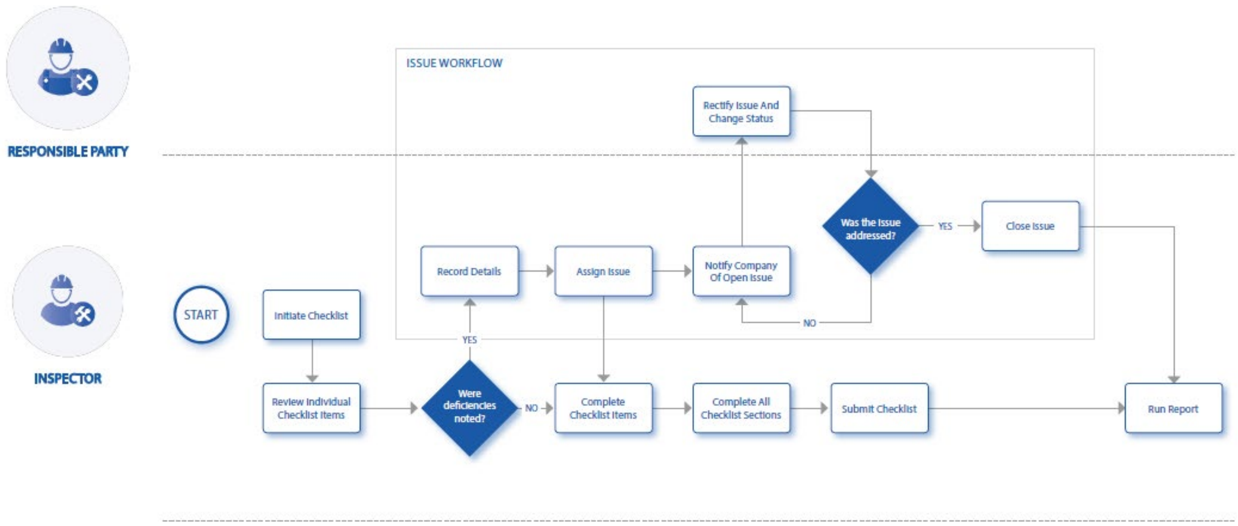
BIM 360 FIELD - QUALITY CHECKLISTS

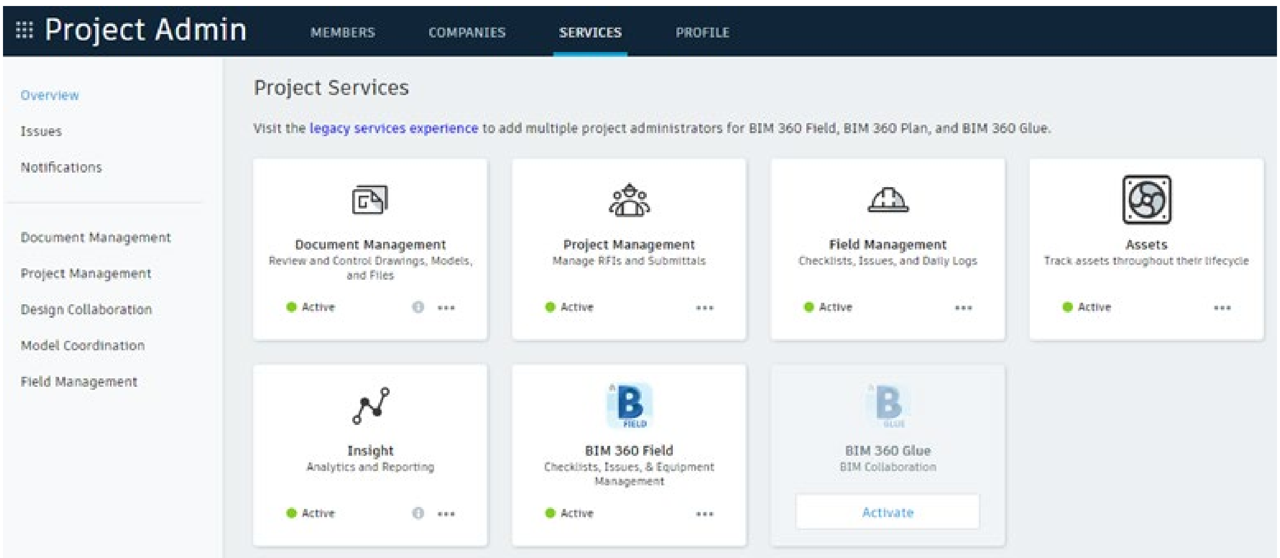
Quality problems that cost the most are the ones you miss. The checklist workflow makes sure your entire team is proactively managing quality standards from any device, anywhere. With the easy-to-use checklist builder, you can create quality checklists, defect lists, and commissioning templates, assign them to team members, and track status. Use Project Home to see your assigned checklists for the day, tomorrow, and the future. During the inspection use your mobile app to add notes, attach photos, and/or create issues for any nonconforming items. With the filters and reporting feature, you can identify trends and areas for improvement.

