

Instructions for setting up Autodesk Forma for Construction and additional Autodesk software in the classroom

The following guide is designed for instructors to help them get started with Forma for Construction, Revit, Cloud Worksharing, and Forma in their classroom.

Assigning Forma for Construction licenses to students should be performed through the platform (<https://acc.autodesk.com/>) and NOT the Autodesk Account page. Assigning licenses to other products such as Revit, AutoCAD, Civil 3D, Cloud Worksharing, etc. is performed through the Autodesk Account page (<https://manage.autodesk.com/>).

Note: Autodesk Construction Cloud is now part of Autodesk Forma.

You may notice that platform and product names in our products have changed to the new Forma brand. Please note that platform and product names in this course and in the screenshots below are not yet be updated, but the functionality of the products and tools remains the same, and the workflows described in these pages are still applicable.

Forma for Construction instructions include:

- 1.0 Adding students as account members and assigning Forma for Construction licenses.
- 2.0 Creating a Forma for Construction project and adding companies and folders.
- 3.0 Inviting members (students) to a project and assigning project access.
- 4.0 Assigning permissions, products, and access levels.

Additional Autodesk Product instructions include:

- 5.0 Providing Revit, Cloud Worksharing, and Forma Site Design licenses to students through the Autodesk Account page.

Note: To work along with the video lessons in Module 3, students will need access to Forma for Construction. Some lessons require students to have project administrator access level to follow along with the video lessons hands-on, however, watching the video lesson alone without this level of project administrator access will still give students the knowledge and understanding of the process and benefits to using BIM workflows as shown in the lessons' steps. Table 1 lists the access level, permissions level, and products required to follow along in the products.

Table 1: Module 3 lesson permissions and access levels

Video lesson	Access level	Permissions	Products
M3 02 Create folders	Project Member	Edit permission level of own folder	Forma Data Management
M3 03 Assign Permissions	Project Administrator	Default	Forma Data Management
M3 04 Create Attributes	Project Administrator	Default	Forma Data Management
M3 05 Create naming standards	Project Administrator	Default	Forma Data Management
M3 06 Collaborate in the Cloud	Project Member	Edit permission level of own folder	Forma Data Management
M3 07 Create Coordination	Project Member	Edit permission level of own folder	Forma Data Management, Design Collaboration
M3 08 Perform clash detection	Project Member	Edit permission level of own folder and a Shared folder	Forma Data Management, Design Collaboration, Model Coordination

M3 09 Share project model	Project Member	Edit permission level of own folder and a Shared folder	Forma Data Management, Design Collaboration
M3 10 Consume a package	Project Member	Edit permission level of own folder and a Shared folder	Forma Data Management, Design Collaboration

Forma for Construction Instructions

1.0 Add students as account members and assign Forma for Construction licenses

It's important to assign Forma for Construction products to students from the platform's Hub Admin area as described here and **not** through your Autodesk Account page although you will see the products listed there.

1. Go to **acc.autodesk.com**, log in using your Autodesk account username and password, and click the Hub Admin link in the top-left of the screen.

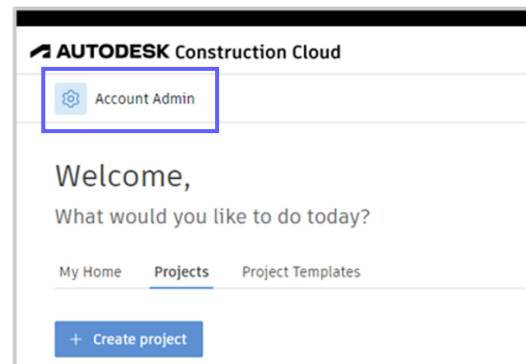


Figure 1.1. Hub Admin in acc.autodesk.com.

2. In Hub Admin, you can see and manage all projects and members associated with your account in the Members tab. You should see your account name listed at the top of the page. If another account is listed, use the drop-down menu to navigate to and select your account name.

To add members, click the Add Members button.

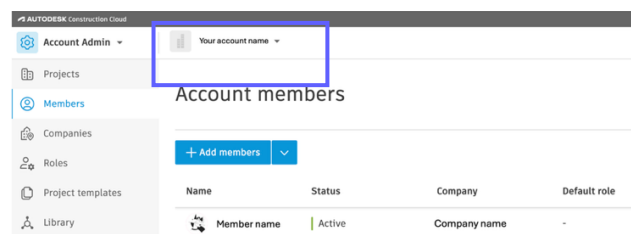


Figure 1.2. Ensure that your account name appears. This is typically the name of your educational institution.

