

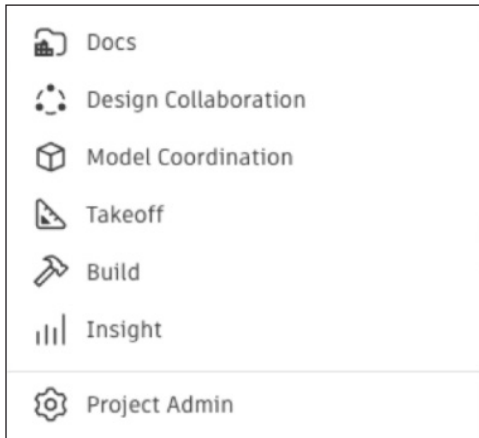
# BIM Collaborate / BIM Collaborate Pro QuickGuide

## BIM 360 Collaborate Platform

Autodesk® BIM 360 Collaborate is a cloud-based platform that enables teams to work collaboratively. Anyone with an Autodesk® ID is able to participate for free; although team members using Revit® through BIM 360 Collaborate must have additional entitlements. The activation of a site is required for each project.

## Getting Started

BIM 360 Collaborate functionality is divided into several modules.



**Docs:** Provides unlimited storage for projects and supports all file types. It is the single source of truth for project files.

**Design Collaboration:** Allows multiple team members from multiple offices to collaborate within Revit® models in the cloud. The central model is accessible for editing from anywhere in the world via the internet.

**Model Coordination:** Provides the ability to publish, review, and run clashes to resolve conflicts.

**Takeoff:** Empowers estimators to perform 2D and 3D quantification workflows from a common data environment.

**Build:** Field management activities.

**Insight:** Provides data, analytics, and reporting.

**Project Admin:** Project-level control of project members, modules, and permission levels.

## BIM 360 Collaborate Key Features

### Single Project Repository

- Unlimited storage
- Supports all files types
- Project activity log

### Navigation

- Lists all thumbnail views
- Version control & rollback
- Single viewer for 2D & 3D files

### Deliverable Coordination

- Trackable project activity
- Model exchange & deliverable coordination
- Curates sets to separate work-in-progress from shared files

### Access Controls

- Project- & folder-level access rights
- Defines access by role / company / user
- Assigns 5 permission levels

### Change Visualization

- View added, removed, or modified elements
- Understand changes in context between aggregated models in a single space
- Navigate by team / phase / building level

### Viewing

- Online & offline access on all devices
- PDF & model viewer (Mac & PC)
- Navigate without closing viewer

## Project Admin

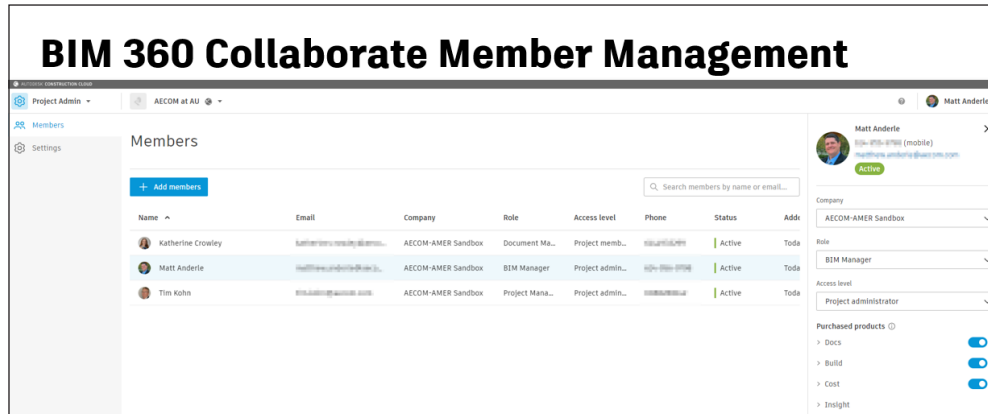
### Configuring a Site

The Project Admin module allows administrators to manage project service modules, add and remove service administrators, and manage the settings of active services.

### Adding Team Members

Click on the [Members] tab. Click the [+Add Members] button to add team members. Enter the name or email address of the new team member in the field provided. Click [Select]. Assign a Company name and apply Role(s). Designate module permissions by toggling the appropriate modules. Click the [Add to Project] button.

TIP: If the member name is not auto-found, hit the [Enter] key to input a new email address.