1. Quality Control Workflow



2. Activate the Field Management Module

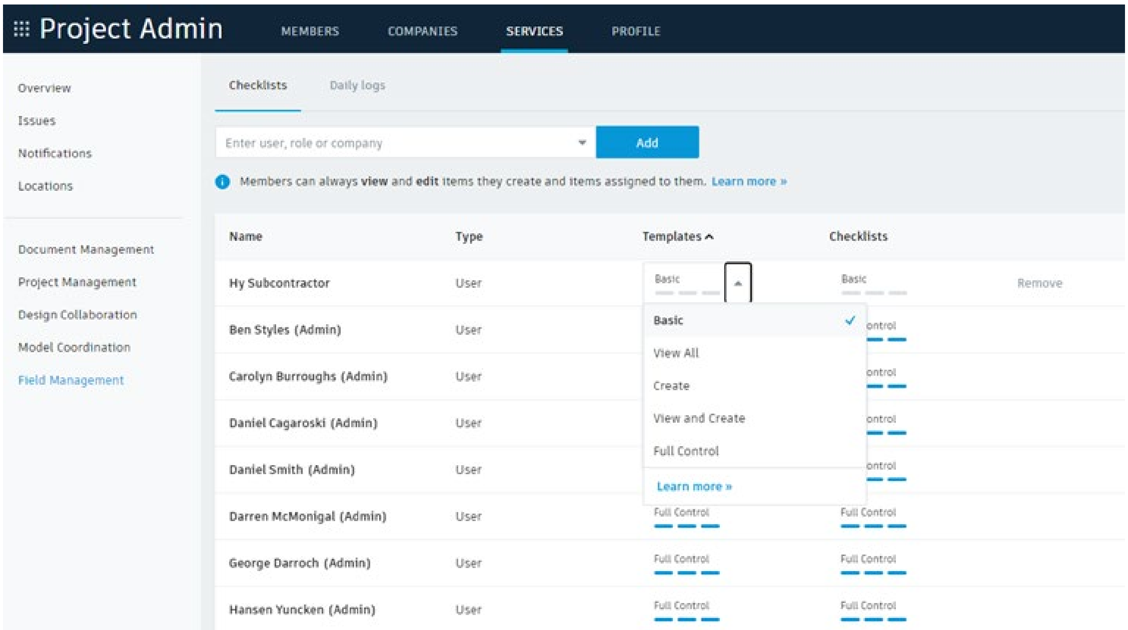
- A project admin needs to activate the Field Management module.
- In the Project Admin module select the Services tab, then “Overview” on the left sidebar.
- In the BIM 360 Field row, select “Filed Management” and click “Activate.” Designate at least one project admin.



