



Cost Management

(Pre-Release)



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 and change management 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 December 2018 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](#).



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3 Additional Capabilities

- Insight & Reporting
- Project Home
- Mobile Access
- Account Admin
- Integration Partners



Suggested Workflow

Cost Management Workflow

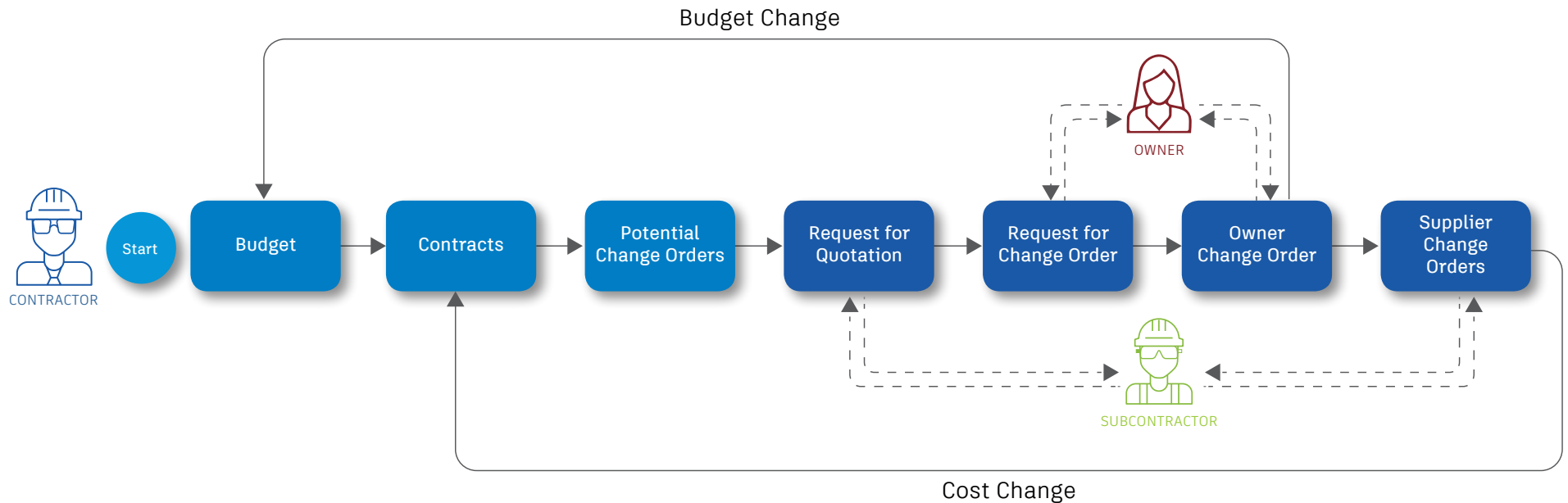
Used to help control cost and confirm all changes are accounted for and managed effectively to maintain positive cash flow, reduce risk and maximize profit. The graphic below outlines the suggested cost management workflow using BIM 360.

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



Cost Management Capabilities

Budget Code Setup

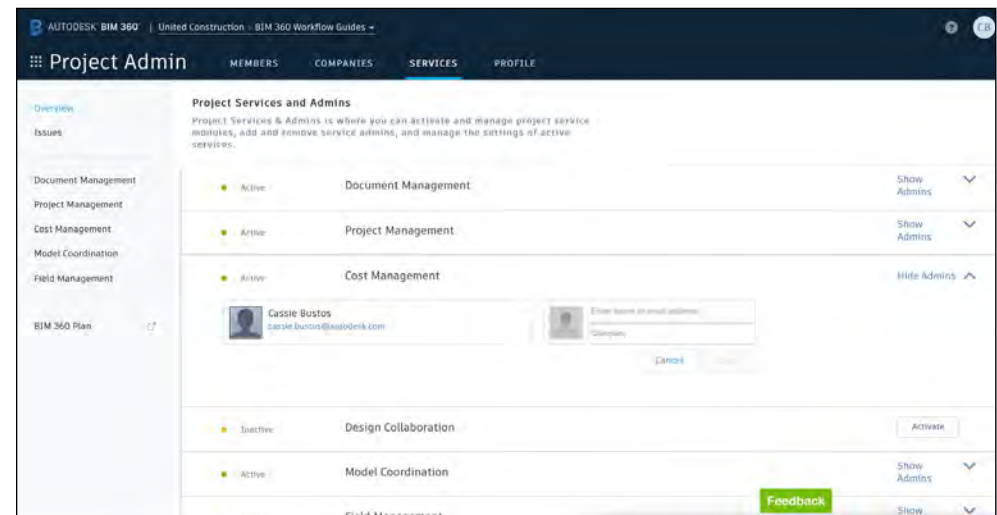
Cost Management is customizable to suit users needs and preferences including detailed hierarchical build ups, custom segment options, and master lists.



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 “Overview” on the left sidebar.
- In the Cost Management row, select “Activate” and designate at least one project admin.

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

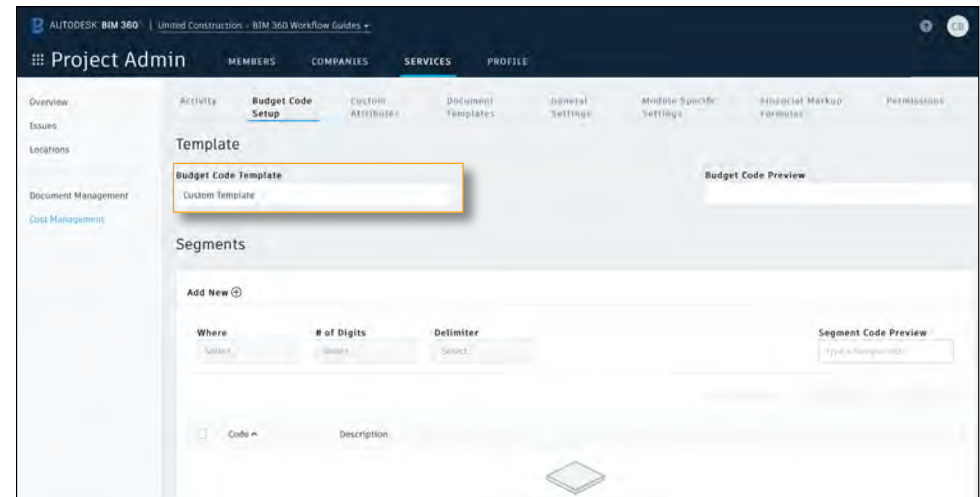


Budget Code Setup

2 Budget Code Templates

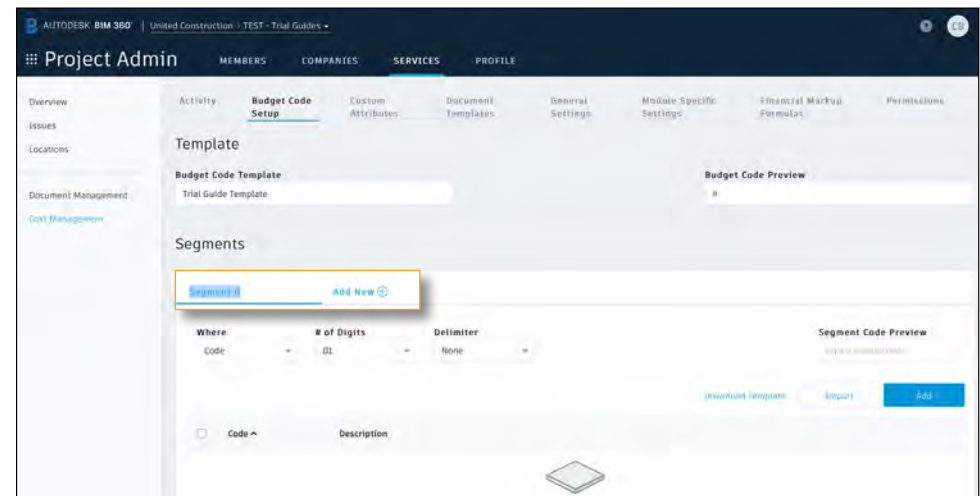
The template informs BIM 360 on how budget codes will be formatted and if imported from an accounting system or similar how they should be deciphered and shown in the Cost Management module. Only project admins can create budget code templates.

- In the Project Admin module, select the Services tab.
- On the left sidebar select “Cost Management” then “Budget Code Setup.”
- Use the “Budget Code Template” field to label the template.



3 Budget Segments

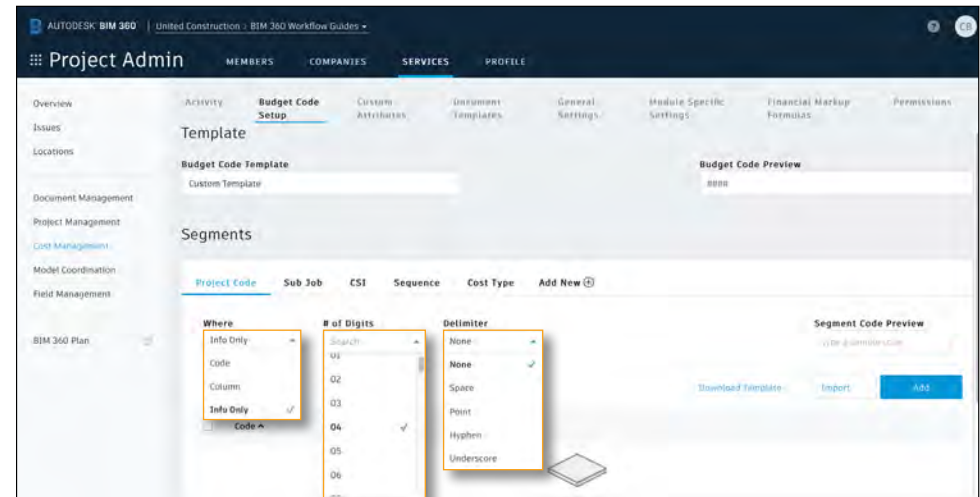
- In the Segment section select “Add New” and double-click to rename the segment.
- At a minimum there must be least one segment, but you can create as many segments as required.
- Click and drag the segment tabs to rearrange.



Budget Code Setup

4 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.



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

5 Adding Segments 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.

Excel template:

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

Results in the budget code setup tab:

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

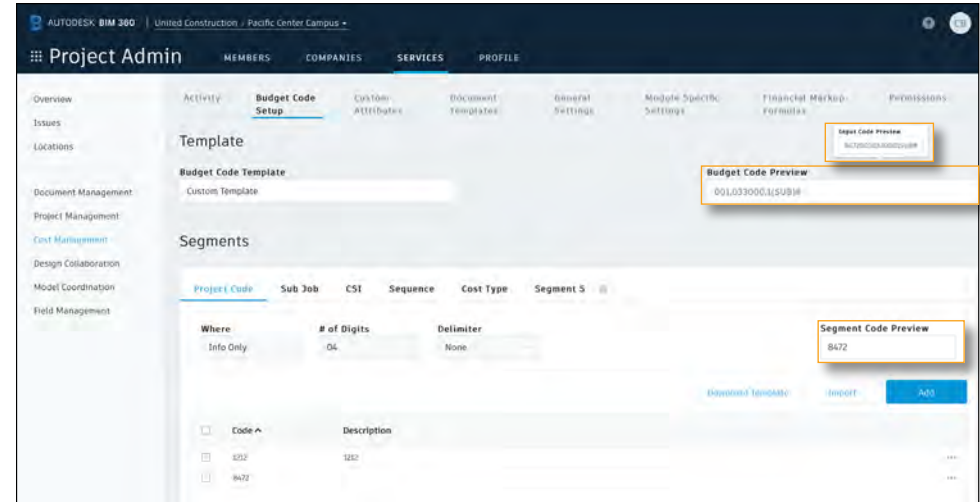
Example budget flyout view where you can see the benefits/results of the master lists import:

Envelope package		
84720010722000SUB		
BUDGET CODE DETAILS		
Segment Name	Code	Description
Project Code	8472	8472
Sub Job	001	001
CSI	07200	Roof and Deck Insulation
Sequence	0	0
Cost Type	SUB	Subcontractor

Budget Code Setup

6 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” an “Input Code Preview” pops up to display the code as it might look when imported in from the accounting system.



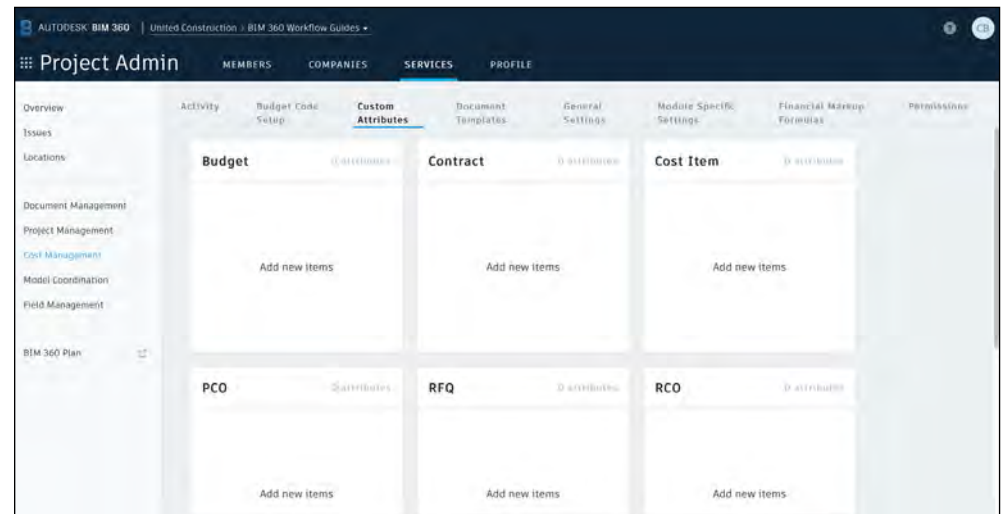
Custom Attributes

Quickly view detailed information behind any cost activity with the details flyout panel. With the Custom Attribute feature teams can customize a portion of the details flyout panel to suit their needs and preferences.



