AUTODESK CONSTRUCTION CLOUD™

Autodesk Build

Document Management

Organize, distribute, and share files on a single, connected document management platform, ensuring all team members have access to the information they need.

SEE THE GUIDE ONLINE

Contents:

Additional Capabilities

Account Admin & Standardization

Project Admin

Mobile Access

Introduction

Overview

Document management may not be the most exciting part of the construction process, but making sure project teams have access to the right information at the right time is essential to completing a successful project. Harnessing the power of a cloud-based repository will increase efficiency, improve quality, and reduce risk, not only saving time and money but leading to happier clients at the end of the project. Don't fall victim to the old way of doing things. Start using the best document management practices today!

The following guide introduces the suggested document management workflow and gives context to the different capabilities built into the product, including step-by-step starter guides.

Learn more about Document Management ›

Watch the Document Management Workflow Video ›

Document Management with Autodesk Construction Cloud

Built on a unified platform and common data environment, Autodesk Construction Cloud is a powerful and complete portfolio of construction management products that empowers general contractors, specialty trades, designers, and owners to drive better business outcomes. Autodesk Construction Cloud combines advanced technology, a unique builders network and predictive insights to connect teams, workflows, and data across the entire building lifecycle.

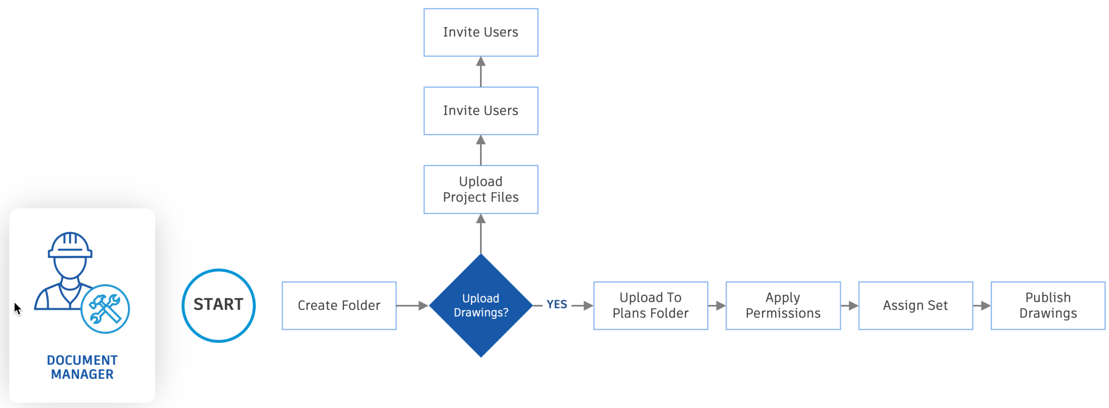
Autodesk Construction Cloud ›

Suggested Workflows

Document Management Workflow

Teams can maximize the benefit of cloud-based file sharing by enforcing a best practice workflow. The graphic below outlines the suggested document management workflow using Autodesk Build.

Document Management Workflow



Why follow this workflow?

- Streamline file organization
- Save time and maintain consistency
- Control sharing of information with the entire project team

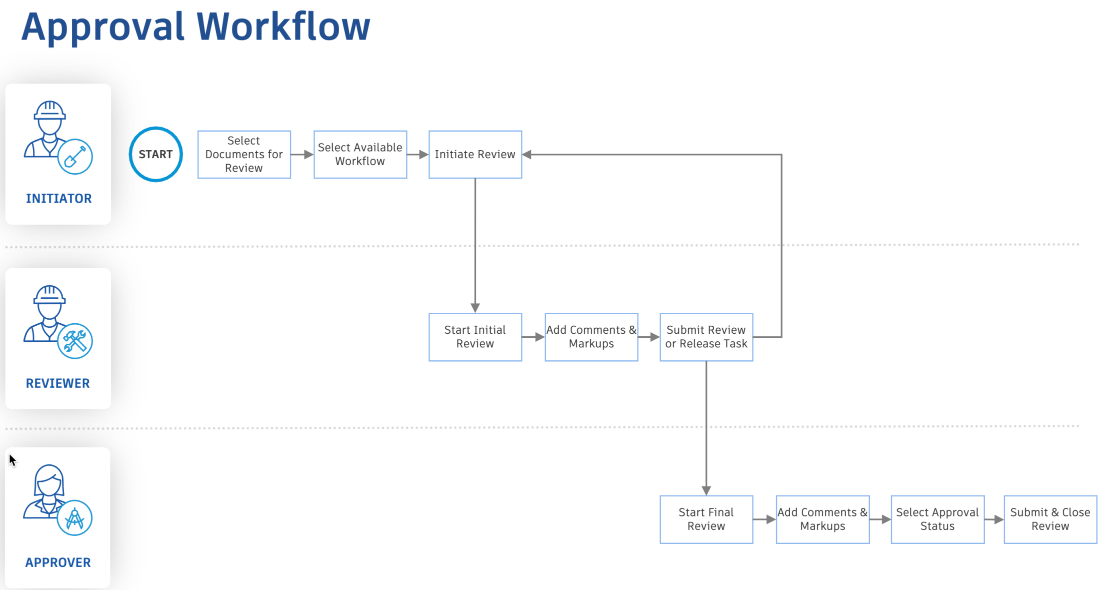
Autodesk Build capabilities used:

- Folder management
- Document distribution
- Publish documents

Suggested Workflows

Approval Workflow

Keep the whole team involved in the review of information prior to it being distributed to a broader group with Autodesk Build's customizable approvals workflow. The graphic below outlines the approval workflow.



Why follow this workflow?

- Tightly controls and organizes the flow of project information
- Ensures all information paths follow an agreed upon and consistent process
- Moves from tracking "what was looked at" to a true status of documents to drive accuracy and transparency

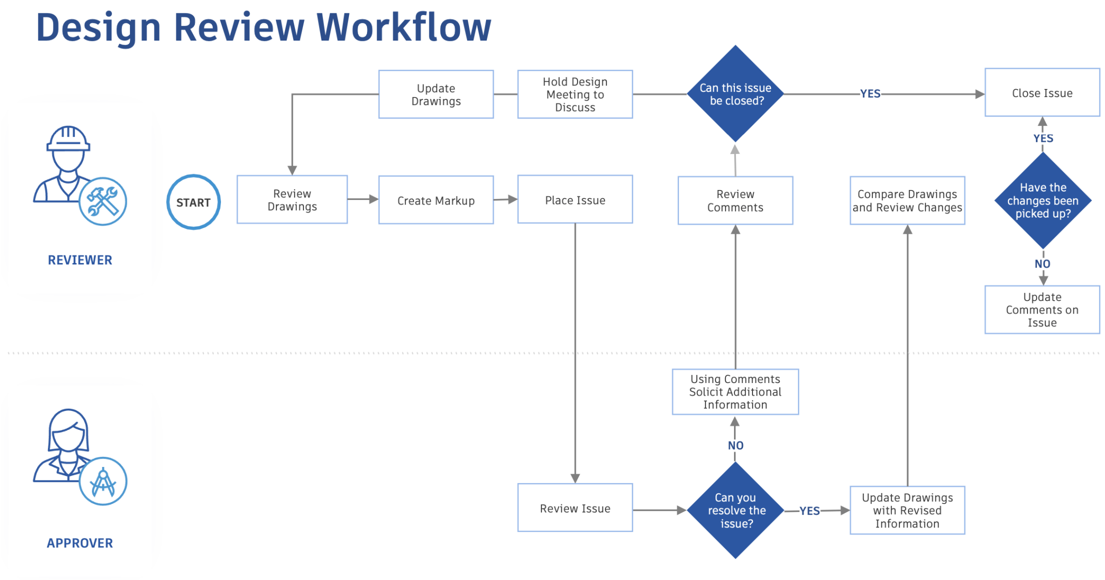
Autodesk Build capabilities used:

- Document distribution
- Markups

Suggested Workflows

Design Review Workflow

Easily collaborate with the team during the design review process by implementing a streamlined workflow. The graphic below outlines the suggested design review workflow using Autodesk Build.



Why follow this workflow?

- Streamline design reviews across team members anytime, anywhere
- Aggregate comments and markups in a single location
- Easily compare versions for both 2D and 3D drawings

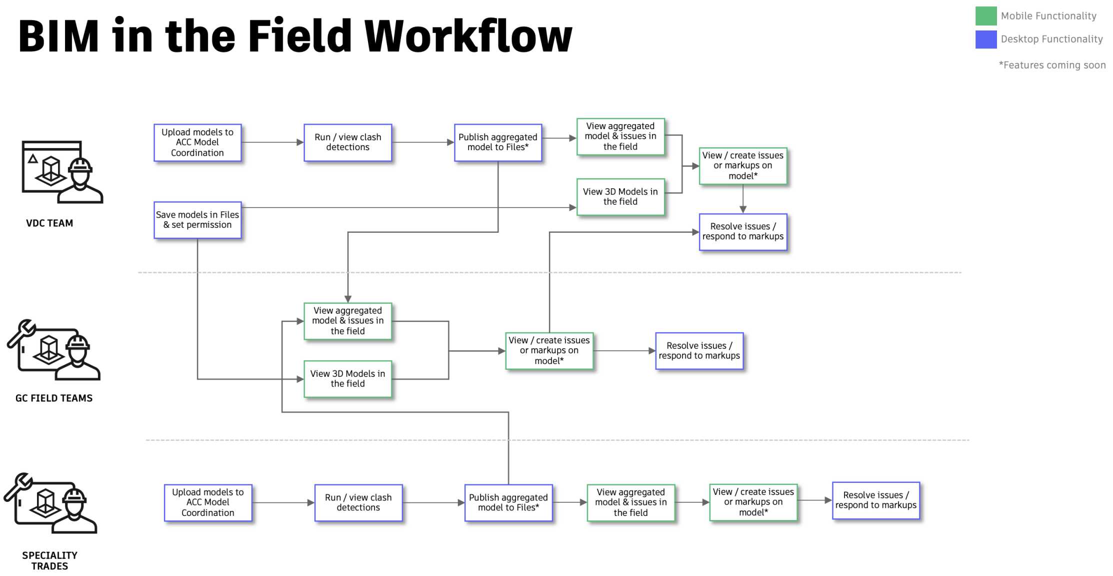
Autodesk Build capabilities used:

- 2D and 3D viewing
- Document compare
- Markups
- Design issues

Suggested Workflows

BIM Workflow

Seamlessly manage the BIM workflow at the job site by implementing a streamlined workflow between the office and field teams. The graphic below outlines the suggested BIM workflow using Autodesk Build.