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

3. Designating Issue Permissions

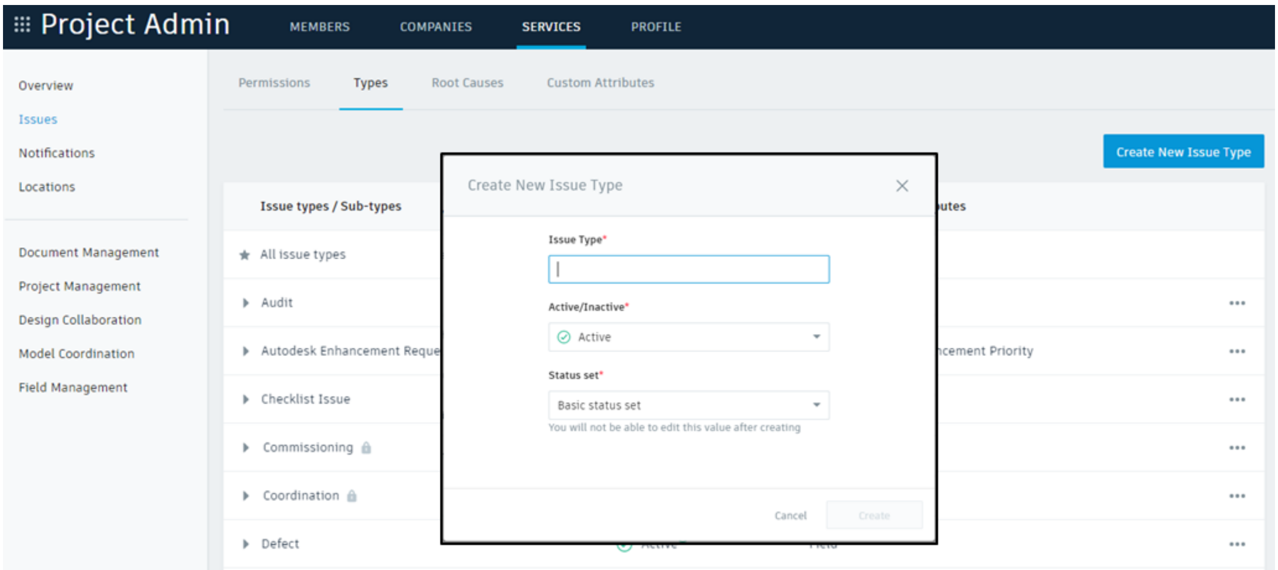
- In the Project Admin module, select the Services tab.
- On the left sidebar, click “Field Management.”
- Here you can designate user-, role-, or company-based permissions using the drop-down list.



4. Custom Issue Types

Project admins can control the issue types and sub-types available for selection. To make filtering issues more efficient, they can add custom issue types or sub-types.