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## Docs

### Folder Structure

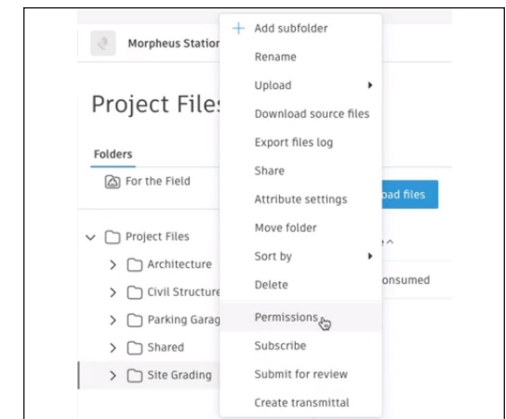
**For the Field:** Files in this folder are available to all project members and they are synced to mobile devices. Markups and reviews are conducted within the BIM 360 Collaborate environment using an integrated set of tools.

**Project Files:** Consistent with cloud-based file storage, the Project Files folder houses work-in-progress design files and other ancillary project documents, which are uploaded and shared through the project site. The Version feature automatically saves a history and identifies the publisher. Project Files is the primary repository for project documents.

**Integration of Office 365®:** Users that have a Microsoft® Office 365® subscription have the ability to edit Office 365® documents within the BIM 360 Collaborate environment.

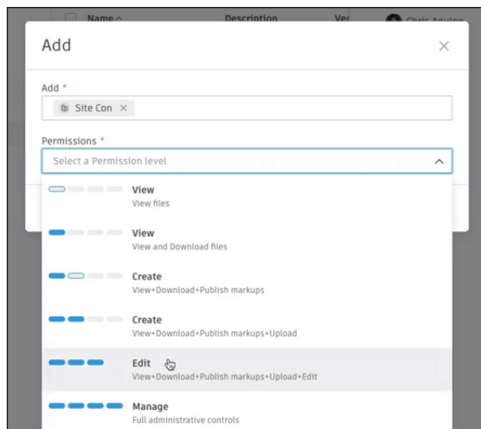
### Setting Up Folders

Select a folder template or set up a custom folder structure. Right-click to access the menu system in order to assign folder permissions and add subfolders. Permissions may be assigned to Companies, Role(s), or individual users. Folder permissions cascade. Individual subfolder permissions can be increased but not decreased with relation to the parent folder. Files can be uploaded by dragging and dropping or using the [Upload] button.



## Markups

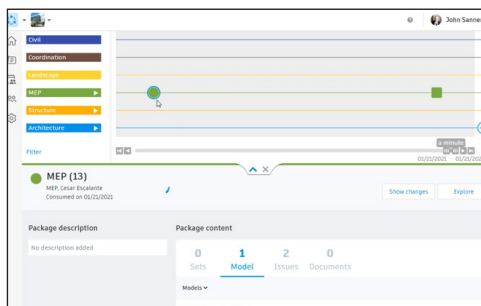
It is best to assign permissions at the broadest level – such as Company or Role – which cascade through subfolders, instead of by individual user.



## Design Collaboration

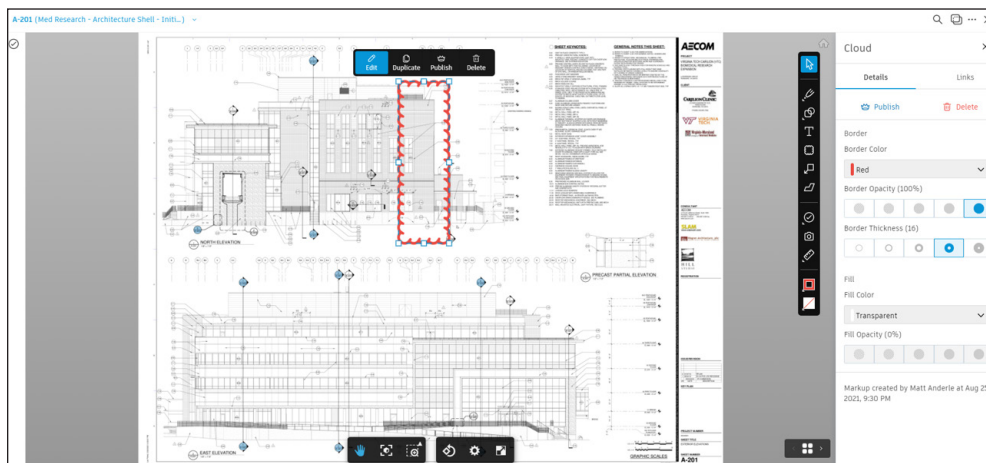
## Publishing Packages

Packages provide milestones throughout the project for the purpose of sharing strategic updates internally or externally to the design team. Packages are created by selecting published content and recorded on the timeline with an identifiable title. Packages are created by the project team who published the content, and are consumed by other teams associated with the project, who can choose between different states of published updates. One opportunity Packages provides is the ability to freeze a background; for example, when executing final deliverables or running energy models.