Why follow this workflow?

- View 2D and 3D models anytime, anywhere
- Aggregate comments and markups in a single location
- Easily sync and download Project files for offline access

Autodesk Build capabilities used:

- Mobile access in the field
- 2D and 3D viewing
- Permissioned document access
- Design issues

Document Management Capabilities

Folder Management

Using cloud-based software for document management enables teams working on-site to easily connect with those working in the office. This connectivity helps to prevent rework, as all documents are stored in one central location, and it promotes a more streamlined process for distributing and sharing files. When folder structures are set up in an organized way and users can subscribe to folder updates, teams spend less time finding documents and more time monitoring the project and solving problems.

1. Setting Up Folders

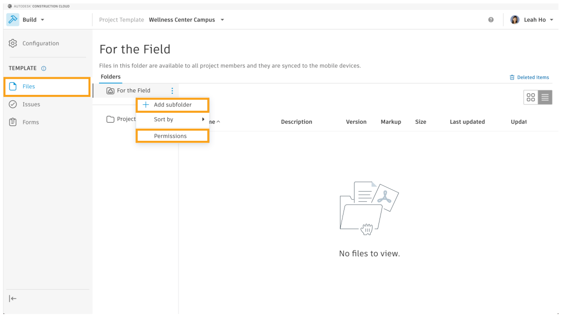
There are two areas where teams can create folder structures:

- For the field
  - Approved files (2D drawings, 3D models, and documents) meant to be shared with the entire project team
  - Files are accessible offline on mobile devices with Autodesk Build mobile app.
  - Project files
  - Organize files that aren't ready for field teams or meant to be used only by office teams.
  - Permissions can be applied to the Project Files folder and any subfolders to control access.
- Project files
  - Organize files that aren't ready for field teams or meant to be used only by office teams.
  - Permissions can be applied to the Project Files folder and any subfolders to control access.

Choose the folder area that is best suited for the documents. Click the three-dot icon to the right of the name, and "Add Subfolder."

Autodesk Takeoff, Autodesk BIM Collaborate, and Autodesk Build users with the right permissions on a project can access these folders through the Files tab of their respective module, or by navigating to the Docs module.

PRO TIP: Account Admins can create folder structures in Project Templates to standardize across projects.



2. Subscribe to Folders

Team members can click the three-dot icon next to specific folders and select the "Subscribe" option.

- Select the option for "This folder and all subfolders" to get notifications for subfolders, even those added later.
- By subscribing, the team member will be notified via email any time an update is made to this folder (such as when a new version of a file is uploaded).

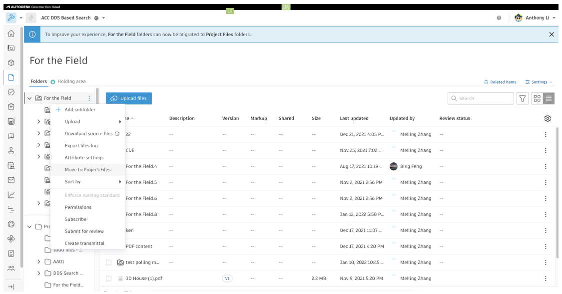
ⓘ **Organize Files with Folders ›**

3. Migrate For the Field Folder to Project Files

Team members on web can migrate "For the field" folders under "Project Files" to consolidate their workspace.

- Click the three-dot icon to the right of the folder name, and select "Move to Project Files".
- After migration, the team member can preform regular folder operations, such as renaming the folders, assign permissions, and delete folders.

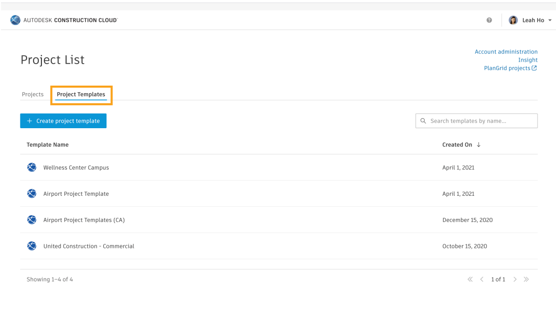
ⓘ **Migrate For the Field Folder to Project Files ›**

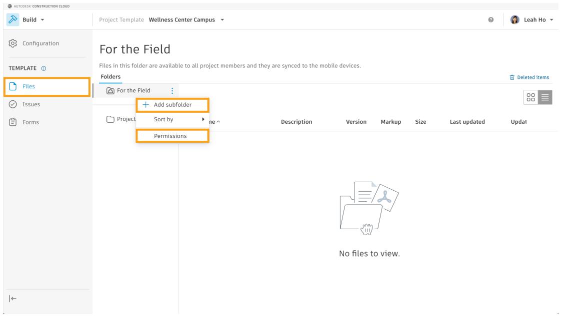


4. Project Templates

- Teams can standardize folder structure templates from across projects with project templates.
- Account Admins can set up file structure as well as role–based permission settings.
- On the project list page, Account Admins can go to the “Project Templates” tab and select “Create project template”.
- Add the project name and other relevant details.
- In the navigation drop down, select “Docs”.
- Click on Files and start adding subfolders and role–based permissions that will be copied over to new projects.

Configure Templates >





PRO TIP: Users can configure other tools besides Files including Issues and Forms.

Document Management Capabilities

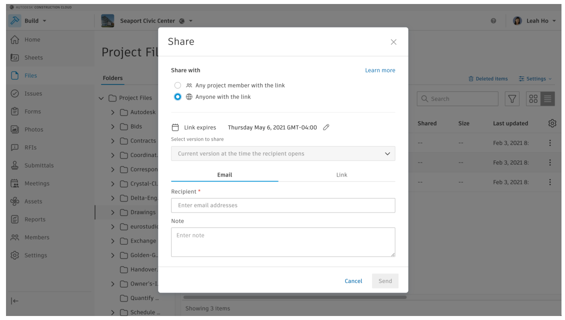
Document Distribution

Reviewing and sharing project files is the first step in establishing a successful document management process for construction projects. 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, distributing and sharing construction documents has never been easier.

1. Sharing Files

- Select the file or subfolder and click the three-dot icon.
- Choose "Share" and select to share with project members only or anyone.
- Note: Project Admins need to enable Public Sharing in Settings for members to be able to generate a publicly shareable link.
- Users can choose to share the current version or the version that is set as current when the recipient opens the file.
- Select between sharing via email or link.

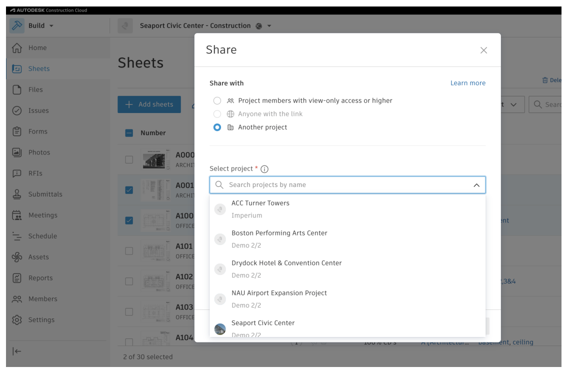
Sharing Files and Folders >



PRO TIP: Include a link expiration date if creating a public link to keep files secure.

- In addition to the standard way of sharing files, users can also share sheets and files across projects using Bridge.
- To share a sheet or file simply select the items and click the "Share" button on the top of the screen.
- From here select to share with "another project" or with "anyone with the link".
- The receiver will either see the sheets automatically added to their project or if shared via link, can select which project they would like to add the sheets to.
- Users can also select to automatically send newer versions to ensure the receiving team always has the most up to date information.

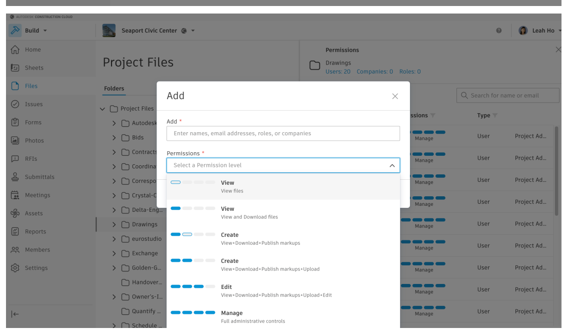
Sharing with Bridge >



2. Setting Permissions

- Select the folder or subfolder and right-click "Permissions" or select from the three-dot folder menu.
- Click "Add" and enter the names, email addresses, roles, or companies.
- Choose the permission level to assign project members to the folder.
- There are six permission levels to choose from ranging from view only to full administrative control.

Folder Permissions >

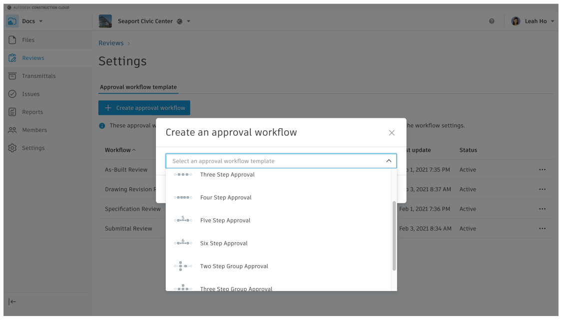


PRO TIP: It is a best practice to start assigning permissions based on a role or company level first.

3. Reviews and Approvals

- Project Admins can create a new approval workflow by navigating to Docs and then clicking the “Reviews” tool on the left navigation. Then, click into “Settings” on the right side, and select “Create approval workflow”.
- Choose from several workflow templates and customize the workflow by name, description, participant (user/role/company), duration, status label, and action after approval.

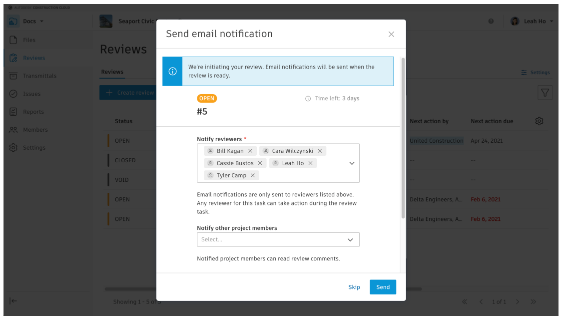
Create Approval Workflow



PRO TIP: All documents will remain in their original folders; however, Project Admins do have the option to configure workflows so documents can be copied into another folder once approved, so that they can be shared with a broader group.