3. In the resulting Add Account Members panel, enter the student email addresses either by typing them in or copy and pasting them. Press the Spacebar after each entry.

Note that you can add a default company (your account name) and role to the list of users. We recommend that you add that here to help with permission setup later.

It is not advised to give student members additional access levels, but you may want to give Hub Administration access to your teaching assistants.

When all the information in the dialog looks correct, click Add.

Figure 1.3. Enter email addresses first and then you can choose to add company and default roles.

4. To activate the students' licenses, make sure you are on the Members tab, and then use the search bar to search for and find the correct member/student.

Figure 1.4. Search for student addresses.

5. Click on the student's name to bring up the member profile panel.

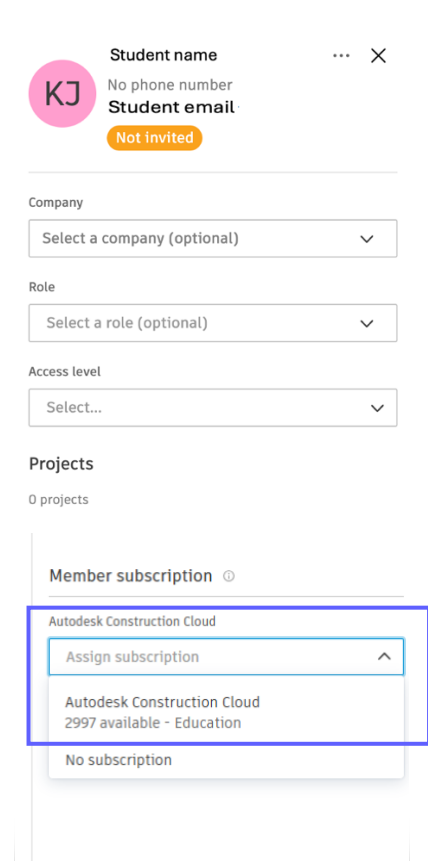
The Forma for Construction subscription covers access to Forma Data Management, Build, Cost, Insight, Takeoff, Design Collaboration, Model Coordination, Autospecs and Forma Carbon Insights.

In the Member Subscription section, select Form for Construction subscription to assign to the member. Changes in the member profile panel will automatically be updated and saved.

Repeat this process for all the students until each has been given a Forma for Construction license.

Tip: Specific Forma for Construction products can be assigned at the project level to focus student access on products. See step 11 in the next section for more details.

Note: Members who show up in the Account Members list as “Not Invited” have not been invited to a project yet and this will change once the member has been invited.



The screenshot shows a member profile panel for a student named 'Student name' (initials KJ). The status is 'Not invited'. Below the profile information, there are dropdown menus for 'Company' (Select a company (optional)), 'Role' (Select a role (optional)), and 'Access level' (Select...). Under the 'Projects' section, it shows '0 projects'. The 'Member subscription' section is highlighted with a blue box, showing a dropdown menu with the following options: 'Assign subscription', 'Autodesk Construction Cloud 2997 available - Education', and 'No subscription'.

Figure 1.5. Assign Forma for Construction subscription license.

2.0 Create a Forma for Construction project and add companies and folders

Projects must be created before the functionality in Forma for Construction can be used. Create unique projects for specific classes, sections, teams, or student projects.

1. Go to **acc.autodesk.com** to open Forma for Construction. Or if you are already in it, click My Home to return to the Welcome page.

Click the Projects tab.

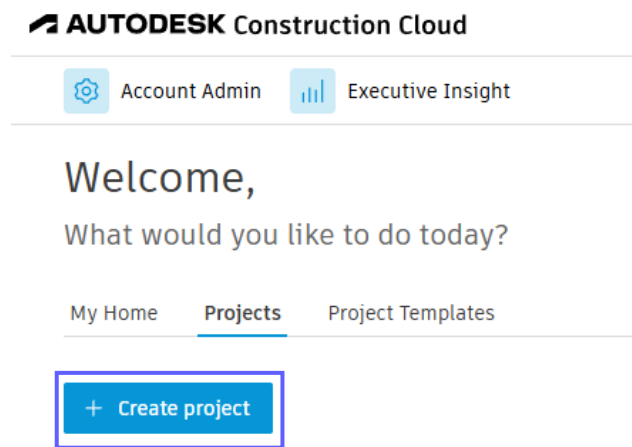


Figure 2.1. The Projects tab in Forma for Construction..