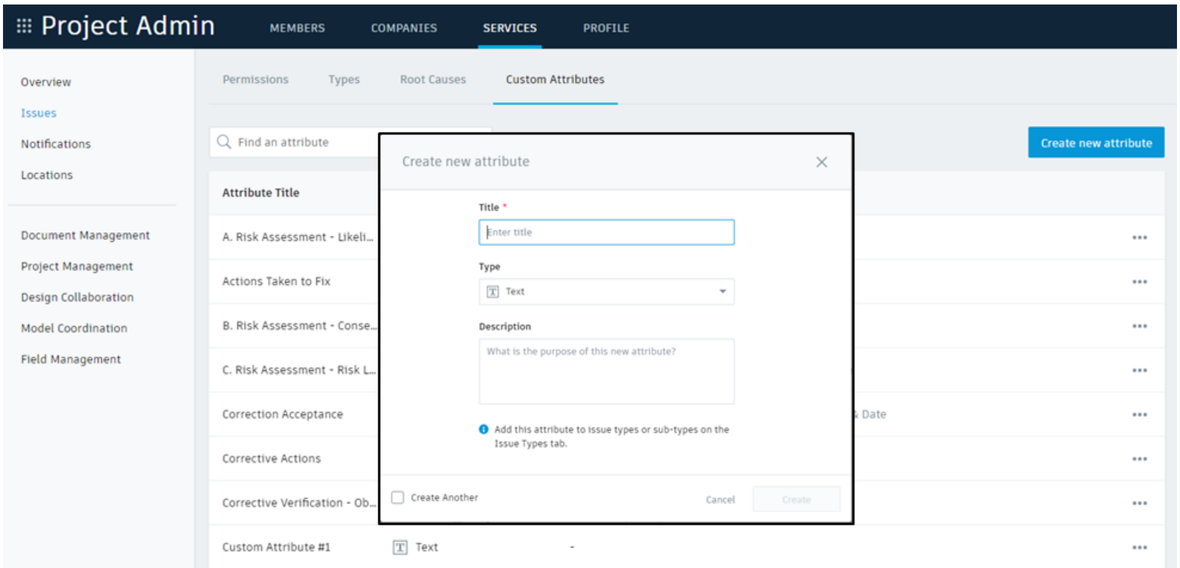
- In the Project Admin module, select the Services tab and Issues on the left sidebar.
- Select the Types tab then click “Create New Issue Type.” Enter the name to appear in the issue drop-down list
- Optionally, change from Active to Inactive. Inactive keeps the newly created type from being available for use. Select the appropriate status set and click “Create.”
- Select the drop-down next to an Issue Type to reveal the sub-types. Add sub-types by clicking “Add Sub-type.” Enter the name of the sub-type and click the check-mark. Use the more menu (...) to edit/activate sub-types.



TIP: Custom issue types can not be removed, they can only be turned off by using the more menu (...)to select Inactive.

5. Custom Issue Attributes

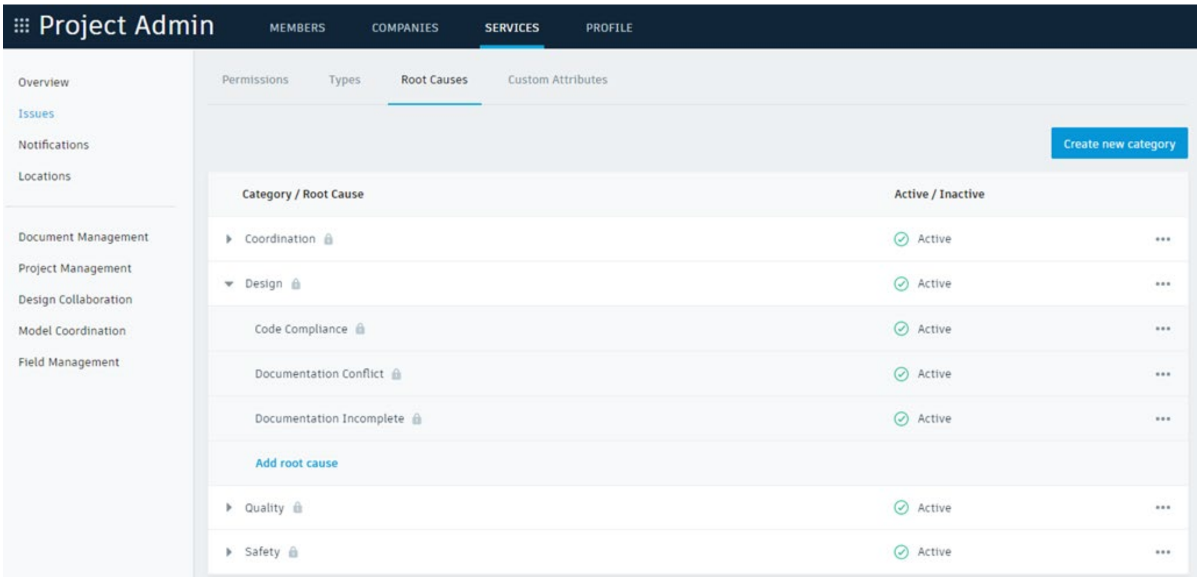
- In the Project Admin module, select the Services tab, Issues on the left sidebar, and then the Custom Attributes tab.
- Once on the Custom Attributes tab click “Create New Attribute.” Add a title and use the type drop down to select the field you need (text, dropdown, paragraph or numeric).



