

Filing Smart: Getting more value from Digital Documents in SMP

 **AUTODESK** Forma

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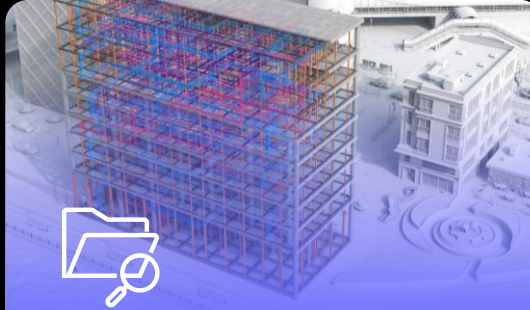

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Document chaos is not just an admin issue — it affects schedule, quality, risk, and trust.

The opportunity: turn files into controlled, connected project information.





Data inconsistency

Different teams working from different versions or naming conventions





Fragmented communication

Decisions and clarifications are difficult to trace later



Limited collaboration


Decisions live in email, chat, and meetings, or silo solutions



Errors and rework


Incorrect documents or missing context lead to avoidable corrections.

Workflows must evolve to meet industry needs




Centralized project data repository

One trusted place for drawings, models, documents, and project records.




Streamlined reporting and communication

Clear visibility into what is current, approved, pending, or at risk.



Seamlessly integrated

RFIs, issues, specs, photos, cost, and schedule are connected.

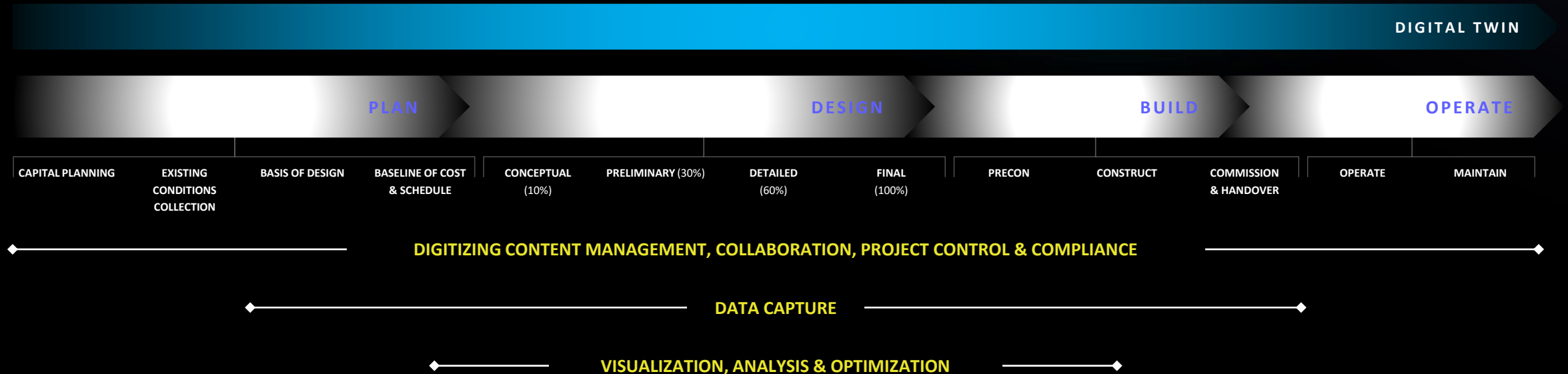
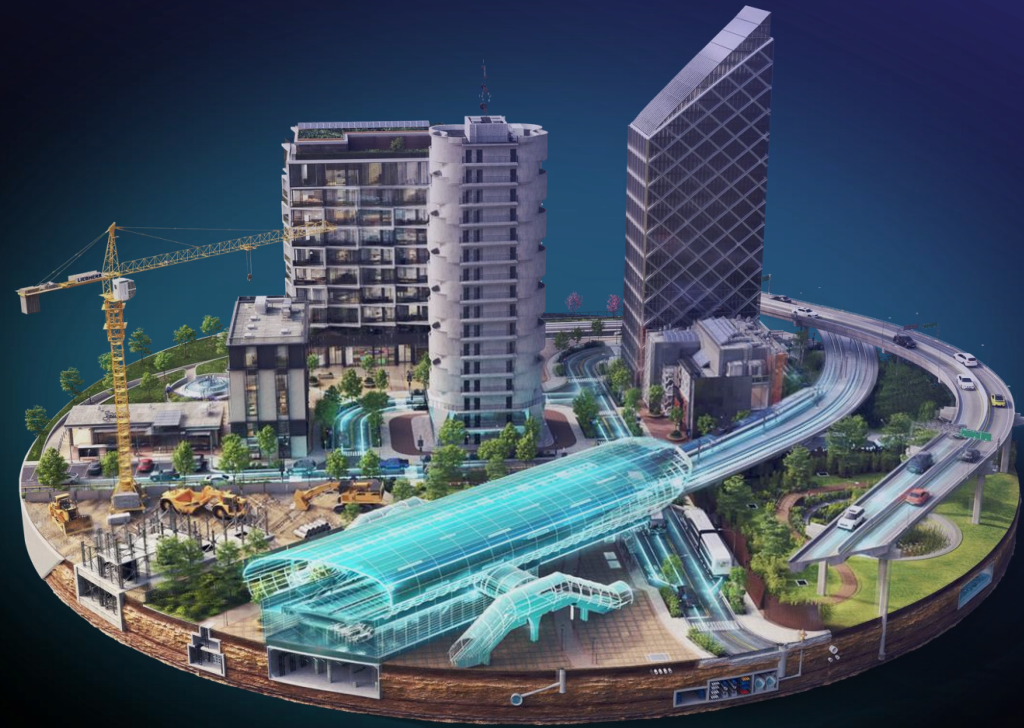