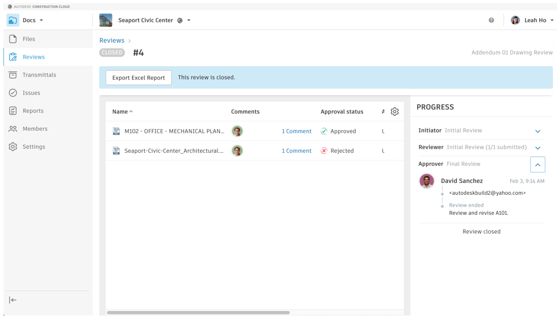
- Team members can start a review from the Reviews tool by clicking “Create review”, selecting the documents, and the workflow. Users can also start a review by finding the document or folder, clicking the three-dot icon next to it, and selecting “Submit for review”.
- An email notification will be sent to the next participant in the workflow. Users can also choose to notify other project team members.

Start a Review



- If using a “multiple reviewer” workflow, teams can have groups of individuals as designated reviewers and can simultaneously review and approve to speed up the process.
- The assigned team members will then go through the review process, with the ability to add markups from within the viewer and add comments for each document.
- The Approver can set the approval status on a document–by-document basis.

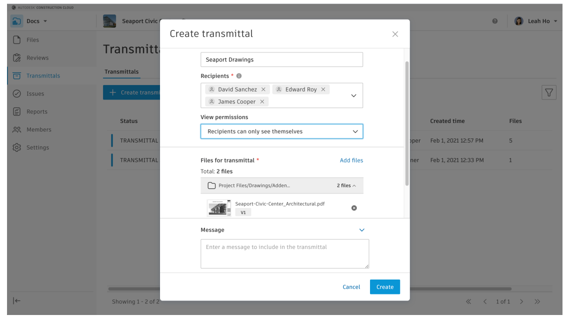
Review and Approve Files



4. Document Transmittals

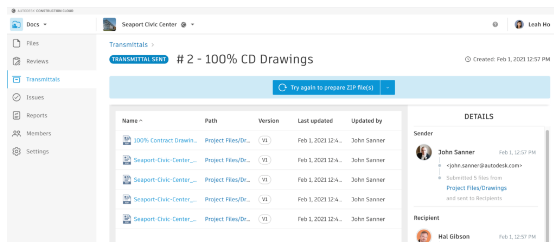
- Navigate to Docs, select the “Transmittals” tool and click “Create transmittal”. Users can also start a transmittal by finding the document or folder, clicking the three-dot icon next to it, and selecting “Create transmittal”.
- Type in a custom title for the transmittal name, and then select the recipients by name, role, company, or email address.
- Select whether recipients will see only themselves, or if they will be able to view other recipients.
- An email will be sent to each recipient when the transmittal is ready, with an optional message.

ⓘ **Create Transmittals ›**



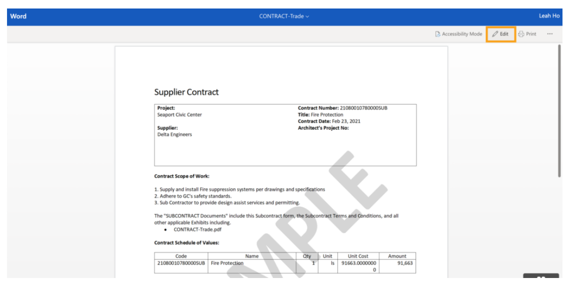
- To view a list of all transmittals, click on the “Transmittals” tool on the left navigation.
- Click into different transmittals to view details.
- Recipients can easily view documents included in the transmittal as well as download a zipped file of all transmittal documents.
- Team members can also export a report of the transmittal.

ⓘ **View, Download, and Export Transmittals ›**

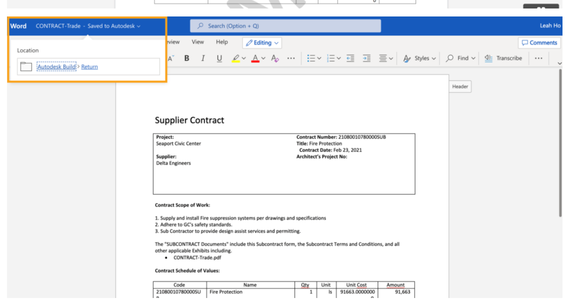


5. Microsoft 365 Integration

- Project members with upload and edit permissions can view and edit Microsoft files (Word, Excel, PowerPoint, Visio) directly from within the Files tab.
- To edit a file, find and open the document.
- Click “Edit”.
- Sign in with Microsoft® Office 365 credentials, or sign up for an account.



- Make the desired changes. The status bar at the top must state “Saved to Autodesk” before exiting a file, or changes may be lost.
- End the editing session by clicking the dropdown arrow to the right of “Saved to Autodesk” and selecting “Return”, or select “Autodesk Docs” to return to the Files page.



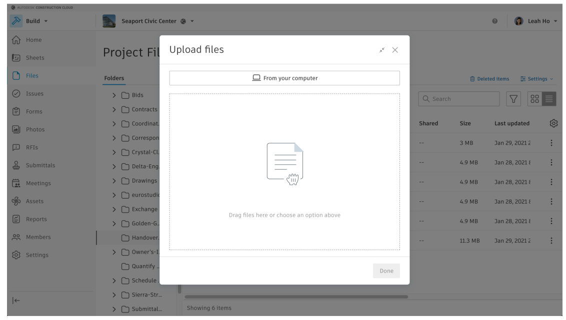
Document Management Capabilities

Publish Documents

Upload files and sheets and save time with tools like optimal character recognition, version control, and Desktop Connector. Teams can easily publish full version sets of drawings, a single sheet, or hefty design files like Autodesk® Revit® or Autodesk® AutoCAD®.

1. Uploading Files

- Select the Files tool.
- Find or create a folder where the user wants to add a file.
- Click "Upload files" and select "From your computer" or simply drag and drop the file.
- Autodesk® Revit® or Autodesk® AutoCAD® users can push files directly from those applications into Autodesk Docs.



PRO TIP: To select multiple files, press Shift+Click or Ctrl+Click.

2. Publishing Sheets

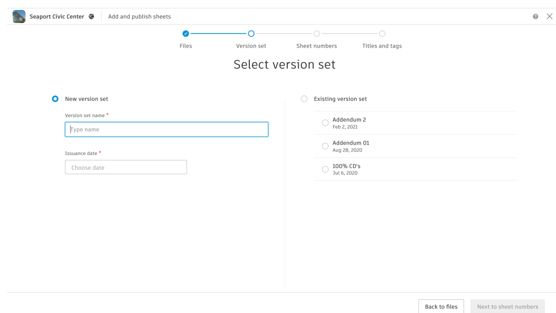
- Select the Sheets tool.
- Click "Add sheets" and select "From your computer" or simply drag and drop the files.
- Choose to create a new version set, or select an existing one to group specific versions of sheets together. If creating a new version set, enter the issuance date.

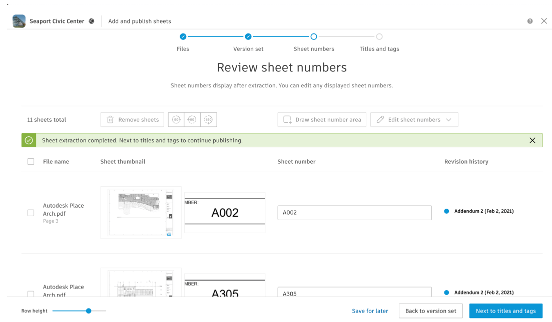
Watch the tutorial on Sheets ›

PRO TIP: Autodesk® Revit® or Autodesk® AutoCAD® users can push files directly from those applications into Autodesk Docs. Autodesk® Revit® files with sheet views or Autodesk® AutoCAD® drawings uploaded in Files can be published to Sheets by selecting the file and clicking "Publish" at the top.

- Sheet numbers and sheet titles are extracted automatically. Users can adjust any that aren't extracted properly.
- Add or remove tags to help team members find relevant sheets.
- Select "Publish sheets". Project members are notified through email that new or updated sheets are available.
- Autodesk® Revit® or Autodesk® AutoCAD® users can push files directly from those applications into Autodesk Docs.

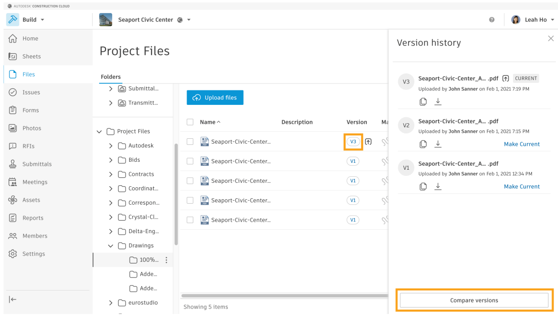
Add Sheets and Publish to the Field ›





3. Version Control

-
    - Open the folder and find the desired document.
    - Click on the version number.
    - A "Version history" dialog box will pop up with details of when the file was updated and by whom.
    - In addition to the above workflow, after opening a document, users can click "Compare" to choose which versions to compare, and compare using either overlay or side-by-side view.

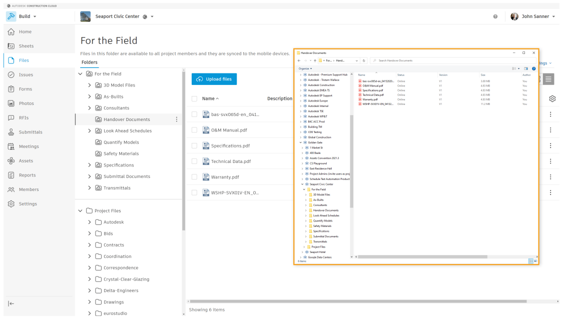


PRO TIP: Teams can also "export files log" to view additional details by clicking the three-dot icon next to the folder.

4. Desktop Connector

- **Download** the Desktop Connector plug-in (currently available for Windows only).
- Once a user has set up the plug-in, they will see the project folder structure mirrored on their finder/ explorer window.
- Users can drag and drop folders and files to add them to a connected drive.
- Users can open and edit files in connected drive folder structure without having to download and re-upload files by selecting the file and clicking "Edit on Desktop".
- All edits are automatically synced.

