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HOW TO SURVIVE AS A BIM MANAGER · EPISODE 4

Surviving the seven CDEs

Auto-Publish Send It Out | **Auto-Collect** Bring It In | **Auto-Route** Pass It On

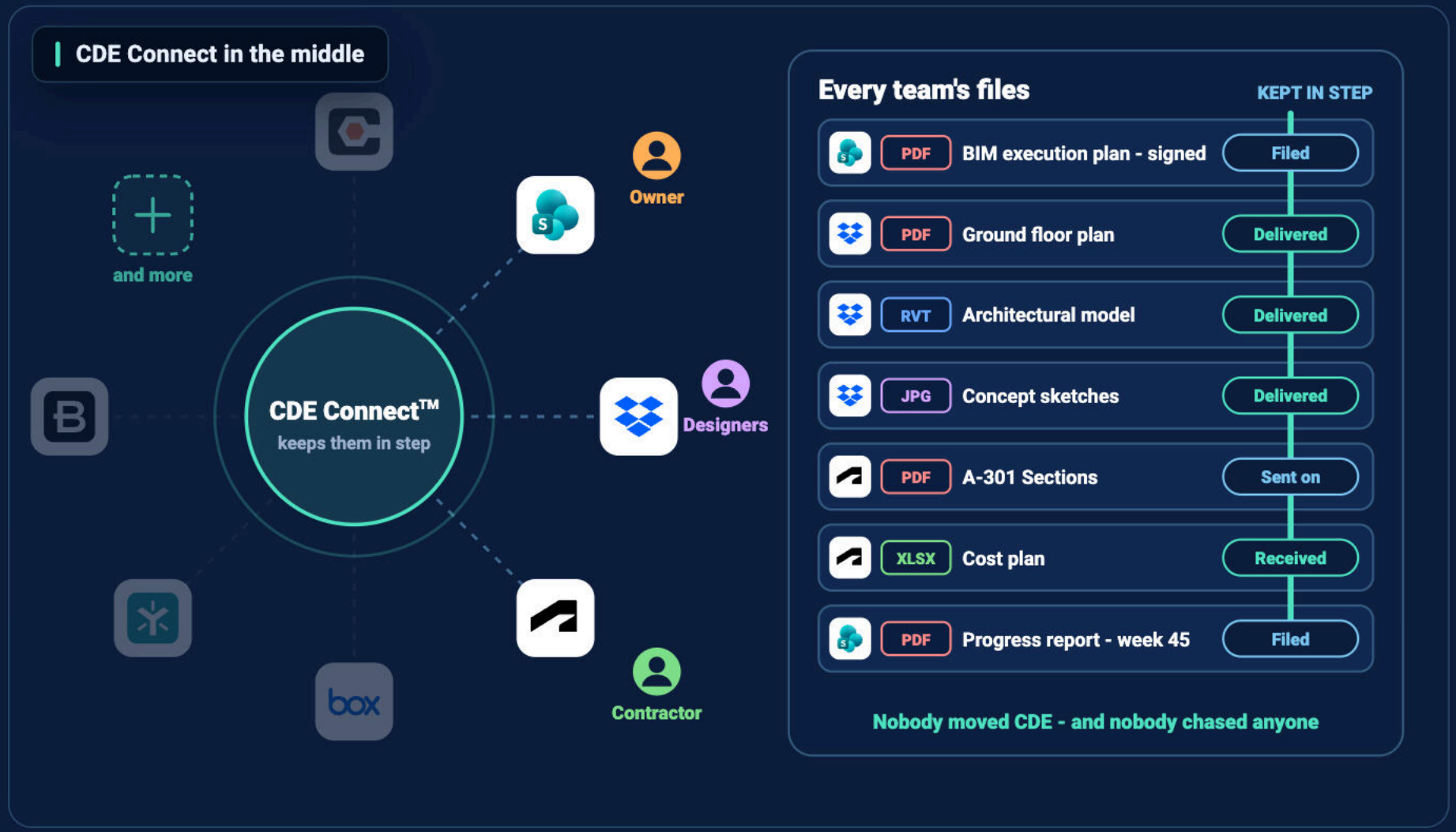
SEVEN CDEs. ONE PLAN.



