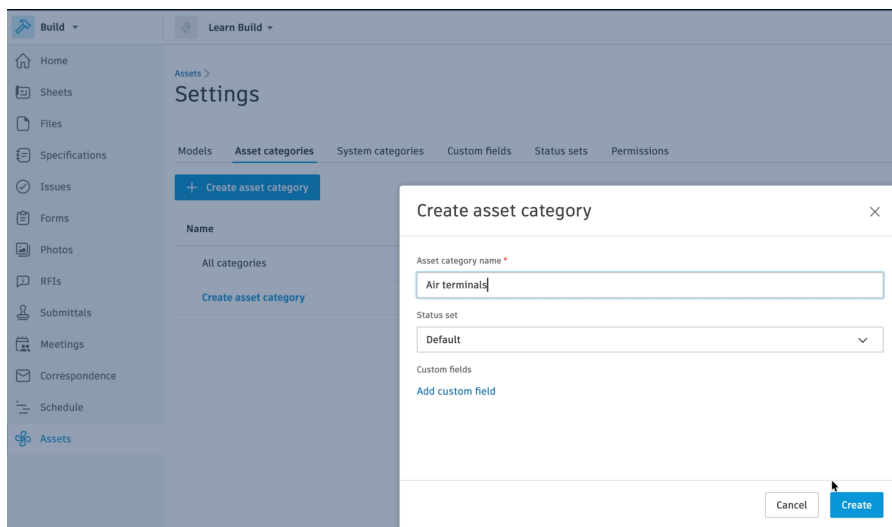


Practice exercise – Answer Key

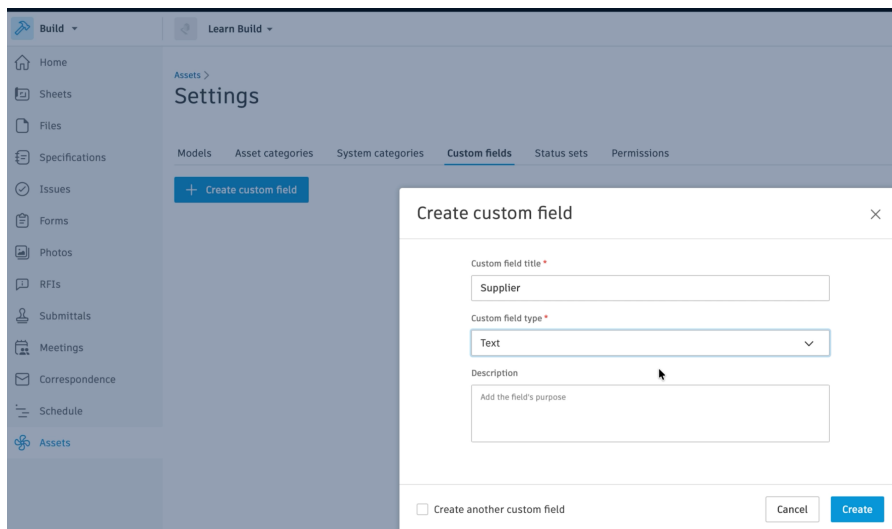
Manage assets and project communication in Forma Build

The following steps were completed in the videos for **Module 2: Manage project communication using Forma Build**. If you followed along in the videos, you are ready to start the exercise that follows these steps. If you have *not* already performed these steps, make sure to complete them first:

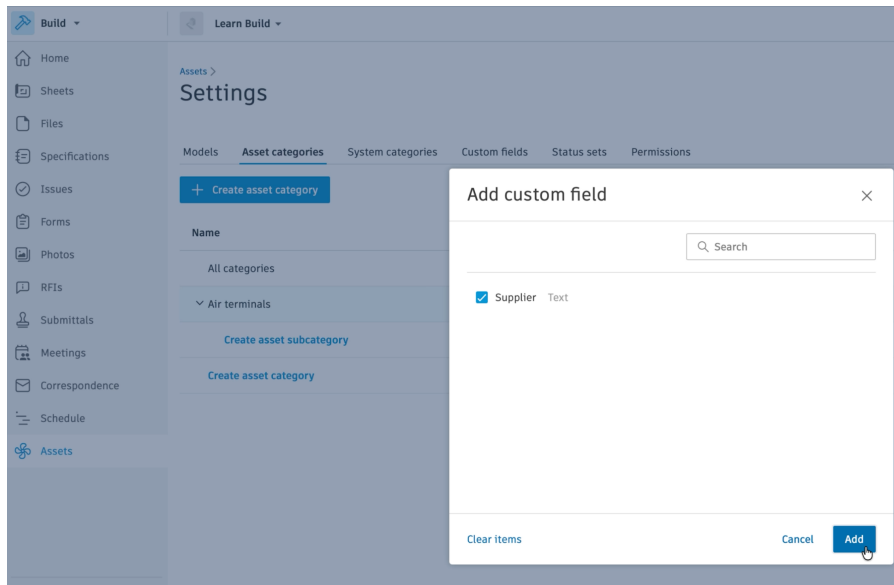
1. You created an asset category for Air terminals in the Settings page of the Assets tool.



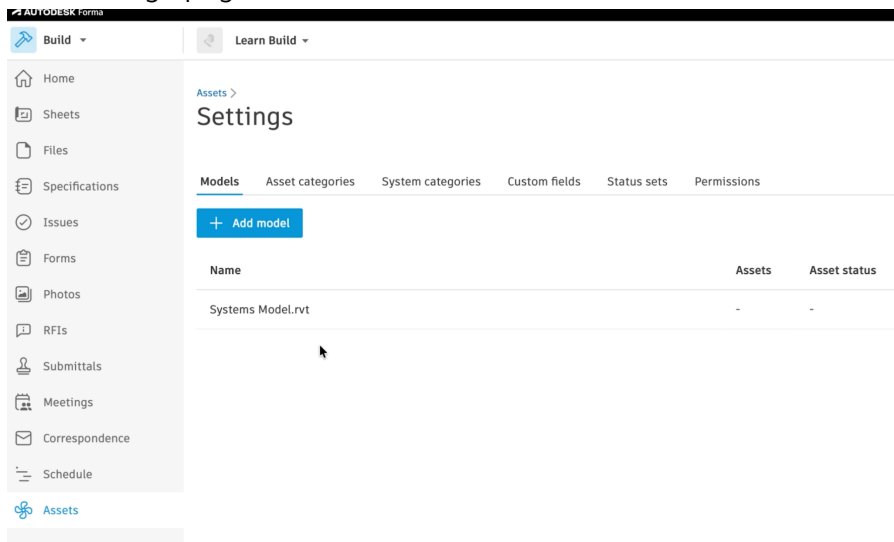
2. You created a custom text field for the Supplier in the Settings page of the Assets tool.



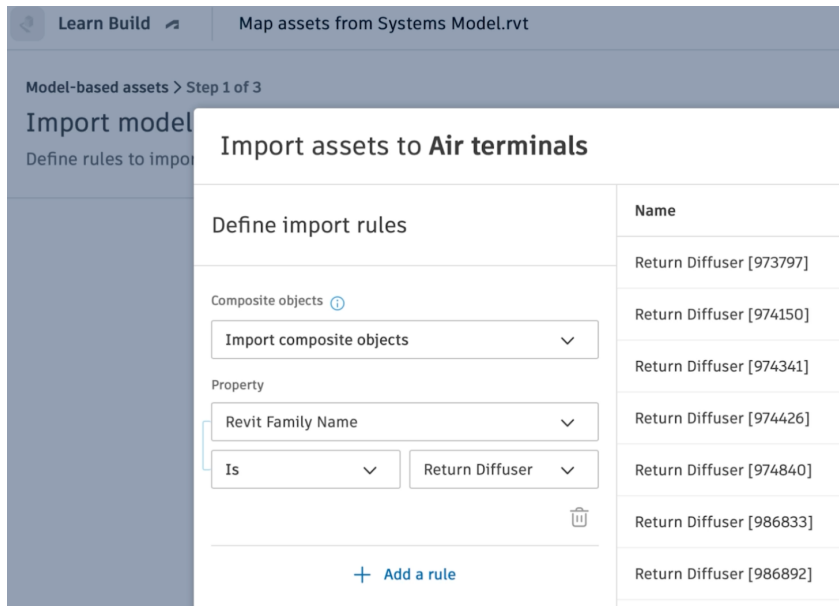
- You added the Supplier custom field to the Air terminals asset category.