Improved change management

Track changes, approvals, and updates so teams act on the latest information

Data is the backbone but information and insights are the fuel for change.

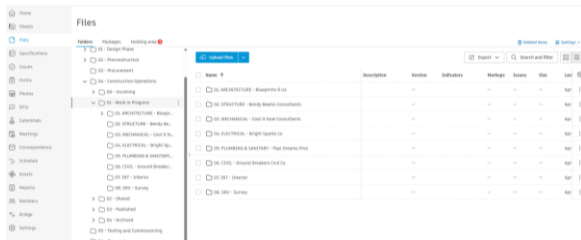
Move beyond drowning in data and systems to a platform that helps turn data into information that is more actionable for your business from design to operations.



Filing Smart Framework

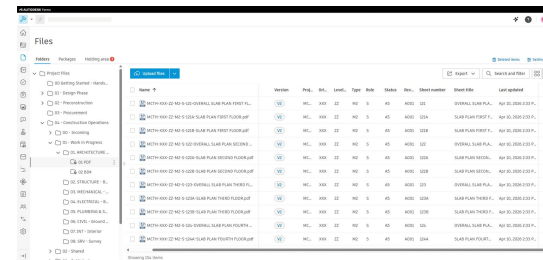
Find it

Standard folder taxonomy, naming, metadata, mobile access, and search.



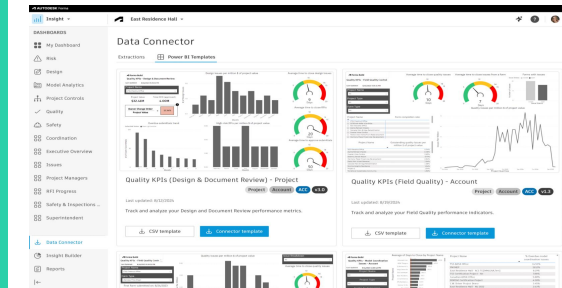
Trust it

Version control, permissions, review states, approvals, and audit trail.