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What if every CDE just kept up?

The client keeps SharePoint. The designers keep Dropbox. The contractor keeps Autodesk Forma. CDE Connect keeps them in step.



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THE WHOLE DIFFERENCE

Every project moves files between CDEs.
Let them move themselves.

Auto-Publish Send It Out

Auto-Collect Bring It In

Auto-Route Pass It On

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THE ISO 19650 IDEA

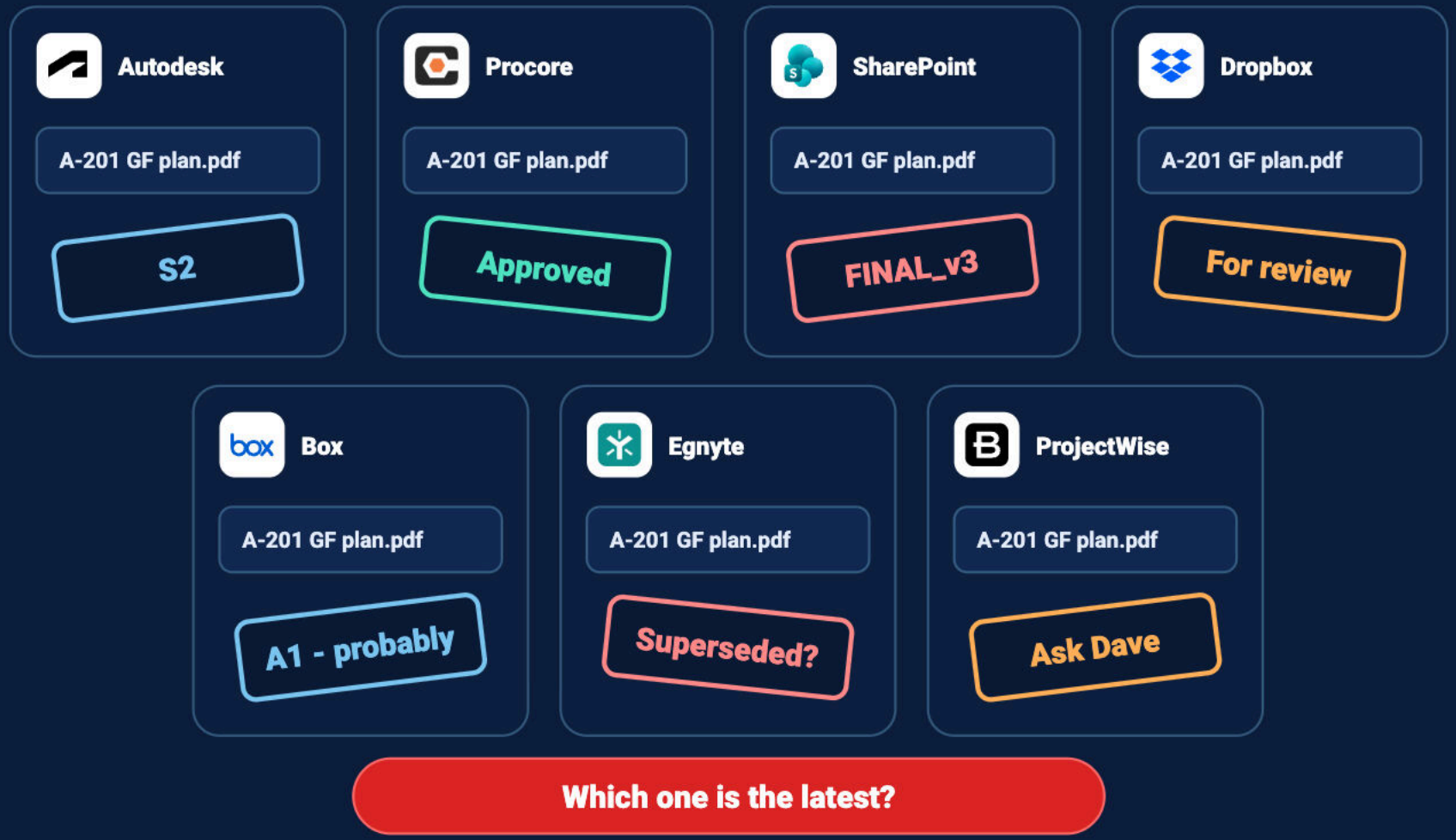
Know where to find the latest. One source of truth.