1 Accessing the Custom Attributes Tab

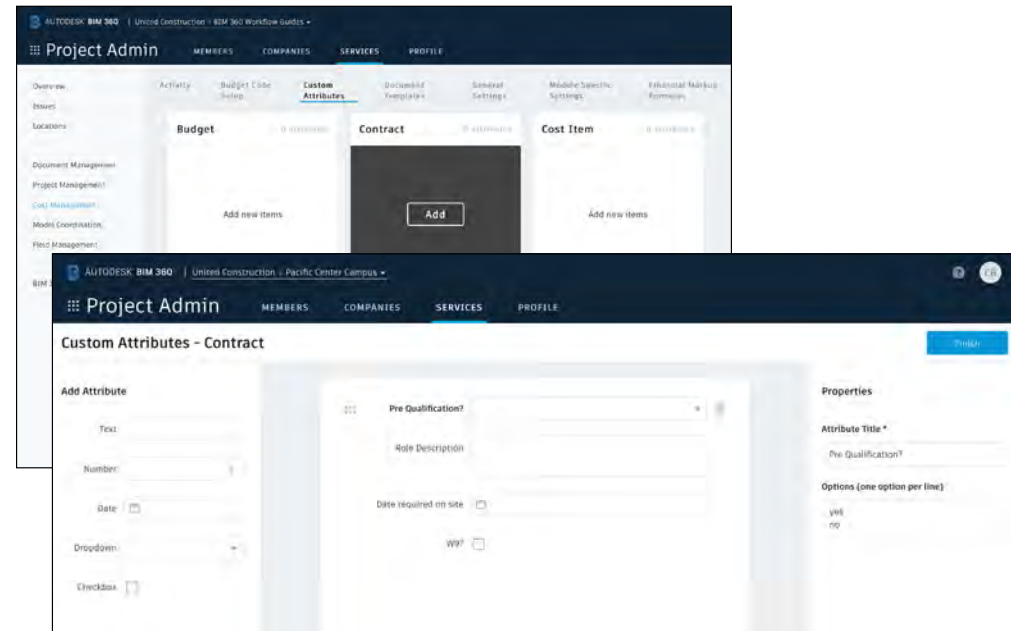
- In the Project Admin module, select the “Services” tab.
- On the left sidebar select “Cost Management” then “Custom Attributes.” Note, only project admins can create custom attributes.
- Custom attributes can be created for the following items:
 - Budget
 - Contract
 - Cost Item
 - PCO (Potential Change Order)
 - RFQ (Request for Quotation)
 - RCO (Request for Change Order)
 - OCO (Owner Change Order)
 - SCO (Supplier Change Order)



Custom Attributes

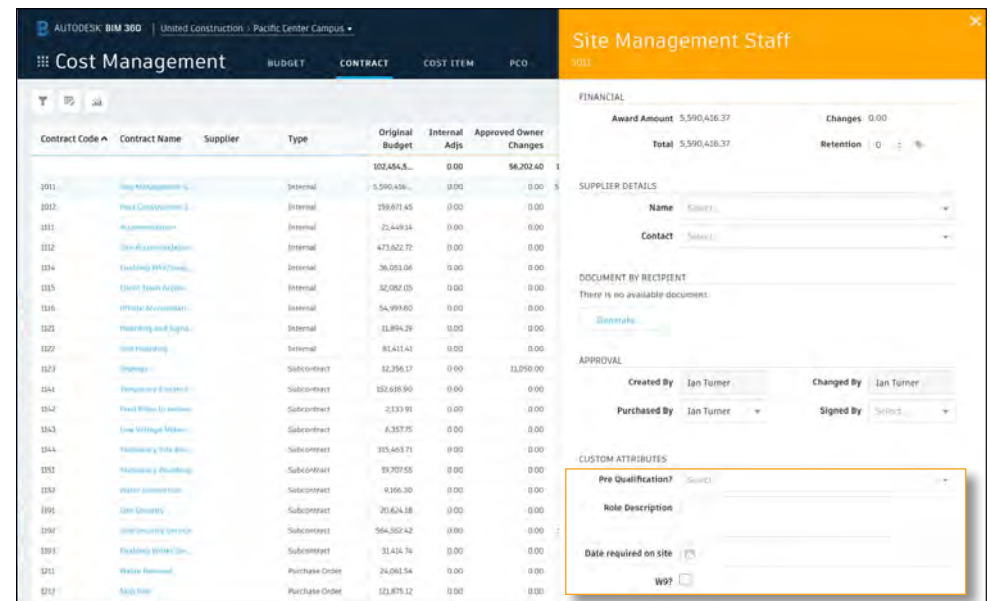
2 Creating a Custom Attribute

- To create a custom attribute, select “Add” within the component.
- Either click to add or drag and drop the attribute from the left sidebar into the center preview panel.
- Then select the attribute and define the settings in the properties panel on the right
- Rearrange the attributes by clicking the six dots and dragging and dropping the field.
- Select “Finish” when done.



3 View Custom Attribute in the Details Flyout

- Use the module picker to open the Cost Management module, select the appropriate tab.
- Click on a cost activity line item to open the details flyout.
- In the details flyout select “Custom Attributes” from the top left drop-down list.
- This will display the custom attribute created in the Project Admin module.



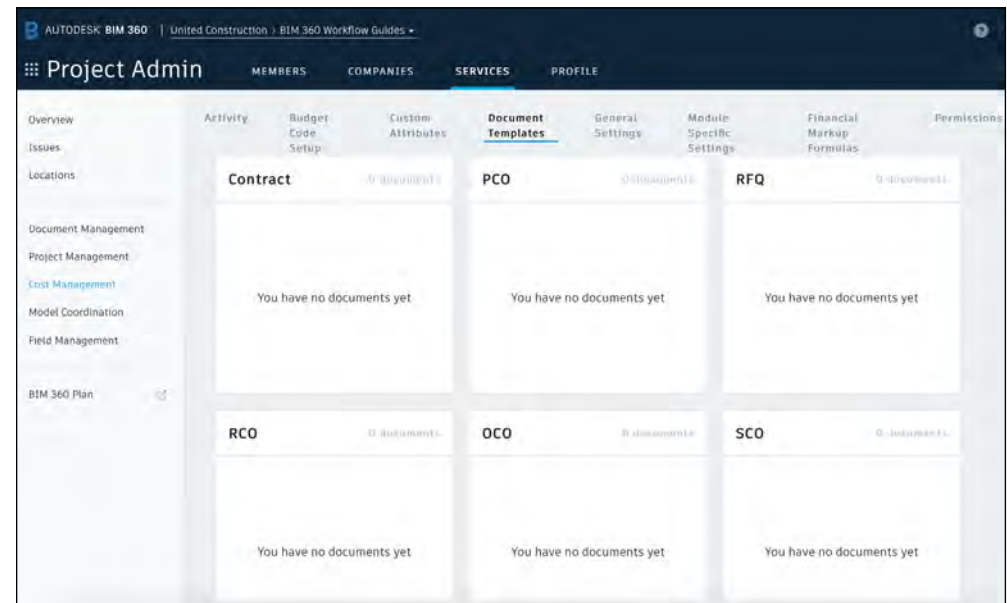
Document Templates

Easily create standard documentation formats for distribution during the change order, pricing request and approval processes with Cost Management's Document Templates capabilities. Templates are created using fields that are automatically populated directly from BIM 360 once a document is generated.



1 Accessing the Document Templates Tab

- In the Project Admin module, select the “Services” tab.
- On the left sidebar select “Cost Management” then “Document Templates.” Note, only project admins can manage the document templates.
- Document templates can be added for the following components:
 - Contract
 - PCO (Potential Change Order)
 - RFQ (Request for Quotation)
 - RCO (Request for Change Order)
 - OCO (Owner Change Order)
 - SCO (Supplier Change Order)
- The document templates will be utilized in the Cost Management module when generating a documents.

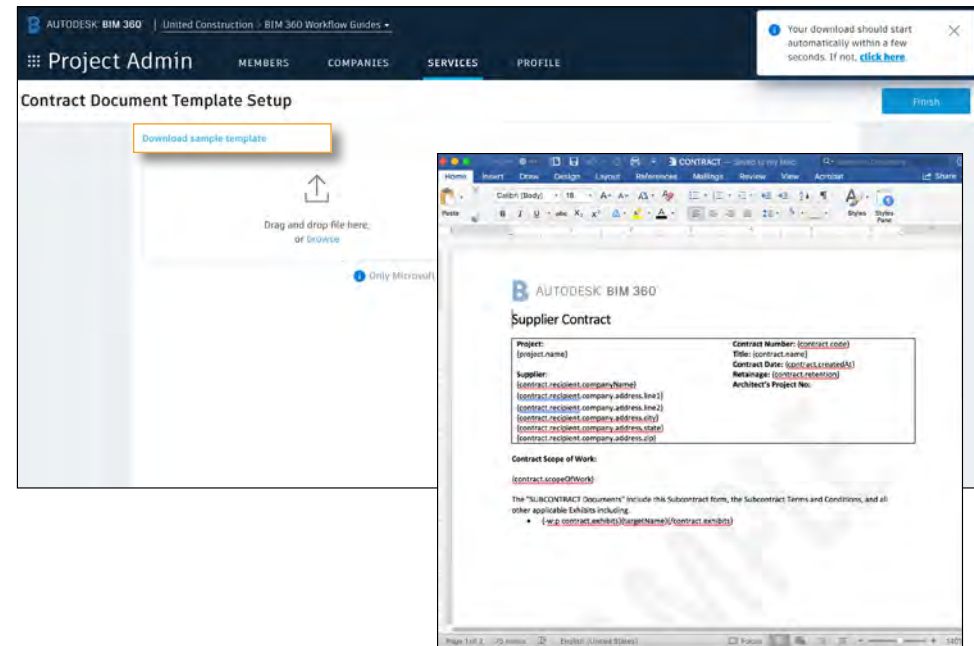


PRO TIP: There is no limit to the number of document templates that can be associate to each component.

Document Templates

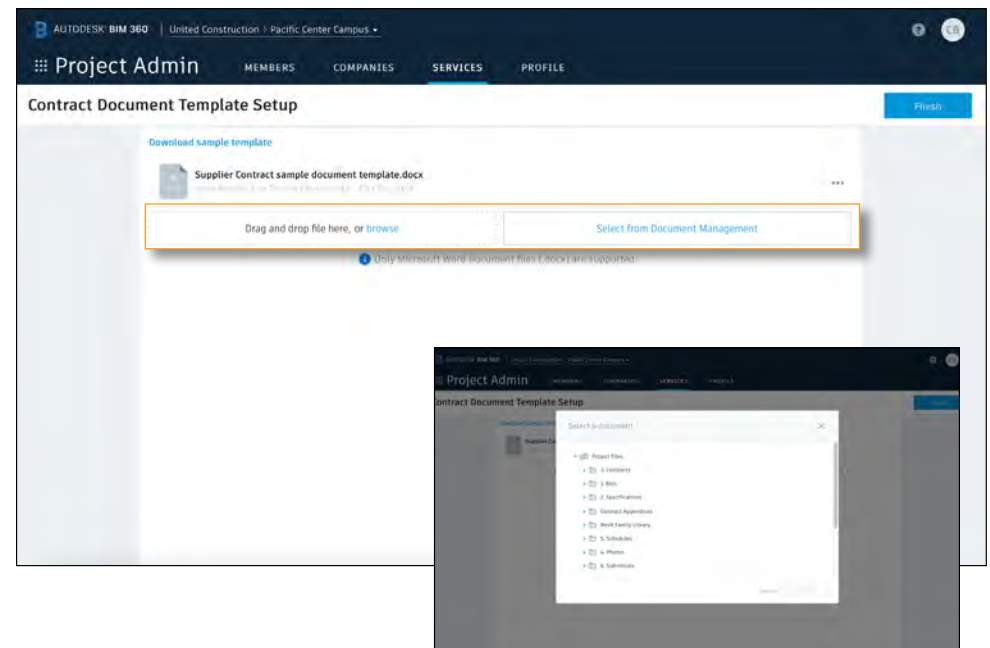
2 Downloading a Sample Template

- In the “Document Templates” tab hover over the component you want to add a template to and select “Add.”
- Select “Download sample template” to download a Word template.
- The template can then 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.
- Once finalized update the template name and save.



3 Uploading a Document Template

- In the “Document Templates” tab hover over the component you want to add a template to and select “Add.”
- There are two ways you can upload a document template:
 - Option 1: drag and drop the file or click “browse” to locate the file to upload.
 - Option 2: You can select a document from the BIM 360 Document Management module by clicking “Select from Document Management” and navigating to the correct folder.
- Select “Finish” to save and exit.



Module Specific Settings

In the Module Specific Settings tab teams have the option to configure the code format by customizing the prefix, suffix, number of digits and start number for each component.



1 Accessing the Module Specific Settings Tab

- In the Project Admin module, select the “Services” tab.
- On the left sidebar select “Cost Management” then “Module Specific Settings.” Note, only project admins can edit the module specific settings.

2 Module Specific Settings

- In the Module Specific Settings tab you have the option to configure the code format by customizing the prefix, suffix, number of digits and start number for each component.
- This will dictate how the information is displayed in the number column of each tab within the Cost Management module.