Act on it

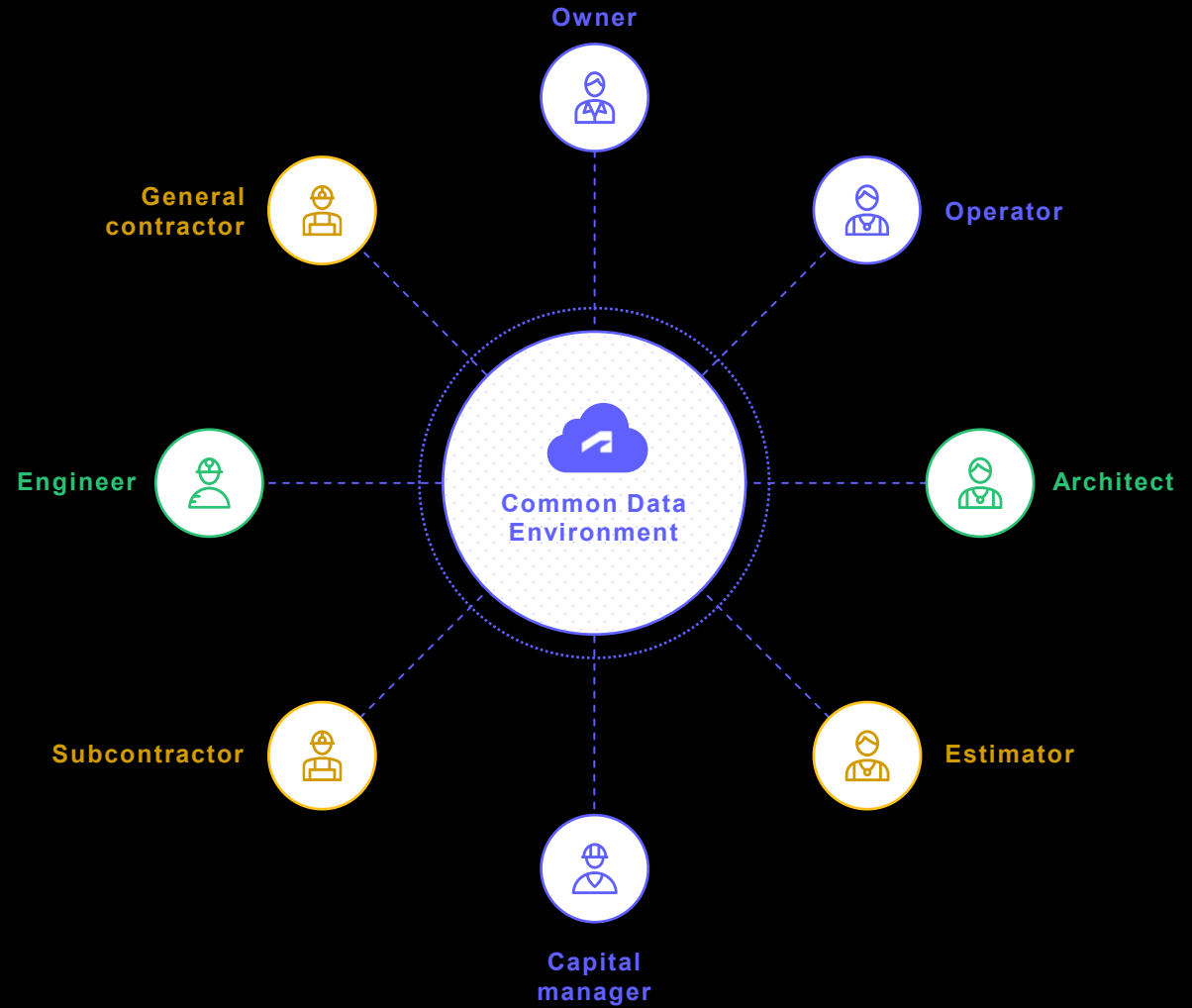
Connected RFIs, submittals, issues, photos, dashboards, and closeout.



Teams spend less time chasing files and more time advancing work.