Best practice says you should always be able to find the right file.

Real projects have it in seven places.

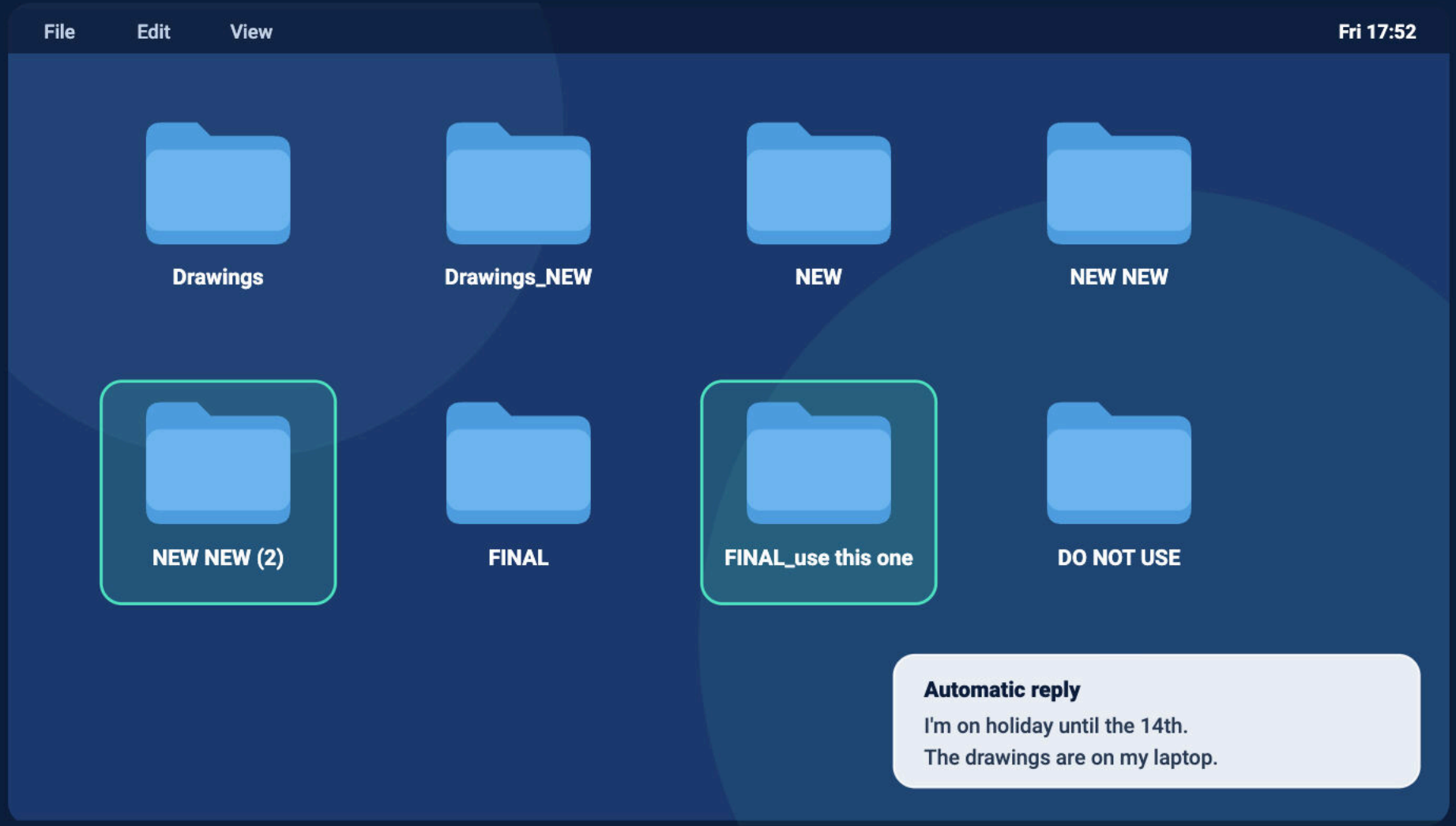
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Same file on the seven CDEs