TIP: Once the custom attribute has been created, you have the option to map the attribute to Issue Types and Sub Types.

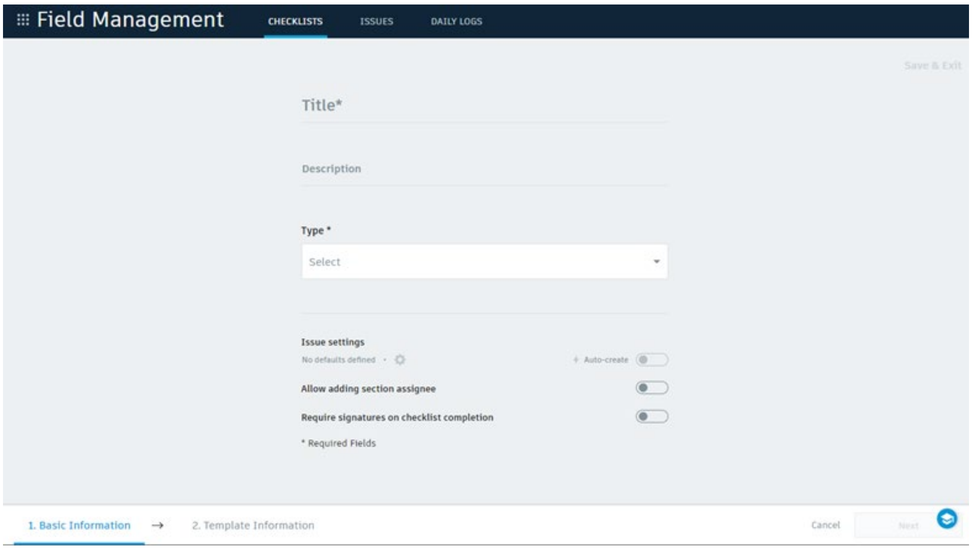
6. Custom Root Causes

- In the Project Admin module, select the Services tab, Issues on the left sidebar and then the Root Causes tab.
- First you need to create a category. Click “Create New Category” and enter a category name. Optionally, you can set it to inactive to delay usage while creating root causes. Click “Create.”
- Once you’ve created a category you can start creating root causes. Select the drop-down next to a Category to reveal the root causes for that category. Add a root cause by clicking “add root cause.” Enter the name of the root cause and click the check-mark. Use the more menu (...) to inactivate root causes.