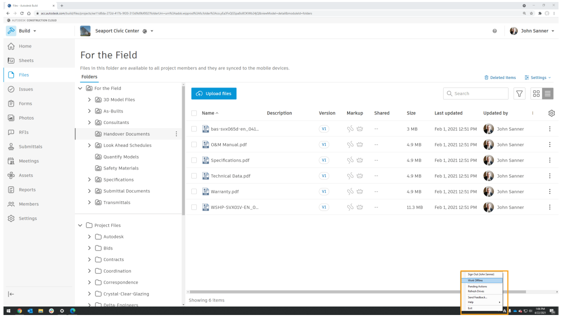
ⓘ **Get Started with Desktop Connector ›**



5. Offline Sync

- To enable Work Offline mode, right-click on the tray icon and select "Work Offline".
- Note: The tray icon will change to blue when a user is offline.
- Open, edit, and create any files in the connected drive.
- Note: Users should check the relevant files and folders are cached before going offline, to make sure they are working from the latest versions.
- Changes are uploaded when a user puts Desktop Connector back online by unselecting "Work Offline".

ⓘ **Work Offline ›**



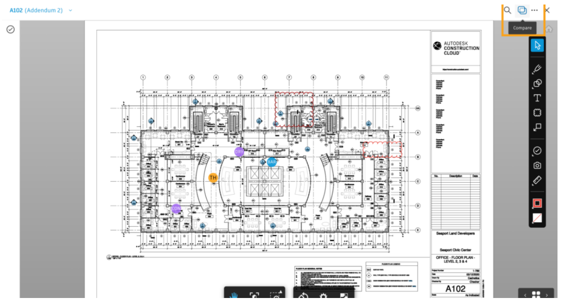
Document Management Capabilities

Document Compare

Tracking multiple iterations of documents and visualizing edits from one version to the next can be time-consuming. With the document compare and version control features built into Autodesk Build, teams can ensure they are viewing the latest version and quickly compare one version with the next to gain insight into how changes impact scope, schedule, and budget. The ability to instantly conceptualize changes helps ensure teams are all on the same page, maximizing time and minimizing rework.

1. Compare 2D Drawings

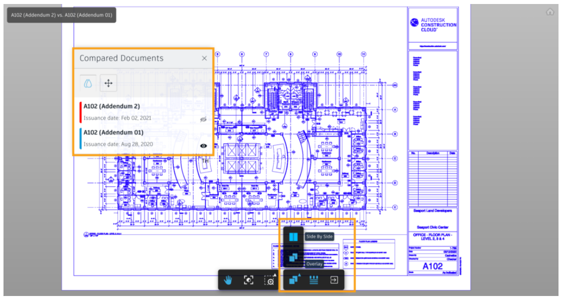
- Once viewing a drawing in Files or Sheets, click the "Compare" icon in the toolbar at the top.
- Users can click the version drop-down list to select the two versions they want to compare and click "Compare."
- By default, drawings are overlaid on top of one another with differences shown in blue and red.



- To align drawings, click the "Align" icon, drag the drawing to align, and click "Finish align".
- To compare side by side, click the "Overlay" icon on the bottom toolbar, change the view to "Side-by-Side," and drag the slider bar to see difference.

Compare Sheets ›

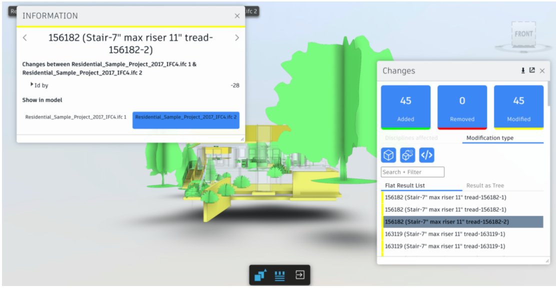
PRO TIP: With 2D compare, users can compare two versions of the same drawing or model or two entirely different drawings. For example, users could compare drawings from two different disciplines.



2. Compare 3D Models

- When comparing 3D models, users can view object-level information, like what has been added (green), removed (red), or modified (yellow).
- Turn on or off different filters to view specified changes.
- Select specific version changes to get more details behind the change.

Compare Files ›



Document Management Capabilities

2D and 3D Viewing

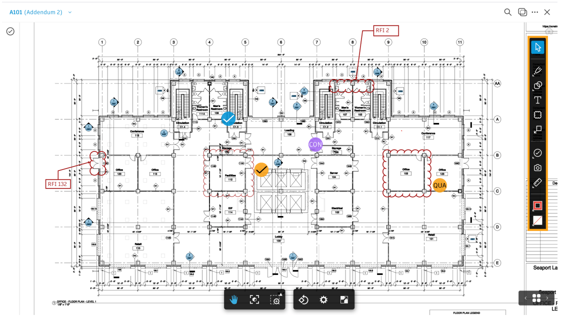
Project teams can now easily access all of their 2D drawings and 3D models in a single, cloud-based document management solution. With easy-to-use tools, the entire project team can gain visibility into design details and all embedded rich metadata, and view both 2D drawings and 3D models simultaneously.

1. Viewing 2D and 3D Files

- Within the Sheets or Files tools, users can click on the 2D drawing or 3D model they want to view. Note: Revit files can be viewed in both 2D and 3D formats, and PDFs can be viewed in 2D.
- Drawings and models in the “For the Field” folder in Files, and drawings in Sheets, can be viewed on mobile devices.
- Use the viewer toolbar to zoom, pan, see properties, measure, markup, etc.

PRO TIP: Users can also search for text within 2D drawings, download, and print from PDFs. Additionally, users can change the configuration, navigation, and appearance settings by clicking on the “Settings” icon while viewing a drawing or model.

View Files >



PRO TIP: When viewing a Revit model or extracted sheet, users can click the “Sheets & Views” icon in the top left to quickly switch between both.

2. 3D Viewing Orientations

- Click the arrow next to the “ViewCube” on the top of the 3D view panel.
- Choose from three view orientations:
  - **Orthographic** – Shows the building model in a 3D view where all components are at the same depth.
  - **Perspective** – Orients the view to a perspective view that portrays height, width, and depth.
  - **Perspective with Ortho Faces** – Orients the view to a perspective view.
- To define a view as the “Home” view, click the arrow next to the “ViewCube” and select “Set current view as Home.”. The same can be done for “Front” and “Top” views.

Document Management Capabilities

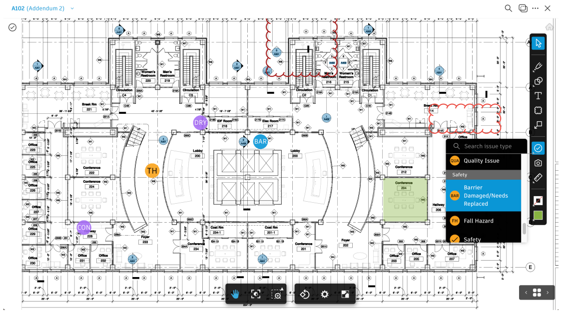
Markups

Markups speed up the decision-making process with the ability to instantly communicate questions, changes, and other information regarding the project drawings and models. The measurement tools enable project team members to accurately verify dimensions and areas. Users can add hyperlinks to drawings, models, or files with additional information or context like photos, RFIs or forms so team members can easily find relevant information.

1. Create a Markup

- Open a 2D drawing or 3D model in the Files tool, or Sheets.
- Use the markups toolbar on the right to create a markup using shapes, text, issues, or photos.
- Edit markup properties such as border color, thickness, fill color, etc.
- Users can click “Publish” if they would like to share their markup with the team, or they can choose to keep it private and visible only to themselves.

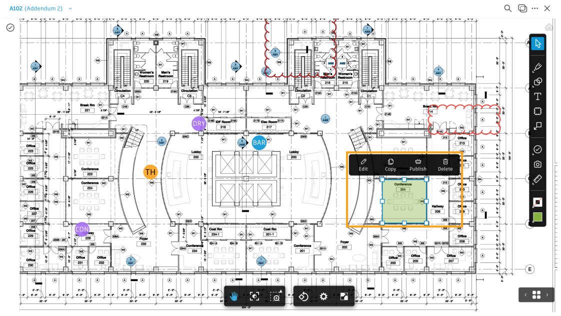
ⓘ **Markups** >



PRO TIP: Use the Issue markup tool to place an issue directly on a model or drawing.

2. Publish/Edit/Delete Markups

- Change the viewing status from private to public by clicking the markup and clicking “Publish”.
- To edit or delete a markup, click on the markup and select “Edit” or “Delete”.
- Users can also copy a markup by selecting it and clicking “Copy”.



PRO TIP: When adding an Issue markup, link references such as photos, files, RFIs, or assets.

Document Management Capabilities

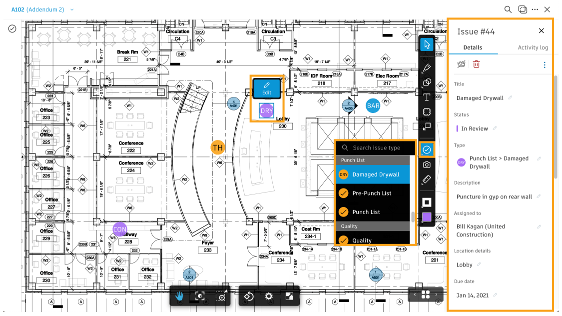
Design Issues

The ability to create, assign, track, and respond to issues on any device is critical to making sure construction projects are completed on time and on budget. Put context around the issue resolution by dropping pins on designs, adding photos in the field, and filling in additional fields. With a central view of all project issues, tracking status and analyzing root causes has never been easier.

Watch the tutorial on Issues in Autodesk Build >

1. Creating Drawing or Model-Based Issues

- Open a 2D drawing or 3D model in Files, or a sheet, and select the Issue icon on the markups sidebar.
- Select the issue type, and click where the issue should be placed.
- Enter a title and complete all desired fields including status, assignee, location, due date, and root cause.
- Add references to photos, files, RFIs, or assets if additional context is desired.

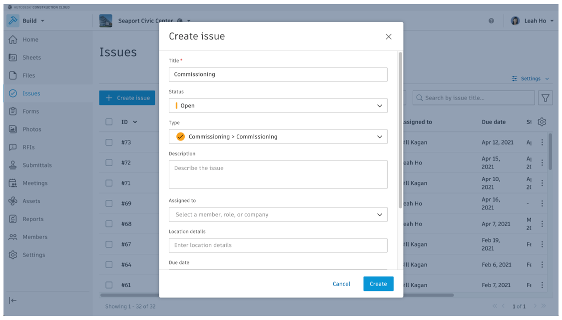


PRO TIP: Issues can be viewed across all product modules.