The screenshot shows the Autodesk BIM 360 Project Admin interface. The top navigation bar includes 'MEMBERS', 'COMPANIES', 'SERVICES', and 'PROFILE'. The left sidebar lists various management tabs. The main content area is titled 'Module Specific Settings' and shows configuration options for different cost item types. Below this, the 'Cost Management' tab is active, displaying a table of cost items.

Number	Name	Type	Scope	Source Type	Source Ref #	Estimate
P-0005	Additional Entry Openings per #4205	Owner Change Or...	Out	RFI	005	49,729.0
P-0006	Reviso Slapage	Owner Directive	Out	ASJ	001	11,021.0
P-0017	Reviso Main Entrance Layout per #5403	Owner Change Or...	Out	ASJ	002	16,576.5

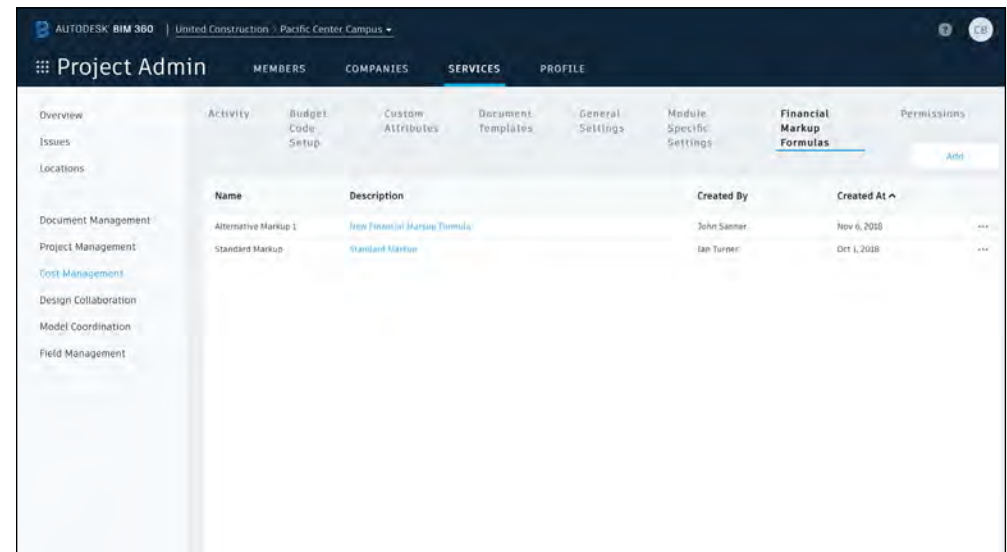
Financial Markup Formulas

Easily create multiple project level markup configurations to apply to potential change orders (PCOs), requests for change orders (RCOs) or owner change orders (OCOs) before submitting with Cost Managements financial markup capabilities.

1

Accessing the Financial Markup Tab

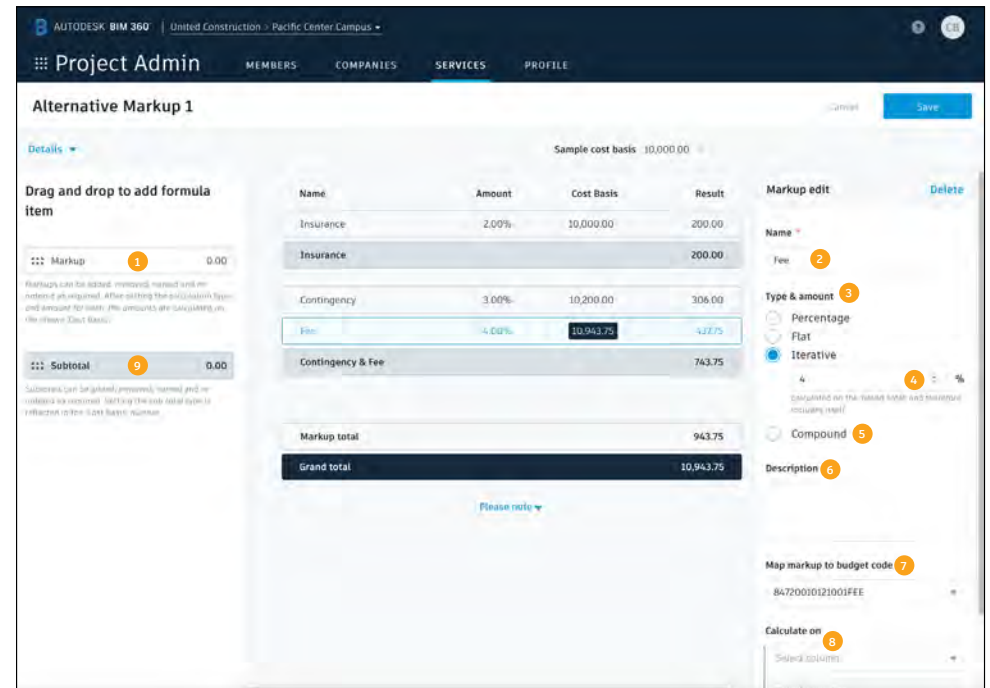
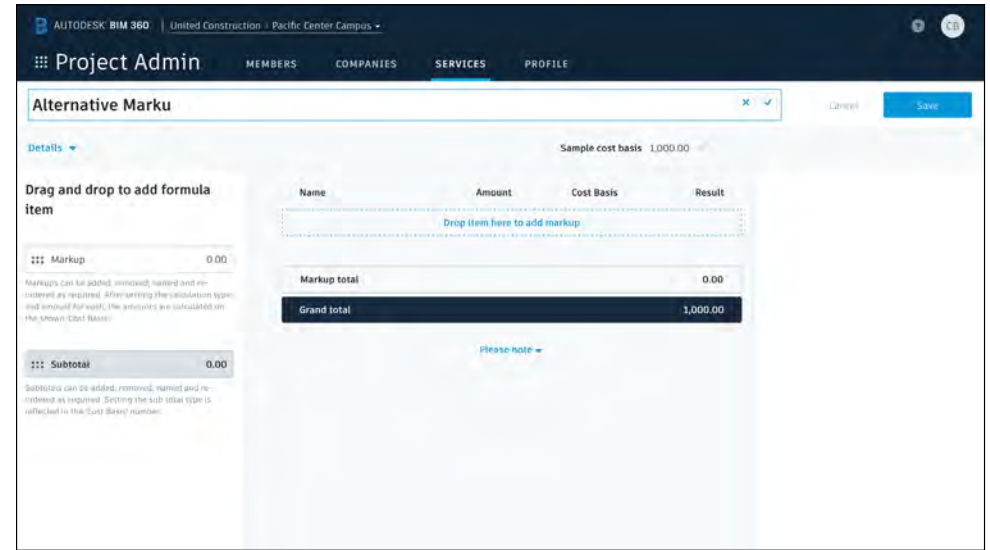
- In the Project Admin module, select the “Services” tab.
- On the left sidebar select “Cost Management” then “Financial Markup Formulas.” Note, only project admins can manage the markup formulas.
- Multiple markup formulas can be created and any existing formulas will be available in the list.
- The markups created here can then be applied to either PCOs (Potential Change Orders), RCO (Request for Change Orders), or OCOs (Owner Change Orders).



Financial Markup Formulas

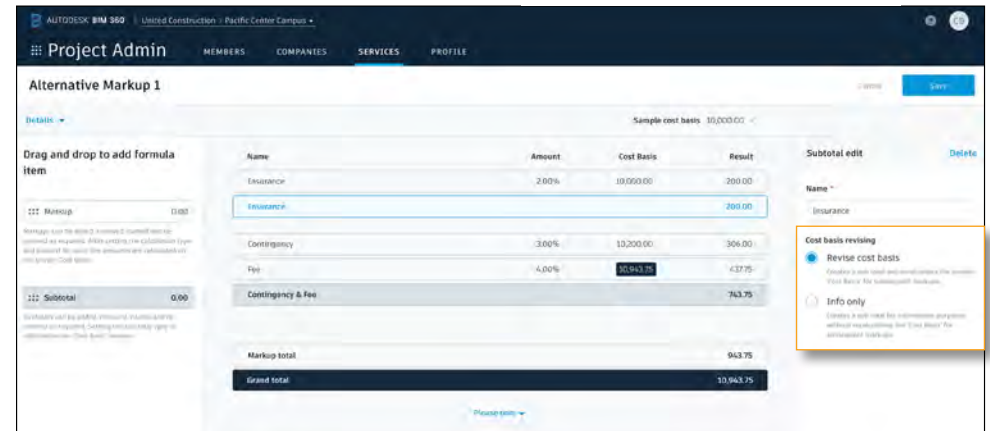
2 Creating a Markup Formula

- In the “Financial Markup Formulas” tab select “Add.”
- Select the top “New Formula” field to title the formula.
- Select the pencil icon next to “Sample cost basis” to enter a sample cost basis which will allow you to check the calculation as you start building out your formula.
- To create your formula...
 1. Either click on a markup to add to the bottom or select and drag into the center preview panel.
 2. With the markup selected, enter a name for the markup amount.
 3. Select the markup type:
 - “Percentage” for a standard percentage based markup.
 - “Flat” for a flat fee, per PCO.
 - “Iterative” for markups to be calculated on the grand total and therefore include themselves.
 4. Enter the required % for a percentage, flat or iterative markup.
 5. Select “Compound” if you want the markup to be calculated on the cost basis plus any prior markups.
 6. (Optional) add a description of the markup.
 7. Type or scroll to select a target budget item for the markup.



Financial Markup Formulas

8. By default, markups are calculated on all budget items. Here you can enter rules to only calculate on particular budget codes, cost types etc.
 9. Add a subtotal and select whether the subtotal is to...
 - Be used to summarize any markups above for information (“Info Only”).
 - Revise the cost basis (“Revise Cost Basis”). If revising, the cost basis for all subsequent markups will be included. Note, this selection is the default.
- Select “Save” to save changes.

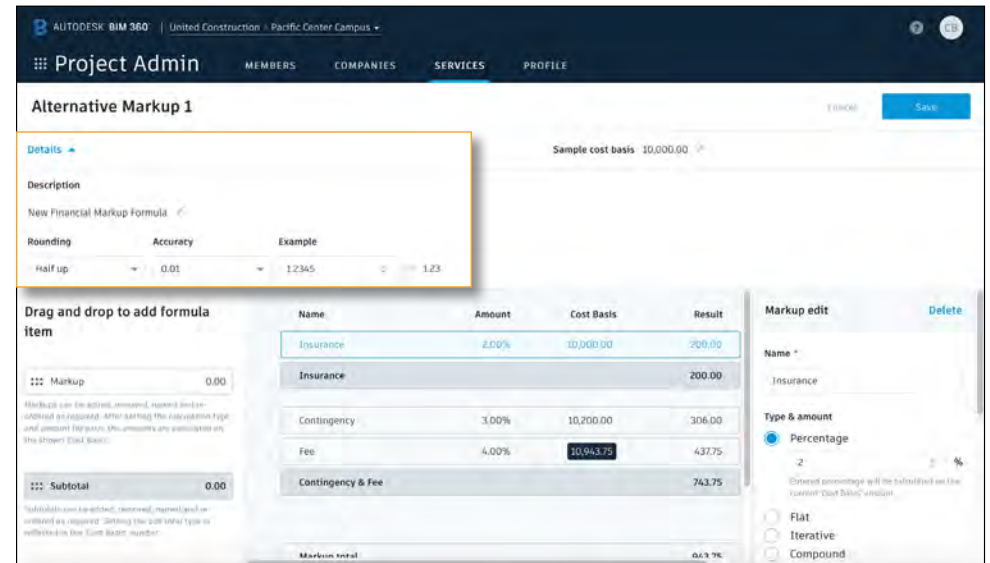


PRO TIP: Drag and drop markups and subtotals to rearrange if required.

3

Setting Description, Rounding & Accuracy

- Under the formula title select the “Details” drop-down
- Edit the description of the markup if required.
- Select rounding options: Half up, Up, Down
- Select accuracy of rounding 1., 0.1, 0.05, 0.01
- View example of chosen settings



General Settings & Permissions

It is essential to assign permission levels appropriately to ensure the right people have access to the right information. With the ability to set standardized permission controls sharing information has never been easier. Once you finish setting up your original budget you can lock it to avoid accidental changes.

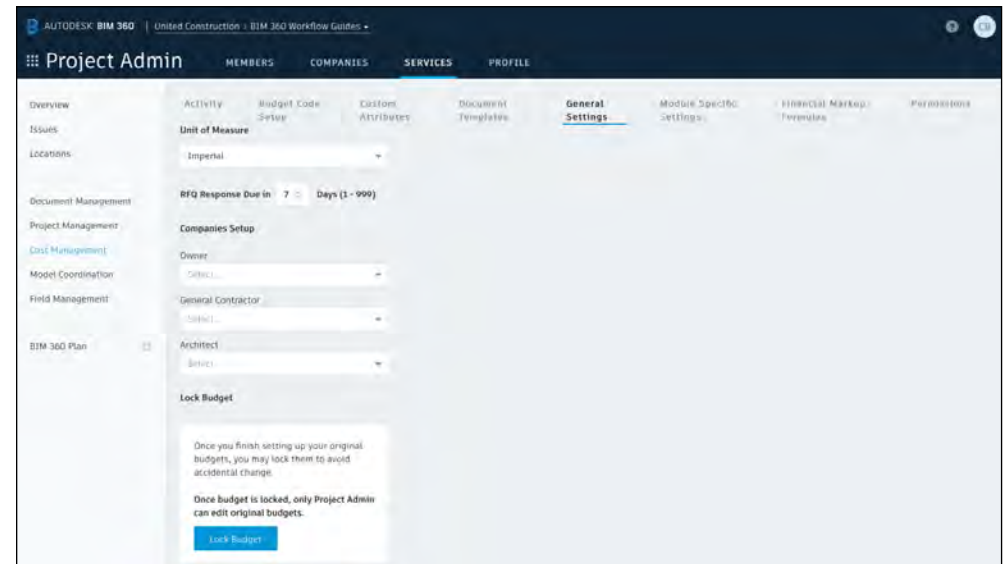


1 Accessing the General Settings Tab

- In the Project Admin module, select the “Services” tab.
- On the left sidebar select “Cost Management” then “General Settings.” Note, only project admins can edit the general setting.