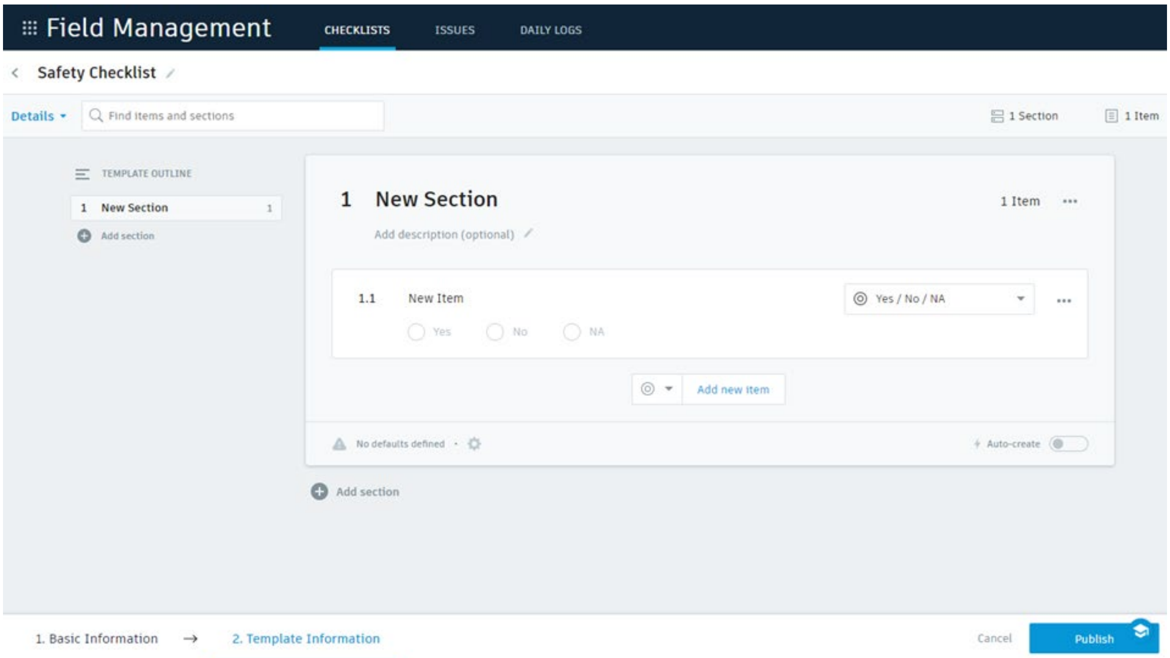


7. Creating Checklists

- Creating a checklist template: Project admins and users designated with “Create” permission can use the template builder to quickly add sections and items to create a new template.
- In the Field Management module, select the Templates tab and click “Create New Template.”
- Select the template type (e.g., Quality) using the “Type” drop-down list.



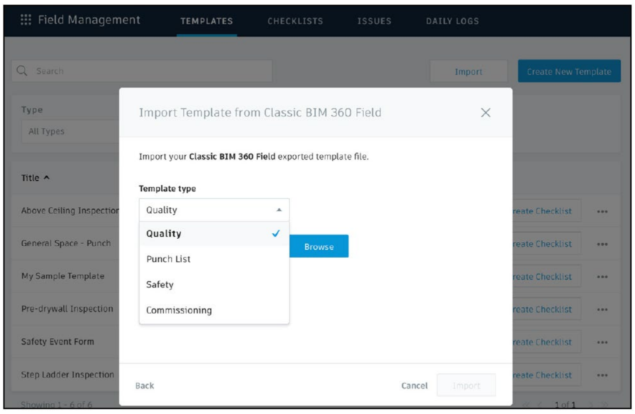
- You can also turn on different settings including “Issue Settings” where you can define if an issue should be auto- created from non-conforming items, “Allow adding section assingee”, and “Require signatures”.
- Here you will start building out the template. Add in section names such as “general,” and click “Add new item” to start populating questions related to that section.
- For each question, click the drop-down list to select the response type and fill in necessary fields. Select (…) to add a description, set as optional, or delete.
- When done, click “Publish.” Now the template can be used to create new checklists.



TIP: While generating a checklist template you have the ability to define at the header if signatures are required or not. If a signature is required, a “signature” section is added to the checklist template which allows the checklist template creator to define how many signatures are required. The role/company of the signatory required can be defined.