2. Creating Project-Level Issues

- Select the Issues tool to display a list of all project issues.
- Click the “Create Issue” button
- Once the “Create Issue” box pops up, enter a title and complete all necessary fields.
- By default, the status will be set to Open. Select “Create” to save.

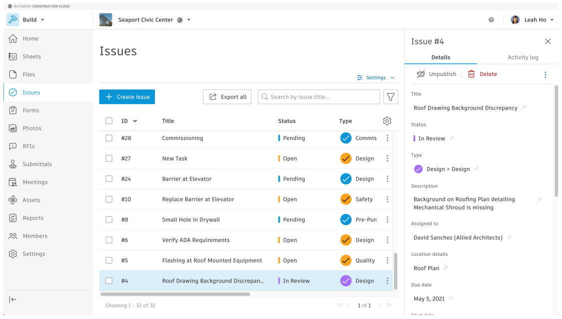
Create Issues >



PRO TIP: Project Admins can create custom fields and root causes in Settings.

3. Reviewing and Responding to Issues

- If a user is assigned an issue, they can open the email notification and click “View issue”.
- Or a user can select the Issues tool to scroll through the issues log or search for the issue.
- Once in the issues log, click on the issue to review and respond.
- For drawing or model-based issues, click the link under “Placement” to view the issue on the associated document.
- An assigned user can edit descriptions, status (except close), and add or remove personal attachments, as well as reassign issues. Only those with Create or Manage permissions can set the issue as closed.

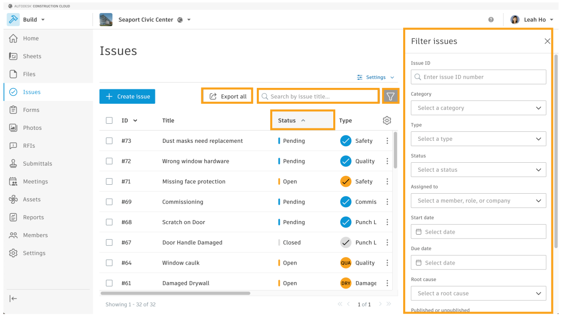


4. Filter/Sort/Export Issues

- Select the Issues tool to display a list of all project issues.
- To filter, click on the filter icon on the top right side, and add filters such as status, assignee, or due date.
- To sort, click the column headers.
- To export, select “Export all” at the top, or click on the three dots next to an issue and select “Export”.
- Use the “Search” bar to do a keyword search.

PRO TIP: Users can filter, sort, and export directly from a 2D drawing or 3D model after clicking on the issue.

Manage Issues



PRO TIP: Users can add or remove columns by clicking on the gear icon.

Prediction and Analytics Capabilities

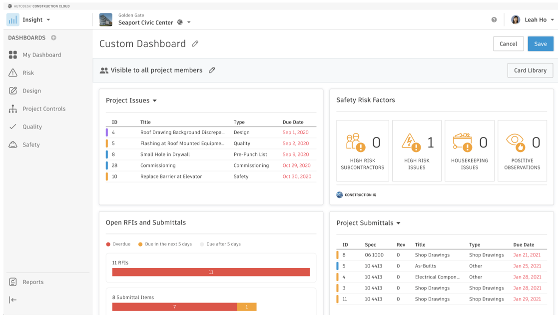
Insight

Everyday construction projects have thousands of open issues, hundreds of RFIs, and countless change orders. Tracking and understanding all of these pieces of data is nearly impossible. Furthermore, nearly 95% of this project data goes unused.

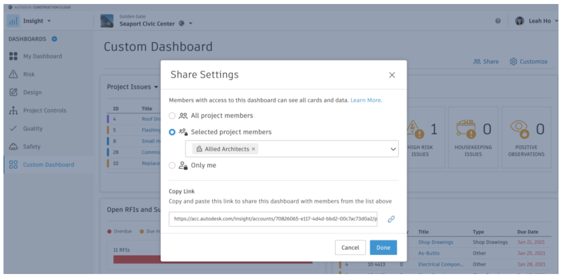
The Insight capabilities built into the Autodesk Construction Cloud platform gives teams a deeper understanding of project performance, prioritized daily activities, and instant visibility into project risk. This allows them to more easily leverage their project data to, ultimately, avoid costly mistakes and minimize risk.

1. Project Dashboards

- Select the product picker drop down and select "Insight".
- From within the Insight tool, users will see a list of preset dashboards for Risk, Design, Project Controls, Quality and Safety.
- Select the "Customize" button on the top right to rearrange, remove, or add new cards to each dashboard view.



- Create a custom dashboard by selecting the blue "+" icon on top of the left navigation panel.
- Custom dashboards can also be shared by user, company, or role.

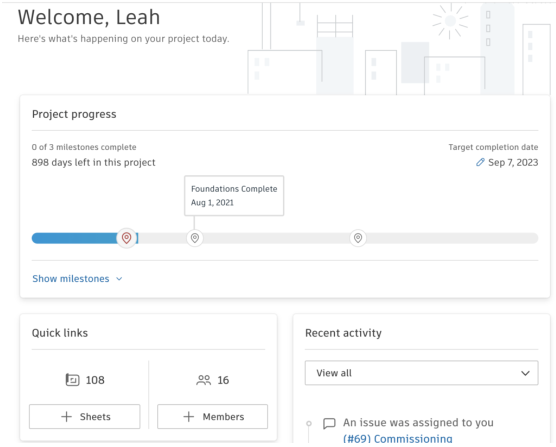


ⓘ **Customize Dashboards** ›

2. Project Home

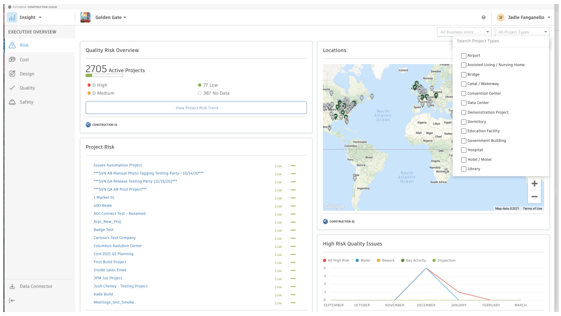
- In addition to project dashboards in Insight, any Autodesk Build user will have a preset home screen called "Project Home".
- Click on the "Project Home" tool from within Autodesk Build.
- From this screen, users can track progress by setting key milestones, access any quick links, view a list of recent activity, see updates on both a user's assigned work status and project overall work status, and get the weather, as well as see how many users from the project are using updated mobile syncing.

ⓘ **Project Home ›**

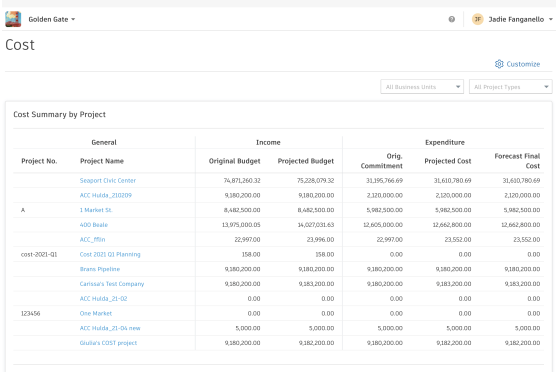


3. Executive Dashboards

- Only users who have Executive Overview access can view the Executive dashboards.
- From within Insight, navigate to the "Executive Overview" option on the bottom of the left side panel.

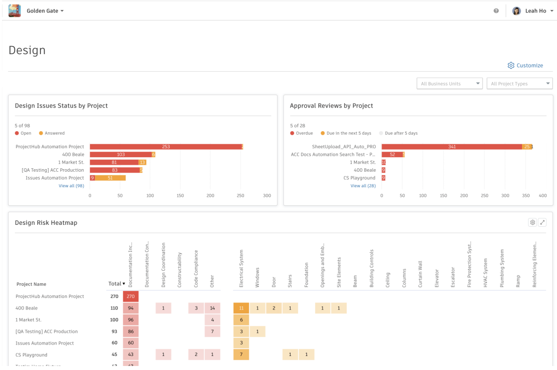


- Similar to project dashboards, users will see a list of pre-set executive level dashboards that show a summary of cross-project data:
  - Risk – Overview of high-risk projects and sort by project type or business unit.
  - Cost – A roll-up summary view of cost information for each project. NOTE: Executives with permissions to view project costs can drill down to see details



- Design – Overview of design issues and approval reviews by project as well as a design risk heatmap flagging projects that may be at higher risk for early design issues.
- Quality – Overview of quality checklist activity per project.
- Safety – Overview of safety checklist activity and safety checklist conformance per project.

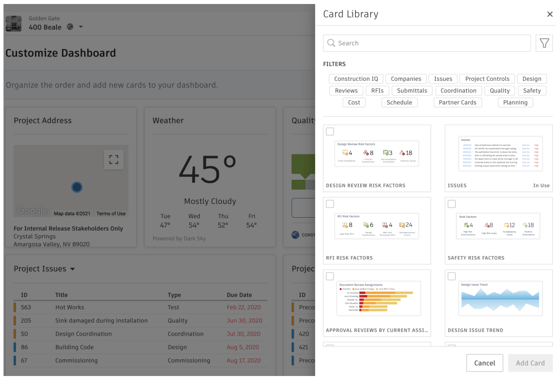
Executive Overview ›



4. Card Library and Partner Cards

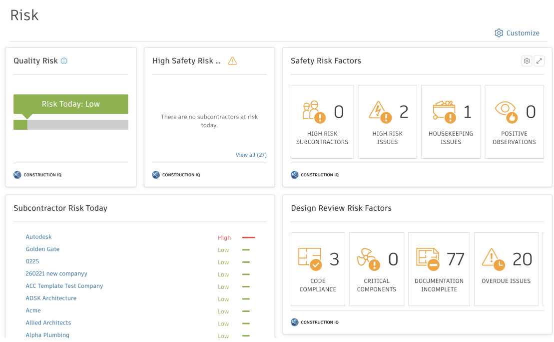
- Both project level and executive overview dashboards can be customized by adding or removing cards from the "Card Library".
- Click on the "Customize" icon on the top left to see a view of the Card Library.
- Filter, view, and select cards to be added to a dashboard:
  - Filter by Partner Cards to add data from any of the selected integration partners.
  - Filter by Construction IQ-specific cards.