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Most projects have an eighth CDE



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So you become the courier



Tracker.xlsx — UPDATED BY HAND

FILE	TRACKER	REALLY
A-201	C01	C02
A-202	B	C
A-301	C02	C03
S-101	A	B

Last updated: Friday, 17:40

OUT OF DATE

Hours every week, moving files - and the tracker still can't keep up.

ADD IT ALL UP

This is where most project files end up

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⚠ Seven CDEs, seven versions

⚠ S2 here, Approved there, FINAL_v3 over there

⚠ Nobody knows who sent what

⚠ Submittals kept to cover yourself, not to help

⚠ Email, FTP sites and thumb drives

⚠ And you, the courier between systems

⚠ No agreed receipt for what was sent or received

A later webinar: **DOCie** - an industry effort to agree how documents get exchanged

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So what do we do about it?

1

Make everyone use one CDE?

2

Just manage the gaps?

3

Automate it?

Live demo today

WAY 1

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We'll just make everyone use one CDE



WAY 2 · MANAGE THE GAPS

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Each one works fine. The trouble is in between.

Syncs to set up, files moved by hand, workflows written down - **and none of it in the contract.**



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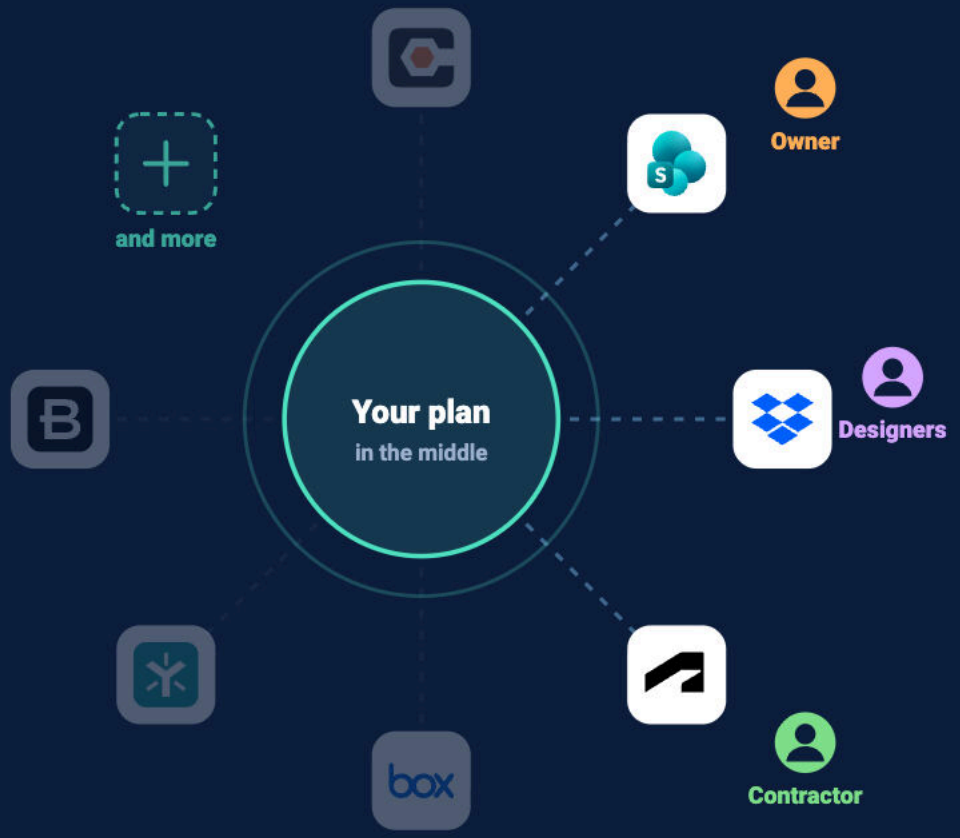
OUT OF DATE

Hours every week, moving files - and the tracker still can't keep up.