Common Data Environment

Enables a connected project stakeholder ecosystem





User Management

Simply add each user to the necessary projects all from one place

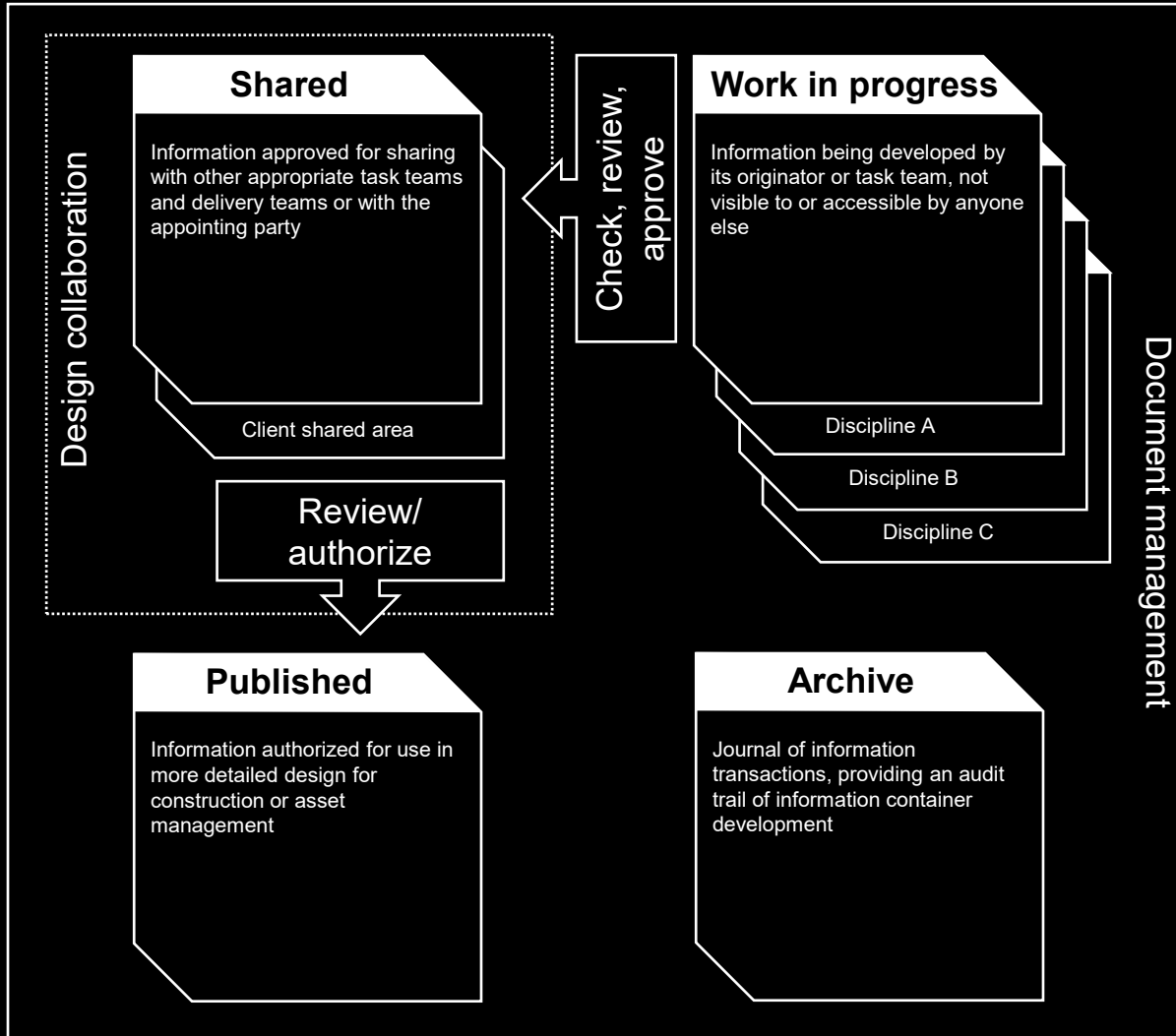
Ensure the right people have access to the right information by setting permissions – by user, role, or company

Admins gain the control they need to support day-to-day changes and maintain project standards

The screenshot displays the 'Members' page in Autodesk Forma for the project 'ACC Turner Towers'. The interface includes a search bar, an 'Add members' button, and an 'Export' button. A table lists 14 members with columns for Name, Email, Status, Company, Access level, Data Management, and Design Collaborative. The member 'Cassie Bustos' is highlighted. On the right, a detailed profile for Cassie Bustos is shown, including her role as 'Commercial Manager' and 'Project administrator', and a list of assigned products and permissions such as 'Data Management', 'Build', 'Files', 'Issues', 'Sheets', 'Submittals', 'RFIs', 'Correspondence', 'Cost Management', and 'Insight'.

