

Autodesk Forma Data Management Configuration and Training

Autodesk Forma Data Management (formerly Autodesk Docs) is a centralised document management solution that acts as a single source of truth across the project lifecycle, for all project teams.

Deliverable

Man and Machine's Autodesk Forma Data Management Configuration services aim to have you up and running within a short amount of time with this powerful Common Data Environment. You will learn from Industry and Application experts, who can customise the toolsets to suit your specific needs.

Whilst the number of days and actual deliverables vary dependent on your precise requirements, this service typically includes:

- Scoping
- Consulting Time
- Best Practise Configuration and Integration
- Customisation Options
- Up and Running Training for your Administrators and Users

SCOPE OF WORKS

Our configuration services typically start with this hand-holding consulting service, which gives you access to an Autodesk Certified Professional in order to discuss and scope out your requirements against best practices and industry standards, before your implementation of the customised configuration(s):

- Custom Folder Structure
- Member and Role Configuration
- Folder Access and Permissions Configuration
- ISO19650 Naming Convention Setup
- Custom Attribute Configuration
- Issue Management Customisation
- Review Workflow Building
- Actual Project Setup

IMPLEMENTATION SERVICES

Following the scoping session, your dedicated Forma engineer will implement the customisation of your account, set up your hub along with a project template to suit the requirements from the scoping session. Alongside giving you a project to get started on, this will ensure a test project or sandbox is ready to use for your training sessions with the admin and user teams.



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TRAINING FOR PROJECT AND ACCOUNT ADMINISTRATORS

This session includes the following topics:

- Autodesk Forma Interface Overview
- Account Administrator's Roles
- Account Administrator's Typical Workflows
- Adding Account Administrators
- Adding Members and Companies
- Editing and Creating Roles
- Activating Services
- Setting Up and Working with Project Templates
- Setting up a Project Ready to be Used
- Project Settings
- Adding Members, Assigning Roles, Companies and Services
- Setting Folder Permissions (by Member, Role and Company)
- Document Management Settings (Attributes, Naming Standards, Advanced Settings)
- Project Workflow Reviews (Setting up and Working on a Project)
- Issues (Types, Customised Fields, Permissions and Root Causes)
- Reports (Templates and Creating Reports)

TRAINING FOR ALL USERS

This session includes the following topics:

- Autodesk Forma Interface Overview
- Project Administrator's Roles and Functions
- Folders (Members Permissions and Subscriptions)
- Uploading Files through the Web Browser
- Uploading Files through the Desktop Connector
- Downloading Files
- Folder Attributes
- Viewing Files (Drawings, Models, Documents, Microsoft Office Files)
- Marking Up Drawings
- Issue Management (Creation of Issues, Types, Root Causes)
- Document Compare (Drawings and Model Versions)
- Moving, Copying, Sharing, Locking and Deleting Files
- View File Activities
- Project Workflow Review
- Transmittal Creation
- Insights



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