- You added the **Systems model.rvt** from Data Management into the Models tab of the Settings page in the Assets tool.



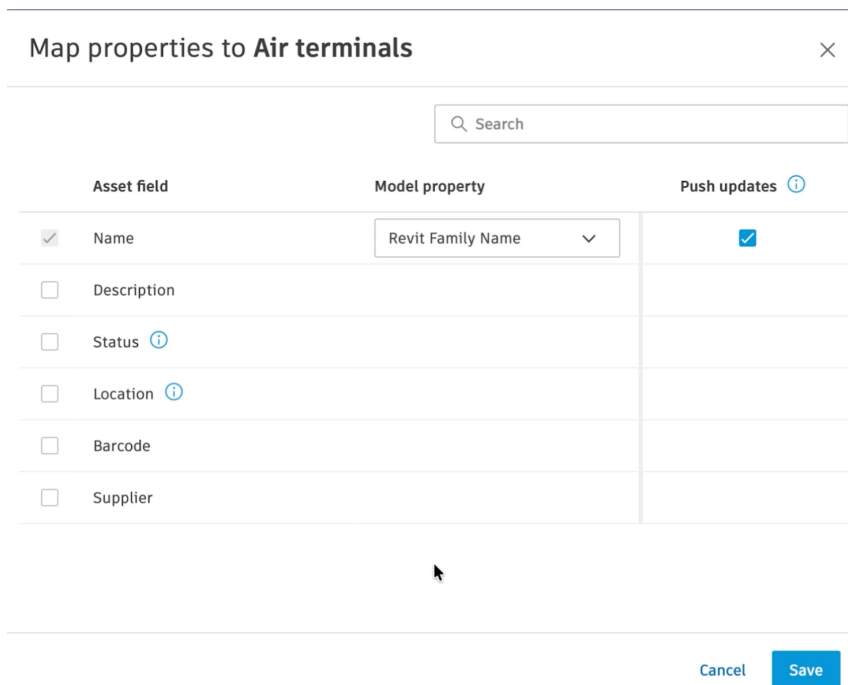
5. You imported return diffusers as assets using Model-based assets.



The screenshot shows the 'Import assets to Air terminals' dialog box. It has a 'Define import rules' section on the left and a list of assets on the right. The 'Define import rules' section includes a 'Composite objects' dropdown set to 'Import composite objects', a 'Property' dropdown set to 'Revit Family Name', and an 'Is' dropdown set to 'Return Diffuser'. There is an 'Add a rule' button at the bottom. The asset list on the right contains several 'Return Diffuser' entries with unique IDs.

Name
Return Diffuser [973797]
Return Diffuser [974150]
Return Diffuser [974341]
Return Diffuser [974426]
Return Diffuser [974840]
Return Diffuser [986833]
Return Diffuser [986892]

6. You mapped the Name of the asset to the Revit Family Name in the Map properties window.



The screenshot shows the 'Map properties to Air terminals' window. It has a search bar at the top. Below it is a table with three columns: 'Asset field', 'Model property', and 'Push updates'. The 'Name' asset field is mapped to the 'Revit Family Name' model property, and the 'Push updates' checkbox is checked. Other asset fields like 'Description', 'Status', 'Location', 'Barcode', and 'Supplier' are listed but not mapped.

Asset field	Model property	Push updates
☒ Name	Revit Family Name	☒
☐ Description		
☐ Status		
☐ Location		
☐ Barcode		
☐ Supplier		

At the bottom right, there are 'Cancel' and 'Save' buttons.

