

Field Collaboration with BIM360 and PlanGrid

Chelsey Tanaka

Group Product Manager, Autodesk

CONNECT & CONSTRUCT SUMMIT



Chelsey Tanaka



Group Product Manager, Field Collaboration

- Joined Autodesk via the PlanGrid acquisition
- 4 years at PlanGrid/ Autodesk
- Co-lead the Field group with Tom Alterman
 - Includes the following PlanGrid and BIM360 Field Management products:
 - Issues/ Tasks
 - Checklists/ Daily logs/ Field Reports
 - Photos & Videos
 - Production tracking
- Prior to Autodesk, built SaaS software for utilities

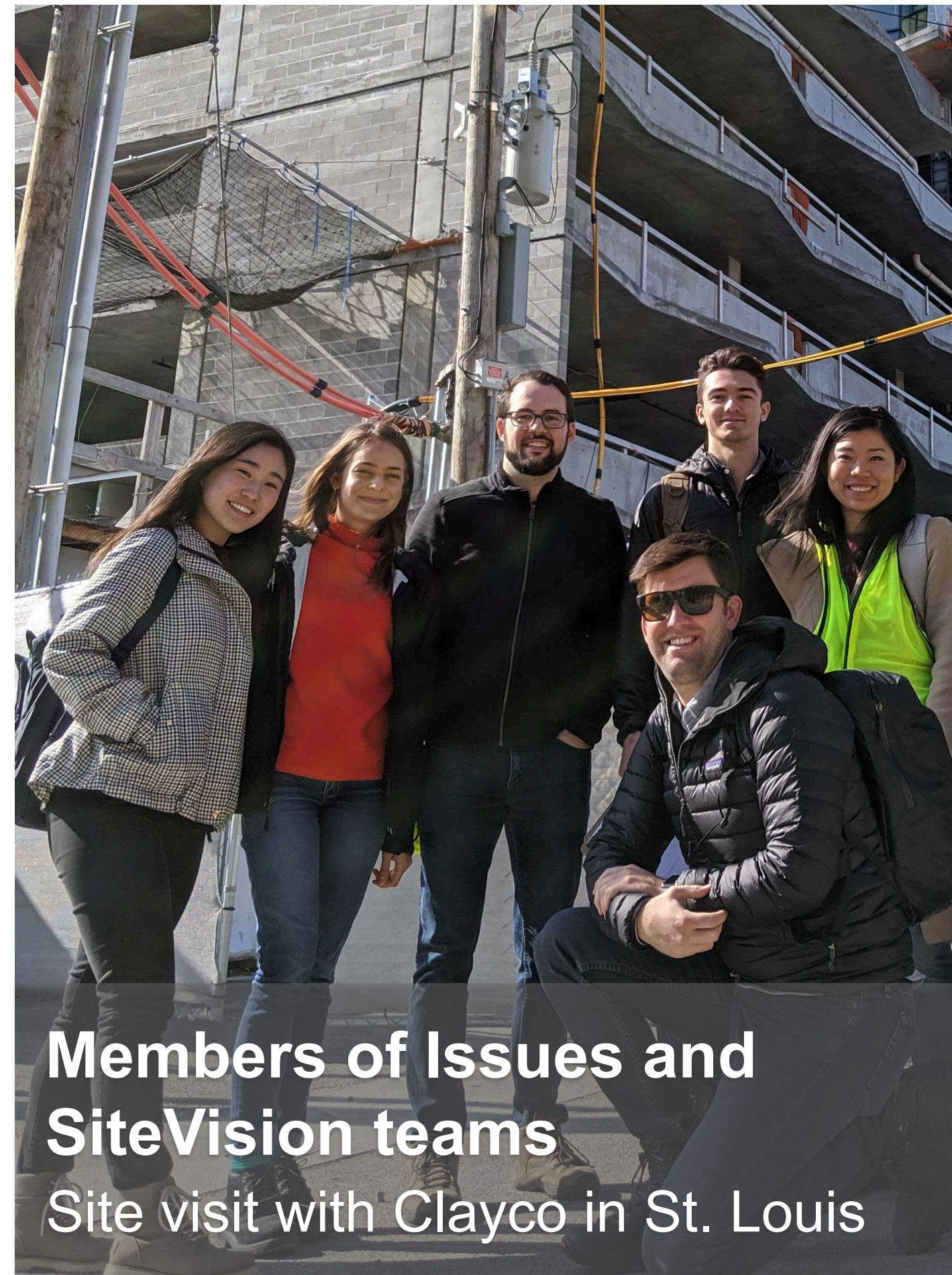
Agenda

- Introductions
- BIM360 and PlanGrid approaches
- Integration possibilities
- Our vision