WAY 3 · AUTOMATE IT · LIVE DEMO

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We're putting your plan in the middle



Every team's files

KEPT IN STEP

PDF	BIM execution plan - signed	Filed
PDF	Ground floor plan	Delivered
RVT	Architectural model	Delivered
JPG	Concept sketches	Delivered
PDF	A-301 Sections	Sent on
XLSX	Cost plan	Received
PDF	Progress report - week 45	Filed

Nobody moved CDE - and nobody chased anyone

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WHAT IF?

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WHAT IF

Your BEP filed itself in SharePoint the moment it was approved?

Signed by every party, then in the client's record.

Auto-Publish Send It Out | Auto-Collect Bring It In | Auto-Route Pass It On



SharePoint

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WHAT IF

The weekly progress report filed and sent itself?

Filed where the client looks, and emailed to the team.

Auto-Publish Send It Out | **Auto-Collect** Bring It In | **Auto-Route** Pass It On



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WHAT IF

Every file request knew which folder to watch?

Your designers keep their Dropbox. The plan keeps an eye on it.

Auto-Publish Send It Out

Auto-Collect Bring It In

Auto-Route Pass It On



Dropbox

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WHAT IF

Your information delivery plans updated themselves?

Each request filled as its file lands - and the dashboard with it.

Auto-Publish Send It Out | **Auto-Collect** Bring It In | **Auto-Route** Pass It On



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WHAT IF

Approving a drawing sent it straight on to Autodesk Forma?

Where the contractor already works.

Auto-Publish Send It Out

Auto-Collect Bring It In

Auto-Route Pass It On



Autodesk

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Three demos. Your plan in the middle.

Each one set up once in CDE Connect, then left to run.

1

Auto-Publish Send It Out

- An appointment, approved in Plannerly
- Filed in the client's SharePoint - no email

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2

Auto-Collect Bring It In

- Episode 1's MIDP, files and charts set up
- Dropped in Dropbox - in the plan, the charts move

 → Plannerly

3

Auto-Route Pass It On

- A drawing from that Dropbox, reviewed here
- Status changed - on to the contractor's Autodesk Forma

 → Plannerly → 

Auto-Publish Send It Out | Auto-Collect Bring It In | Auto-Route Pass It On

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Auto-Publish

Approve it here. It's filed there - no email.

- **A document, approved**
  The Appointment, status set to Approved
- **Filed in the client's SharePoint**
  In their Contracts folder, by itself
- **Set up once**
  New revisions follow automatically



ONE FOR THE CHAT

Where does your client keep the final record?