2. Click Create Project to begin creating a new project.

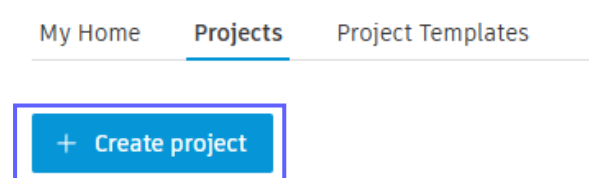


Figure 2.2. Create project.

3. Complete the mandatory information such as Project name, Account, and Project Type.

Project name:

This can be whatever name is appropriate for your course. A suggested naming convention is UniversityInitials_Year_ModuleNumber_ModuleName_Section_EducatorsLastName (ex: OSU_2025_CM200_Construction Estimating_Section 1_Smith)

Hub: Select your (or your school) account name.

Project Type: From the prepopulated list, select a project type that best corresponds to the building type that you will be using. You can also select Training and Demonstration project types.

Other information is optional.

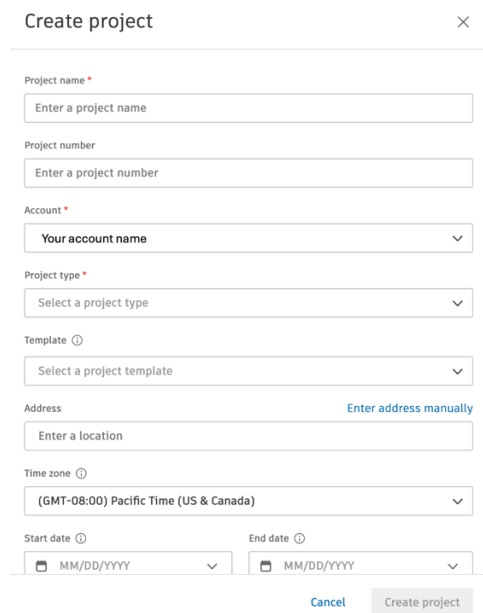


Figure 2.3. Project details.

4. Click Create Project to complete the process and access your project.



Figure 2.4. Create project.

5. You will be taken automatically to the Project Admin area.

On the panel at the right, ensure you have Project Administrator access level.

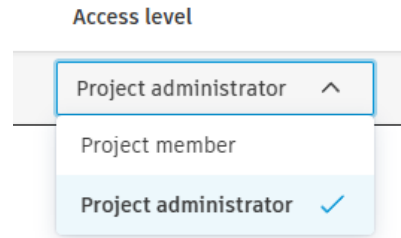


Figure 2.5. Access level.

6. Click the toggles to assign yourself products for the project.

You can choose all the products or only those that you need.

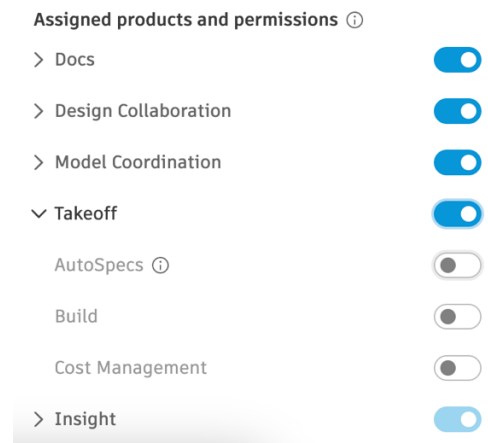


Figure 2.6. ACC products.

7. You can create multiple companies and assign your students to different companies, which allows you to teach multi-discipline coordination and workflows. In the Tools panel, click Companies.

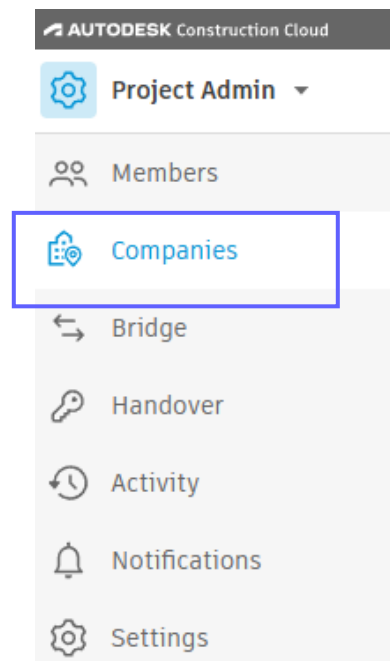


Figure 2.7. Tools panel with Companies selected.