Partner Cards ›

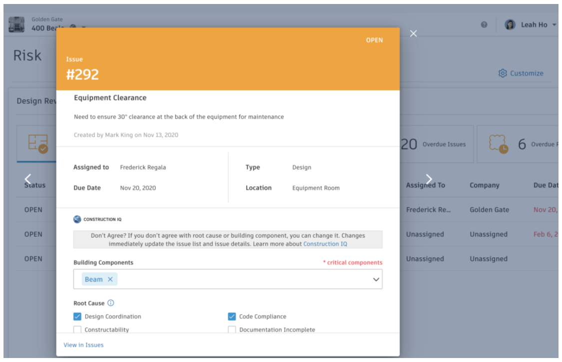


5. Construction IQ

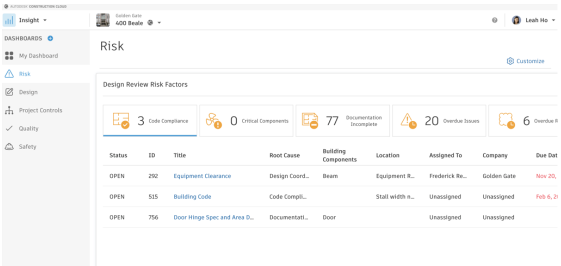
- Construction IQ is a built-in machine learning and AI functionality that leverages data across the entire Autodesk Construction Cloud platform.
- Construction IQ sifts through millions of data points from your construction documents, issues, checklists, related meta-data and historical data, and analyzes it to identify and prioritize risks.



- Construction IQ automatically classifies items and flag issues as “High Risk”.
- “High Risk” issues are items that, if left open, will likely lead to bigger more costly issues down the road.
    - For example: If flashing was marked as missing on a window, the Issue would be flagged as “High Risk” to avoid bigger water-leaking Issues.



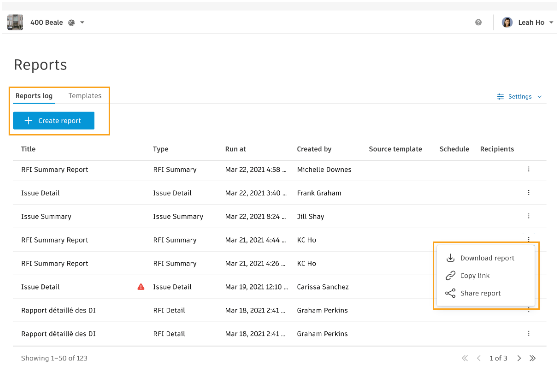
- View Construction IQ data through the “Risk” tab within the Insight module as well as by selecting cards tagged as “Construction IQ” in the Card Library.



ⓘ **Construction IQ** ›

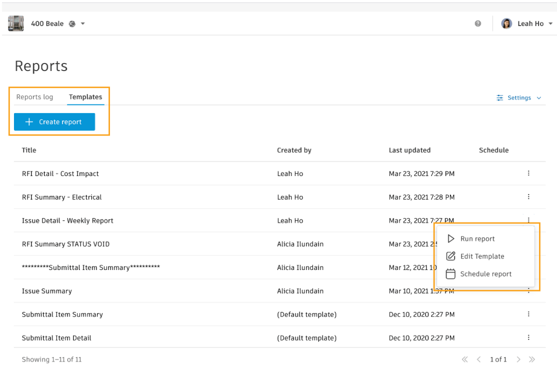
6. Reports

- Navigate to the “Reports” tool on the left side panel.
- Click the blue “Create report” button and select a report template to start with.
- Modify the report template as needed by selecting the file format, filtering, and sorting options.
- Once you run the report, it will show up in the “Reports log” tab.



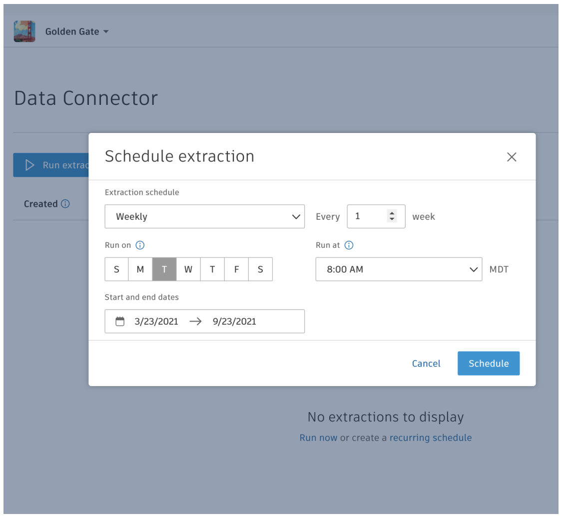
- Users can choose to download the report, share the report via link or by user, role, or company, or save the report as a template.
- In the “Templates” tab, users will see a list of reports that were saved as templates.
- From here, users can choose to run a report, edit the template, or schedule a recurring report.

Creating Reports >



7. Data Connector

- Users with the right permissions can extract data using Data Connector at either an individual project level or across all projects.
- From within Insight, navigate to the “Data Connector” option on the bottom of the left side panel.
- Users can extract data in different ways:
  - Click the blue “Run extraction” button to manually extract data.
  - Click the “Schedule” button to schedule recurring extractions.
- Users can set up direct connections to Power BI using the Microsoft certified Power BI Connector to automate data syncing / extracts.
- Users can select any Power BI templates from the gallery view.



PRO TIP: Use the Power BI Connector to automatically sync data from Autodesk Construction Cloud platform directly into Power BI, and use the premade Power BI Templates. There is also a Data Connector API that helps integrate to other business intelligence tools.

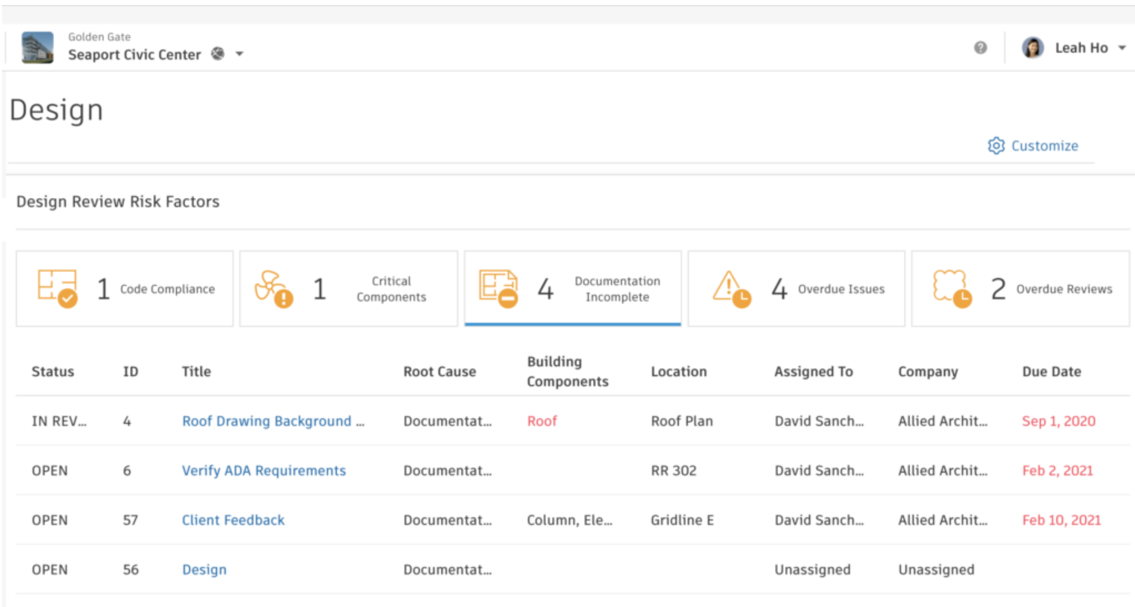
Prediction and Analytics Capabilities

Design Insights

Design issues that are not initially addressed become time-consuming RFIs, costly change orders, and even larger litigation issues that cause schedule delays and cost overruns– two major areas of construction project risk. Autodesk takes design and constructability reviews to a new level, helping teams track issues, manage the review process, and unleash the power of Construction IQ to help predict critical design problems and prevent them from being overlooked.

1. Design Review Risk Factor

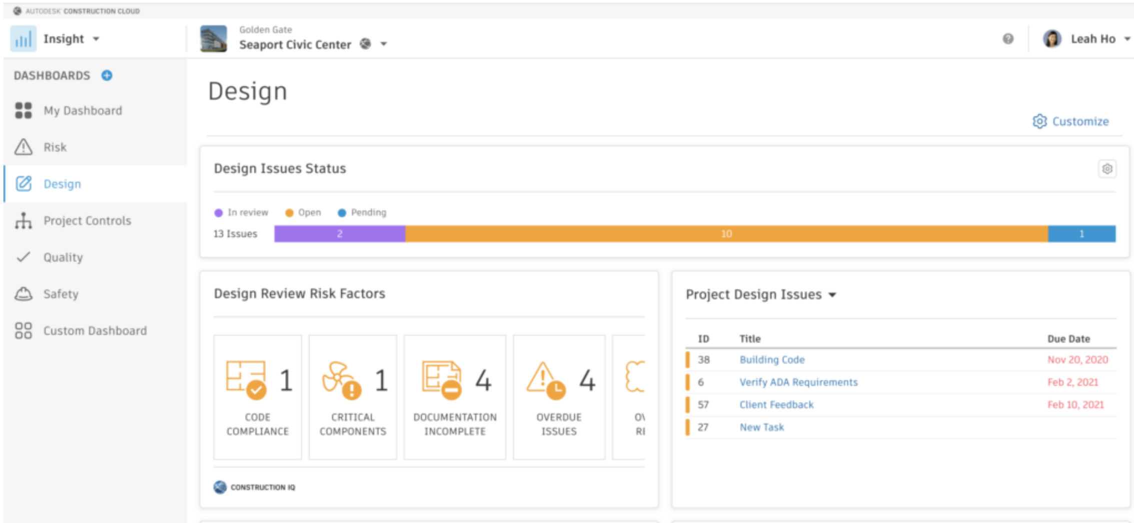
- The Design Review Risk Factor card is powered by Construction IQ.
- Users can add this card to any dashboard through the card library .
- Five factors are visualized through this card:
  - **Code Compliance** – Surfaces code compliance design issues.
  - **Critical Components** – Identifies design issues that involve critical building components.
  - **Documentation Incomplete** – Highlights documentation errors and omissions.
  - **Overdue Issues** – View, filter, and review past due design "issues."
  - **Overdue Reviews** – Gain insight into the status of reviews and drive accountability.
- Users can open each factor tab and click into various issues to drill down and find more information.