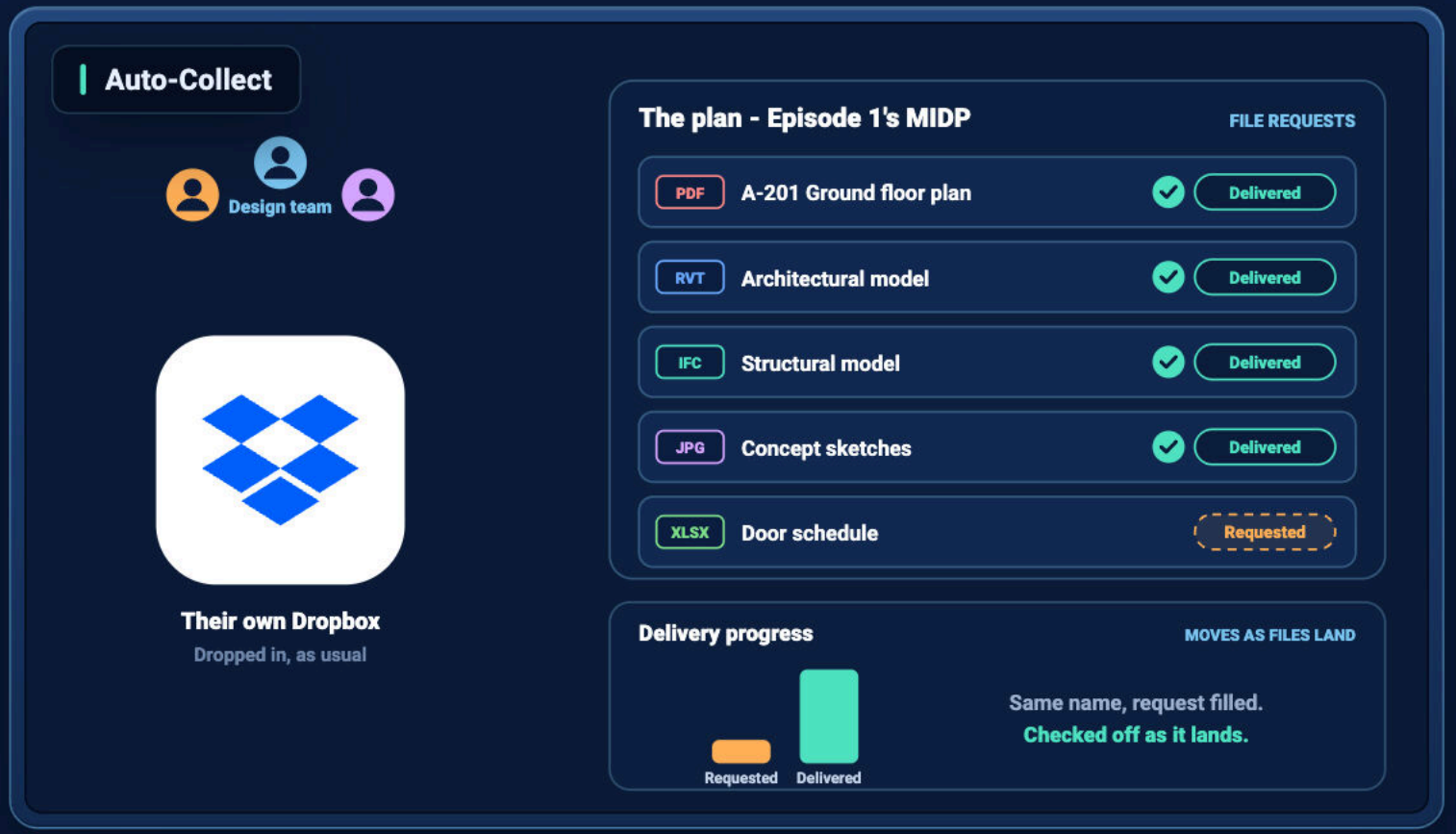
Auto-Publish Send It Out | Auto-Collect Bring It In | Auto-Route Pass It On

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Auto-Collect

Drop it in Dropbox. It's in the plan.

- **Episode 1's MIDP**
  Requests, files and charts already set up
- **Dropped in Dropbox**
  The design team's own folder - nothing new for them
- **Requested, then delivered**
  Each file fills its request, and the charts move



ONE FOR THE CHAT

What's the strangest file name you've received this month?