8. To add companies to the project, click Add Company.

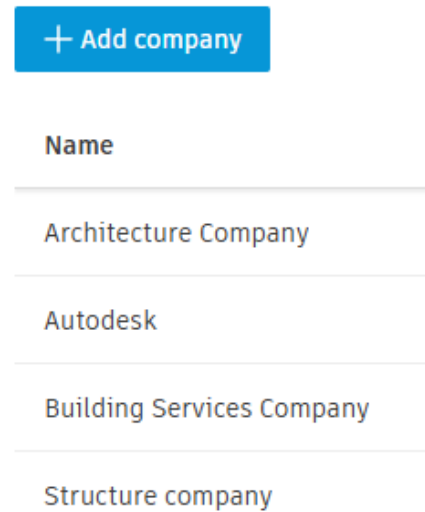
Project Companies

[+ Add company](#)

Figure 2.8. Add company.

9. Complete the details and create companies that suit your particular project's needs. In this example, companies are added to teach multi-discipline coordination: a company owner (Autodesk), architecture firm, building services (MEP), and structure companies.

Note: When creating a new company name, you must press Tab after typing in the name (not Enter).



Name
Architecture Company
Autodesk
Building Services Company
Structure company

Figure 2.9. Example companies to add.

10. In the tools panel, Click Members to return to the members area of the project.

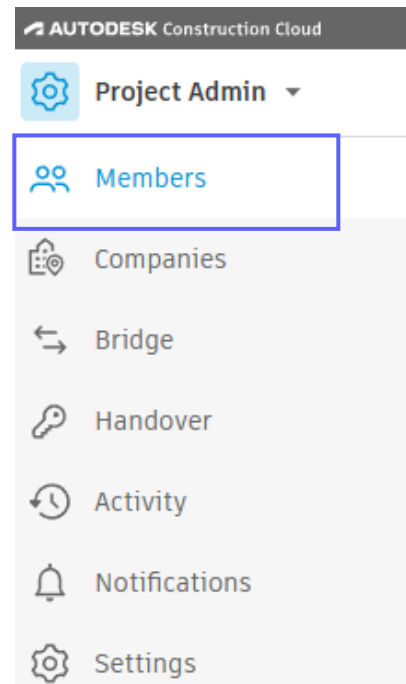


Figure 2.10. Tools panel.

11. Click the member name and assign the company, role, and products by selecting from the drop-down menus and toggles. Students should have access to all the products when you first assigned licenses in the previous section, but you can narrow down the product access at the project level if you choose.

Note: It is recommended to set up a new student with Project Member access level only when first setting up their account. You can switch the access to Project Administrator level when the student has more experience and wants to use additional features of the Forma for Construction tools.

Company

Autodesk

Role

BIM Manager

Access level

Project administrator

Assigned products and permissions ⓘ

> Docs

Design Collaboration

Model Coordination

Takeoff

AutoSpecs ⓘ

Build

Cost Management

> Insight

Figure 2.11. Role and products.

12. You can create folders and organize project files for individuals, teams, or the entire class.

To create folders for each student or student groups, in the Product Picker, click Forma Data Management.

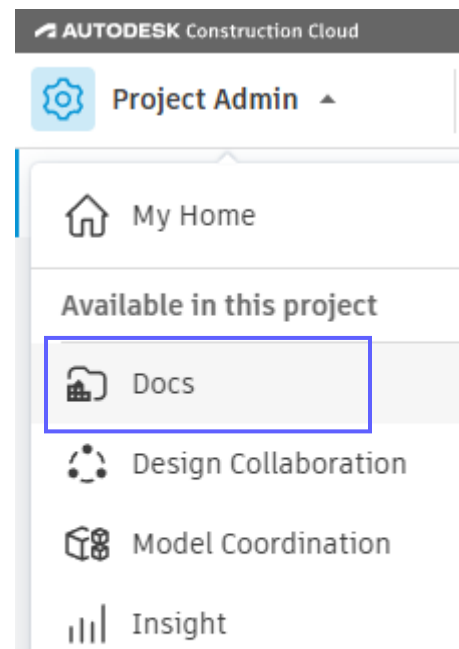


Figure 2.12. Product picker.