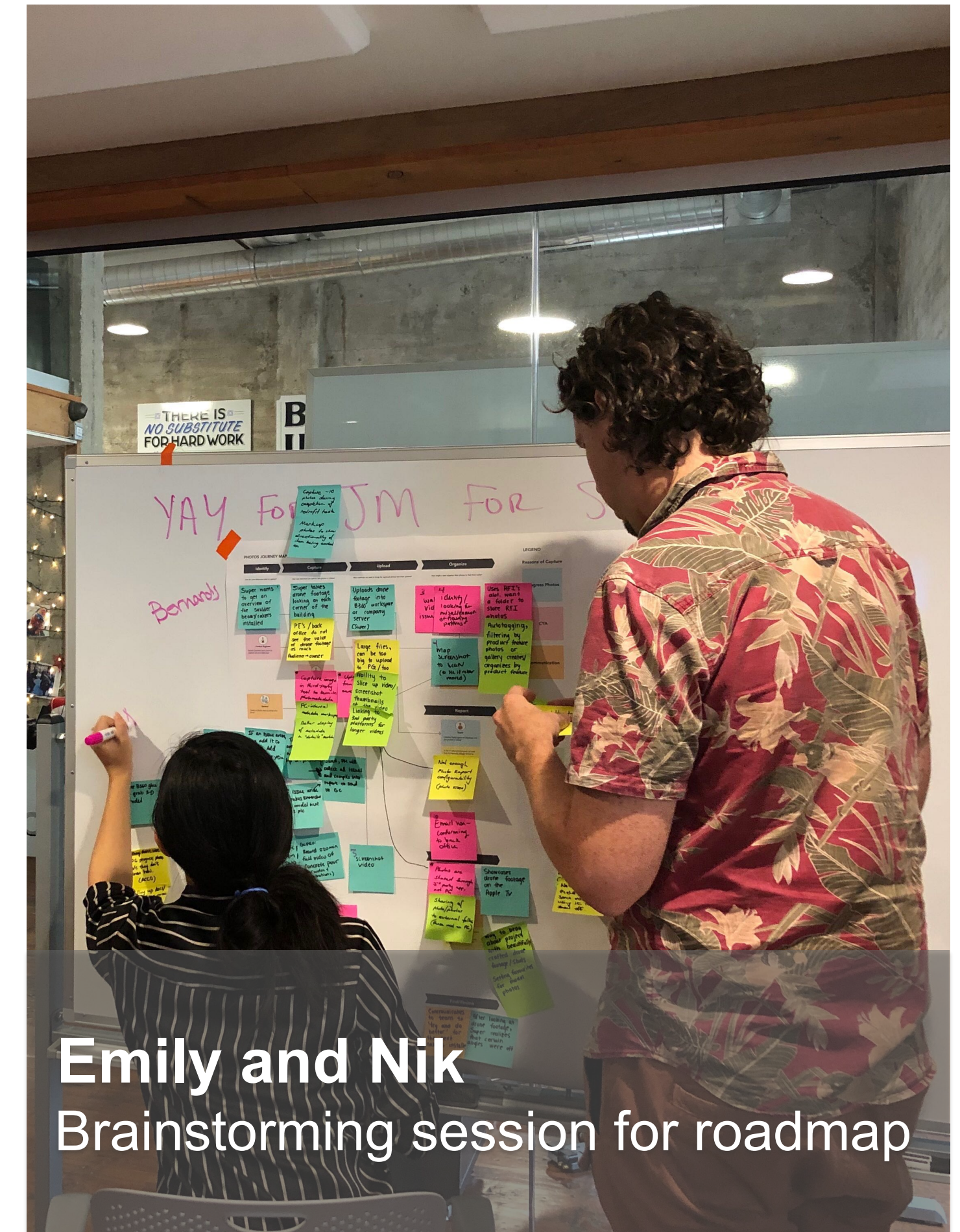
The team



Phill and Sriram
Values award: Focus on real people, real work



Members of Issues and SiteVision teams
Site visit with Clayco in St. Louis



Emily and Nik
Brainstorming session for roadmap

Who's in the room?

- Currently use BIM360 for field collaboration activities
- Currently use PlanGrid for field collaboration activities
- Use both BIM360 and PlanGrid for field collaboration activities
- Don't currently use BIM360 or PlanGrid for these activities, but are interested in using one or both

What do we mean by Field Collaboration?

- Activities that happen primarily on the jobsite (trailer or field)
- Involve collecting info from the field, sharing it, and often taking action on it
- Goal: Build it right, build it well, build it safely
- Some of these activities:
 - Issue tracking
 - QA/QC
 - Safety
 - Progress photos
 - Annotating plans and project files
 - RFIs

BIM360 and PlanGrid have many parallel pieces of functionality...

BIM360 modules/ features		PlanGrid features
Document Management	Plans	Sheets
	Project Files	Documents
Field Management	Checklists	Field Reports
	Daily logs	
	Issues	Tasks
Project Management	RFIs	RFIs

...but the products take different approaches

Standardizing tools and processes across projects



B AUTODESK®
BIM 360™

Empowering field to use tools in optimal way for them



PlanGrid
AN AUTODESK COMPANY

Standardizing tools and processes across projects

Characteristics

- Tools and processes determined at HQ and rolled out to projects
- Extensive tool configuration; limited ability to change by field teams
- Complex permissions model

Benefits

- Enables data aggregation and analysis across projects
- Data helps management see trends and challenges
- Field staff have consistent experience going from one site to another



Empowering field to use tools in optimal way for them

Characteristics

- Tools are simple and intuitive, with limited configuration options
- Flexibility of tools encourages field staff to use tools to meet their needs
- Limited permissions to streamline collaboration

Benefits

- Field teams can adapt tools to meet the needs of their team and project
- Field teams can setup and manage projects themselves
- Adoption is quicker even without training



Case study 1: Checklists and Field Reports

- Checklists are the BIM360 tool for collecting data via structured forms
- Field Reports are the PlanGrid tool for collecting data via PDF forms
- Both are used for many of the same use cases:
 - QA/QC checklists
 - Safety checklists
 - Job hazard analysis
 - Commissioning checklists
 - etc.

BIM360 Checklists: Configuring checklist templates at account level

The screenshot displays the BIM360 Field Management interface. The top navigation bar includes the Autodesk BIM 360 logo, the PlanGrid dropdown, and a user profile icon. The main header shows 'Field Management' and 'TEMPLATES'. The current view is the 'Concrete Pre-Pour Checklist' template configuration page. A modal dialog titled 'Publish template to projects?' is open, allowing the user to select projects to publish the template to. The dialog includes a search bar, a list of projects currently using the template, and a list of available projects. The background shows the template outline with 'Section 1' and 'Item 1.1'.

Publish template to projects?

☐ Find a project

PROJECTS USING THIS TEMPLATE Remove All

- ☒ Plangrid Test Project (Update) Remove
- ☒ Web test project (Update) Remove
- ☒ Workflows (Update) Remove


AVAILABLE PROJECTS

- ☒ ACS Forms (PlanGrid Field Reports)
- ☒ BTLV-13197 verification
- ☐ Construction Recordset PlayGround



Clear 2 items Not now Publish




BIM360 Checklists: Syncing account-level checklists to projects


AUTODESK® BIM 360™

[PlanGrid](#) > [Plangrid Test Project](#)



Field Management

TEMPLATES

CHECKLISTS

ISSUES

DAILY LOGS

Import





Create New Template

Type

Updated

All Types

Choose Dates

Title ^	Type	Updated	Instances	Items	
Air handling commissioning checklist 	Commissioning	Nov 16	0	14	<div>Create Checklist</div> <div>...</div>
Concrete Pre-Pour Checklist 	Quality	Nov 16	0	1	<div>Create Checklist</div> <div>...</div>
Field Report for S&G	Safety	Nov 28, 2018	1	3	<div>Create Checklist</div> <div>...</div>
Kitchen Casework QA/QC checklist 	Quality	Nov 16	0	5	<div>Create Checklist</div> <div>...</div>
QA/QC Checklist	Quality	Nov 27, 2018	2	3	<div>Create Checklist</div> <div>...</div>
Weekly Safety Audit 	Quality	Nov 16	0	2	<div>Create Checklist</div> <div>...</div>

Showing 1 - 6 of 6

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1 of 1

>

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BIM360 Checklists: Configuring structured data form

AUTODESK

BIM 360™

PlanGrid

?

