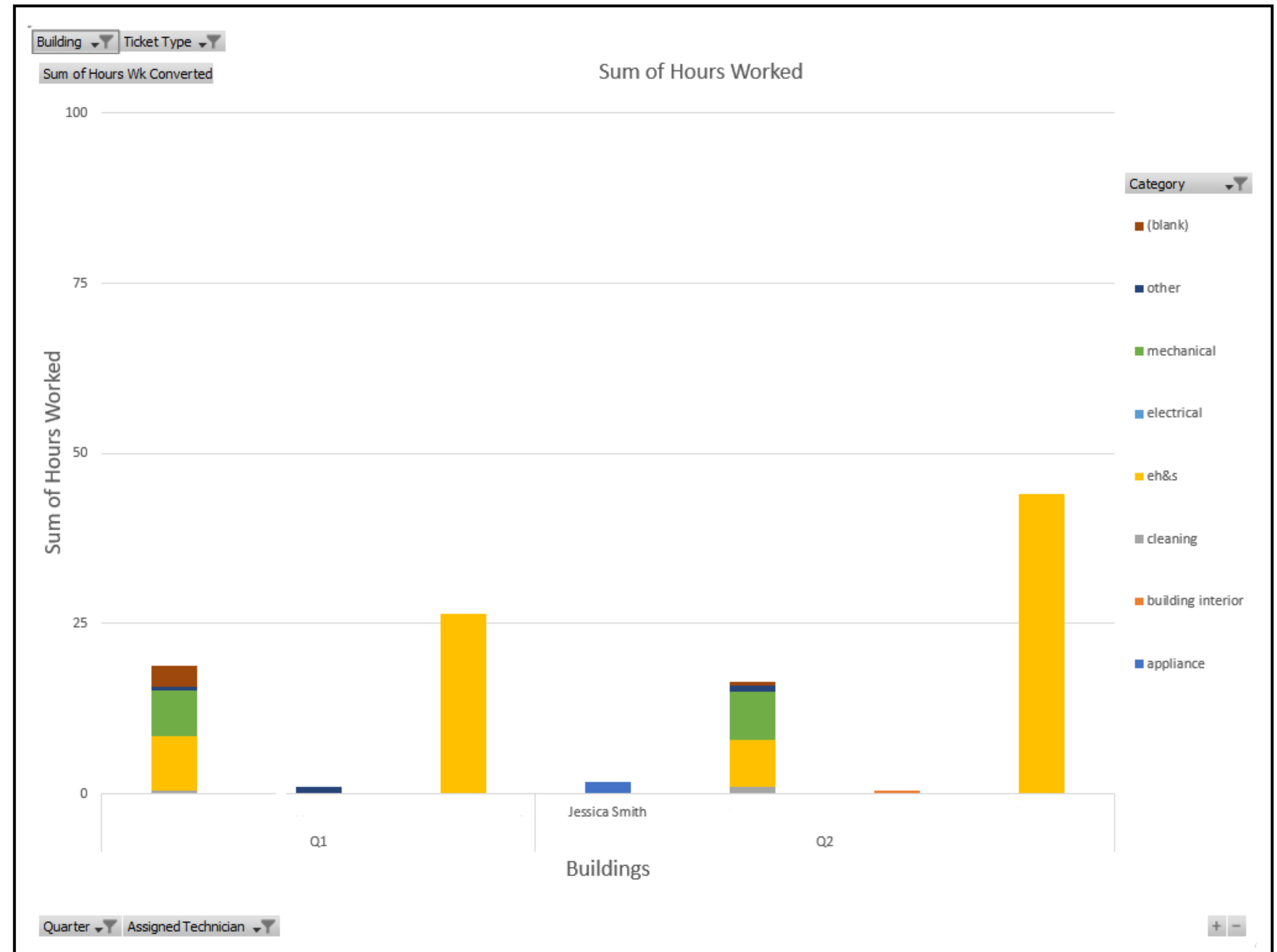
Reporting

- Print Graph and Download PNG, exports of picture of the graph
- Save View
 - Like the graph you see, save it to view at a later date
 - Be mindful of the time frame you have selected
 - Date you save the view, determines the start date if you want to have a recurring report.
- Download CSV



Reporting

- In excel using .csv export you can create more customized graphs
- Where having tickets categorized correctly really counts