2 Editing the General Settings

- **Unit of Measure** - select imperial or metric.
- **RFQ (Request for Quotation) Response Due** - set the default response time frame for RFQs.
- **Companies Setup** - identify the project Owner, General Contractor and Architect.
- **Lock Budget** - Once you finish setting up your original budgets, you may lock them to avoid accidental change.



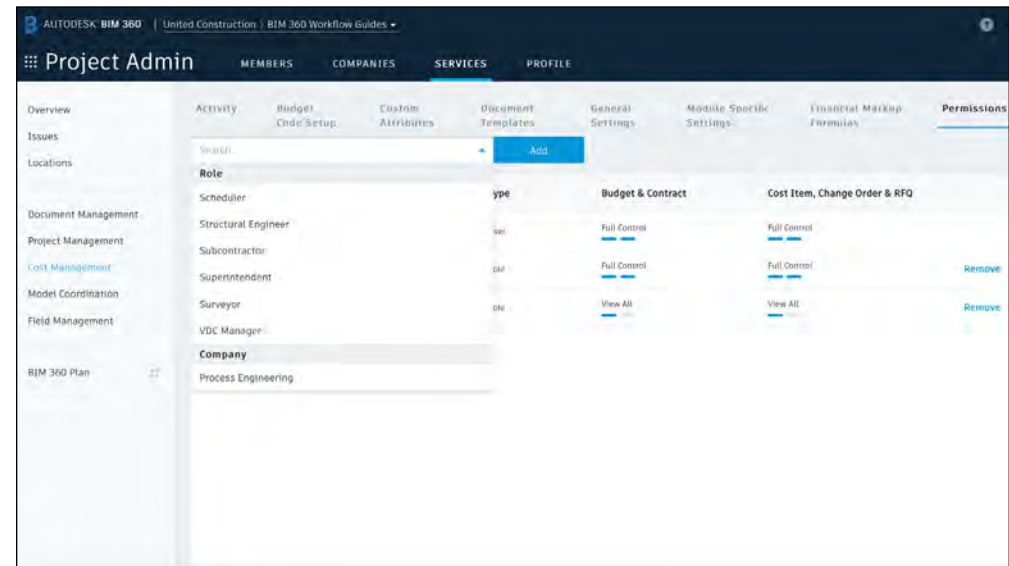
General Settings & Permissions

3 Accessing the Permissions Tab

- In the Project Admin module, select the Services tab.
- On the left sidebar select “Cost Management” then “Permissions.” Note, only project admins can edit the permissions.

4 Setting Permissions

- You can designate user-, role-, or company-based permissions.
- Use the search field to find a user, company or role and click “Add.”
- Now you can select “view all” or “full control (editing)” permissions for Budget & Contracts or Cost Items, Change Orders & RFQ.



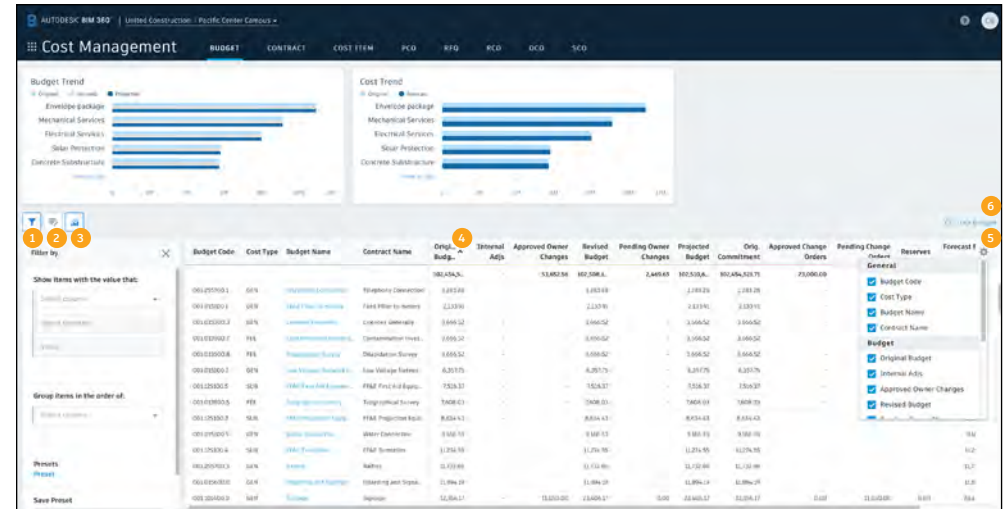
Module Overview

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 Module - Overview Mode

Open the Cost Management module and select the “Budget” tab.

1. Users can select the filter icon to open a flyout panel where they can create and save filters with multiple conditions.
2. The edit icon allows users to toggle between the overview and edit modes.
3. The chart icon allows users to turn charts on or off.
4. Users can select the column headers to sort in ascending or descending order.
5. Column settings allows users to show, hide, or lock columns (similar to freezing panes in excel).
6. Once you finish setting up your original budget, you may lock them to avoid accidental changes by selecting “Lock Budget.” This can also be done in General Settings within the Project Admin module.



Module Overview

2 Budget Module - Edit Mode

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

1. "Import" allows users to import an excel file. It works same as budget template creation.
2. "Add" allows users to manually enter a new budget items. You will see a tip appear that is to help guide you through adding the code in accordance with the budget template defined in the budget code setup process in the Project Admin module.
3. Select the three dots to open a menu which allows for transferring budget between contracts, voiding an item or adding sub items. It is also available by right clicking in the grid view.
4. Budget sub items can be added (or part of the initial import) underneath each budget item and can have any form of coding. There is 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 arrived.

Budget Code	Cost Type	Budget Name	Qty	Unit	Unit Cost	Amount	Internal Adj.	Assigned Contract	Supplier
360.020000.0	FFB	Accessories	1	EA	3,040,779.22	3,040,779.22		Architect	
360.020000.1	FFB	Construction & Equipment	1	EA	3,144,798.47	3,144,798.47		Contracting Engineers	
360.020000.2	FFB	FFM Services	1	EA	3,319,838.47	3,319,838.47		FFM Services	
360.020000.3	FFB	Construction Items	1	EA	3,584,238.33	3,584,238.33		Construction Items	Wolseley Ltd
360.020000.4	FFB	Other	1	EA	3,686,277.53	3,686,277.53		Other	
360.020000.5	FFB	FFM & Construction	1	EA	4,078,447.94	4,078,447.94		Block Construction	
360.020000.6	FFB	FFM Services	1	EA	4,354,742.67	4,354,742.67		Contractor Subcontractor	Subcontractor Ltd
360.020000.7	FFB	Construction & Equipment	1	EA	4,524,792.67	4,524,792.67		Contractor Subcontractor	Subcontractor Ltd
360.020000.8	FFB	Construction & Equipment	1	EA	4,524,792.67	4,524,792.67		Contractor Subcontractor	Subcontractor Ltd
360.020000.9	FFB	Construction & Equipment	1	EA	4,524,792.67	4,524,792.67		Contractor Subcontractor	Subcontractor Ltd
360.020000.10	FFB	Construction & Equipment	1	EA	4,524,792.67	4,524,792.67		Contractor Subcontractor	Subcontractor Ltd
360.020000.11	FFB	Construction & Equipment	1	EA	4,524,792.67	4,524,792.67		Contractor Subcontractor	Subcontractor Ltd
360.020000.12	FFB	Construction & Equipment	1	EA	4,524,792.67	4,524,792.67		Contractor Subcontractor	Subcontractor Ltd
360.020000.13	FFB	Construction & Equipment	1	EA	4,524,792.67	4,524,792.67		Contractor Subcontractor	Subcontractor Ltd
360.020000.14	FFB	Construction & Equipment	1	EA	4,524,792.67	4,524,792.67		Contractor Subcontractor	Subcontractor Ltd
360.020000.15	FFB	Construction & Equipment	1	EA	4,524,792.67	4,524,792.67		Contractor Subcontractor	Subcontractor Ltd
360.020000.16	FFB	Construction & Equipment	1	EA	4,524,792.67	4,524,792.67		Contractor Subcontractor	Subcontractor Ltd
360.020000.17	FFB	Construction & Equipment	1	EA	4,524,792.67	4,524,792.67		Contractor Subcontractor	Subcontractor Ltd
360.020000.18	FFB	Construction & Equipment	1	EA	4,524,792.67	4,524,792.67		Contractor Subcontractor	Subcontractor Ltd
360.020000.19	FFB	Construction & Equipment	1	EA	4,524,792.67	4,524,792.67		Contractor Subcontractor	Subcontractor Ltd
360.020000.20	FFB	Construction & Equipment	1	EA	4,524,792.67	4,524,792.67		Contractor Subcontractor	Subcontractor Ltd
360.020000.21	FFB	Construction & Equipment	1	EA	4,524,792.67	4,524,792.67		Contractor Subcontractor	Subcontractor Ltd
360.020000.22	FFB	Construction & Equipment	1	EA	4,524,792.67	4,524,792.67		Contractor Subcontractor	Subcontractor Ltd
360.020000.23	FFB	Construction & Equipment	1	EA	4,524,792.67	4,524,792.67		Contractor Subcontractor	Subcontractor Ltd
360.020000.24	FFB	Construction & Equipment	1	EA	4,524,792.67	4,524,792.67		Contractor Subcontractor	Subcontractor Ltd
360.020000.25	FFB	Construction & Equipment	1	EA	4,524,792.67	4,524,792.67		Contractor Subcontractor	Subcontractor Ltd
360.020000.26	FFB	Construction & Equipment	1	EA	4,524,792.67	4,524,792.67		Contractor Subcontractor	Subcontractor Ltd
360.020000.27	FFB	Construction & Equipment	1	EA	4,524,792.67	4,524,792.67		Contractor Subcontractor	Subcontractor Ltd
360.020000.28	FFB	Construction & Equipment	1	EA	4,524,792.67	4,524,792.67		Contractor Subcontractor	Subcontractor Ltd
360.020000.29	FFB	Construction & Equipment	1	EA	4,524,792.67	4,524,792.67		Contractor Subcontractor	Subcontractor Ltd
360.020000.30	FFB	Construction & Equipment	1	EA	4,524,792.67	4,524,792.67		Contractor Subcontractor	Subcontractor Ltd
360.020000.31	FFB	Construction & Equipment	1	EA	4,524,792.67	4,524,792.67		Contractor Subcontractor	Subcontractor Ltd
360.020000.32	FFB	Construction & Equipment	1	EA	4,524,792.67	4,524,792.67		Contractor Subcontractor	Subcontractor Ltd
360.020000.33	FFB	Construction & Equipment	1	EA	4,524,792.67	4,524,792.67		Contractor Subcontractor	Subcontractor Ltd
360.020000.34	FFB	Construction & Equipment	1	EA	4,524,792.67	4,524,792.67		Contractor Subcontractor	Subcontractor Ltd
360.020000.35	FFB	Construction & Equipment	1	EA	4,524,792.67	4,524,792.67		Contractor Subcontractor	Subcontractor Ltd
360.020000.36	FFB	Construction & Equipment	1	EA	4,524,792.67	4,524,792.67		Contractor Subcontractor	Subcontractor Ltd
360.020000.37	FFB	Construction & Equipment	1	EA	4,524,792.67	4,524,792.67		Contractor Subcontractor	Subcontractor Ltd
360.020000.38	FFB	Construction & Equipment	1	EA	4,524,792.67	4,524,792.67		Contractor Subcontractor	Subcontractor Ltd
360.020000.39	FFB	Construction & Equipment	1	EA	4,524,792.67	4,524,792.67		Contractor Subcontractor	Subcontractor Ltd
360.020000.40	FFB	Construction & Equipment	1	EA	4,524,792.67	4,524,792.67		Contractor Subcontractor	Subcontractor Ltd
360.020000.41	FFB	Construction & Equipment	1	EA	4,524,792.67	4,524,792.67		Contractor Subcontractor	Subcontractor Ltd
360.020000.42	FFB	Construction & Equipment	1	EA	4,524,792.67	4,524,792.67		Contractor Subcontractor	Subcontractor Ltd
360.020000.43	FFB	Construction & Equipment	1	EA	4,524,792.67	4,524,792.67		Contractor Subcontractor	Subcontractor Ltd
360.020000.44	FFB	Construction & Equipment	1	EA	4,524,792.67	4,524,792.67		Contractor Subcontractor	Subcontractor Ltd
360.020000.45	FFB	Construction & Equipment	1	EA	4,524,792.67	4,524,792.67		Contractor Subcontractor	Subcontractor Ltd
360.020000.46	FFB	Construction & Equipment	1	EA	4,524,792.67	4,524,792.67		Contractor Subcontractor	Subcontractor Ltd
360.020000.47	FFB	Construction & Equipment	1	EA	4,524,792.67	4,524,792.67		Contractor Subcontractor	Subcontractor Ltd
360.020000.48	FFB	Construction & Equipment	1	EA	4,524,792.67	4,524,792.67		Contractor Subcontractor	Subcontractor Ltd
360.020000.49	FFB	Construction & Equipment	1	EA	4,524,792.67	4,524,792.67		Contractor Subcontractor	Subcontractor Ltd
360.020000.50	FFB	Construction & Equipment	1	EA	4,524,792.67	4,524,792.67		Contractor Subcontractor	Subcontractor Ltd

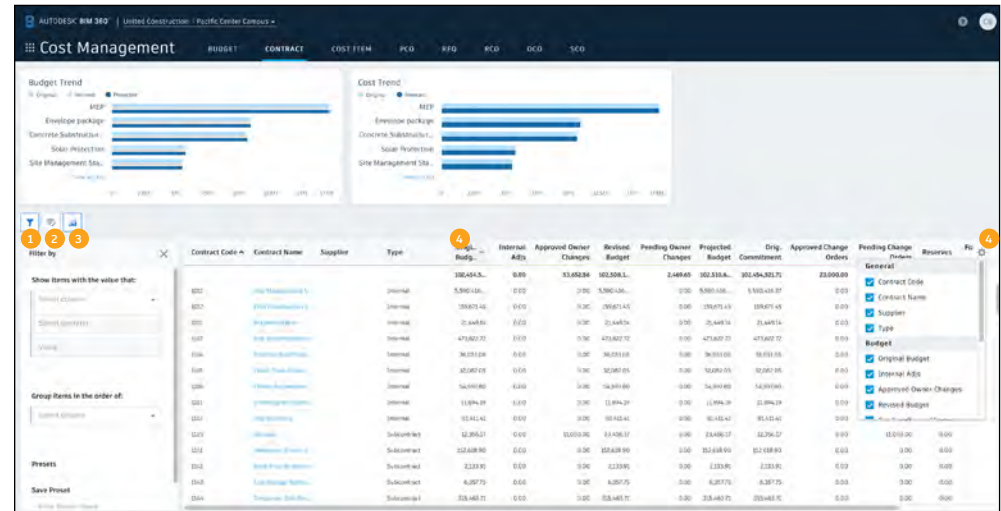
PRO TIP: If the user has view only permission they will have access to enter the edit mode. However, they will not have access to make edits.