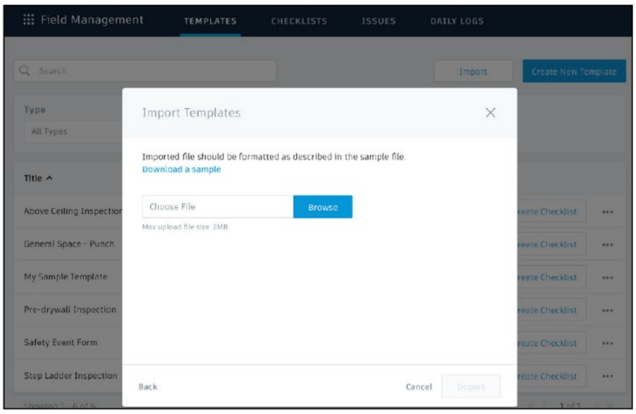
Import a template from Classic BIM 360 Field:

- In classic BIM 360 Field, export from the admin space the checklist template that you want to import. Save it to your computer.
- In the Templates tab, select "Import."
- Check "Import Template from Classic Field" and click "next."
- Specify the template type, click "Browse" to select the file, then "Import."
- Once it is imported, you can edit the template as needed.



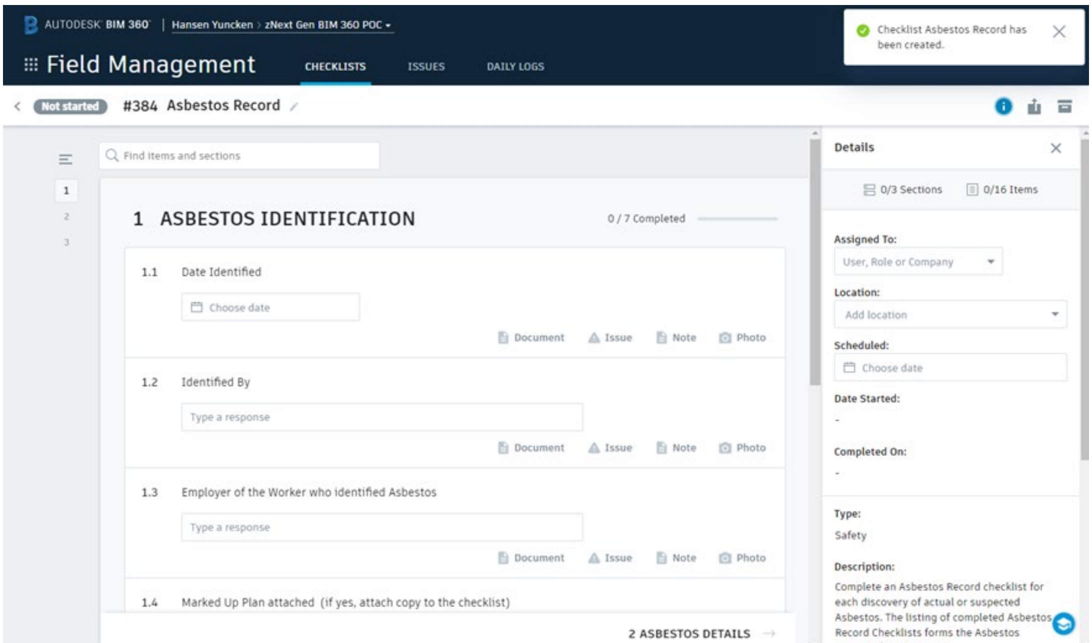
Import a template from excel:

- In the Templates tab, select "Import."
- Check "Import Templates" and click "next."
- If you don't have a properly formatted spreadsheet, click "Download a sample" and enter your inormation in the spreadsheet. Rename and save the file.
- If you have a properly formatted spreadsheet, select "Browse" to choose the file, then "Import."



8. Adding Checklists to a Project

- In the Templates tab, use the search bar or filter by type to find the checklist you need.
- Click "Create Checklist" in the list view, or open the checklist and click "Create Checklist" to add it to the project.
- Once the checklist has been added, a new window will pop up where you will see a details box. Complete all necessary fields.