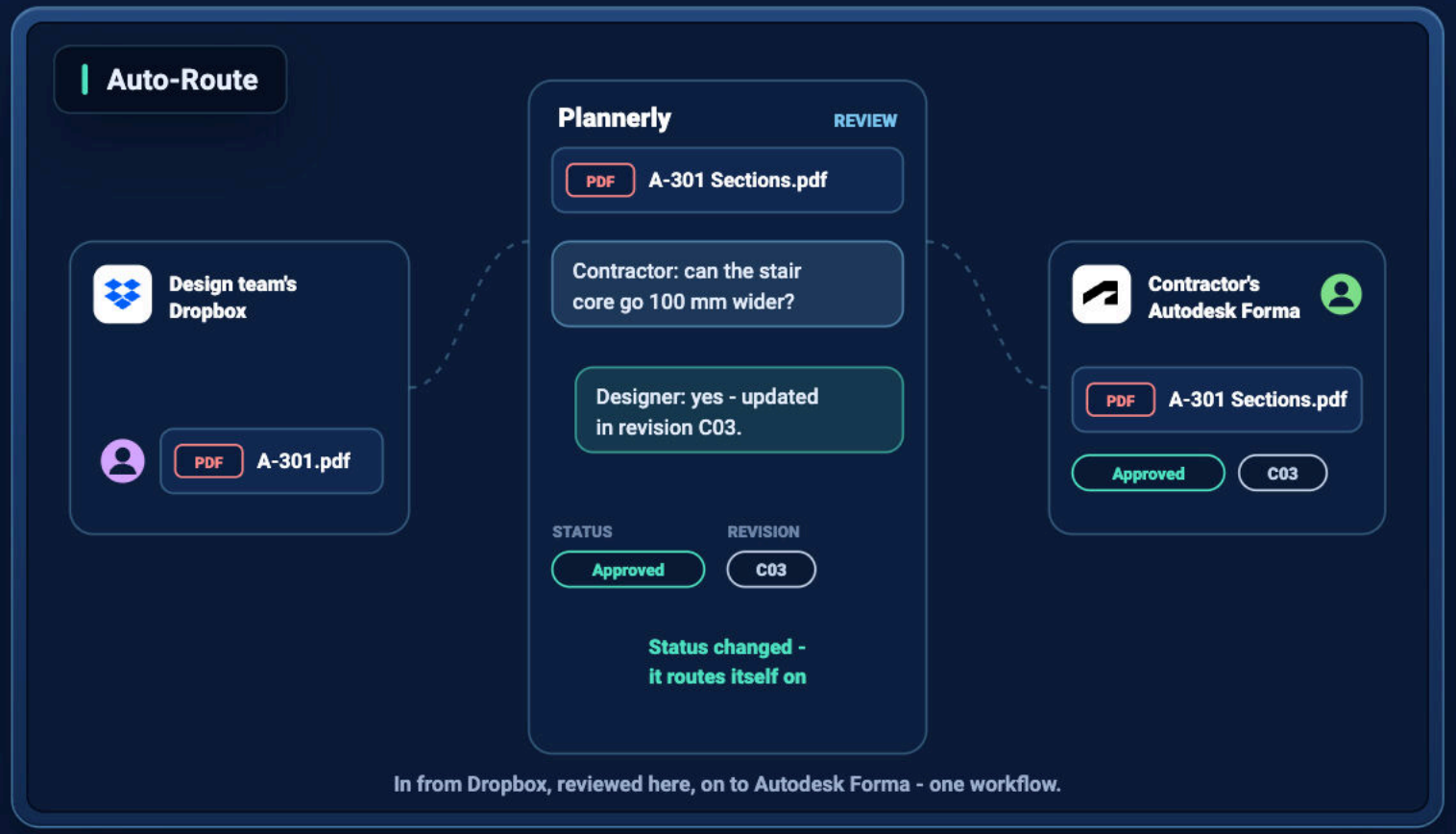
Auto-Publish Send It Out | Auto-Collect Bring It In | Auto-Route Pass It On

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Auto-Route

Reviewed here. Approved, and it's in Autodesk Forma.

- **From the design team's Dropbox**
  A drawing that came in during demo 2
- **Reviewed in Plannerly**
  Comments, then one status change
- **On to Autodesk Forma**
  The contractor gets it where they work



ONE FOR THE CHAT

Where does your contractor want approved files?

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YOUR CDE SURVIVAL KIT

Three things to take with you

- **The CDE Connect handout** - all of today on one page
- **Three free PDFs** - from our ISO 19650 training
- **The beta program** - type “add me” in the chat, new connectors included

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NEXT TIME ON HOW TO SURVIVE AS A BIM MANAGER

Surviving AI Model Checking

Checking models against your requirements.

THU, NOV 19 · SAME TIME, SAME LINK

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Auto-Publish Send It Out | **Auto-Collect** Bring It In | **Auto-Route** Pass It On

THANK YOU

SEVEN CDEs. ONE PLAN.

The beta program, new connectors included: **type “add me” in the chat**

Every step's full walkthrough - free: **plannerly.com/training**

Episode 5 - AI Model Checking: **Thu, Nov 19, same link**