13. In the Tools panel, click Files.

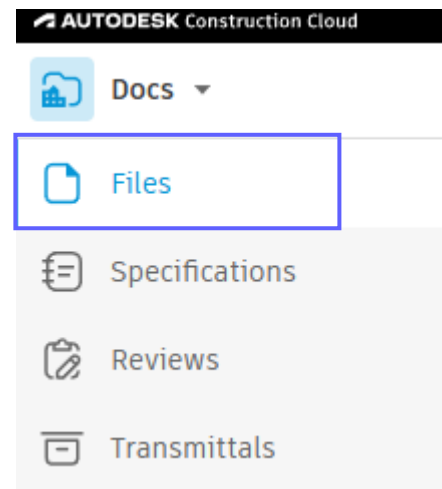


Figure 2.13. Tools panel.

14. By default, you will be presented with a single folder titled Project Files.

Click the three dots after the folder name to open the menu.

Files

Folders

Packages

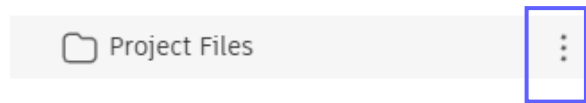


Figure 2.14. Files.

15. In the menu, click Add Subfolder to create a folder within the Project files folder.

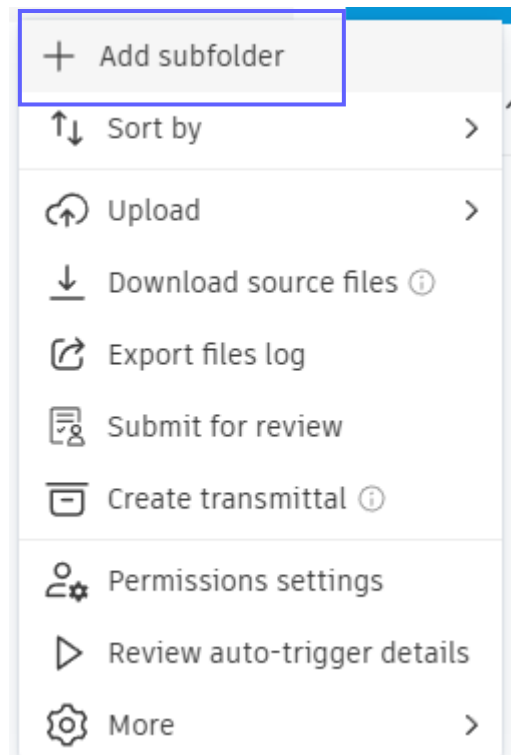


Figure 2.15. Folder menu.

16. You can name this folder using a student identifier such as student name, student number, or simply **Student 1**.

Tip: You can also do this step for a group of students if, for example, you want to use a name that identifies the group.

Files

Folders Packages

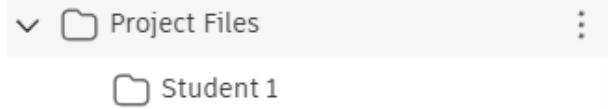


Figure 2.16. Student 1 folder.

17. Repeat the process to create a folder for every student, or group of students.

Files

Folders Packages

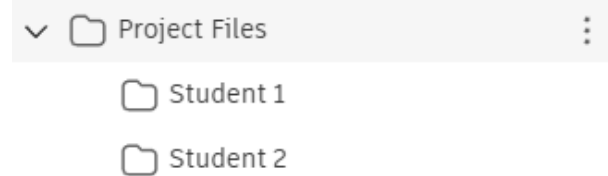


Figure 2.17. Student 2 folder.

3.0 Add members (students) to a project and assign product access

These steps to invite members to a project can be performed in either the Hub Admin or Project Admin accounts.

1. In the Tools panel, click Members to open the members area of the project.

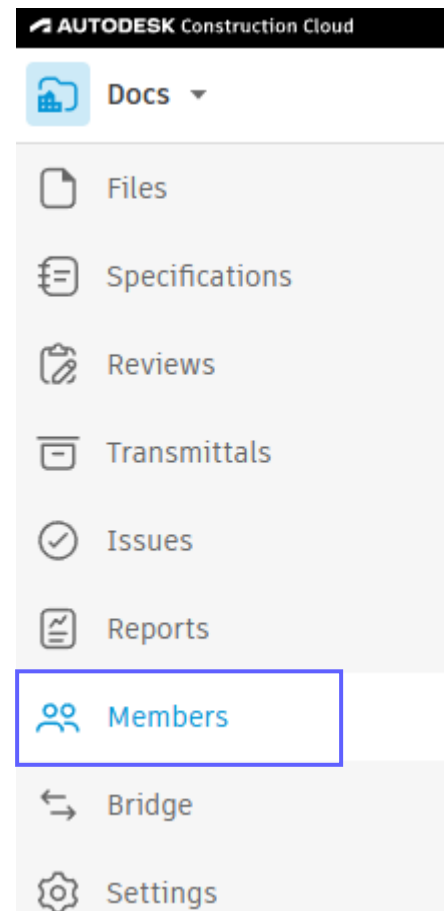


Figure 3.1. Tools panel.