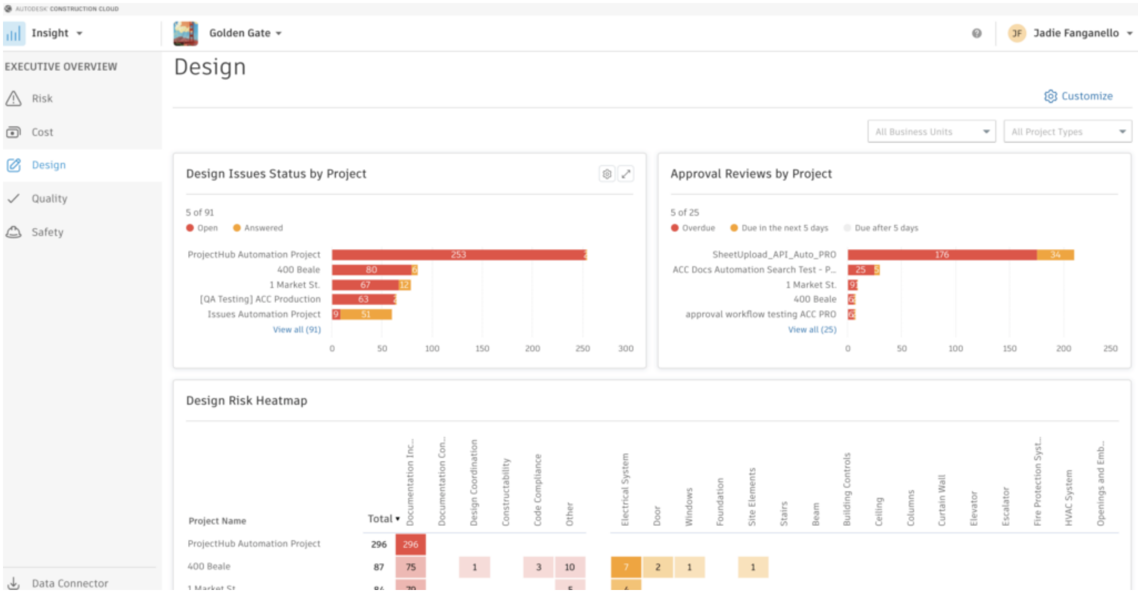
Status	ID	Title	Root Cause	Building Components	Location	Assigned To	Company	Due Date
IN REV...	4	Roof Drawing Background ...	Documentat...	Roof	Roof Plan	David Sanch...	Allied Archit...	Sep 1, 2020
OPEN	6	Verify ADA Requirements	Documentat...		RR 302	David Sanch...	Allied Archit...	Feb 2, 2021
OPEN	57	Client Feedback	Documentat...	Column, Ele...	Gridline E	David Sanch...	Allied Archit...	Feb 10, 2021
OPEN	56	Design	Documentat...			Unassigned	Unassigned	

2. Design Dashboards

- Within both project level and executive overview dashboards, there is a preset dashboard for Design.
- Project Level – This dashboard houses cards such as “Design Issue Status” or “Project Design Issues,” which help teams quickly resolve design issues and take immediate action. All cards can be moved around or removed, and users can also add new cards.



- **Executive Level** – This dashboard houses cross-project data with cards like “Design Issues Status by Project” or “Approval Reviews by Project” and can show filtered results by business unit or project type. The “Design Heatmap” card shows projects that have several issue types that typically lead to higher-risk design issues like incomplete documentation or constructability issues. All cards can be moved around or removed, and users can also add new cards.



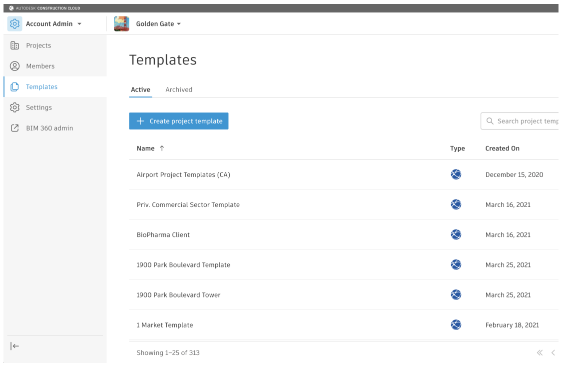
Additional Capabilities

Account Admin & Standardization

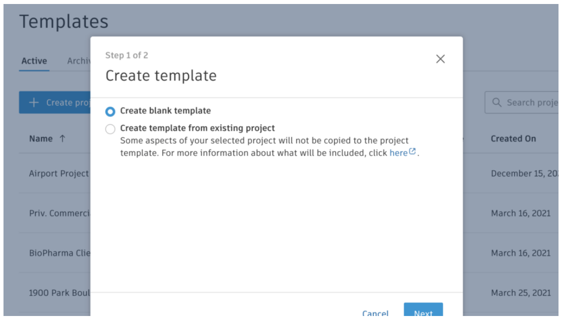
Setting up account-level features and standards is critical to ensuring teams are being set up for success. Whether it is creating project templates or ensuring the right team members have the right access to different features, the account admin functions help everyone get up and running quickly. Taking that a step further, by setting up standards that are used across the organization, teams are able to maximize the data being collected and better leverage information downstream to improve decision-making.

1. Setting Up Templates

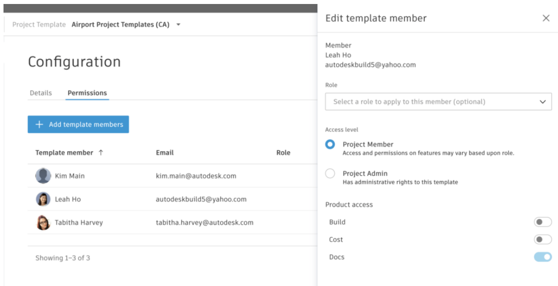
- Users with Account Admin settings can navigate to Account Admin using the product picker or by selecting "All Projects" under the project picker and clicking "Account Administration" on the top left.
- Select "Templates" from the left side panel.
- From here, users can see a list of all active or archived templates.



- Click on an active template to edit any details, or click the blue "Create project template" button to see two options to create a new template:
  - **Create a new template** – This allows users to start a template from scratch.
  - **Create a template from an existing project** – This allows users to copy over certain aspects of a project into a template.



- Once a template has been created, users can add, edit, or remove members from the template and assign permissions or product access



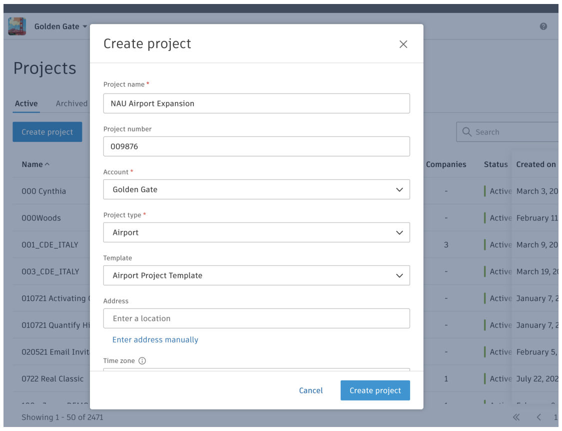
PRO TIP: Check out the help site to view which aspects of a product can be carried over into a template.

About Project Templates

2. Creating a Project

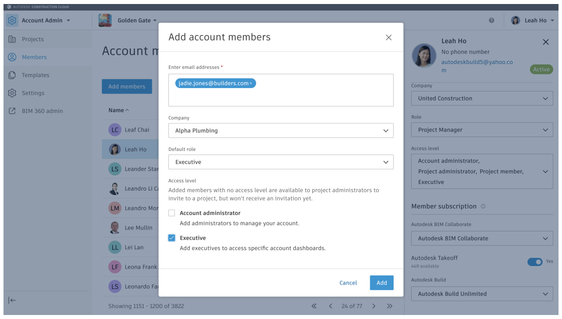
- Users with “Account Admin” settings can navigate to the Account Admin tool and select “Projects” from the left side panel.
- From here, select the blue “Create project” button.
- Enter all the relevant details, including project name, project number, address, start and end dates, as well as the option to use a project template.

Creating a Project >

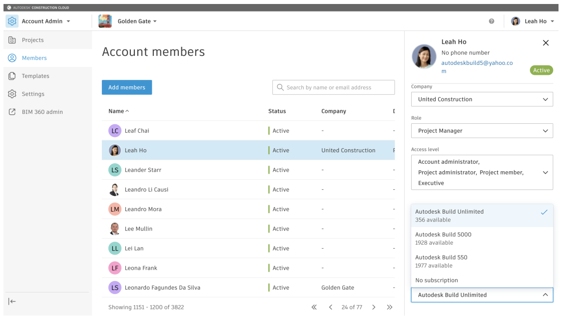


3. Adding Project Members

- Members can be added via an individual project as well as added to an account.
- From the “Account Admin” tool, select the “Members” option from the left side panel.



- Here, admins can add members and assign them access levels, associate roles or companies, as well as manage their individual member subscriptions.



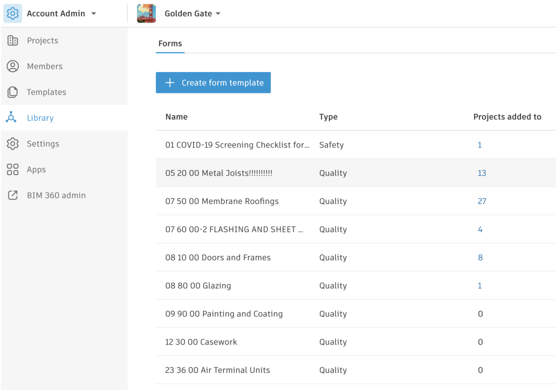
PRO TIP: Account Admins will see how many subscription licensees are available.