Once these steps are completed, you will be ready to start the exercise. You will update asset import rules, configure asset properties, create filters, track asset status, and use RFIs and Meetings to document and communicate project information.

Learning objectives:

By the end of this exercise, you should be able to:

- Configure and manage assets in Forma Build.
- Create and apply asset filters to locate project information.
- Create RFIs and link them to project assets.
- Document project information using Meetings and asset references.

Success criteria:

- Asset import rules are updated and additional assets are successfully imported.
- Custom asset fields are created, mapped, and displayed in the asset list.
- Asset filters are used to locate specific assets and update their status.
- An RFI is created and submitted with references to the appropriate assets.
- A Meeting is created with references to the RFI and related assets.
- Exercise questions are completed and required items are submitted for review.

Follow the steps below to complete this practice exercise.

1. From the Systems model imported into Assets, you should have already imported 26 return diffusers. Modify the import rules to include all supply diffusers in the assets. What's the total number of assets included in Build now?

Answer Key

The total number of assets is now 89. Check the student work on their project on Autodesk Forma for Construction.

Import assets to Air terminals

Define import rules

Import composite objects

Property

Revit Family Name

Is

Return Diffuser

AND

OR

Composite objects

Import composite objects

Property

Revit Family Name

Contains

Supply Diffuser

Show results

Name

Supply Diffuser - Rectangular Face Round Neck [970480]
Supply Diffuser - Rectangular Face Round Neck [970562]
Supply Diffuser - Rectangular Face Round Neck [970749]
Supply Diffuser - Rectangular Face Round Neck [970904]
Supply Diffuser - Rectangular Face Round Neck [970997]
Supply Diffuser - Rectangular Face Round Neck [971858]
Supply Diffuser - Rectangular Face Round Neck [971997]
Supply Diffuser - Rectangular Face Round Neck [972125]
Supply Diffuser - Rectangular Face Round Neck [972252]
Supply Diffuser - Rectangular Face Round Neck [972337]
Supply Diffuser - Rectangular Face Round Neck [972390]
Supply Diffuser - Rectangular Face Round Neck [972465]
Supply Diffuser - Rectangular Face Round Neck [972797]

2 rules - 89 assets [Clear rules](#)

2. Complete the following steps:

- In the Assets settings, in the custom fields tab, create a new text-based custom field named System Name.