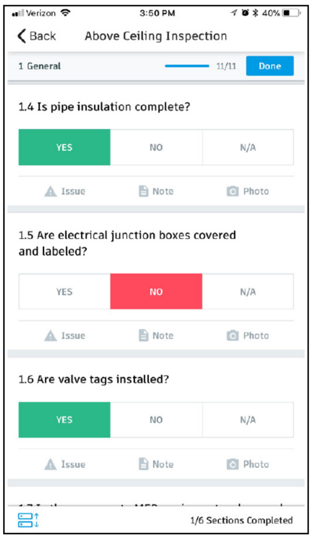


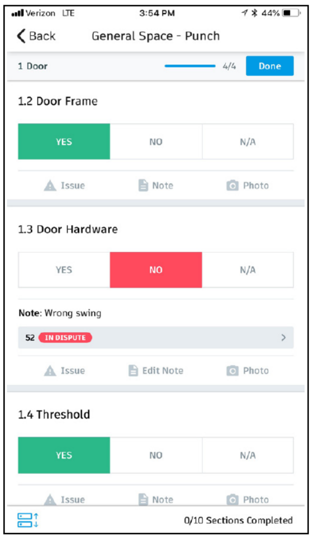
TIP: Add a checklist to the project with the BIM 360 mobile app by tapping "+" in the checklist to select your template.

TIP: Using checklist sections will help navigate long checklists by breaking items down into more manageable groupings.

9. Completing Checklists

- Complete your checklist in the field with the BIM 360 mobile app - tap “Checklists” and select a checklist from the list.
- As you perform your inspection, review the criteria for each item and enter the appropriate response.
- (Optional) Add a note/photo by tapping the icon under each item. Use the photo markup tools to refer to specific areas.
- (Optional) If you aren’t utilizing the Auto Issue Create function for non-conforming items, you can manually create issues. Tap the issue icon and fill in. You can snap a photo and add markups. The issue is added to the project issue list.
- Tap “Save” when complete.



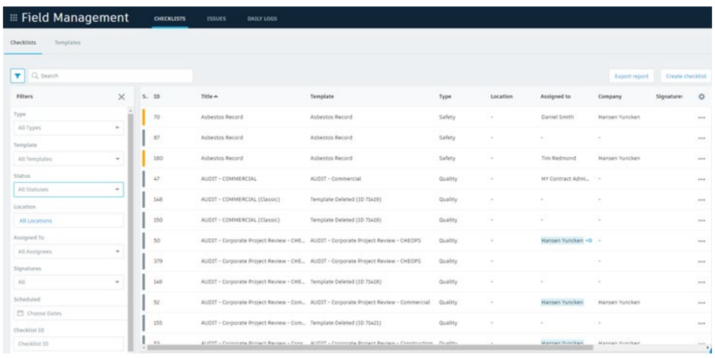


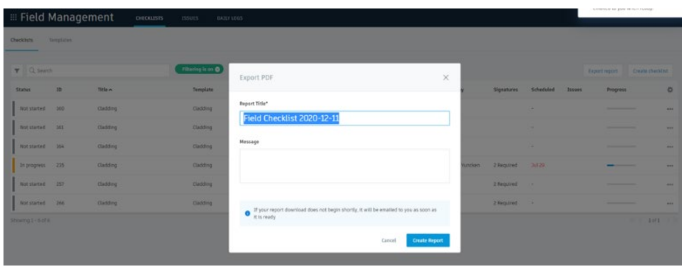
10. Exporting Reports

- On a computer select the Field Management module then the Checklists tab.
- To export a summary report of all clicklists click “Export Report.” You can optionally edit the report title and add a message. Select “Create Report” and the report will be emailed to you.
- To export a detail report of an individual checklist select to open the checklist. Then click the folder icon in the top right corner. The report will be emailed to you.

11. Filter and Sort

- On a mobile device, tap “Checklists” then use the filter options.
- On a computer select the Field Management module then the Checklists tab to filter with the drop-down lists or sort by clicking the column headers.





TIP: Use the reports tab in the Insight module to access all exported summary and detailed checklist reports. You can filter the reports by type, creation date, and creator in order to quickly find the report you need.

You can download the report or share it with team members by clicking the three dot icon.