

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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