Field Management

TEMPLATES

Concrete Pre-Pour Checklist

Cancel

Save

Details

Find items and sections

7 Sections

4 Items

In 5 projects

TEMPLATE OUTLINE

1 Site survey1

2 Rebar0

3 Electrical penetrations3

4 Mechanical penetrations0

5 Fire protection penetrations0

6 Tension cables0

7 Safety audit0

+ Add section

3 Electrical penetrations3 Items

Add description (optional)

3.1 Are all electrical penetrations in the right place?

Yes / No / NA

Yes

No

NA

3.2 Are all electrical penetrations at least 4" from other types of penetrations?

Yes / No / NA

Yes

No

NA

3.3 New Item

Yes / No / NA

Yes

No

NA

Add new item

2 Rebar

4 Mechanical penetrations



PlanGrid Field Reports: Uploading a PDF form

154 Hillside Ave Tower (test project)

Live ChatHelp CenterChelsey Tanaka

Home

Sheets

Tasks

RFIs

Field Reports

Documents

Photos

Submittals

Team

Settings

Field Reports

Weekly work safety observations

Draft45 ReviewersCopyExport

Report Details

Report date

11/16/2019

Description

References

Add references

No references

Notes

Add additional details

Download PDFReplace PDFDiscard changesSave

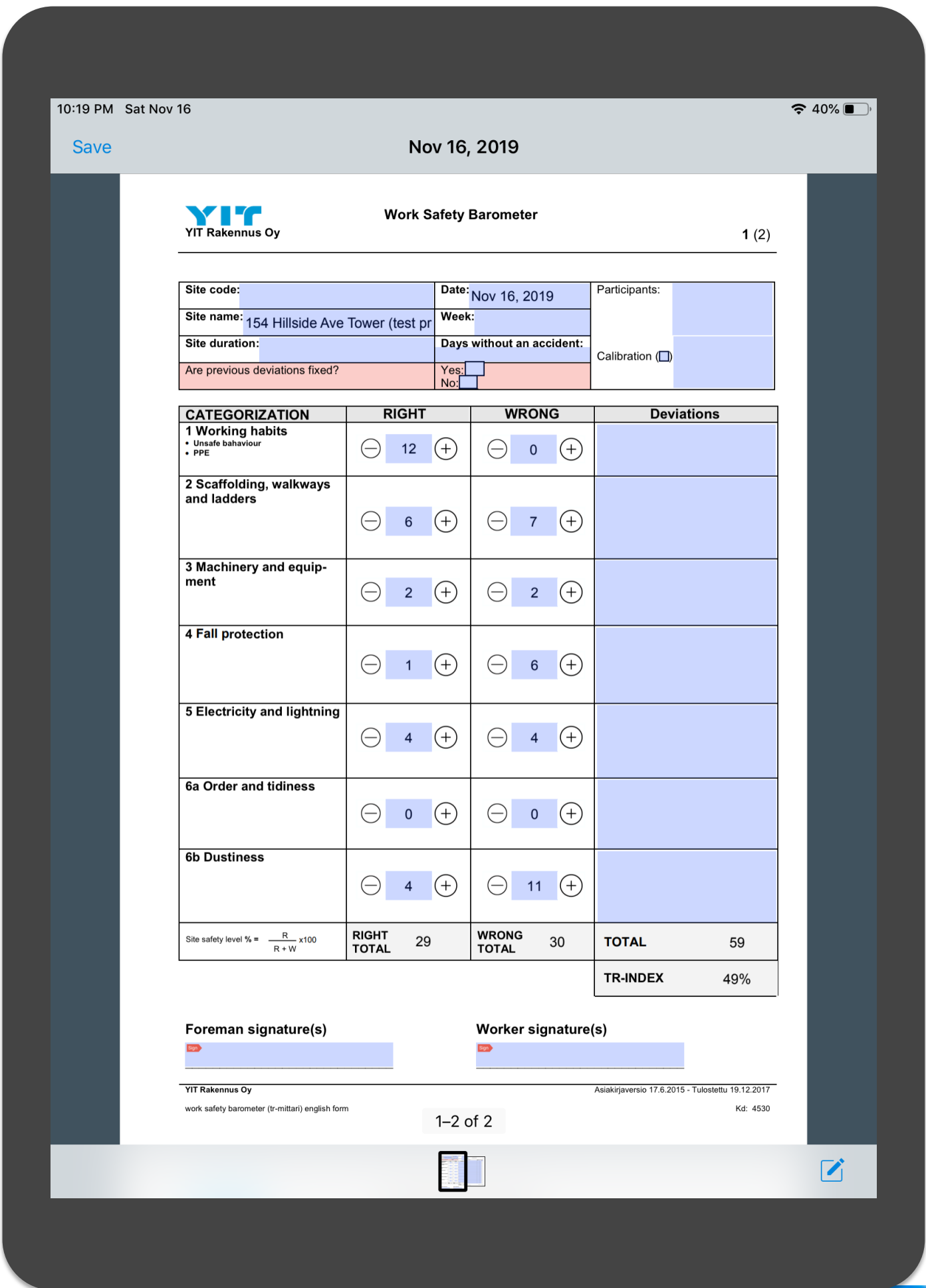
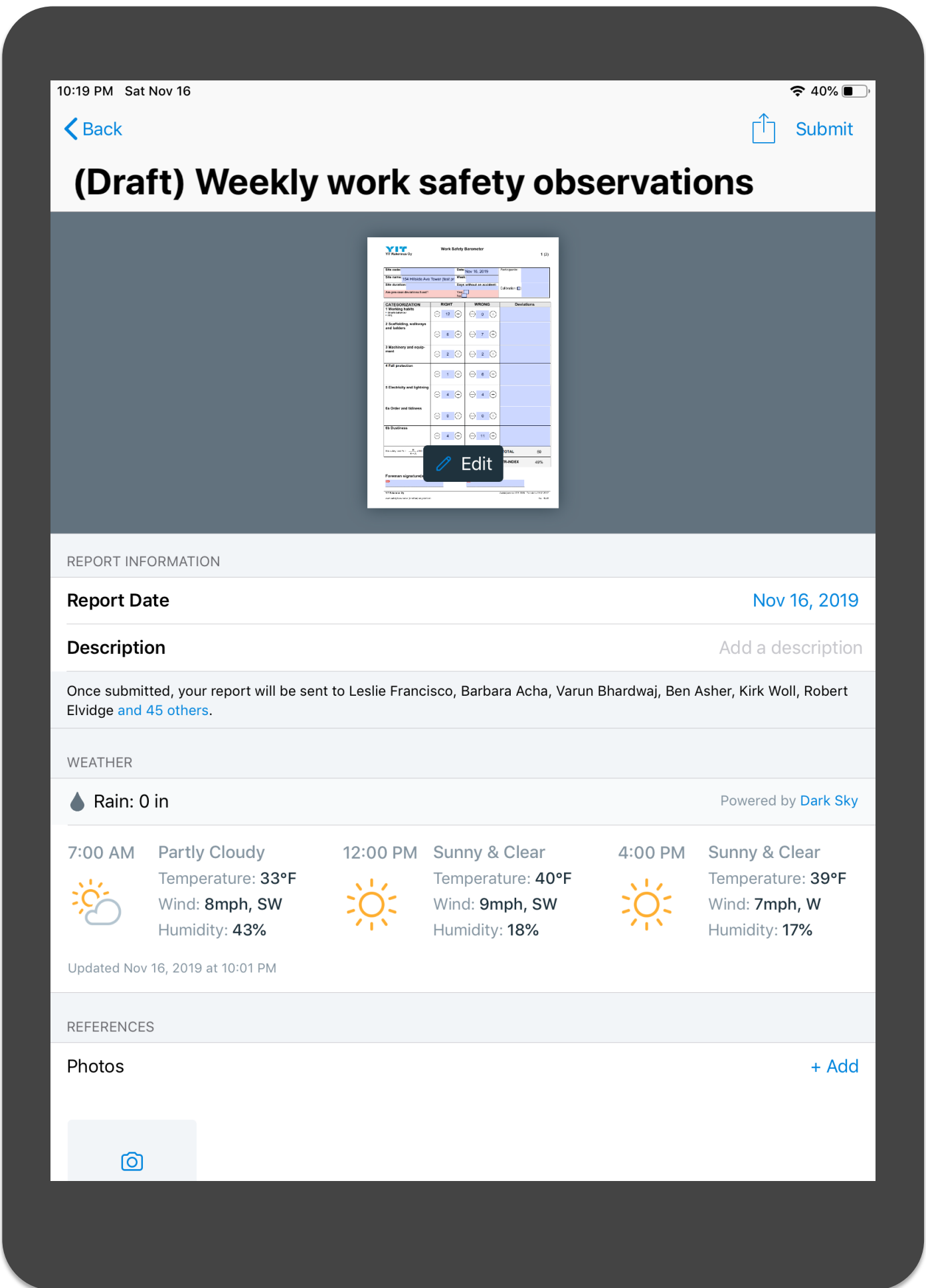
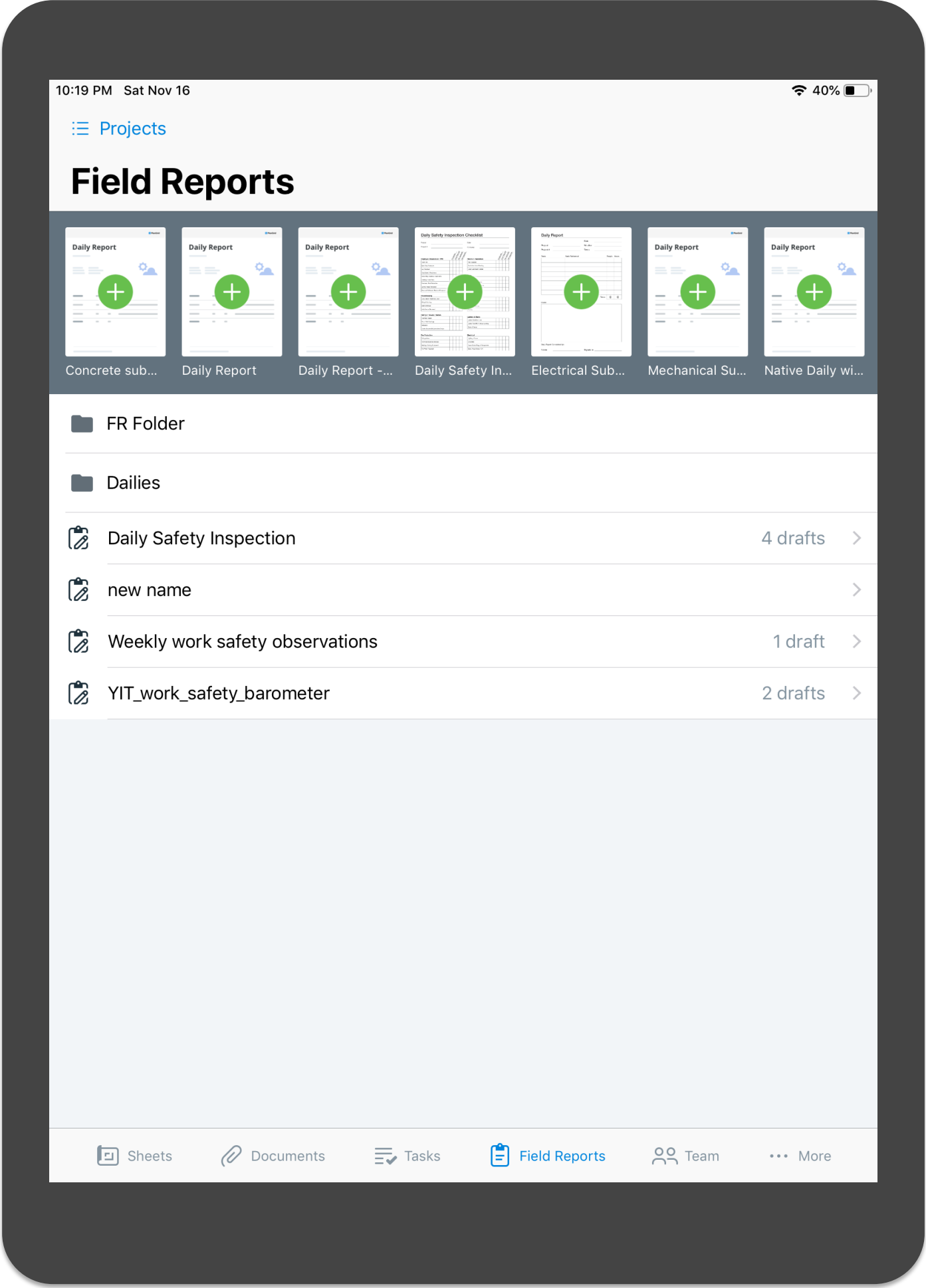
Site code:	123-009872	Date:	Nov 16, 2019	Participants:	
Site name:	154 Hillside Ave Tower (test pro	Week:			
Site duration:		Days without an accident:	52	Calibration	<input type="checkbox"/>
Are previous deviations fixed?		Yes:	<input checked="" type="checkbox"/>	No:	<input type="checkbox"/>
CATEGORIZATION	RIGHT	WRONG	Deviations		
1 Working habits <ul style="list-style-type: none">Unsafe bahaviourPPE	3	2	1. Scaffolding was not properly covered 2. Worker not wearing protective eyewear		
2 Scaffolding, walkways and ladders	6	7			
3 Machinery and equip-ment	2	2			
4 Fall protection	1	6			
5 Electricity and lightning					