Reporting - Airtable

Tickets

HELP

SHARE

BLOCKS

Default Grid View

1 hidden field

Filter

Group

Sorted by 1 field

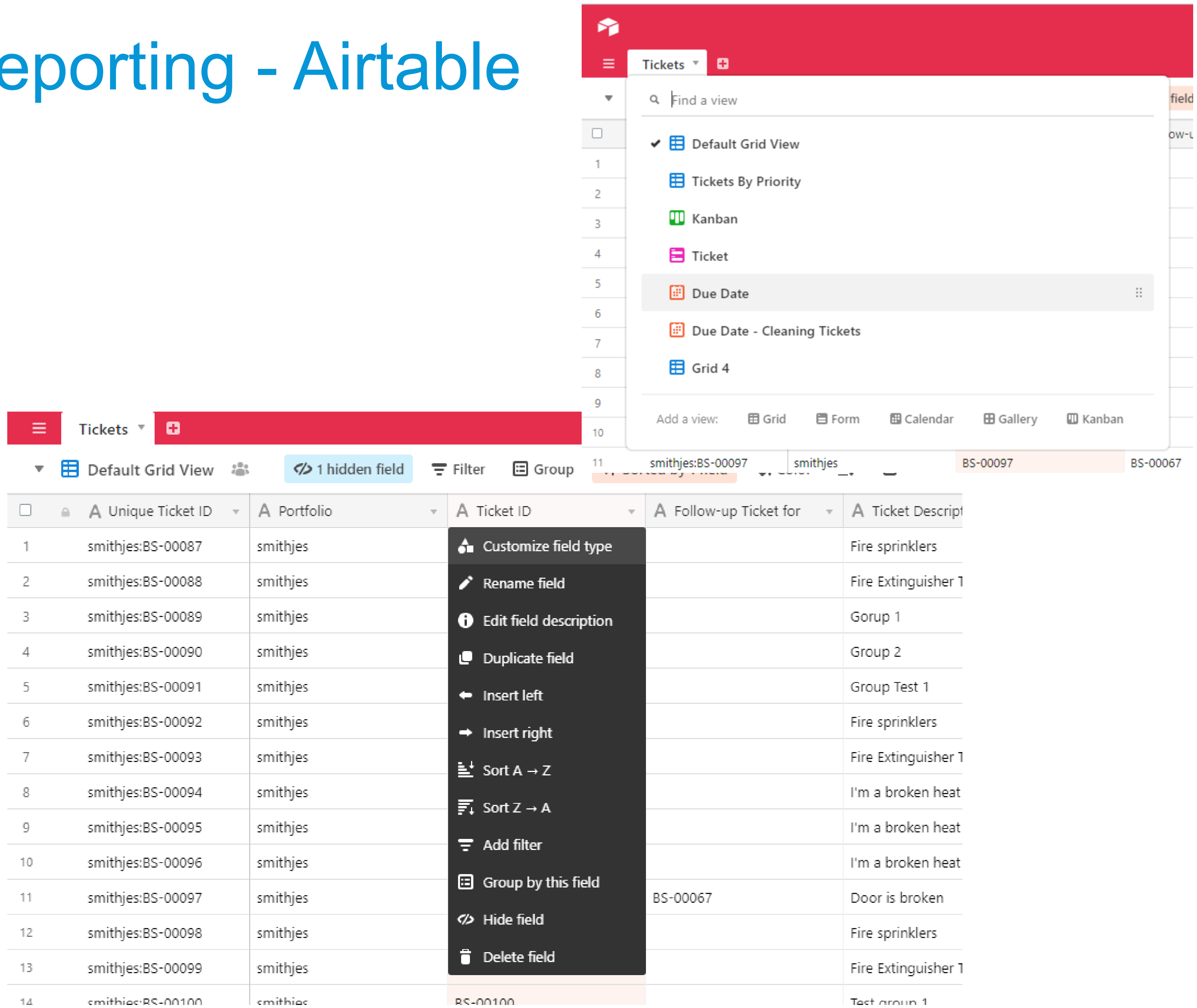
Color

	Unique Ticket ID	Portfolio	Ticket ID	Follow-up Ticket for	Ticket Description	Comments	Category	Ticket Type	Status	Priority	Checklist Percent Complete
1	smithjes:BS-00087	smithjes	BS-00087		Fire sprinklers		eh&s	preventive	Open	Medium	
2	smithjes:BS-00088	smithjes	BS-00088		Fire Extinguisher Trianing		eh&s	preventive	Open	Medium	
3	smithjes:BS-00089	smithjes	BS-00089		Gorup 1		other	reactive	Closed	Medium	
4	smithjes:BS-00090	smithjes	BS-00090		Group 2		other	reactive	Closed	Medium	
5	smithjes:BS-00091	smithjes	BS-00091		Group Test 1		other	reactive	Closed	Medium	
6	smithjes:BS-00092	smithjes	BS-00092		Fire sprinklers		eh&s	preventive	Open	Medium	0%
7	smithjes:BS-00093	smithjes	BS-00093		Fire Extinguisher Trianing		eh&s	preventive	Open	Medium	
8	smithjes:BS-00094	smithjes	BS-00094		I'm a broken heat pump ...			reactive	Assigned	Medium	
9	smithjes:BS-00095	smithjes	BS-00095		I'm a broken heat pump ...			reactive	Assigned	Medium	
10	smithjes:BS-00096	smithjes	BS-00096		I'm a broken heat pump ...			reactive	Assigned	Medium	
11	smithjes:BS-00097	smithjes	BS-00097	BS-00067	Door is broken	Created from "Civic Center ...		reactive	Closed	Medium	
12	smithjes:BS-00098	smithjes	BS-00098		Fire sprinklers		eh&s	preventive	Open	Medium	0%
13	smithjes:BS-00099	smithjes	BS-00099		Fire Extinguisher Trianing		eh&s	preventive	Open	Medium	
14	smithjes:BS-00100	smithjes	BS-00100		Test group 1			reactive	Open	Medium	
15	smithjes:BS-00101	smithjes	BS-00101		Test group 2			reactive	Open	Medium	
16	smithjes:BS-00102	smithjes	BS-00102		Jess, this is Katie's text tic...			reactive	Closed	Medium	
17	smithjes:BS-00103	smithjes	BS-00103		Fire sprinklers		eh&s	preventive	Open	Medium	0%
18	smithjes:BS-00104	smithjes	BS-00104		Fire Extinguisher Trianing		eh&s	preventive	Open	Medium	
19	smithjes:BS-00105	smithjes	BS-00105		Fire sprinklers		eh&s	preventive	Open	Medium	0%
20	smithjes:BS-00106	smithjes	BS-00106		Fire Extinguisher Trianing		eh&s	preventive	Open	Medium	
21	smithjes:BS-00107	smithjes	BS-00107		Fire sprinklers		eh&s	preventive	Open	Medium	0%
