

Autodesk Forma Template Setup 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

*Training may go over 16-hours depending on requirements and can be determined prior to commencement

The Autodesk Forma Template Setup Training Course is designed for organisations looking to standardise their digital delivery environment, establish Autodesk Docs project templates, and implement company-wide standards for collaboration, information management, and construction workflows.

Participants work from a professionally developed Autodesk Forma and Autodesk Docs base environment which is customised throughout the training to suit organisational requirements, including folder structures, permissions, naming conventions, approval workflows, dashboards, reporting standards, and governance procedures.

Rather than simply learning administration, attendees leave with a customised Autodesk Forma environment that can be immediately deployed across projects and teams. The course combines training outcomes with practical commercial outcomes, helping organisations establish a single source of truth for digital engineering and construction information management.

Topics Covered

- Autodesk Forma administration
- Autodesk Docs templates
- Autodesk Docs project templates
- Autodesk Construction Cloud setup
- Autodesk Construction Cloud project configuration
- Folder structures and naming conventions
- User permissions and access management
- Approval workflows
- Information management procedures

- Digital engineering standards
- Dashboard reporting
- Enterprise governance
- BIM collaboration standards
- Multi-office deployment strategies
- Quality assurance processes

Prerequisites

Participants should have a general understanding of BIM workflows, digital project delivery, or construction management processes.

Previous experience with Autodesk construction technologies, Revit, Civil 3D, or project collaboration environments is beneficial but not essential. No prior administration experience is required.

Training Guide Contents*

Chapter 1: Autodesk Forma Standards and Administration Fundamentals

- Understanding Autodesk Forma and Autodesk Docs environments
- Company standards planning
- User roles and permissions
- Governance and administration principles

Chapter 2: Autodesk Docs Templates and Project Structures

- Autodesk Docs project templates
- Folder structures and naming conventions
- Information management procedures
- Company standards implementation

Chapter 3: User Permissions and Access Controls

- Team permissions
- Role assignments
- Security standards
- Multi-office collaboration workflows

Chapter 4: Workflow Automation and Approval Processes

- Approval procedures
- Notifications
- Review workflows
- Quality assurance processes

Chapter 5: Dashboard Reporting and Project Analytics

- Dashboard standards
- KPI tracking
- Reporting templates
- Executive reporting procedures

Chapter 6: BIM Standards and Digital Engineering Workflows

- ISO 19650 principles
- Information requirements

- BIM governance
- Collaboration frameworks

Chapter 7: Autodesk Ecosystem Integrations

- Revit integrations
- Civil 3D workflows
- Navisworks coordination
- Open standards and IFC procedures

Chapter 8: Information Management and Quality Assurance

- Data governance
- Document control
- Audit procedures
- Compliance frameworks

Chapter 9: Autodesk Construction Cloud Deployment

- Enterprise rollout procedures
- User onboarding
- Change management
- Standards maintenance

Chapter 10: Customised Company Environment Development

- Reviewing business requirements
- Configuring company standards
- Testing workflows
- Final deployment planning

Optional Chapter: Forma Data Management Setup

- Folder standards
- Approval workflows
- Information governance
- ISO 19650 compliance

Optional Chapter: Forma Design Collaboration Setup

- Shared environments
- Coordination workflows
- Issue management
- Team procedures

Optional Chapter: Forma Build Administration

- Field workflows
- RFIs and submittals
- Safety processes
- Quality procedures

Optional Chapter: Forma Estimate Configuration

- Cost structures
- Budget standards
- Estimating procedures

- Reporting frameworks

Optional Chapter: Forma Site Design Workflows

- Urban planning standards
- Environmental analysis
- Infrastructure coordination
- Site development procedures

Optional Chapter: Forma Takeoff Standards

- Quantity measurement
- Classification systems
- Reporting workflows
- Cost integration procedures

Optional Chapter: AutoCAD Collaboration Environment Setup

- Autodesk Docs integration
- Xref management
- Shared project standards
- Publishing workflows

Optional Chapter: Civil 3D Collaboration Environment Setup

- Data Shortcuts
- Shared references
- Survey workflows
- Multi-user project standards

Optional Chapter: Plant 3D Collaboration Environment Setup

- Project structures
- Spec management
- Shared environments
- Publishing workflows

Optional Chapter: Revit Cloud Collaboration Setup

- Revit Cloud Worksharing
- Linked model management
- Shared coordinates
- BIM governance procedures

Optional Chapter: Navisworks Model Coordination Setup

- Coordination models
- Clash workflows
- Issue management
- Construction reviews

*Training may go over 16-hours depending on requirements and can be determined prior to commencement