Assets >

Settings

Models

Asset categories

System categories

Custom fields

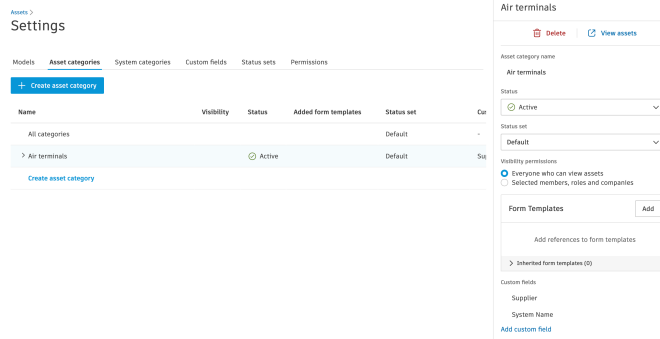
Status sets

Permissions

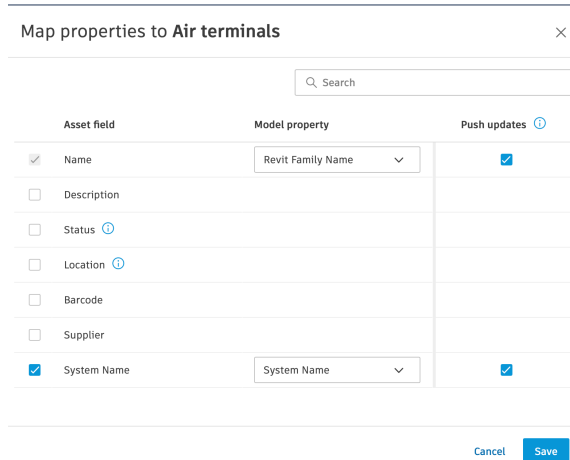
+ Create custom field

Custom field title	Type	Values	Description
Supplier	Text		
System Name	Text		

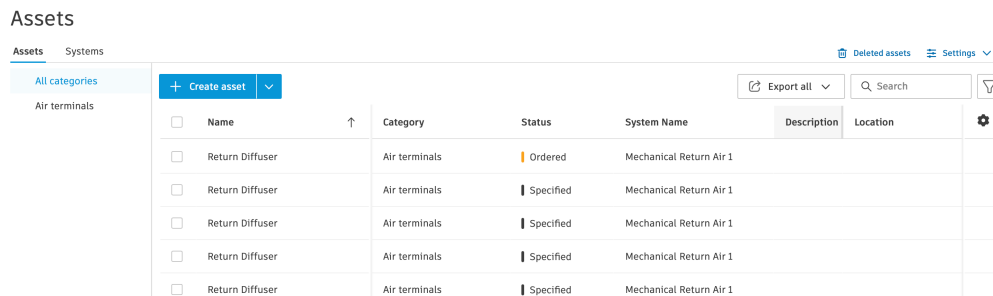
- In the Asset categories tab, add the newly created field to the Air Terminals asset.



- c. In the Assets tab, manage the current assets, include the newly added Asset filed in the map properties and map it to the System Name model property. Apply the changes.



- d. In the main Assets page, customize the column to include the System Name field.



- e. Create a filter to keep only supply diffusers that have a “Mechanical Supply Air 9” as a System Name. How many of these diffusers are there.

Answer Key

There are six of these diffusers. Check the work of the student on Autodesk Forma for Construction Build.

Assets

Systems

All categories

Air terminals

+ Create asset

Export (6) filtered

Search

Filters (1)

☐	Name	Category	Status	System Name
☐	Supply Diffuser - Rectangular F...	Air terminals	Specified	Mechanical Supply Air 9
☐	Supply Diffuser - Rectangular F...	Air terminals	Specified	Mechanical Supply Air 9
☐	Supply Diffuser - Rectangular F...	Air terminals	Specified	Mechanical Supply Air 9
☐	Supply Diffuser - Rectangular F...	Air terminals	Specified	Mechanical Supply Air 9
☐	Supply Diffuser - Rectangular F...	Air terminals	Specified	Mechanical Supply Air 9
☐	Supply Diffuser - Rectangular F...	Air terminals	Specified	Mechanical Supply Air 9

Filter assets

Status

Select statuses

Location

Select a location

Model

Select...

Custom fields

Select filters

System Name

System Name

Q Mechanical Supply Air 9

3. Complete the following steps:
- a. Change the status of the supply diffusers you found in the step above to Delivered.
- Assets

Systems

All categories

Air terminals

+ Create asset

Edit

Delete

☒	Name	Category	Status	System Name
☒	Supply Diffuser - Rectangular F...	Air terminals	Delivered	Mechanical Supply Air 9
- b. In the RFI tool, create a new RFI with **Storage for Supply Diffusers** as a title, and the Default RFI Workflow as a type.

Create RFI

Status *

Open For reviewers

RFI number *

4

Title *

Storage for Supply Diffusers

Type

Default RFI workflow

Ball in court *

Instructor Sam T. (ABC)

- c. In this RFI, add a reference to the delivered assets. Use a filter to quickly find those assets.

Add asset reference

Search...

Filters (1)

	Asset name	Category	Status
☐	Supply Diffuser - Rectangular Fac...	Air terminals	Delivered
☐	Supply Diffuser - Rectangular Fac...	Air terminals	Delivered

Filter assets

Category

Select categories

Status

Delivered

- d. Create the RFI and submit it to the Instructor.

Answer Key

You, the instructor, should see the RFI on your end.

RFIs

Create RFI

Status	ID	Title	Ball in court
Open In review	4	Storage for Supply Diffusers	Instructor Sam T. (...)