Module Overview

3 Contract Module - Overview Mode

Open the Cost Management module and select the “Contract” tab. The contract overview works the same as the budget overview.

1. Users can select the filter icon to open a flyout panel where they can create and save filters with multiple conditions.
2. The edit icon allows users to toggle between the overview and edit modes.
3. The chart icon allows users to turn charts on or off.
4. Users can select the column headers to sort in ascending or descending order.
5. Column settings allows users to show or hide columns



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 view either way.

Module Overview

4 Contract Module - Edit Mode

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

1. "Import" allows users to import an excel file.
2. "Add" allows users to manually enter a contract item.
3. Select the three dots to delete a contract.
4. Select a contract to open the details flyout panel.

The flyout is intended to save time when wanting to see the detailed information behind any item in the grid. Use the drop down list to select the items to view in the flyout. Items can be viewed individually or in a scrolling list.

General:

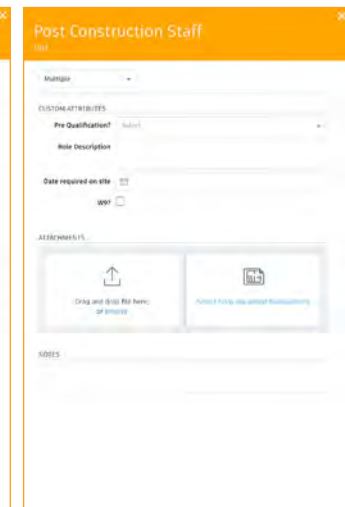
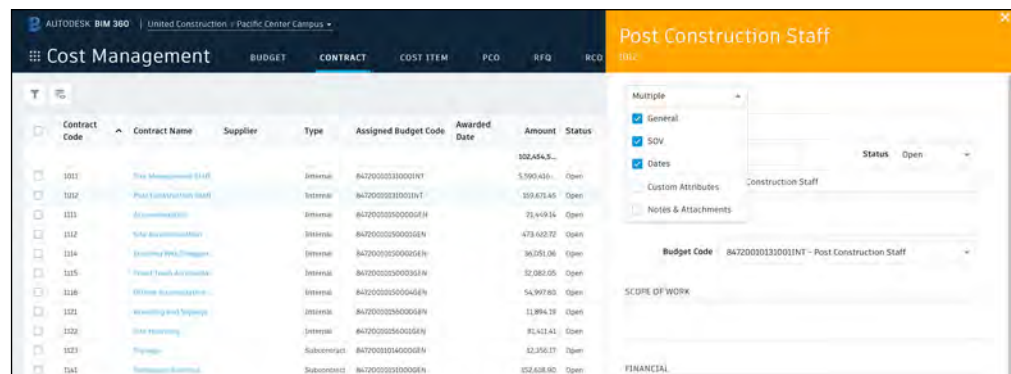
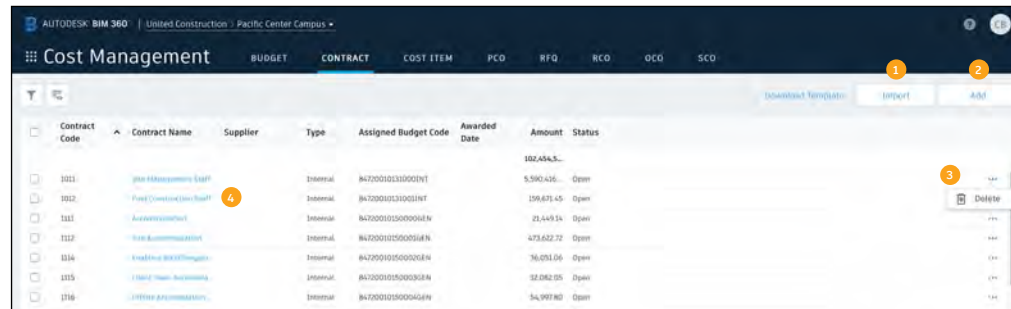
- Create the connection between contract and budget item by selecting the "Budget Code" drop-down which will show a list of all unallocated budget items to choose from to assign to the contract.
- Select the supplier and set a status value.
- Select a document template to generate the contract from.

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 a section of the flyout panel. 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 Cost Items

Open the Cost Management module and select the “Cost Item” tab. Cost items are the detail summary items for each budget code associated with a potential change.

They can either be created in the PCO view or directly in this view. Here users have a selectable link to open the ‘container’ for which ever part of the process they are currently in.

- This works similarly to the contract module edit mode.
 1. “Add” allows users to manually enter a cost item.
 2. Select the three dots to delete a cost item.
 3. Select a cost item to open the details flyout panel.
- Creating and editing cost item will be done in the details flyout panel. Like the contract module use the drop down list to select the items to view in the flyout. Items can be viewed individually or in a scrolling list.
- In the flyout panel under “Cost Summary” users can break down the cost item into a more granular level of detail. For example, the cost item CI-0084 (see bottom image) is broken down into labor hours and materials. Which make up the total price of the cost item.

Number	Name	Supplier	Budget Code	Type	Scope	Estimated	Proposed	Submitted	Approved	Committed	Budget Status	Cost Status	PCO
CI-0037	Doors - Revised Main Entrance Layout p...	Substructures r ut	84720010330	Owner Change Or...	Dist	70,000.00	23,000.00	23,000.00	23,000.00	23,000.00	Approved	Approved	---
CI-0038	Revised Summary		84720010304	Owner Directive	Dist	10,000.00	11,000.00	11,000.00	11,000.00	11,000.00	Approved	Proposed	---
CI-0035	Contingency		84720010220	Owner Directive	Dist	450.00	---	450.00	450.00	---	Approved	Proposed	---
CI-0066	Attainable		84720010220	Owner Directive	Dist	309.00	---	309.00	309.00	---	Approved	Proposed	---
CI-0047	Steel		84720010220	Owner Directive	Dist	154.50	---	154.50	154.50	---	Approved	Proposed	---
CI-0068	Net		84720010220	Owner Directive	Dist	663.00	---	663.00	663.00	---	Approved	Proposed	---
CI-0082	Contingency		84720010220	Owner Change Or...	Dist	309.00	0.00	0.00	0.00	0.00	Open	Open	---

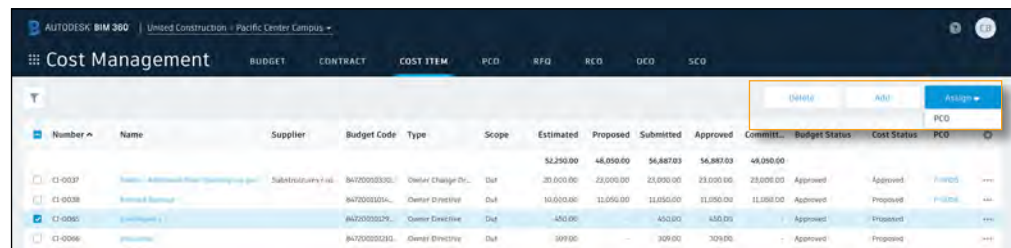
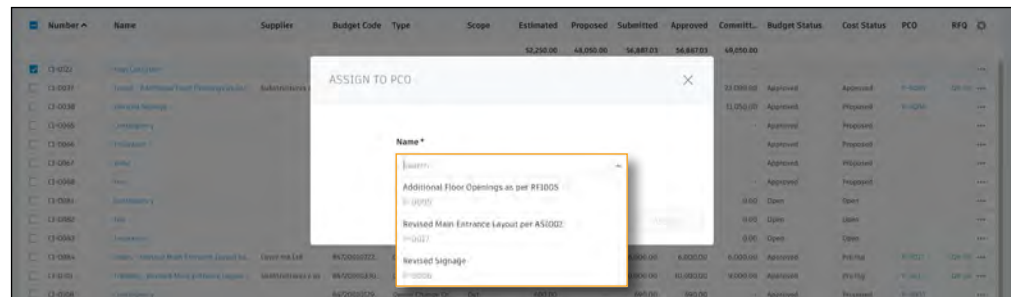
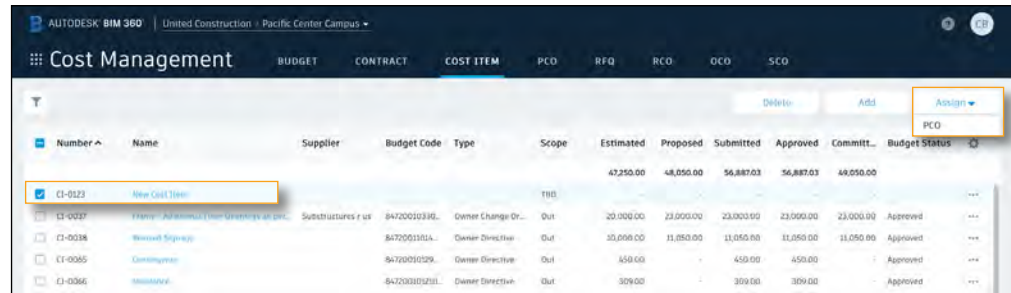
Code	Name	Qty	Unit	Unit Cost	Total
CI-0084	Doors - Revise...	1	ea	10,000.00	10,000.00
LAB	Labor	10	hr	50.00	500.00
MAT	Increased Doo...	1	ea	9,500.00	9,500.00

COST SUMMARY					
Estimated	Proposed	Submitted	Approved	Committed	
5,000.00	5,000.00	6,000.00	6,000.00	6,000.00	
Code	Name	Qty	Unit	Unit Cost	Total
▼ CI-0084	Doors - Revise...	1	ea	10,000.00	10,000.00
LAB	Labor	10	hr	50.00	500.00
MAT	Increased Doo...	1	ea	9,500.00	9,500.00

Module Overview

Cost Items (Continued)

- New cost items created directly in the cost item view can be “assigned” to existing “containers” by selecting the check box next to the cost item.
- Once selected an “assign” button appears, click the drop down to assign.
- An assign window will pop up where users can type in search criteria to filter the list. Select the “container” to add the cost item to.
- Note, when the check box next to the cost item is selected users also have the option to delete the cost item or add a new cost item.



Module Overview

6 PCO Tab View

Open the Cost Management module and select the “PCO” tab. PCO’s (Potential Change Orders) are where every potential change, whether budget, cost, or both are logged.

1. Select “Add” to create a new PCO.
2. Selecting the three dot menu or right clicking any PCO will allow the user to add a cost item, generate a document, or delete the PCO.
3. “Type” allows users to select the type of PCO.
4. “Scope” allows users to say whether the PCO is an “In” scope change or “Out.” The former meaning a cost change and the latter meaning a budget (and cost) change. This is important to select as it will define where it is shown in the budget and contracts overview.
5. “Source Type” allows users to select the PCO source.
6. “Source Ref #” is the reference number associated with the type.
7. “Budget Status” is the current status of the PCO in the budget request workflow.
8. “Cost Status” is the current status of the PCO in the cost change workflow.

Select the check box next to the PCO you would like to apply a markup to. A “Markup” drop down box will appear, select the appropriate markup. Note, markups will be created in the Project Admin module.