We're offline- le...

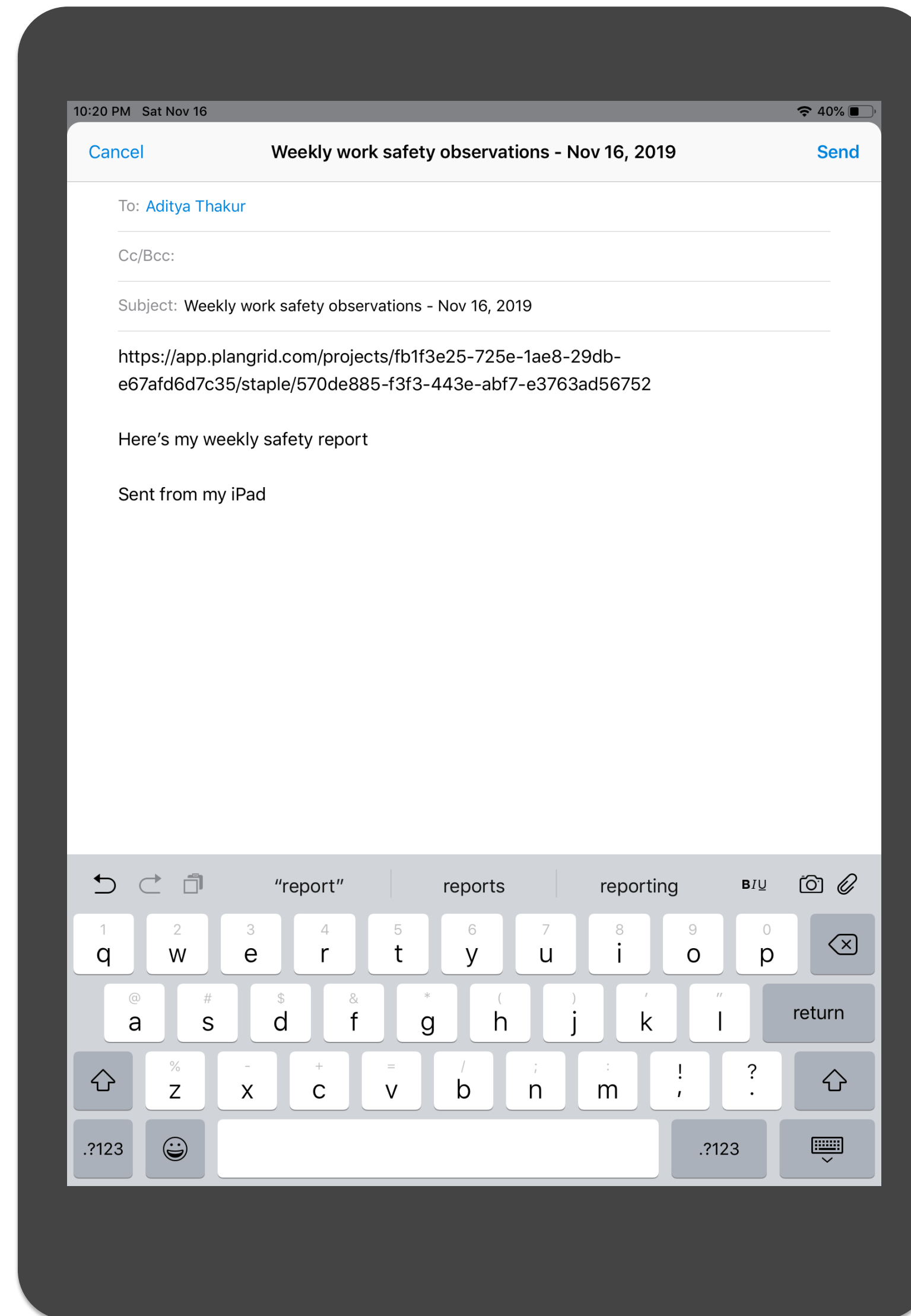
DeleteSubmit



PlanGrid Field Reports: Filling out form on mobile



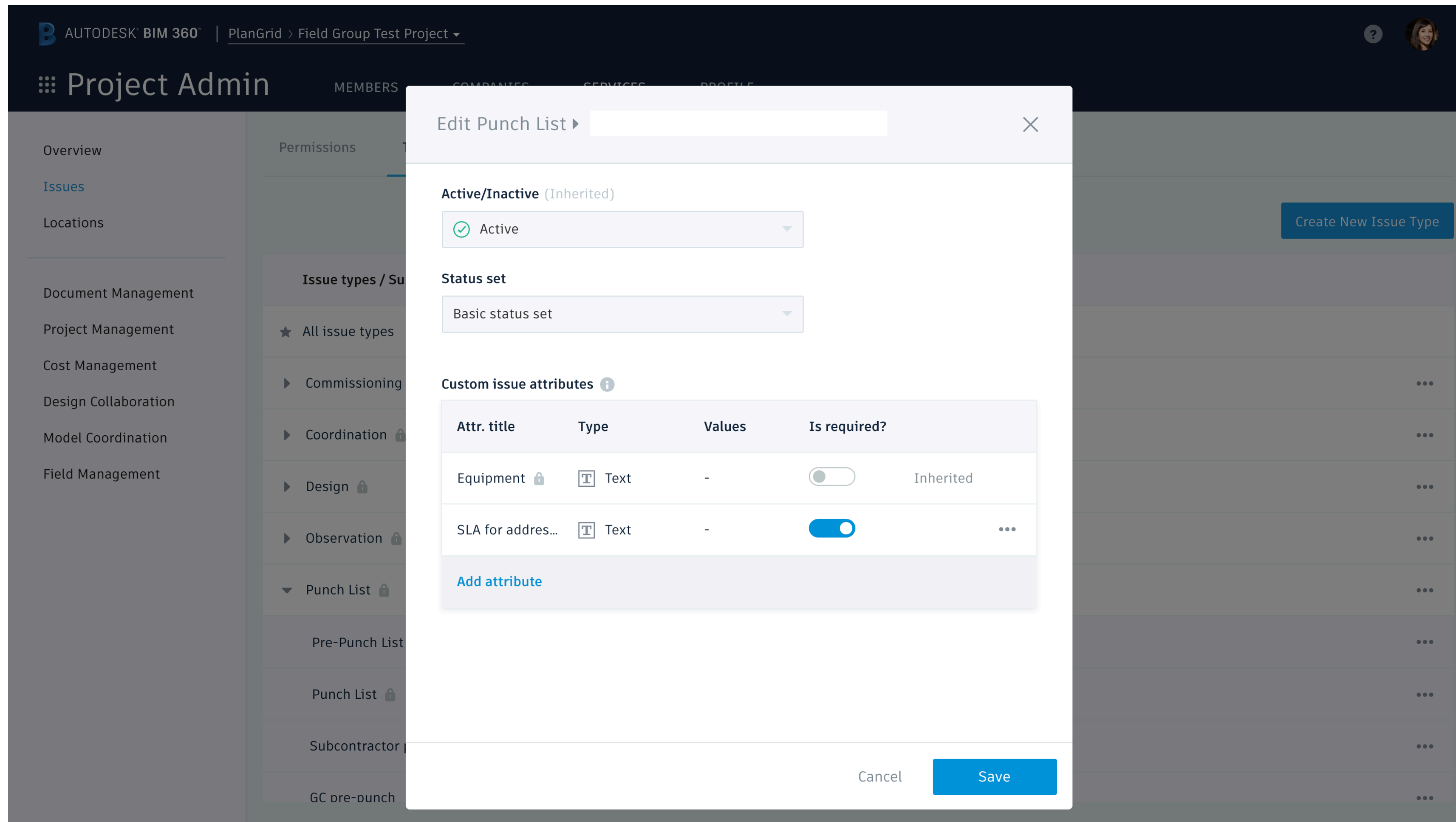
PlanGrid Field Reports: Sending PDF of report via email