22	smithjes:BS-00108	smithjes	BS-00108		Fire Extinguisher Trianing		eh&s	preventive	Open	Medium	
23	smithjes:BS-00109	smithjes	BS-00109		Fire sprinklers		eh&s	preventive	Open	Medium	
49 records											

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Reporting - Airtable

- We like Airtable
- Only available to user roles Owners and Co-Owners
- Does export more information then .CSV
- Same interface benefits as with Scheduled Tasks
- Blog Post:
<https://bim360ops.autodesk.com/blog/export-tickets-to-airtable>



The image displays the Airtable interface for a 'Tickets' table. A context menu is open over the 'Ticket ID' column, showing options such as 'Customize field type', 'Rename field', 'Edit field description', 'Duplicate field', 'Insert left', 'Insert right', 'Sort A → Z', 'Sort Z → A', 'Add filter', 'Group by this field', 'Hide field', and 'Delete field'. The table view is set to 'Default Grid View' and includes a search bar at the top. The table data is as follows:

	Unique Ticket ID	Portfolio	Ticket ID	Follow-up Ticket for	Ticket Description
1	smithjes:BS-00087	smithjes			Fire sprinklers
2	smithjes:BS-00088	smithjes			Fire Extinguisher 1
3	smithjes:BS-00089	smithjes			Gorup 1
4	smithjes:BS-00090	smithjes			Group 2
5	smithjes:BS-00091	smithjes			Group Test 1
6	smithjes:BS-00092	smithjes			Fire sprinklers
7	smithjes:BS-00093	smithjes			Fire Extinguisher 1
8	smithjes:BS-00094	smithjes			I'm a broken heat
9	smithjes:BS-00095	smithjes			I'm a broken heat
10	smithjes:BS-00096	smithjes			I'm a broken heat
11	smithjes:BS-00097	smithjes		BS-00067	Door is broken
12	smithjes:BS-00098	smithjes			Fire sprinklers
13	smithjes:BS-00099	smithjes			Fire Extinguisher 1
14	smithjes:BS-00100	smithjes			Test group 1

Reporting - Airtable

- Shared View
 - Can limit what users see and do when working with Personal Identifiable information
 - Can share one spreadsheet for multiple people rather than creating multiple excel files
 - When adding collaborators, each one can have their own specified access
- Airtable Resource: <https://support.airtable.com/hc/en-us/articles/205752117-Creating-a-base-share-link-or-a-view-share-link>

Share B3O Airtable Viewing Test

1 view can be viewed by anyone with the associated view share link. 2 collaborators can see this base when signed in.