Number	Name	Type	Scope	Source Type	Source Ref #	Estimated	Proposed	Submitted	Approved	Commit.	Budget Status	Cost Status	Created Date
P-0005	Additional Field Workings at Pacific Center	Owner Change Or.	Out	RFI	005	45,799.89	48,050.00	55,310.46	55,310.46	48,050.00	Approved	Proposed	Oct 16, 2018
C-0007	Fire Alarm Installation at Pacific Center	Owner Change Or.	Out			22,102.08	23,000.00	25,417.40	25,417.40	23,000.00	Approved	Approved	
C-0008	Fire Alarm Installation at Pacific Center	Owner Change Or.	Out			2,102.08	-	2,117.68	2,117.68	-	Approved	Approved	
C-0009	Fire Alarm Installation at Pacific Center	Owner Change Or.	Out			400.00	-	450.00	450.00	-	Approved	Approved	
C-0010	Fire Alarm Installation at Pacific Center	Owner Change Or.	Out			-42.00	-	-473.80	-473.80	-	Approved	Proposed	Nov 29, 2018
C-0011	Fire Alarm Installation at Pacific Center	Owner Change Or.	Out			306.00	-	-236.90	-236.90	-	Approved	Proposed	Nov 29, 2018
C-0012	Fire Alarm Installation at Pacific Center	Owner Change Or.	Out			884.08	-	1,056.70	1,056.70	-	Approved	Proposed	Nov 29, 2018
P-0006	Revised Main Entrance Layout at Pacific Center	Owner Directive	Out	ASD	001	11,050.04	11,050.00	12,211.40	12,211.40	11,050.00	Submitted	Proposed	Oct 24, 2018
P-0007	Revised Main Entrance Layout at Pacific Center	Owner Change Or.	Out	ASD	002	16,576.56	16,000.00	17,681.67	17,681.67	15,000.00	Open	Open	Nov 6, 2018

Type	Scope	Scope	Source Type	Source Ref #	Budget Status	Cost Status
Back Charge	Out	TBD	ASI	005	Approved	Proposed
Budget Transfer		In	CCD		Approved	Approved
Internal Change		Out ✓	INT		Approved	Proposed
Owner Directive		Out	ISSUE		Approved	Proposed
Owner Change Order ✓		Out	RFI ✓	001	Approved	Proposed
Contingency		Out	RFP	002	Approved	Proposed
		Out	T&M		Submitted	Proposed
		Out			Open	Open

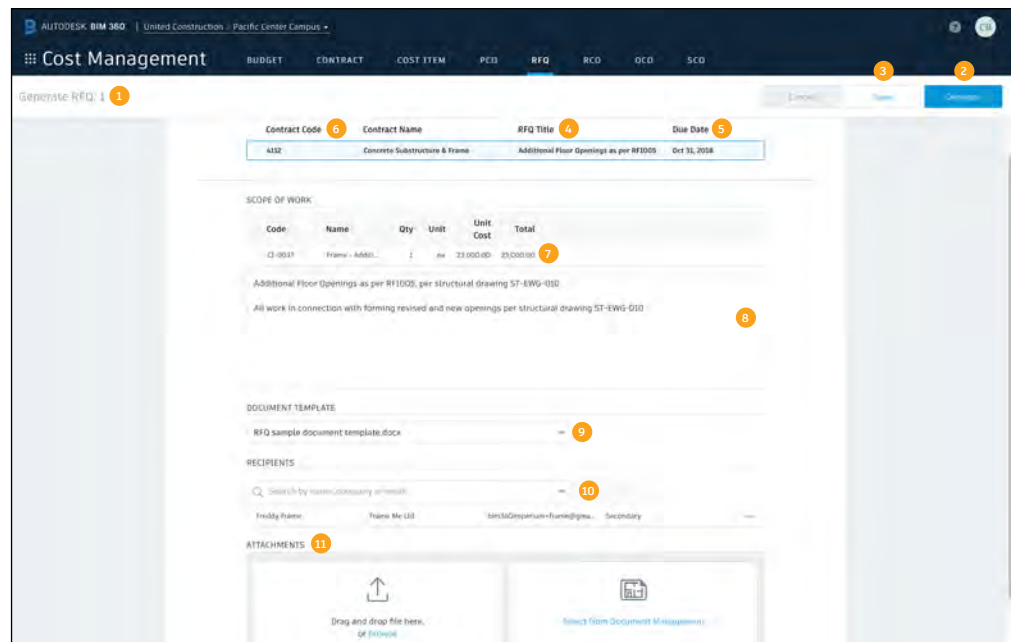
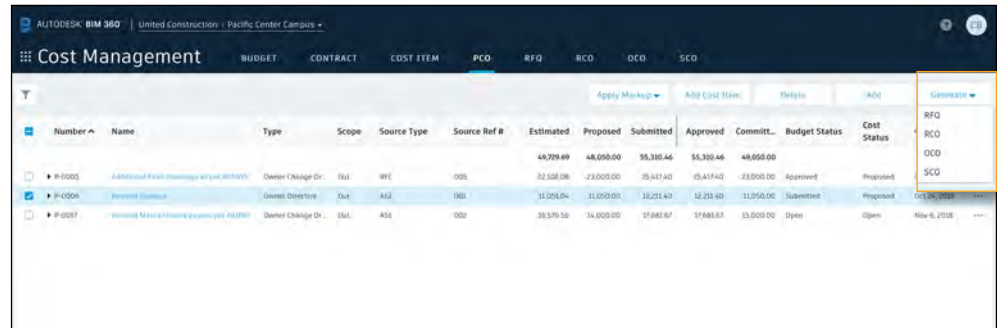
Number	Name	Type	Scope	Source Type	Source Ref #	Estimated	Proposed	Submitted	Approved	Commit.	Budget Status	Cost Status
P-0005	Additional Field Workings at Pacific Center	Owner Change Or.	Out	RFI	005	45,799.89	48,050.00	55,310.46	55,310.46	48,050.00	Approved	Proposed
P-0006	Revised Main Entrance Layout at Pacific Center	Owner Directive	Out	ASD	001	11,050.04	11,050.00	12,211.40	12,211.40	11,050.00	Submitted	Proposed
P-0007	Revised Main Entrance Layout at Pacific Center	Owner Change Or.	Out	ASD	002	16,576.56	16,000.00	17,681.67	17,681.67	15,000.00	Open	Open

Module Overview

7 Generating an RFQ from a PCO

RFQ's (Request for Change Orders) are how we create a document to send to a supplier to solicit pricing. This process utilizes the document templates created in the Project Admin module.

- In the PCO tab select the check box next to the PCO you would like to generate an RFQ for.
- A drop down box titled "Generate" will appear, select RFQ. A RFQ generator window will open.
 1. An RFQ will be auto created for each cost item, and they can be managed in this single view. The indicator provides a count.
 2. "Generate" allows the user to create the document after checking the remaining data.
 3. "Save" allows the user to save in current state and return to tab view.
 4. Here the user can toggle between the RFQs and the RFQ title can be edited.
 5. The due date will use project admin setting by default but can be overwritten here.
 6. Contract Code and Name are auto populated by the related budget code.
 7. The cost item is brought across here.
 8. Additional scope description will automatically be populated here from the PCO/Cost Item flyouts but can be edited/appended here.
 9. Select the desired document template.
 10. Add additional recipients. The default recipient is auto populated based on the contract award of the same budget code the cost item is assigned.
 11. Additional files can be uploaded or linked here.



PRO TIP: This utilizes the document templates capabilities set up in the project admin module, refer to the previous section on Document Templates.

Module Overview

8 RFQ Tab View

Open the Cost Management module and select the “RFQ” tab. This works similarly to the contract module edit mode.

1. “Status” auto updates to pricing after a document is generated.
 2. “Response Due” defaults to duration set in the project admin module but can be overwritten here.
 3. Select an RFQ to open the details flyout panel.
 4. Select the three dots to delete an RFQ or generate a document.
- Editing RFQs will be done in the details flyout panel. Like the contract module use the drop down list to select the items to view in the flyout. Items can be viewed individually or in a scrolling list.
 - Similar to generating an RFQ from a PCO, select the check box next to the RFQ you would like to generate a SCO (Supplier Change Order) document for or use the three dots to the right.
 - A drop down box titled “Generate” will appear, select SCO. When the document generator window opens (similar to generating an RFQ) information will be auto populated, you can select the document template, choose the recipient(s), attach files and generate the document.

Number	Name	Contract Name	Supplier	Proposed	Status	Response Due	Created Date	Created By	Source Type	Source Ref #
QR-0007	Additional Floor Openings as per RFI005	Concrete Substru...	Substructures r us	33,000.00	Proposed	Oct 31, 2018	Oct 24, 2018	Ian Turner	RFI	005
QR-0017	Revised Main Entrance Layout per RFI005	Concrete Substru...	Substructures r us	9,000.00		Dec 5, 2018	Nov 28, 2018	John Samer	ASI	007
QR-0018	Revised Main Entrance Layout per RFI005	Envelope package	Lover me Ltd	5,000.00		Dec 5, 2018	Nov 28, 2018	John Samer	ASI	008

Additional Floor Openings as per RFI005

QR-0007

General

Status: Proposed

Supplier Details

Name: Substructures r us

Contact: Steve Subs

Recipients

QR-0007 - Additional Floor Openings as per RFI005

Scope of Work

Additional Floor Openings as per RFI005, per structural drawing ST-EWG-010

Approval

Created By: Ian Turner

Changed By: Ian Turner

Purchased By: Ian Turner

Number	Name	Contract Name	Supplier	Proposed	Status	Response Due	Created Date	Created By	Source Type	Source Ref #
QR-0007	Additional Floor Openings as per RFI005	Concrete Substru...	Substructures r us	33,000.00	Proposed	Oct 31, 2018	Oct 24, 2018	Ian Turner	RFI	005
QR-0017	Revised Main Entrance Layout per RFI005	Concrete Substru...	Substructures r us	9,000.00		Dec 5, 2018	Nov 28, 2018	John Samer	ASI	007

Module Overview

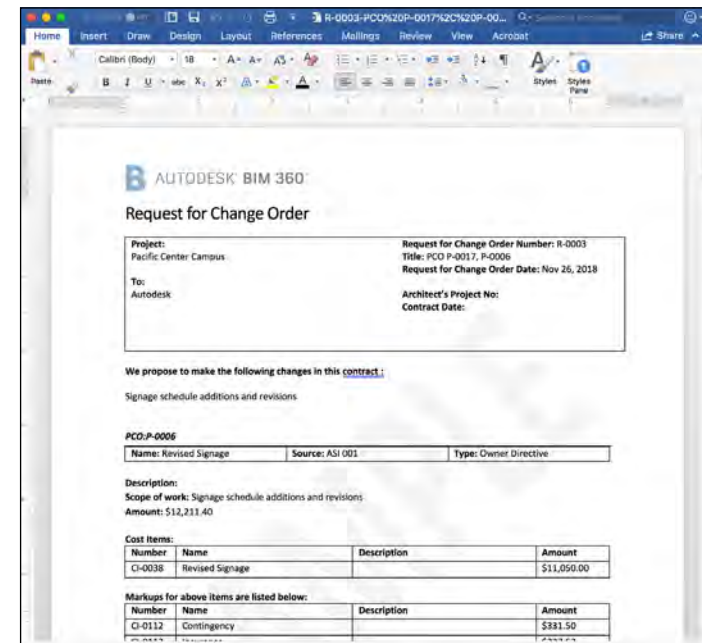
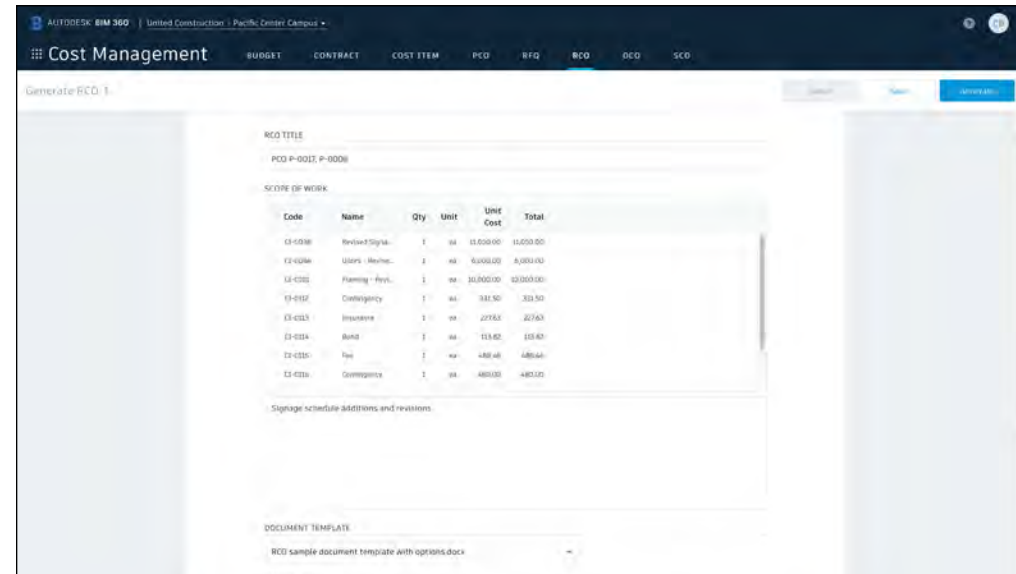
9 Generating an RCO from a PCO

RCO's (Request for Change Order) 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 sent to the owner and is built from one or more Cost Events (or Cost Items). The RCO contains an itemized breakdown of cost/time changes to a contract.

Similar to generating an RFQ this process utilizes the document templates created in the Project Admin module.

- In the PCO tab select the check box next to the PCO you would like to generate an RCO for.
- A drop down box titled "Generate" will appear, select RCO. A RCO generator window will open.
- Like an RFQ, scope information is auto populated, you can select the document template, choose the recipient(s), attached 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, the scope is auto populated but can be adjusted, select the document template and recipient.

PRO TIP: If you don't need to generate an RCO simply bypass this step and just go straight to an OCO.

