

Autodesk Forma Data Management Training Course

Course Overview

Course Length: 16-Hours

- 16-Hours – 8 x 2-hour training sessions
- Remote training over MS Teams
- Sessions are recorded and download links for each session are provided for future use
- Training for up to 1-3 people
- Sessions can start within 7 days upon ordering
- Flexible sessions (for example, consecutive or Monday, Wednesday, Friday)
- Courses are private and topics can be customised to suit
- Includes Certificate of Completion

The Autodesk Forma Data Management Training Course teaches organisations how to manage project information, configure collaboration workflows, and implement document control standards using Autodesk Docs and Autodesk Construction Cloud technologies.

Participants learn how to establish project structures, configure permissions, manage approvals, control revisions, and standardise information management procedures across multiple disciplines and project teams.

The course covers practical workflows for architects, engineers, contractors, consultants, owners, and digital engineering teams, ensuring organisations establish a single source of truth for project documentation and digital delivery processes.

Topics Covered

- Autodesk Docs administration
- Project setup and configuration
- Folder structures and naming conventions
- User permissions and access controls
- Approval workflows
- Review procedures
- Document version control
- Issue management
- Transmittals and packages
- Dashboard reporting
- Information governance
- ISO 19650 workflows
- BIM collaboration procedures
- Multi-office deployment
- Enterprise digital delivery standards
- Autodesk Construction Cloud administration

Prerequisites

Participants attending this Autodesk Dynamo Online Course should have working knowledge of at least one Autodesk application such as Revit, Civil 3D, Advance Steel, FormIt, or another Autodesk design platform.

No previous programming experience is required. The course is designed for both technical and non-technical users wanting to automate workflows through visual programming. Access to Autodesk Dynamo and the relevant Autodesk software platform is required for participation in the training sessions.

Training Guide Contents

Chapter 1: Introduction to Autodesk Forma Data Management

- Understanding Autodesk Docs environments
- Common Data Environment principles
- User roles and responsibilities
- Information management fundamentals

Chapter 2: Project Setup and Folder Structures

- Creating projects
- Folder structures
- Naming conventions
- Company standards implementation

Chapter 3: User Permissions and Access Controls

- Team permissions
- Role assignments
- Security settings
- Multi-office collaboration procedures

Chapter 4: Document Management and Version Control

- Uploading and managing documents
- Version history
- Review processes
- Document lifecycle management

Chapter 5: Approval Workflows and Transmittals

- Approval procedures
- Review workflows
- Transmittals
- Information exchange standards

Chapter 6: Issues, Markups and Collaboration Tools

- Issue management
- Markups and comments
- Team coordination procedures
- Communication standards

Chapter 7: Dashboard Reporting and Project Analytics

- Dashboard creation
- KPI reporting
- Executive summaries
- Project insights

Chapter 8: Information Management and ISO 19650

- Information requirements
- Naming standards
- Compliance procedures
- Governance frameworks

Chapter 9: Autodesk Application Collaboration Workflows

- AutoCAD integrations
- Civil 3D collaboration
- Plant 3D project environments
- Revit Cloud Worksharing
- Navisworks coordination procedures

Chapter 10: Enterprise Deployment and Administration

- Multi-project administration
- User onboarding
- Change management
- Standards maintenance

Optional Chapter: AutoCAD Collaboration Environment Setup

- Xref management
- Shared project standards
- Publishing workflows
- Cloud collaboration procedures

Optional Chapter: Civil 3D Collaboration Environment Setup

- Data Shortcuts
- Survey collaboration
- Shared references
- Infrastructure workflows

Optional Chapter: Plant 3D Collaboration Environment Setup

- Project structures
- Specification management
- Shared environments
- Publishing standards

Optional Chapter: Revit Cloud Collaboration Setup

- Cloud worksharing
- Linked models
- Shared coordinates
- BIM governance procedures

Optional Chapter: Navisworks Model Coordination Setup

- Coordination models
- Clash management
- Issue workflows
- Construction review procedures