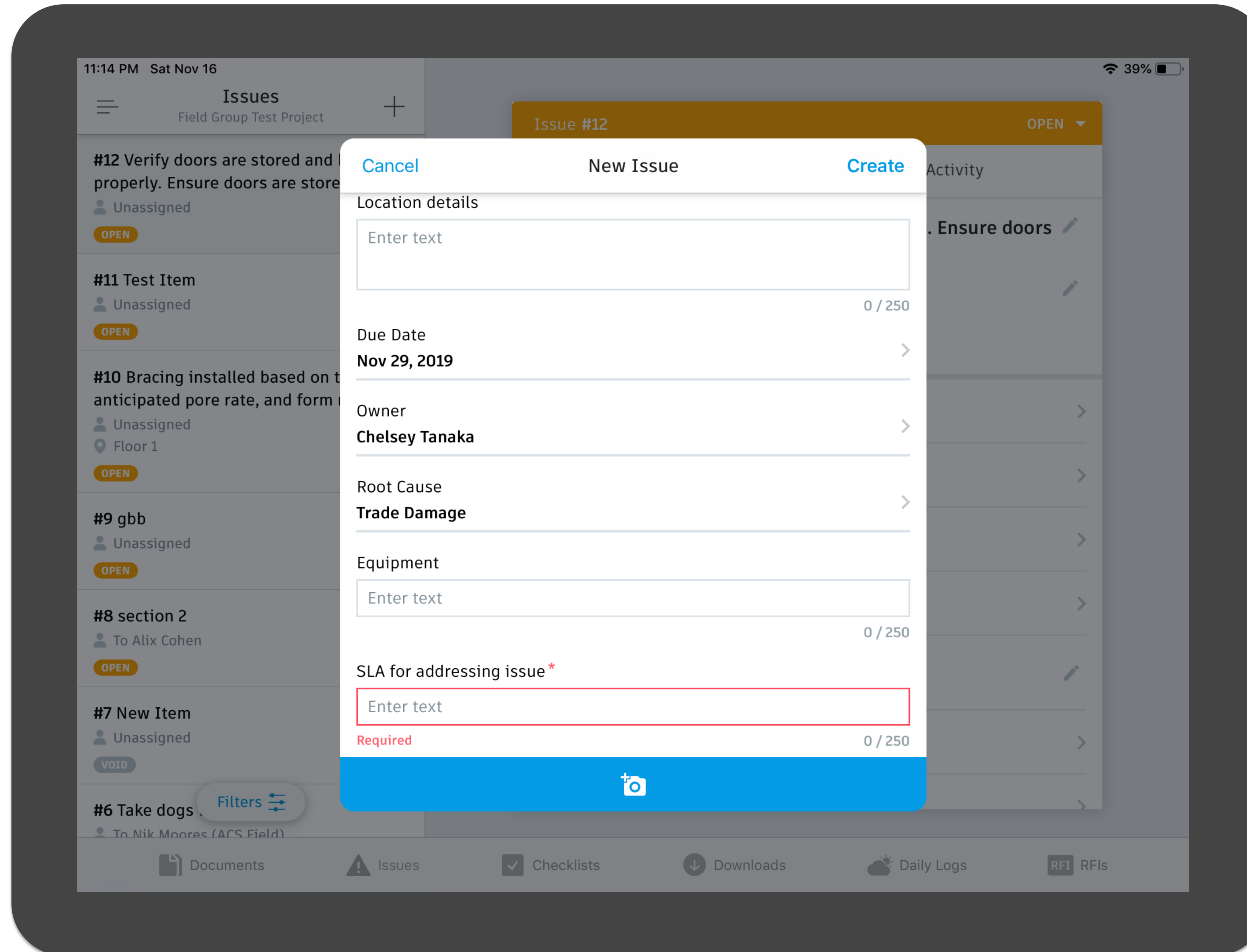
Case study 2: Issues and Tasks

- Issues are a feature in BIM360 for tracking deficiencies across many phases of the project
- Tasks are a feature in PlanGrid for tracking units of work
- Some of the use cases for these products:
 - Ongoing deficiency tracking
 - Pre-punch
 - Punchlist
 - Items to address from QA/QC or safety checklist