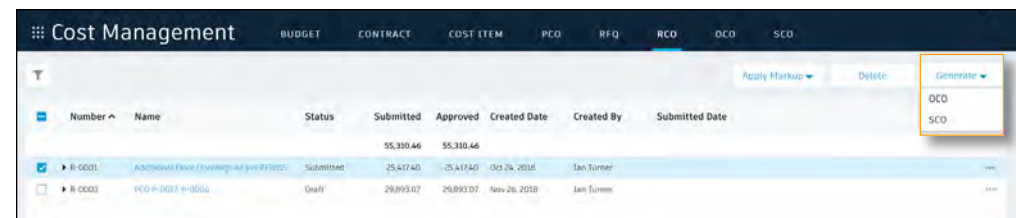
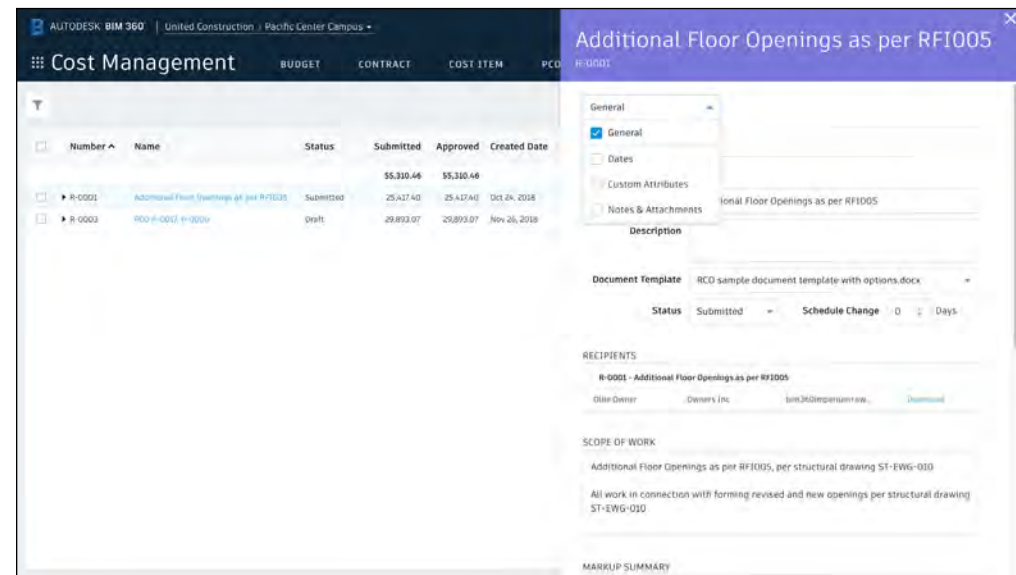
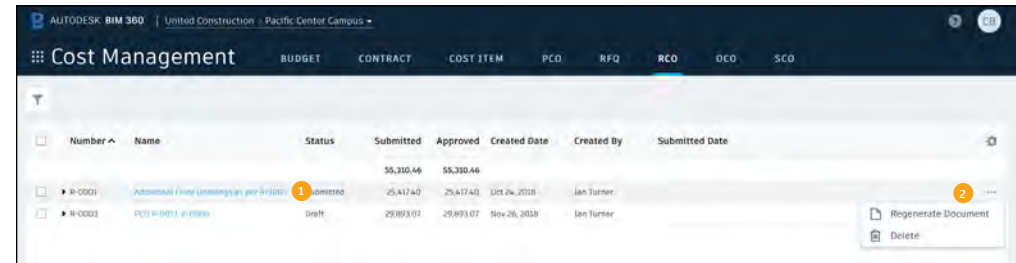


Module Overview

10 RCO Tab View

Open the Cost Management module and select the “RCO” tab. This works similarly to the contract module edit mode.

1. Select an RCO to open the details flyout panel.
 2. Select the three dots to delete an RCO or generate a document.
- Editing RCOs will be done in the details flyout panel. Like the contract module use the drop down list to select the items to view in the flyout. Items can be viewed individually or in a scrolling list.
 - Select the check box next to the RCO you would like to apply a markup to. A “Markup” drop down box will appear, select the appropriate markup. Note, markups will be created in the Project Admin module.
 - Similar to generating an RCO from a PCO, select the check box next to the RCO you would like to generate a document for or use the three dots to the right.
 - A drop down box titled “Generate” will appear, select the type of document. When the document generator window opens (similar to generating an RFQ) information will be auto populated, you can select the document template, choose the recipient(s), attached files and generate the document.



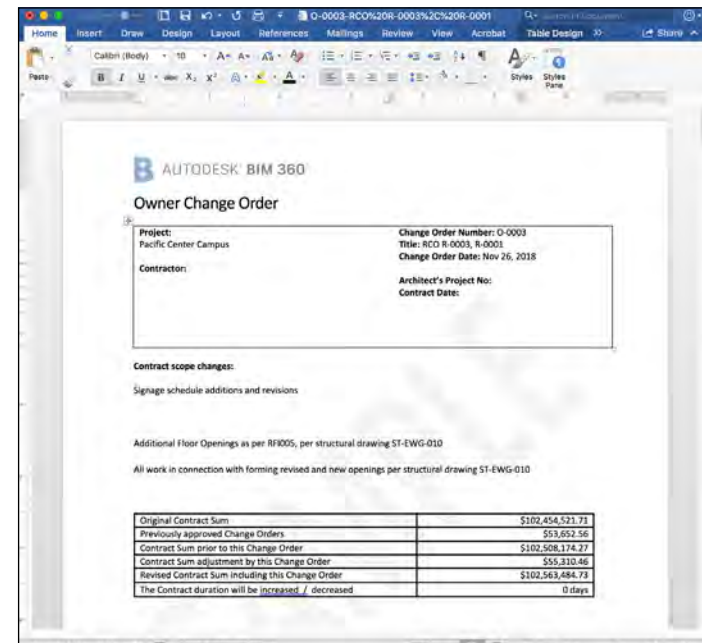
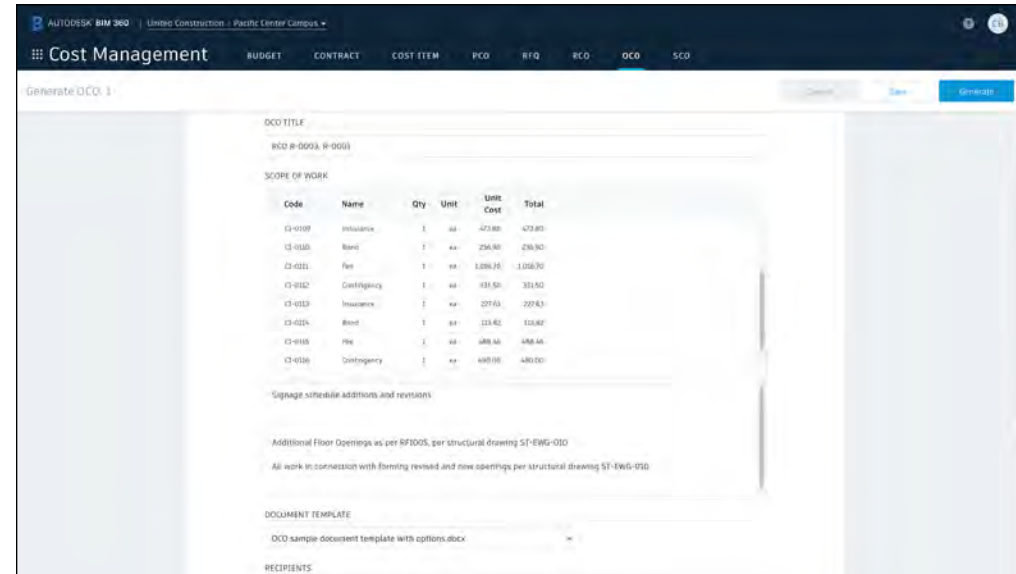
Module Overview

11 Generating an OCO from a RCO

An 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 the OCO. An OCO is a signed written order legally amending a contract to affect a change in requirements, cost, or schedule to a previously negotiated contract.

Similar to generating an RFQ this process utilizes the document templates created in the Project Admin module.

- In the RCO tab select the check box next to the approved RCO you would like to generate into an OCO.
- A drop down box titled “Generate” will appear, select OCO. A RCO generator window will open.
- Like an RFQ, 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, the scope is auto populated but can be adjusted, select the document template and recipient.

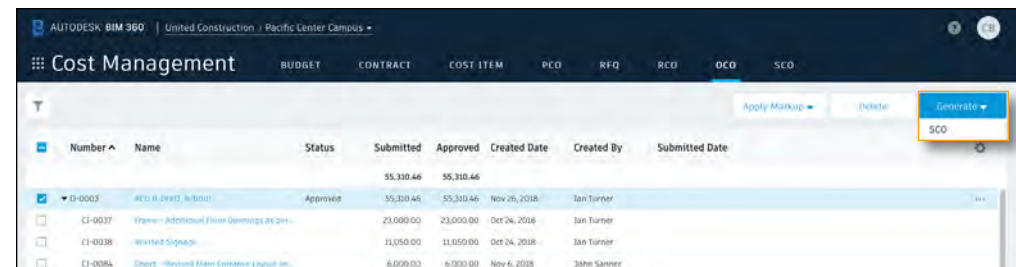
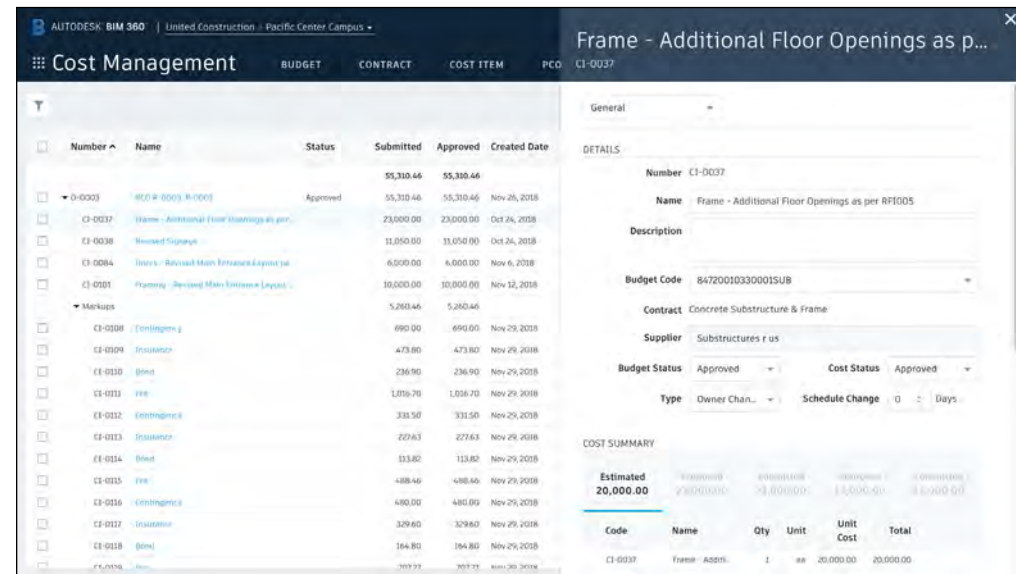
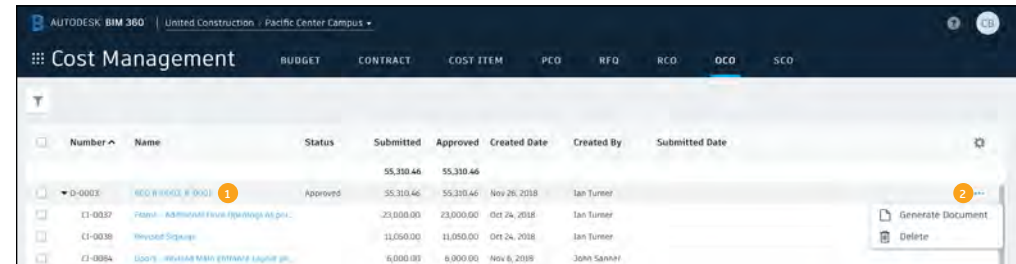


Module Overview

12 OCO Tab View

Open the Cost Management module and select the “OCO” tab. This works similarly to the contract module edit mode.

1. Select an OCO to open the details flyout panel.
 2. Select the three dots to delete an OCO or generate a document.
- Editing OCOs will be done in the details flyout panel. Like the contract module use the drop down list to select the items to view in the flyout. Items can be viewed individually or in a scrolling list.
 - Select the check box next to the OCO you would like to apply a markup to. A “Markup” drop down box will appear, select the appropriate markup. Note, markups will be created in the Project Admin module.
 - Similar to generating an RCO from a PCO, select the check box next to the RCO you would like to generate an “SCO” for or use the three dots to the right.
 - A drop down box titled “Generate” will appear, select “SCO”. When the document generator window opens (similar to generating an RFQ) information will be auto populated, you can select the document template, choose the recipient(s), attached files and generate the document.
 - Note, 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.

