

# CS323441 Driving the transition from BIM 360 Field (classic) to Field management (next gen)

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# About the speaker

Isaac Charbonneau Beaulieu

Fighting to get the industry moving forward, by the use of the right processes to support the transformation.

# Who's **POMERLEAU** ?

2 bn \$

ANNUAL TURNOVER

Heading toward growth

5.5 bn \$

BACKLOG

Across all our divisions

7

OFFICES

From coast to coast

46

EMPLOYEES

In our innovation  
department

# Our platforms ecosystem



# Our classic version use

2015

THE START

Starting with 1 pilot  
project

>300

PROJECTS

From civil to building  
projects

>5000

USERS

Including Pomerleau and  
external stakeholders

10

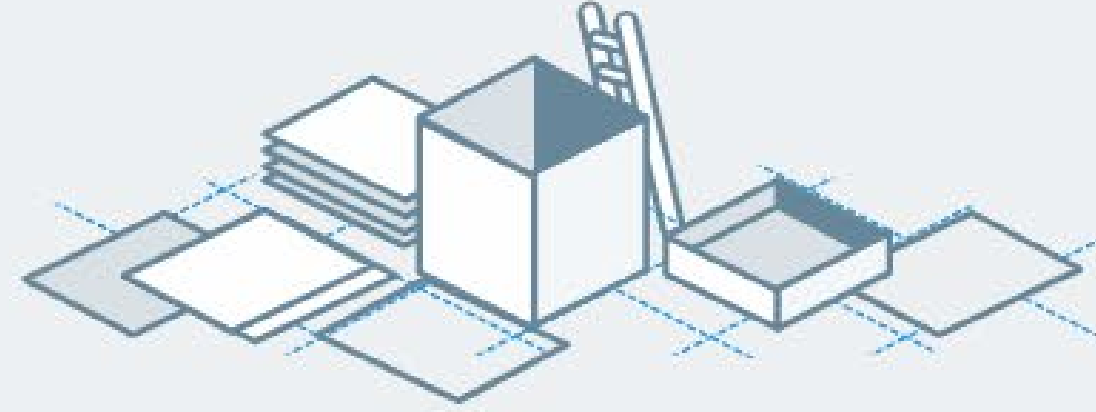
SUPERUSERS

To support locally all the  
projects



# The reason for the switch?





No checklists found

# Checklist, checklist, checklist

- Better control over the checklist completion
- Possibility to have section assignee
- Mandatory signatures
- Better status tracking

# Our deployment strategy

START WITH PILOT PROJECTS NEAR THE MOST KNOWLEDGEABLE USER

Easier to provide support and get valuable feedback

CONTINUE WITH THE LEAST ADVANCED USERS

The lowest point of resistance

CONTINUE WITH THE ONES CRITICIZING CLASSIC VERSION

They will likely get the features they were waiting



# WHY THIS STRATEGY IS PROBABLY WORKING...

## CIVIL PROJECTS MAINLY

Much less volume in the issue dept...

## SMALLER OVERALL PROJECT SIZES

Less people involved, less volume overall...

## PROJECTS WITHOUT COMMISSIONING NEEDS

Help us forget we're missing the asset management module (equipment)

# HOW WE'RE DOING THE INITIAL PROJECT SETUP

Copying our template from project to project is still easy:

- No more locations to assign to documents (lots of interns are happier now!)
- Can still push most of the parameters from project to project

But watch for those points:

- Checklists are not coming along
- When setting up your template watch for the issue type modifications: some are required for specific modules



## The integration strategy

Drawings need to be updated, unlike what we did with the BIM 360 Field classic.

Not using the drawing module, this integration can only work with the project files.

# THINGS WE THOUGH WERE WRONG

(BUT MAYBE IT WAS US THAT WERE)

## CAN'T ASSIGN TO A COMPANY/USER THAT HAVEN'T ACCEPTED THE INVITE

But wait... this means people can't skip being on the platform!

## NO MORE HEADERS IN THE CHECKLISTS

Lot of people were having issues remembering it existed, much simpler UX now!

## THE CHECKLIST TEMPLATES THAT ARE NOW OUT OF THE PROJECT ADMIN

Designated people can set the checklist templates without them having to grant them full control over the projects

# SOME WORKAROUND WE'RE USING

- Setting up filtering in Outlook to remove almost all emails from BIM 360
- Importing all checklists in one single excel file
- If multiple users needs to be able to close an issue: generic user (not ideal)
- Using the issues to track the Non Conformities
- Taking pictures or saving as images directly in a scanner to be able to join attachments to a checklist
- Specify the date format you want your users to fill in directly in the checklist line



# WHAT TO WATCH

- Make sure only the main Superintendant fills in the Daily logs
- You either have full transparency or people will be very limited in what they can see
- Using the roles to assign checklists or issues
- The amount of different roles
- Be careful when creating issue types

# WHAT'S NEXT?

- Getting the data to our BI platform
- Start using the asset management (pretty soon)
- Wait for some improvement to use it on large scale projects



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