Manage Account Members >

4. Library

- The Account Admin Library serves as a centralized library of objects or “components.” From the library, users can configure a component, and simultaneously add them to multiple existing projects.
- Click on the ‘Forms’ tab to create a new form template
- Choose to build a new form or upload an existing PDF form
- Once saved, the new form template can then be added to new or existing projects
- Account Administrators can also edit any template and all updates will be pushed to any projects in which this template was added to

About Library >



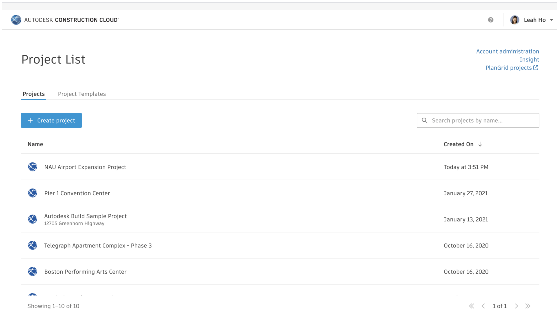
Additional Capabilities

Project Admin

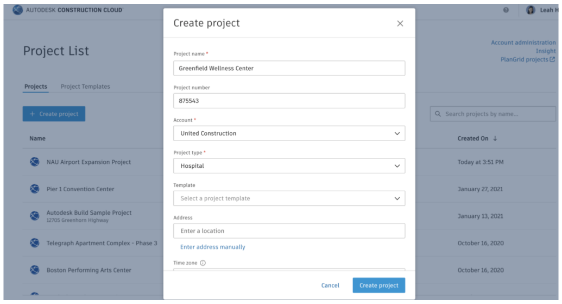
Ensuring all aspects are running smoothly is a key component of making sure projects stay on time and on budget. When technology is set up in a way that simplifies daily activity, teams can collaborate and get things done more efficiently. With the project admin features in the Autodesk Construction Cloud unified platform, admins can easily create new projects, add and manage project members, and ensure all settings or project locations are being used correctly.

1. Create Projects

- Users with “Project Admin” settings can open the project picker and click “View all projects” and select “Projects” from the left side panel.
- From here, select the blue “Create project” button.



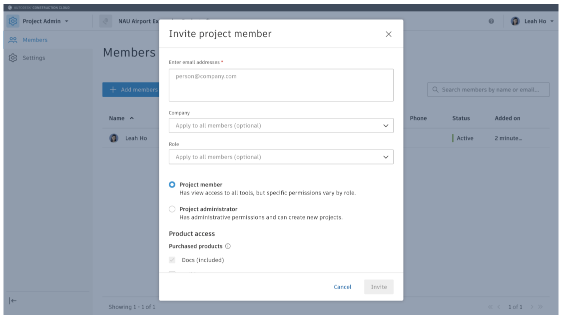
- Enter in all the relevant details, including project name, project number, address, start and end dates, as well as the option to use a project template.



ⓘ **Create a Project ›**

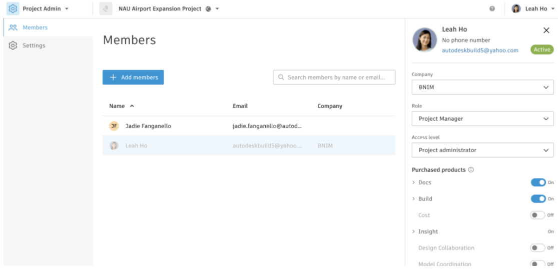
2. Adding Project Members

- Once a project has been created, users can add any team members and assign them access levels, roles, and which products should be turned on.
- Admins can also invite new users by email and associate them to a company or role.



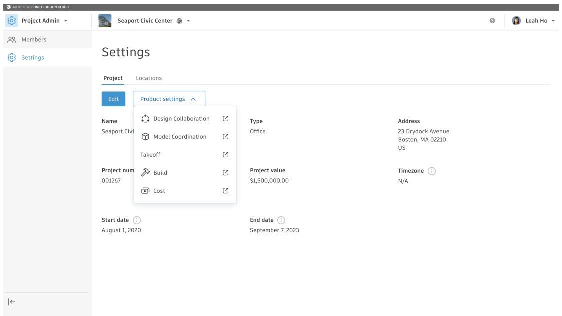
- NOTE: If a template was used to create the project, the members associated with the template will be prepopulated here. However, admins can also remove any members through their member settings panel.

ⓘ **Add/Manage Members ›**

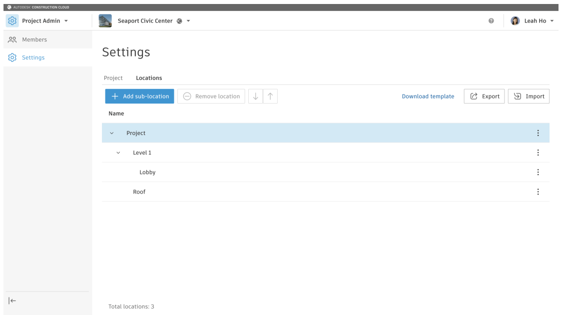


3. Settings

- Within the "Project Admin" tool, select the "Settings" option on the left side panel.
- From here, admins can update project information or update specific product level settings.



- Additionally, users can add locations or sublocations of a project (including levels or rooms), which can be referenced in other workflows throughout the product.



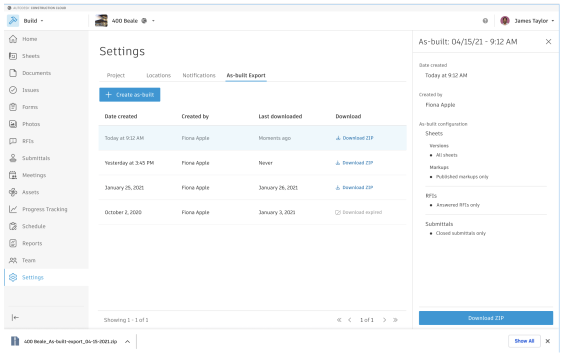
PRO TIP: Users can download an Excel template to populate different locations and then re-import for quicker entry.

ⓘ **Project Settings ›**

4. As Built Export

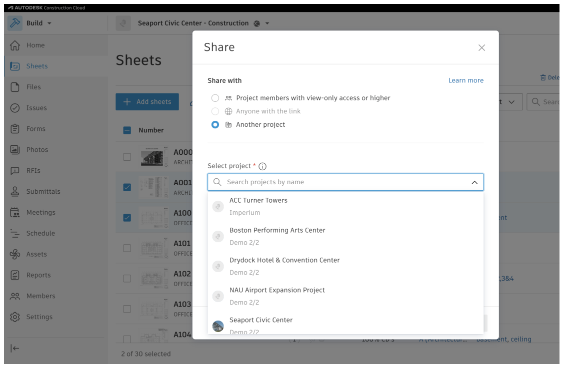
1. From the left navigation in Autodesk Build, select Settings to navigate to the Settings tool.
2. On the Settings page, click the As-built Export tab.
3. From here users can download previously generated as-builts or create a new one.
4. To create a new as-built, click the blue 'Create as-built' button and configure which Sheets, RFI's, and Submittals to include.
5. Once created, the user will receive an email notification which will direct back to the as-built export log page from where you can download the zipped file for all documents.

ⓘ **As-Built Export ›**



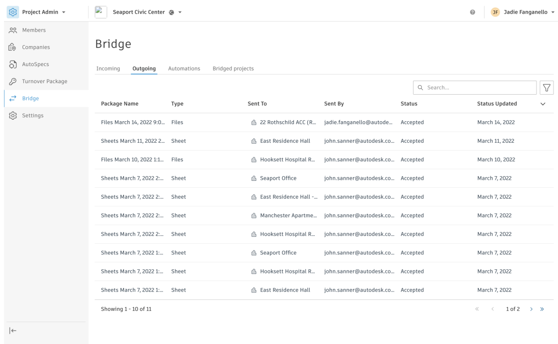
5. Bridge

- Using Bridge users can share sheets or files across projects or accounts.
- To share a sheet or file simply select the items and click the "Share" button on the top of the screen.
- From here select to share with "another project" or with "anyone with the link".
- The receiver will either see the sheets automatically added to their project or if shared via link, can select which project they would like to add the sheets to.
- Users can also select to automatically send newer versions to ensure the receiving team always has the most up to date information.



- To view a list of all shared or received sheets or files navigate to Bridge from the left side panel.
- From here you will see a tab for Incoming or Outgoing shares, a list of sheets that have automations set up, as well as a "Bridged Projects" tab where you can directly link one project to another to make sharing even easier.

ⓘ **Bridge Overview ›**



Additional Capabilities

Mobile Access

Autodesk Build, Autodesk Docs, and Autodesk BIM Collaborate/Pro teams can complete tasks from anywhere on the jobsite with seamless access to Autodesk Build data, even when they're offline.

With the PlanGrid Build mobile app, teams can get access to project data and all the project management tools they need on the jobsite, including creating sheet markups, editing quality and safety checklists, viewing RFIs, adding, tracking and resolving issues, capturing progress photos, and more.

1. Download the PlanGrid Build App

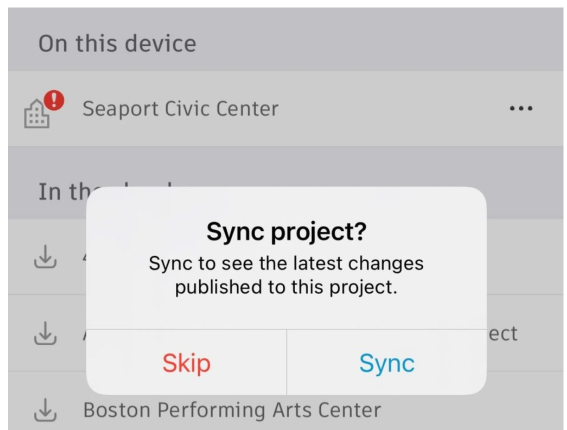
Go to the App Store or Google Play Store on your mobile device to download the PlanGrid Build app.

DOWNLOAD IOS APP

DOWNLOAD ANDROID APP

2. Access Data Online and Offline

- Teams are able to work on-site without internet access.
- They can have access to project data and complete essential tasks when working offline. Once back online, all changes will be synced back to the cloud.



3. Complete Tasks on the Jobsite

In addition to having access to all crucial project data, teams can complete all essential tasks without having to leave the jobsite.
Most common mobile workflows include:

- Viewing sheets
- Creating markups
- Tracking issues and RFIs
- Editing checklists and daily reports
- Capturing photos