BIM360 Issues: Configuring custom attributes



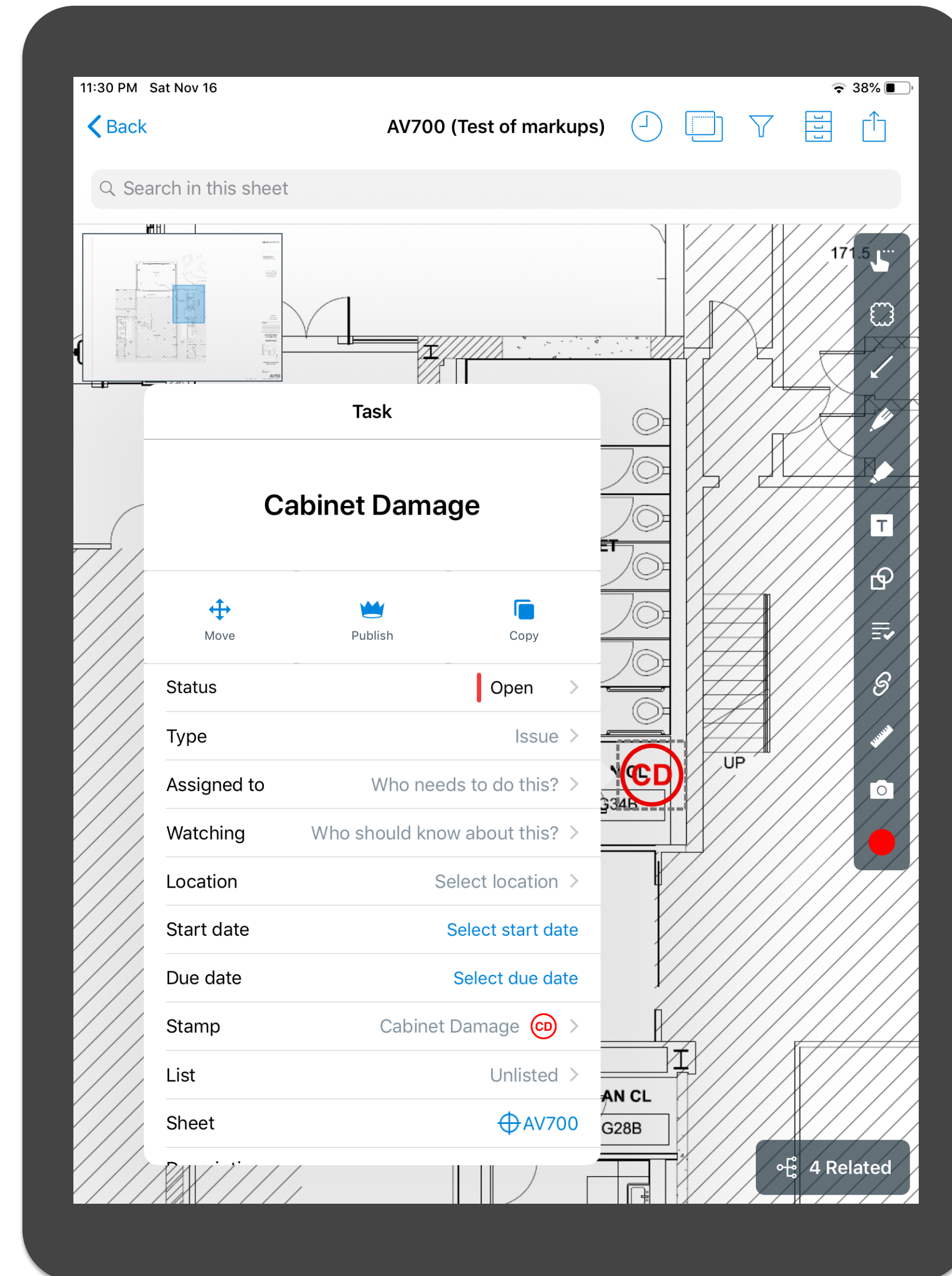
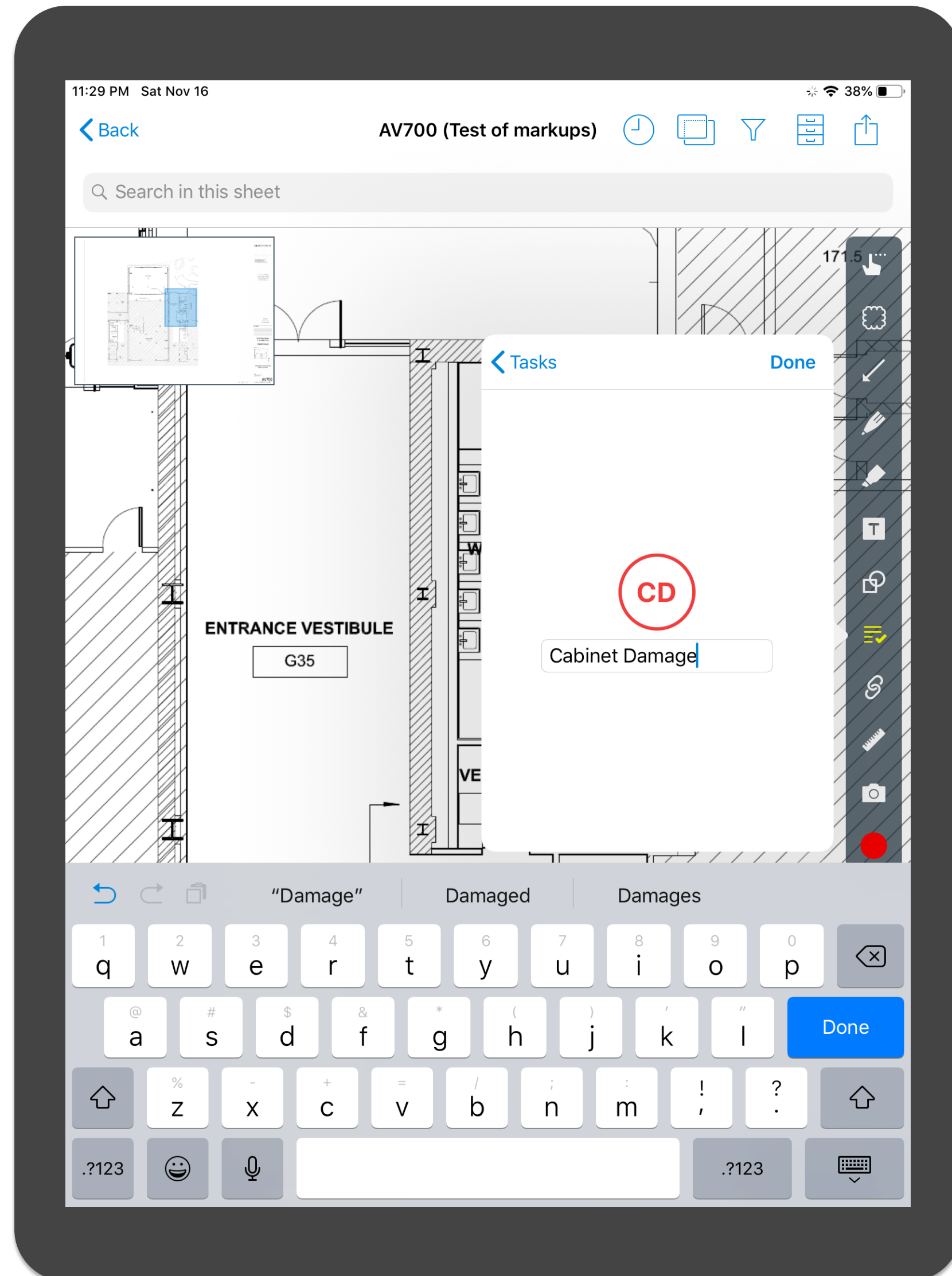
BIM360 Issues: Configuring custom attributes



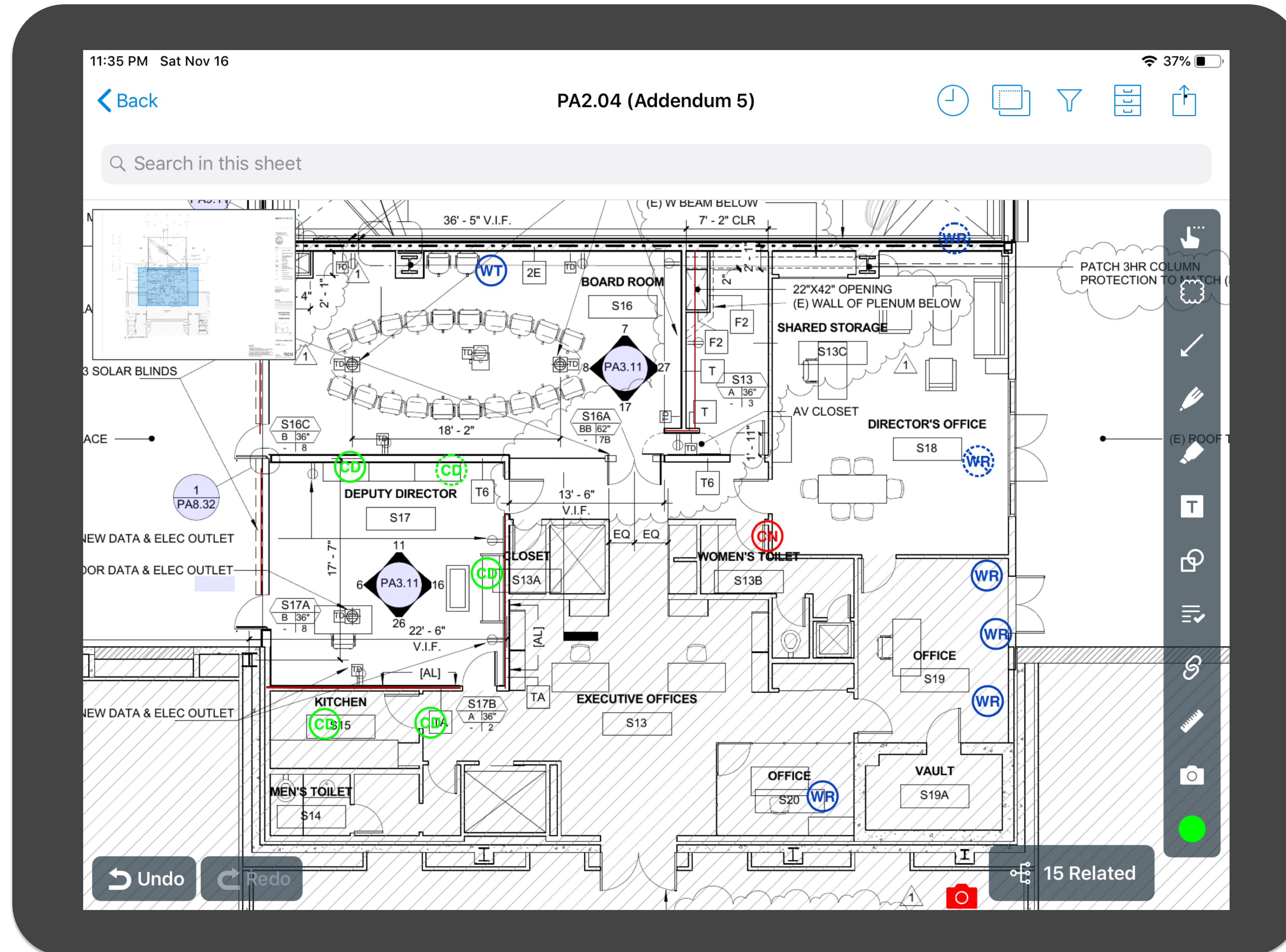
PlanGrid Tasks: Create new stamp from field