Invite by email Invite by link

Invite more base collaborators via email

Add a message (optional)

Import your Google contacts

Creator

Send invite

Base collaborators

Ray Bennett
ray.bennett@autodesk.com
joined 14 days ago

Workspace collaborators

Jessica Smith
jessica.smith@autodesk.com
joined 5 months ago

Shared base link

Create a shared link to the whole base.
A private link that shows all the tables in a base without having to sign in.

Shared view links

See the 1 shared table view link in this base.
These are private links that show a specific view without having to sign in.

Editor

- Creator
Can fully configure and edit this base
- Editor
Can edit records and views, but cannot configure tables or fields
- Commenter
Can comment on records
- Read only
Cannot edit or comment

Importance of [All] Users



iOS Devices & Day Porters

- Who walks around the most in Boston? Our Day Porters!
 - Individuals in these roles are often forgotten about but can (and do in Boston) contribute to the locations for mobile assets
 - They have a constant view of the space
- How are they able to help?
 - Provided them with iPods
 - They can submit tickets to Ops
- Ops does translate to Spanish and Portuguese

We Love our Users

- The more people that use Ops, the more we stay on top of what is occurring in the space
- Usually more occupants than facilities in a space, first to report the problem
- Vendors
 - They are the ones working in the space and usually in areas not frequently accessed
- More opportunity for perspectives; what might not seem like an issue to one person, is an issue to someone else
 - Promoting user adoption across all roles will allow teams to be more aware and facilities to be more efficient. All around this helps everyone

Some Lessons Learned

MAKE SURE LOCATIONS ARE FORMATTED CORRECTLY

Have these correct the first time could have saved me countless hours of moving assets from a duplicate location to the original due to imports/exports.

LOCK DOWN CATEGORIES

Not doing this will create a project of catastrophic proportions that you just don't want

DETERMINE GATE KEEPER

Have designated admin(s) will help keep the chaos to a minimum. Keep you Scheduled Tasks from becoming to long and repetitive

DETERMINE NEEDS SOONER RATHER THEN LATER

Don't want to realize later that something should have been done (like categories) and have to make massive edits i.e. Asset ID naming standard

Questions?



BIM 360 Ops Classes at AU 2019

Session ID	Title	Day and Time
BLD322234	Getting Started with BIM 360 Ops	Tuesday 1:30
BLD322245	Indoor Mapping for Facility Operations	Tuesday 2:45
BLD322176	Revit to BIM 360 Ops—Exporting Asset and Location Data for Facilities Management	Tuesday 4:30
BLD323807	Autodesk Facilities and BIM 360 Ops: How We Integrated Our Systems and Why	Wednesday 8:00
BLD322056	Maintaining Models with Value: What OSU Learned Moving to BIM	Wednesday 9:15
BLD334451	Leveraging Apple Indoor Maps Program for Building Operations	Wednesday 10:30
BLD322039	FM—with the End in Mind	Wednesday 1:30
BLD323156	How to Manage a Large Portfolio of Buildings in BIM 360 Ops	Wednesday 2:45
BLD322704	BIM 360 Ops for Data Centers: An Application Review	Wednesday 4:30
BLD323162	Existing to Expansion—BIM 360 Ops for the Fayetteville Public Library System	Thursday 8:00
CS323783	Getting Real with BIM 360: A Case Study of Autodesk’s Boston Office	Thursday 10:30
CS322863	Enhanced Workflows to Successfully Implement BIM 360 Ops	Thursday 1:30
BLD322830	How to Write an Awesome Facilities Management Data Specification	Thursday 2:45

BIM 360 Ops Resources

*****Email us! Ops.at.au@autodesk.com*****

- Blogs: <https://bim360ops.autodesk.com/blog>
- Product Site: <https://bim360ops.autodesk.com/>
- App Store (Mobile App): <https://itunes.apple.com/us/app/bim-360-ops/id941471006?mt=8>
- Web App: <http://ops.bim360ops.com/>



Get Started Now!

- Scan the barcode OR Visit <https://ops.bim360ops.com>
(or download **BIM 360 Ops** from the App Store)
- Enter your email address and join the portfolio **AU2019.**
- Confirm your email address and enter a phone #
- You are now an occupant of this portfolio
- Add tickets with questions, comments, feedback etc.!
- Create your own portfolio and start managing your own building.





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