



AUTODESK FORMA

Consulting Services

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Forma Data Management Configuration and Training

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 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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Forma Data Management

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Forma Build Configuration and Training



Forma Build requires a Forma Data Management Configuration, either pre-existing or via our Forma Data Management Configuration Service.



Forma Build (formerly Autodesk Build) adds complete end-to-end cloud-based project workflows and interoperability, to further augment your Forma Data Management deployment.

Deliverable

Due to the sheer complexity and number of toolsets, scope of works sessions are necessary to ensure alignment of your own requirements to the final configuration.

Whilst the number of days and actual deliverables vary dependent on your precise requirement, 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 customised configuration(s):

- Files
- Issues
- Sheet Settings
- Form Customisation (Checklist, Sign Off Sheets, etc)
- Photos Workflows
- RFI Configuration
- Submittals Setup
- Meetings Settings
- Scheduling Permissions
- Asset Definition
- Report Template and Schedules

IMPLEMENTATION CONSULTING

Following the scoping session, your dedicated Forma engineer will implement the customisation on 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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ADMINISTRATION OVERVIEW

This session includes the following topics:

- Forma Build Interface Overview and Project Progress
- Settings of Sheets
- Setting of Specifications
- Issues Customisation/Management
- Form Permission and Workflows
- Photo Settings
- RFIs Workflows
- Submittals Workflows
- Creating and Managing Meetings
- Correspondence Permissions and Settings
- Schedule Permissions
- Assets Modification and Set Up
- Sharing Sheets and Files from one Forma Project to another
- Reports - Templates and Creating Reports

GENERAL USER OVERVIEW

This session includes the following topics:

- Forma Build Interface Overview and Project Home
- Publishing and Using Sheets
- Accessing and Viewing Files
- Issue Creation and Usage
- Working with Forms
- Adding Photos
- Creating RFIs
- Creating Submittals
- Creating and Managing Meetings



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Forma Design Collaboration Configuration and Training



Forma Design Collaboration requires a Forma Data Management Configuration, either pre-existing or via our Forma Data Management Configuration Service.



Deliverable

Forma Design Collaboration (formerly Autodesk BIM Collaborate Pro) Configuration is a service designed to further augment the Forma Data Management deployment. It provides an efficient and effective implementation to enable you to benefit from access to this industry standard, cloud-based collaboration platform.

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

- Administrative Overview and Forma Design Collaboration Configuration
- Model Coordination
- Design Collaboration

ADMINISTRATION OVERVIEW AND IMPLEMENTATION

This session includes the following topics:

- Project Setup Settings
- Shared Folder Settings
- Team Setup Settings
- Coordination and Space Settings
- Schedule Publish for Models
- Creating Meeting Templates
- Correspondence Settings
- Adding Members
- Invitation to Bridge Project
- Creating Clash Space for Model Coordination



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DESIGN COLLABORATION TRAINING (IF REQUIRED)

This session includes the following topics:

- Worksharing Overview
- Working with the Desktop Connector
- Cloud Publishing
- Swim Lanes Overview
- Consuming and Sharing Packages
- Issues Overview/Issues Add-in
- Reviewing Design Changes
- Creating Meeting Minutes
- Creating and Organising Emails within Correspondence
- Reporting
- Bridge Overview

MODEL COORDINATION TRAINING

This session includes the following topics:

- Model Overview
- Creating and Saving Federated Views
- Clash Detection
- Collaboration Overview
- Manage Design Exchanges between Task Teams
- Preparing a Model for Clash Detection
- Running a Clash Detection
- Reviewing Clashes
- Model Reviews and Reporting
- Working with Clashes in Autodesk Forma
- Meeting Minutes Setup
- Reporting



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Forma Takeoff Configuration and Training



Forma Takeoff requires a Forma Data Management Configuration, either pre-existing or via our Forma Data Management Configuration Service.



Deliverable

Forma Takeoff (formerly Autodesk Takeoff) Configuration adds cloud-based quantity take off functionality to your existing Forma Data Management deployment. Besides the provision of Forma Takeoff, our technical experts will help with:

- Administrative Best Practise and Overview
- 2D and 3D Takeoff User Overview

ADMINISTRATION OVERVIEW

This session includes the following topics:

- Cloud-Based Quantification Overview
- Project Administration
- Adding Members and Configuration Access
- Classification Systems and Units
- Custom Project Template Configuration

TAKEOFF OVERVIEW

This session includes the following topics:

- Setting up a Project (Packages, Takeoff Types, Classifications)
- Project Settings
- Working with 2D Sheets (Upload and Viewing)
- Working with 3D Models (Upload and Viewing)
- Performing 2D Takeoffs
- Performing 3D Takeoffs
- Assigning Formulae to Takeoffs (Using Formulae for More Complex Takeoffs)
- Using Packages to Create Detailed Takeoffs
- Inventory Management (Exporting to Excel)





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