2. To add students to the project, click the drop-down arrow after Add Members and select Quick Add Members.

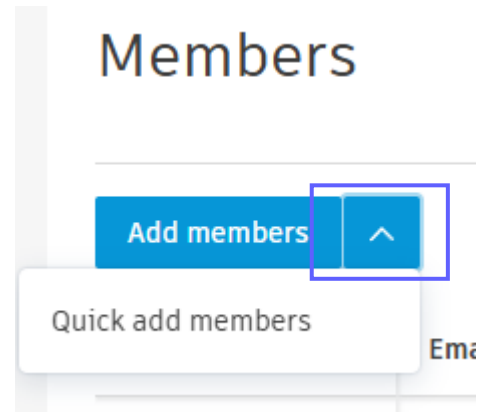


Figure 3.2. Add members.

3. This method allows you to assign company, role, products, etc. to multiple students in one step.

Enter all student emails. Then set their Company, Role, Project Member access, and Products as shown.

Tip: You can paste multiple email addresses that are exported from other systems such as registers, online spreadsheets, or Google forms.

Add project members

Enter or copy and paste email addresses *

person@company.com

Company * ⓘ

Architecture Company

Role * ⓘ

Architect

ⓘ This role's default access level is Project member.

☒ Project member

Has view access to all tools, but specific permissions vary by

☐ Project administrator

Has administrative permissions and can create new projects.

Invite to these products

Members must also have a subscription to the selected products provide a subscription in Account Administration or the member own subscription. [Learn more](#)

☒ Docs (current product)

☒ Design Collaboration

☒ Model Coordination

Figure 3.3. Quick add members.

4.0 Assign Folder Access and Permissions

Now that projects and folders have been set up and students have been invited, you will give student access to folders and set up permissions. These instructions include giving students Project Administration rights, but you can decide whether that is appropriate for your classroom needs.

1. In the product picker, select Forma Data Management. Then in the Tools panel, click Files.

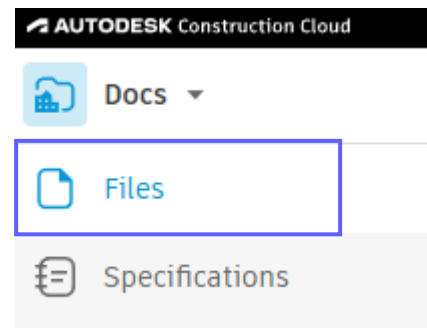


Figure 4.1. Tools panel.

2. Permission settings for each folder need to be set individually.

For the Student 1 folder (or whatever folder name you created in previous steps), click to select the three dots after the folder name and then click Permission Settings to open the permission settings information area.

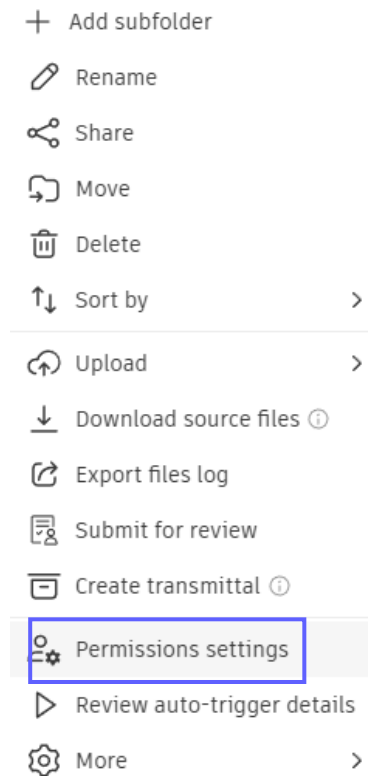


Figure 4.2. Folder menu.

3. To add the student, click Add.

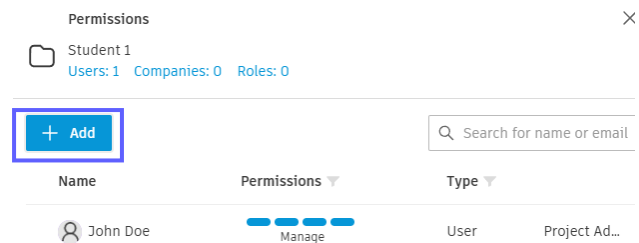


Figure 4.3. Add student to folder.