PlanGrid Tasks: Create new stamp from field



PlanGrid Tasks: Visible stamp code + color + status



BIM360 and PlanGrid specialize in different approaches, but they can be brought together

Standardizing tools and
processes across projects



Empowering field to use tools in
optimal way for them



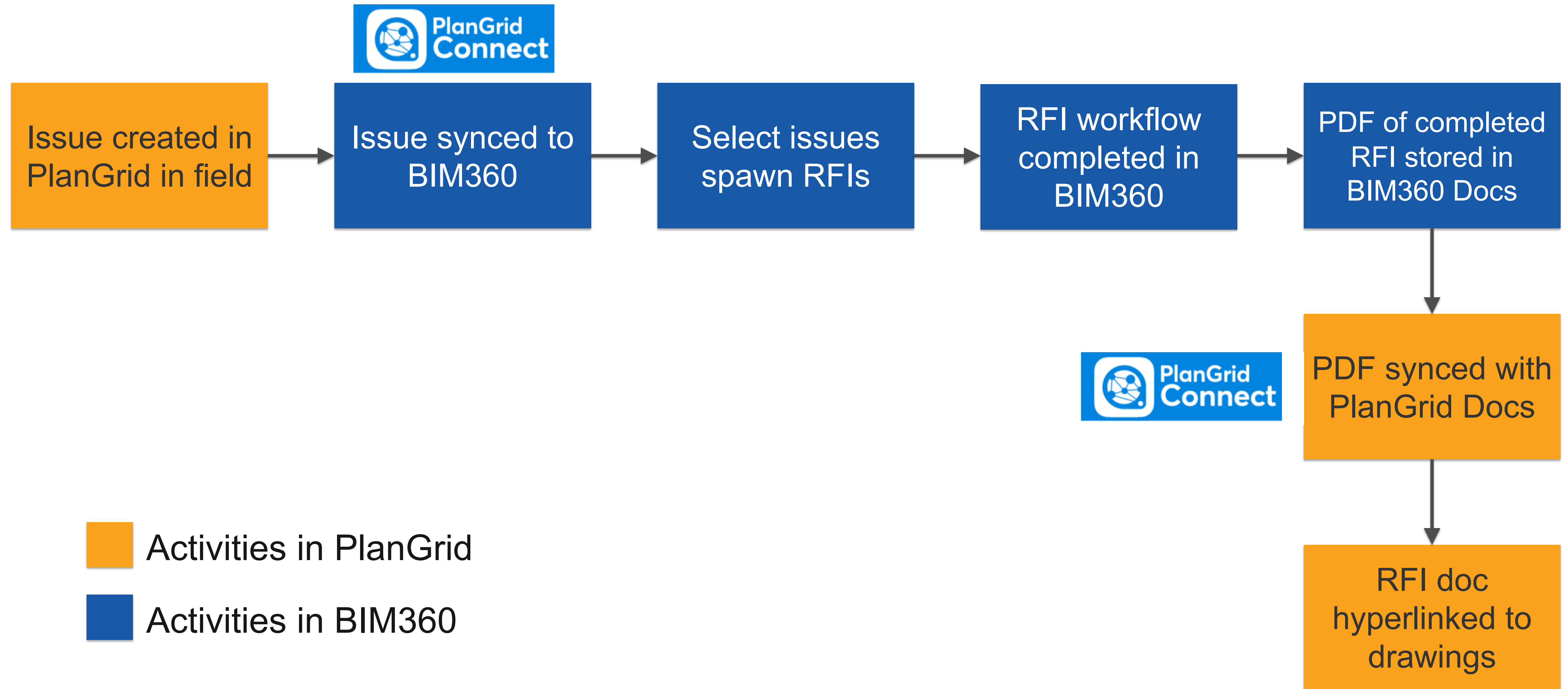
Integration possibilities

- Determine which modules in which product best meet your needs, then use API integrations to bring them together
- Examples:
 - Sync PlanGrid issues to BIM360
 - Sync BIM360 RFIs to PlanGrid Docs



Visit this url to play video: https://youtu.be/CRuvlws_Pdo

Integration possibilities



Agenda

- Introductions
- BIM360 and PlanGrid approaches
- Integration possibilities
- Our vision

We're working hard to bridge the gap between these two approaches

Standardizing tools and processes across projects



Empowering field to use tools in optimal way for them



Our customers are counting on us to solve this problem

- Clear feedback from customers is that they need both:
 - Standardization of data and processes to drive insights
 - Adoption in the field with intuitive, flexible and easy-to-use tools

What could an integrated approach to Forms look like?

Standardization

Structured data forms configured at account level and pushed to projects

Ability to specify pre-defined workflow for a form to go through

All form data available via API and used in custom reports

Flexibility and ease-of-use

- Library of form templates to start from
- Upload paper form and automatically create structured data template

Creators can add participants to the pre-defined workflow

Most common reports can be generated and sent from the field

Our background with both BIM360 and PlanGrid products gives us a unique perspective

- We learn from the research, design, product and engineering expertise of both sides in order to develop an integrated approach
- We pay attention to the needs of different types of companies and different types of users within companies
- We bring best of breed features together



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