Graphical descriptions, or “Markups”, can be made to a variety of 2D documents or 3D models throughout the Docs module. After selecting a document, click the Markups Icon. Markup functionality provides a variety of tools, styling, and editing capabilities which are tracked by user.

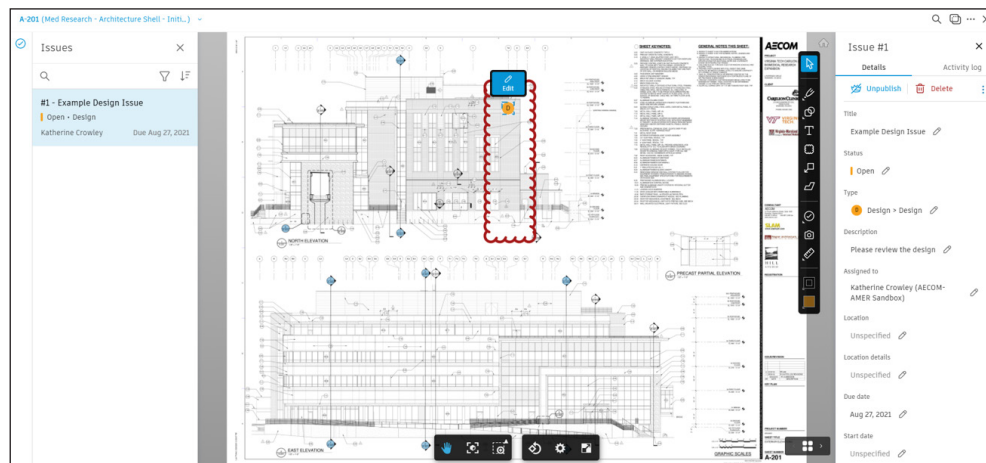
TIP: Be sure to publish Markups so that they are visible to the team.



## Issues

Issues related to 2D documents and 3D models can be created and managed at the document or project level. Within the Project Admin module, project administrators can create Issues types and sub-types, create custom attributes, and control Issue permissions.

Project Issues are available across the entire project site on a variety of different documents. After selecting a document, click the Issues icon, click the [Create Issue] button, input the required information, and click the [Create] button.

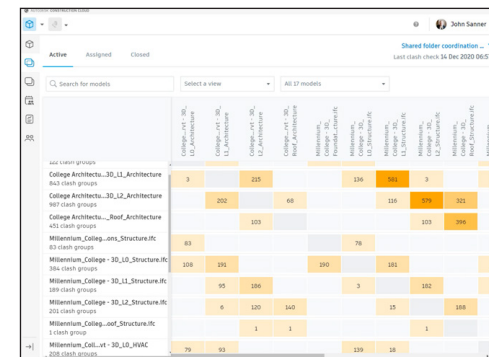


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## Model Coordination

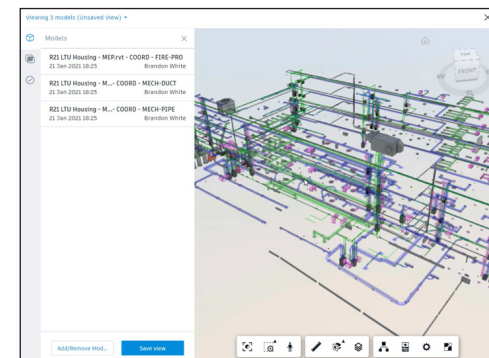
## Clash Detection

The Clash Detection feature generates an automated design conflict report of all models that are published to the module. The report allows the design team to review interferences in any combination of models.



## Visual Review

The Visual Review feature allows design anomalies to be identified using first-person navigation. Conflicts are tracked through Issues. Models can be combined in different scenarios and saved as Views for continued review.



## Leveraging Metadata



## Callout Hyperlinks

Hyperlinks are automatically created when publishing PDF sheets, RVT, DWG, DWF 2D sheets, and raster or vector PDFs with metadata that match Sheet Numbers in the same folder.

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