- If you want, you can add a single student to the folder, so that this becomes their own project folder. Begin typing Student 1 name or email address and select them from the drop-down list when they appear.

Note: If you wish to assign multiple students, add all their email addresses.



Figure 4.4. Add permissions dialog.

- For now, assign Edit permissions.

Edit permissions allows members to create folders, however they won't see or be able to access other folders (such as Student 2 folder and others).

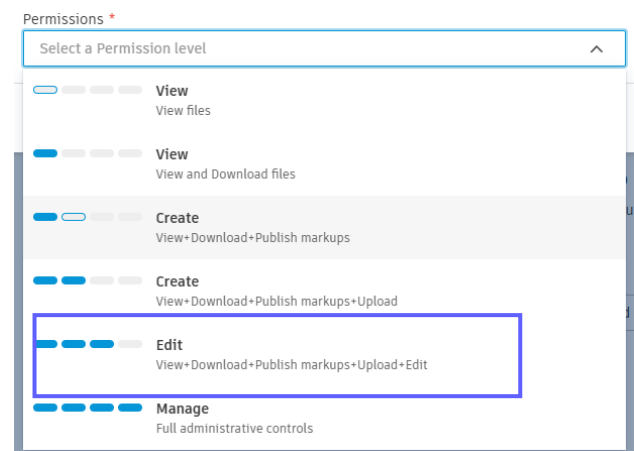


Figure 4.5. Permissions level.

- Click Add to complete the step.

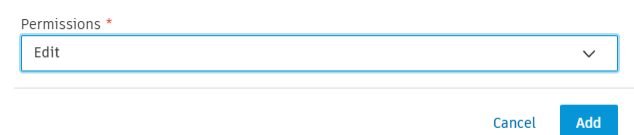


Figure 4.6. Permissions level: Edit.

- You should see yourself as Project Administrator with Manage permissions, and the student as a project member with Edit permissions.

Continue to do this for each folder, assigning one student or groups of students to each folder.

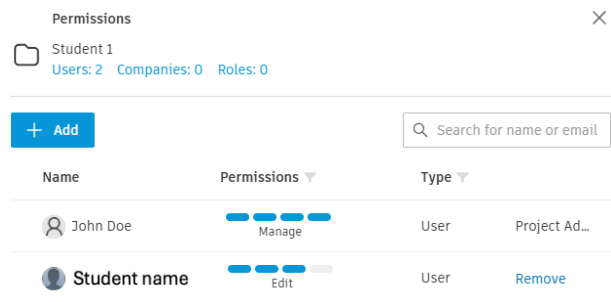


Figure 4.7. Folder permissions.

- For specific exercises where students need project administrator access levels, this can be changed by clicking Members in the Tools panel

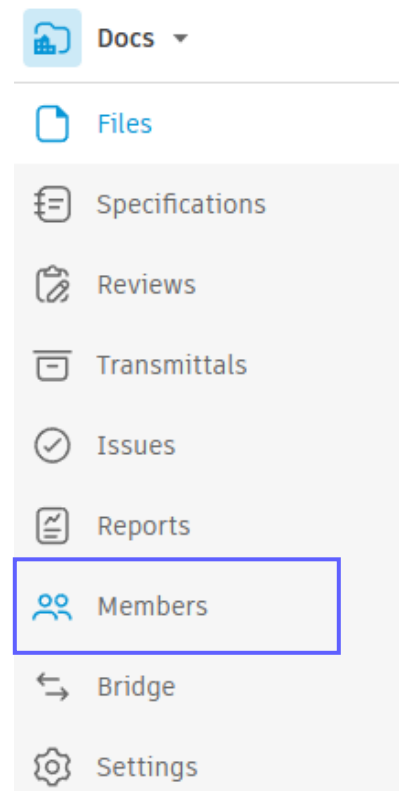


Figure 4.8. Tools panel.

9. Change the Access level from Project Member to Project Administrator.

Note: Students with Project Admin level access will be able to access and edit all folders and files in the project.

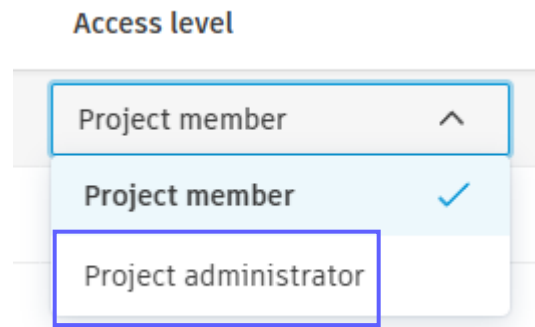


Figure 4.9. Access level.