4. Complete the following steps:

- a. In the Meetings tool, create a new meeting with the following details.

Meetings

01 Meeting to discuss diffusers

Invites

References

Date

Nov 9, 2026

Time

02 : 00 PM

Location

Your Office

Video conference link

Unspecified

Description

Add meeting description

Meeting discussion

Location of diffusers

1. Where to store diffusers?

7 references

Invites

Add Invitees

Invites

Instructor Sam T. ABC

Organizers

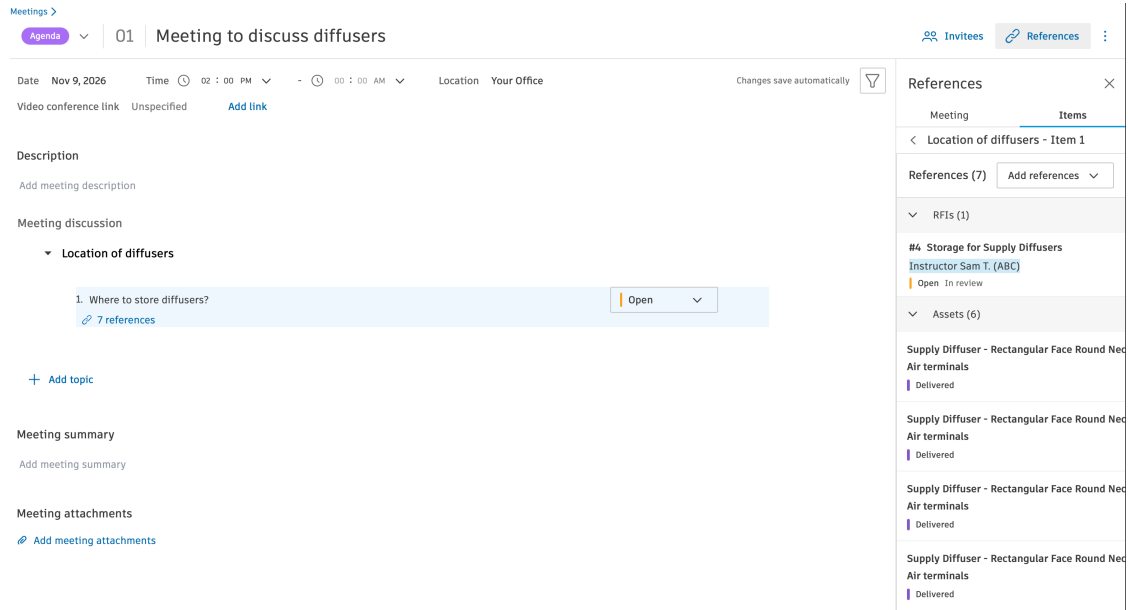
Student Ralph T.

Practice exercise KEY: Manage assets and project communication in Forma Build Page 8

- b. Include a reference to the RFI you created in the step above and to the delivered assets.

Answer Key

You, the instructor, should see the meeting on your end with all seven references.



The screenshot shows a meeting interface in Formabuild. The meeting is titled "Meeting to discuss diffusers" and is scheduled for Nov 9, 2026, at 02:00 PM. The location is "Your Office". The interface includes sections for Description, Meeting discussion, Meeting summary, and Meeting attachments. The Meeting discussion section shows a topic "Location of diffusers" with a sub-item "1. Where to store diffusers?". The right sidebar displays a list of references, including "RFIs (1)" and "Assets (6)".

References (7)

- RFIs (1)
 - #4 Storage for Supply Diffusers
 - Instructor Sam T. (ABC)
 - Open In review
- Assets (6)
 - Supply Diffuser - Rectangular Face Round Nec Air terminals
 - Delivered
 - Supply Diffuser - Rectangular Face Round Nec Air terminals
 - Delivered
 - Supply Diffuser - Rectangular Face Round Nec Air terminals
 - Delivered
 - Supply Diffuser - Rectangular Face Round Nec Air terminals
 - Delivered