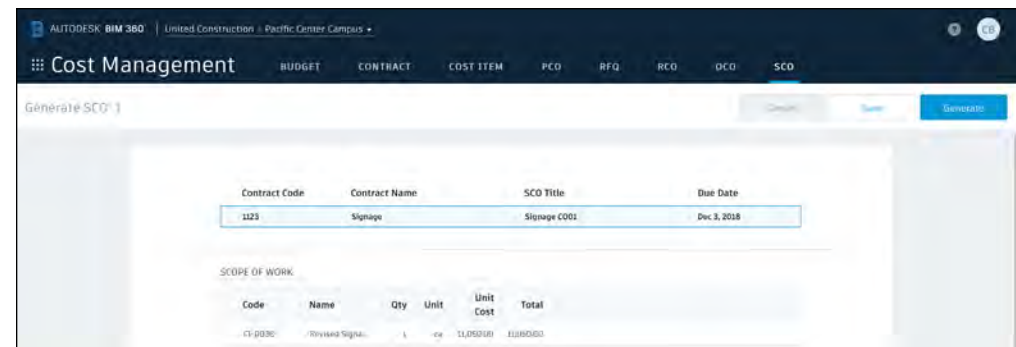
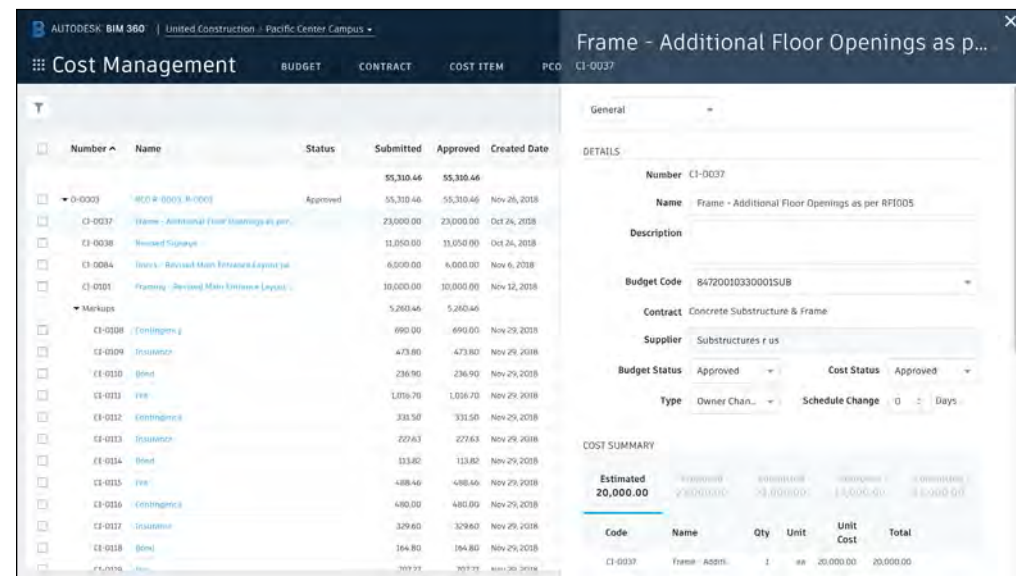
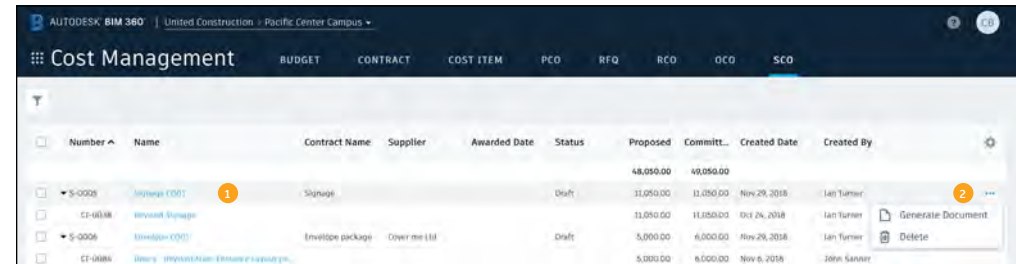


Module Overview

13 SCO Tab View

Open the Cost Management module and select the “SCO” tab. This works similarly to the contract module edit mode.

1. Select an SCO to open the details flyout panel.
 2. Select the three dots to delete an SCO or generate a document.
- Editing SCOs will be done in the details flyout panel. Like the contract module use the drop down list to select the items to view in the flyout. Items can be viewed individually or in a scrolling list.
 - You can generate an SCO document from the SCO tab by selecting the three dots to the right of the SCO.
 - When the document generator window opens (similar to generating an RFQ) information will be auto populated, you can select the document template, choose the recipient(s), attach files and generate the document.



Additional Capabilities

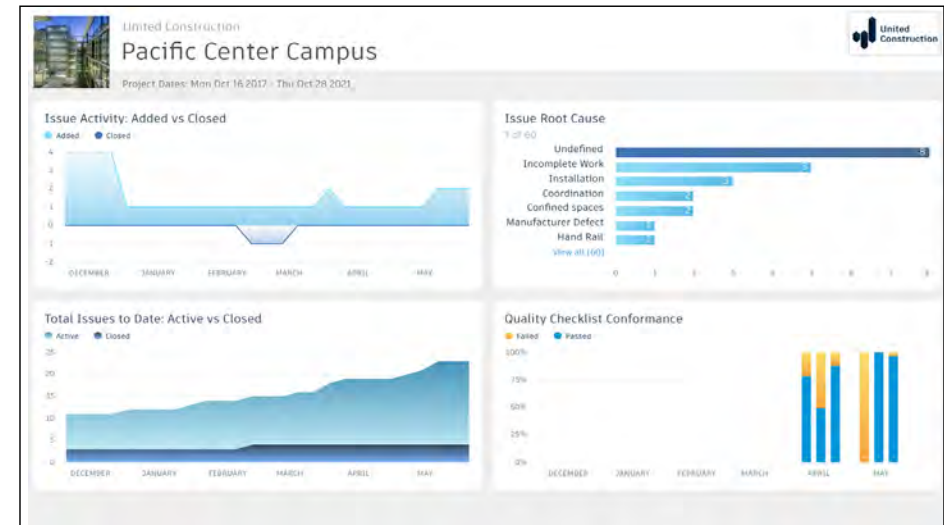
Insight & Reporting

Having the right information at your fingertips is key to making better business decisions. With the Insight module, teams have visibility into high-level issues that might be holding up project schedules and driving up costs. By quickly seeing where issues are happening and putting the right steps in place to solve problems, teams can prioritize next steps and drive quality control needs to help ensure projects are successful.



1 Insight module

- Click on the Insight module from the module picker.
- On the various cards, get a high-level view of what is happening with the project, including:
 - Issue activity
 - Issue root cause
 - Total issues to date
 - Quality checklist conformance
- Use the settings gear icon to change the date range of the view.
- Use the expand arrows to get a more detailed view and metrics.

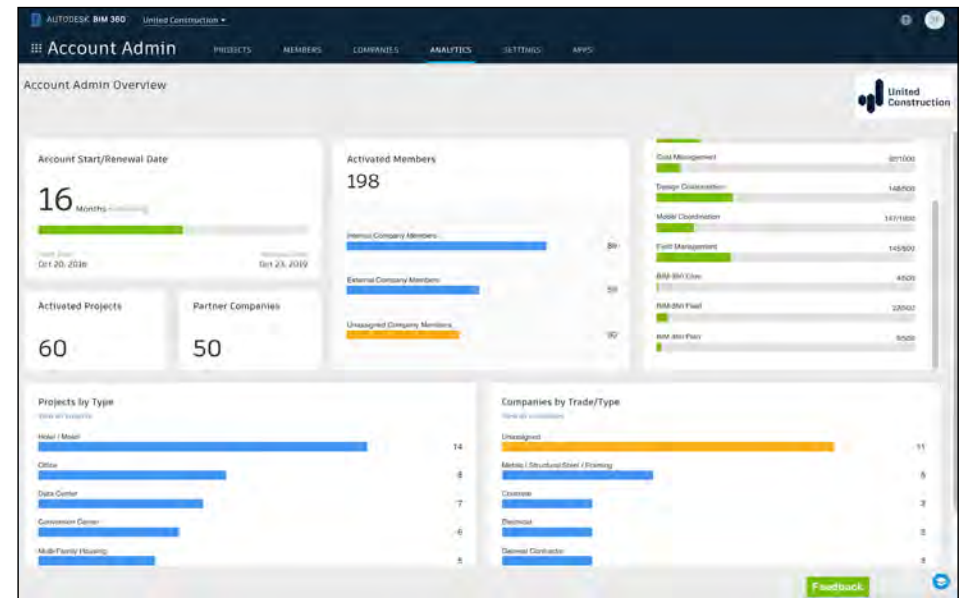


Insights Setup



2 Account analytics

- Click the Account Admin module in the module selector tool.
 - This option will only appear if you have admin privileges.
- Click “Analytics” to see insights on member activations, linked companies, and account information.
- Click the Members tab to see insights, member usage, and status.



Account Admin



Project Home

Project Home is a new way of interacting with BIM 360 that gives users a single view into their entire project, with access to important, relevant, and actionable information from across BIM 360 and even some third-party services. It provides a unified experience with at-a-glance insights about the entire project, all in one place. This enables teams to quickly evaluate areas that require attention and put the necessary action in place.



1

Dashboard cards

- There are several cards that default into the Project Home view:
 - Project Address
 - Weather
 - Field Issues
 - Checklists
 - RFIs
 - Submittal Items
 - Document Issues
 - Design Packages
- Click any of the links to drill down and get more information on a specific item.
- Use the expand arrows to open the card to full screen and minimize it.

Project Home
United Construction
Pacific Center Campus
Project Dates: Mon Oct 16 2017 - Thu Oct 28 2021

Project Address
JACKSON SQUARE
FINANCIAL DISTRICT
SAN FRANCISCO, CA
1 Market street
San Francisco, CA 94105

Weather
60°
Partly Cloudy Day
Fri 61° Sat 64° Sun 68° Mon 73°
Powered by Dark Sky

Field Issues

ID	Title	Due Date
5	Insulation missing	Nov 3, 2017
4	Insulation missing	Nov 4, 2017
7	Drywall defect	Nov 10, 2017
6	Drywall Defect	Nov 15, 2017
10	Issue draft	Nov 20, 2017

5 of 19 Open Issues | view all (19)

Checklists

Title	Location	Scheduled
Above Ceiling Inspection		Nov 4, 2017
First Floor Inspection		Nov 5, 2017
Ceiling Inspection		Nov 16, 2017
Pre-drywall Inspection		Nov 18, 2017
Above Ceiling Inspection		Dec 1, 2017

5 of 46 Open Checklists | view all (46)

RFIs

ID	Title	Due Date
10	Bath partition anchorage	Nov 15, 2017
3	Floor specifications needed	Nov 15, 2017
14	Ceiling failure	Nov 16, 2017
2	Wall type at exhibit storage	Nov 16, 2017
1	Mechanical pad needed	Nov 17, 2017

5 of 36 Open RFIs | view all (36)

Project Home Overview

Project Home

2 Setup & permissions

- The information presented in Project Home depends on your permission levels set up in the Project Admin module.
 - **Project member:** As a project member, you can view issues relevant to you. It will help you answer the question, “What do I need to do today?”
 - **Project leader:** As a project leader, you can still see details that help you understand the most pressing needs for the day, but you also see outstanding items at the project level.
- Each user can configure Project Home to their liking by adding, removing, or rearrange the cards.



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.”

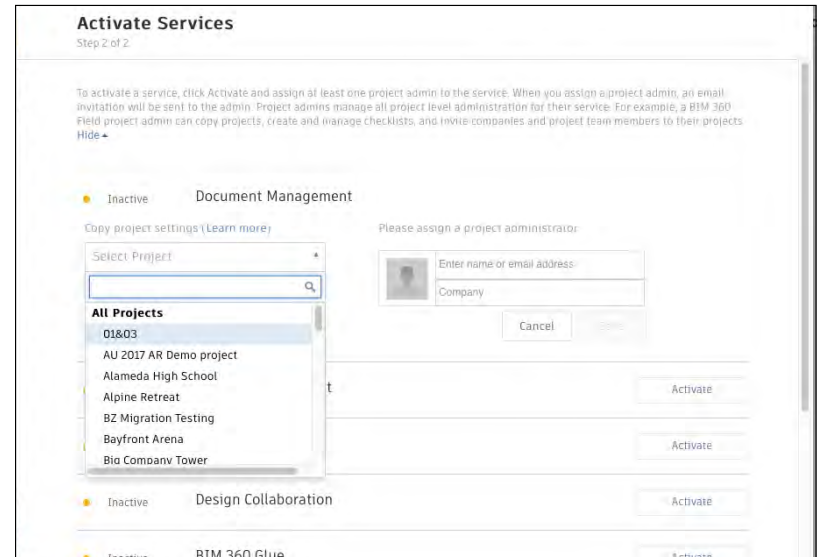
Getting Started Guide 

Create a Project 

Account Admin

2 Activating modules

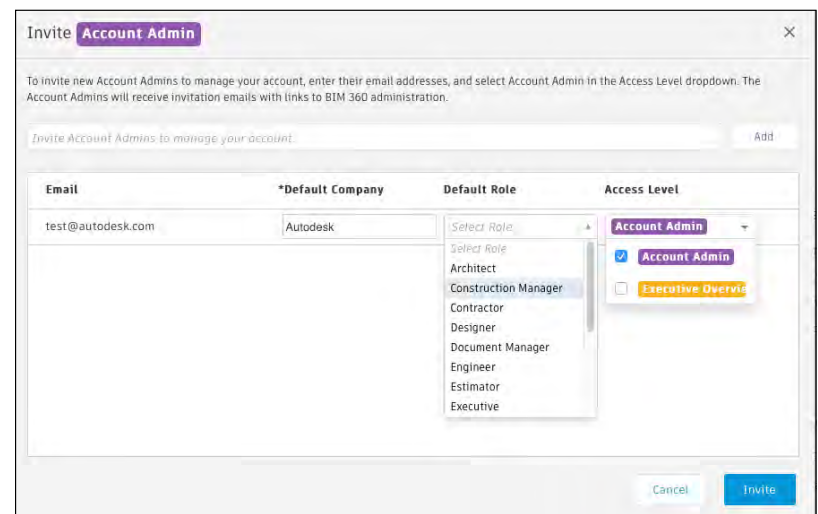
- Click “Activate” for the desired BIM 360 service.
- Assign a project admin for each service. You can add multiple admins.
- (Optional) For Document Management and Field you can copy existing project settings.
- An email invitation will be sent to the assigned project admin(s). They will need to click the link to join the project.
- Click “Finish.”



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.



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 right, there are 'Cancel' and 'Add to Project' buttons. Below is a search bar labeled 'Enter Names or Email Addresses'. 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 (active), a person icon with a slash (disabled), and a person icon with a lock (locked).

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

Members & Access Levels 

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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Construction Management

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STRATUS

SITEAWARE

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SMARTVID.IO

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