Additional Autodesk Product instructions

5.0 Autodesk Product instructions for Revit, Cloud Worksharing, and Forma Site Design

You can assign additional Autodesk products to students through your Autodesk Account page. For Cloud Worksharing in Revit, you must assign Cloud Worksharing in addition to Revit and Forma for Construction.

1. Once a Forma for Construction license has been assigned, go to **manage.autodesk.com**. In the User Management tab, click By Product to see all products you have access to.

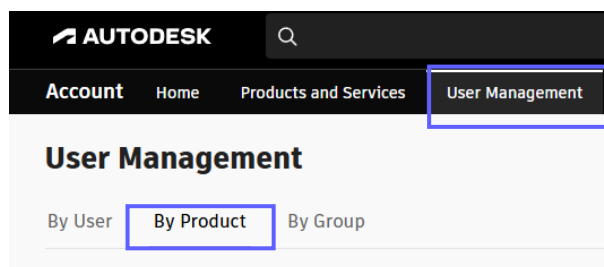


Figure 5.1. By product.

2. If you are using Revit and Cloud worksharing, students will need to sign into Revit using a license.



Figure 5.2. Revit product.

If Revit has not already been assigned to students, click the Revit product name.

3. You will be presented with the number of licenses you have assigned and available.

Assigned groups: None [Edit](#)

492 seats available | 500 seats total ⓘ

Assign users

Figure 5.3. Licenses available.

4. For small groups, you can individually assign a license by typing their name and email as:
John Doe <john.doe@email.com>

Tip: For class groups where there are more than a few students, use the Import option as described in the next step.

Assign Import

You can assign **492 more** users.

Names and email addresses

Example: John Doe <john.doe@email.com>

Users will have access to:

All 12 included items [Customize](#)

Figure 5.4. Assign licenses.

- For larger class groups, it's recommended to Import users, and you'll want to assign licenses for multiple products. Click the Import tab to use the Import option.

Note: You should first complete a CSV file either from an export from register data, or have the students complete the information via an online spreadsheet or Google form.

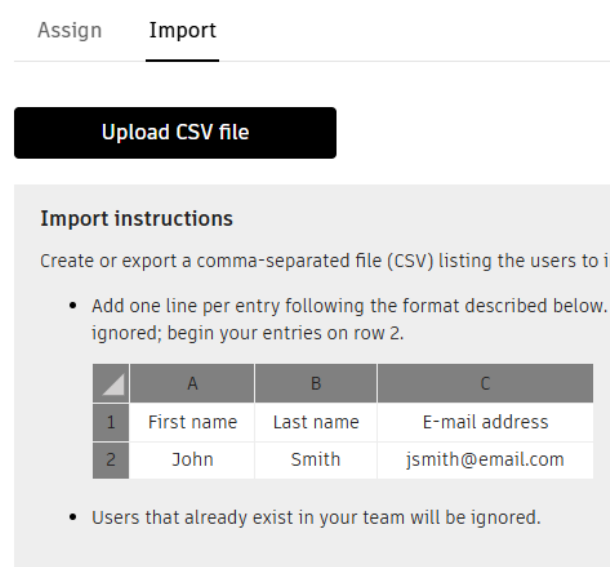


Figure 5.5. Import instructions.

- For collaborating on workshared cloud models, students will also need a Cloud Worksharing license.

Repeat the steps above to assign a Cloud Worksharing license to every student.

Note: Students will also need access to Forma for Construction to use Cloud Worksharing which they should have if you have set up their access according to the directions in the beginning of this document.

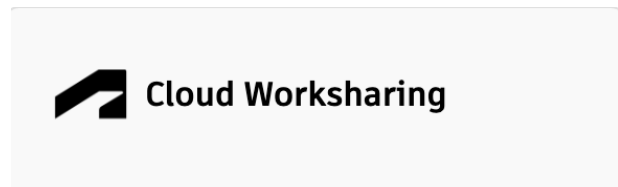


Figure 5.6. Cloud Worksharing is required for using this feature in either Revit or Civil 3D.

7. For access to Forma, you can assign a Forma license in the same manner to your students.



Figure 5.7. Autodesk Forma is a tool used for conceptual design.