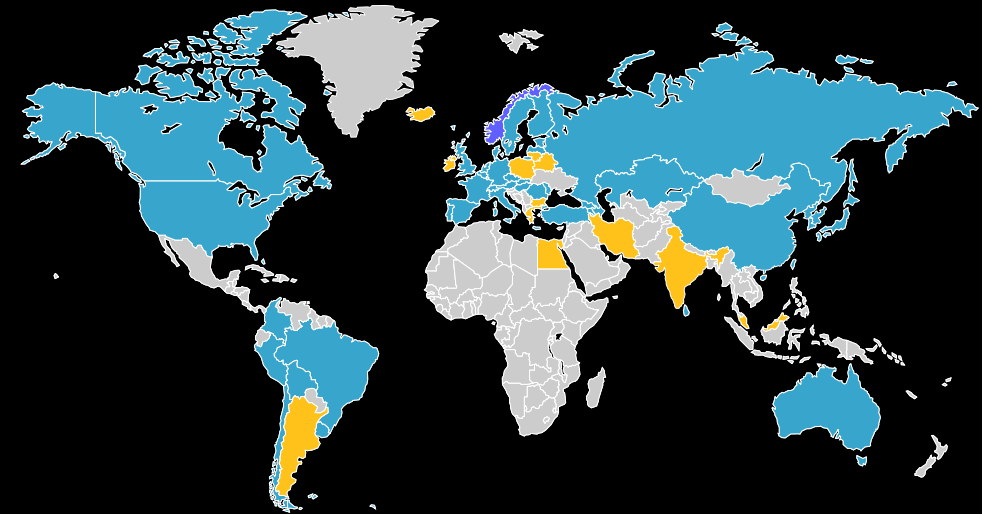
| Name | Email | Status | Company | Access level | Data Management | Design Collaborative |
|------------------|-------------------|--------|-------------|-----------------|-------------------------------------|-------------------------------------|
| AC acrd cost | acrd_cost@yop... | Active | Owner' | Project me... | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| AJ Aravind J... | aravind.jayaku... | Active | | Project ad... | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| AA Archie Arc... | formacost+arch... | Active | Design ... | Project memb... | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| CC Carl Clad | formacost+clad... | Active | Cover Me | Project memb... | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Cassie Bu... | cassie.bustos@... | Active | Imperi... | Project ad... | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| CB Cassie Bu... | cassiebustos@... | Active | Imperi... | Project memb... | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| CS cost suppl... | cost_supplier@... | Active | Autode... | Project memb... | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| DD Dave Door | formacost+ent... | Active | Welco... | Project memb... | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| DD Demo De... | ian2turner@gm... | Active | Autode... | Project ad... | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| FL Fangfang ... | fangfang.lin@a... | Active | | Project memb... | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| FF Freddy Fr... | formacost+fram... | Active | Frame ... | Project memb... | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| GG Gary Glaze | formacost+glaz... | Active | Crystal ... | Project memb... | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| GG Gerrv Gvd... | formacost+ovp... | Active | Wewall | Project memb... | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

ISO 19650



The Autodesk Common Data Environment solution supports the ISO 19650 international standards aimed at enhancing quality, efficiency, and collaboration in managing built environment projects.

ISO 19650 Committee (ISO/TC 59/SC 13) participation map*



- Secretariat (Norway)
- Observing members (14)
- Participating members (31)



Autodesk Construction Cloud reached a significant milestone by achieving ISO 19650 conformance and Level 2 BIM attestation



Folder Structure

Organize templates, folder taxonomy, naming standards, in accordance with ISO 19650 and BCA SMP requirements

Apply suitability codes (S0–S7) to control document workflow states — Work In Progress, Shared, Published, or Archived

Standardize naming conventions

The screenshot displays the AUTODESK Forma file management interface. The left sidebar shows a hierarchical folder structure under 'Project Files':

- 00 Getting Started - Hands...
- 01 - Design Phase
- 02 - Preconstruction
- 03 - Procurement
- 04 - Construction Operations
 - 00 - Incoming
 - 01 - Work in Progress
 - 01. ARCHITECTURE ...
 - 01 PDF
 - 02 BIM
 - 02. STRUCTURE - B...
 - 03. MECHANICAL - ...
 - 04. ELECTRICAL - B...
 - 05. PLUMBING & S...
 - 06. CIVIL - Ground ...
 - 07. INT - Interior
 - 08. SRV - Survey
 - 02 - Shared
 - 03 - Published

The main area shows a list of files with columns: Name, Version, Proj..., Ori..., Level..., Type, Role, Status, Rev..., and Sheet num. The files listed are:

| Name | Version | Proj... | Ori... | Level... | Type | Role | Status | Rev... | Sheet num |
|--|---------|---------|--------|----------|------|------|--------|--------|-----------|
| MCTH-XXX-ZZ-M2-S-121-OVERALL SLAB PLAN FIRST FL... | V2 | MC... | XXX | ZZ | M2 | S | A5 | A001 | 121 |
| MCTH-XXX-ZZ-M2-S-121A-SLAB PLAN FIRST FLOOR.pdf | V2 | MC... | XXX | ZZ | M2 | S | A5 | A001 | 121A |
| MCTH-XXX-ZZ-M2-S-121B-SLAB PLAN FIRST FLOOR.pdf | V2 | MC... | XXX | ZZ | M2 | S | A5 | A001 | 121B |
| MCTH-XXX-ZZ-M2-S-122-OVERALL SLAB PLAN SECOND ... | V2 | MC... | XXX | ZZ | M2 | S | A5 | A001 | 122 |
| MCTH-XXX-ZZ-M2-S-122A-SLAB PLAN SECOND FLOOR.pdf | V2 | MC... | XXX | ZZ | M2 | S | A5 | A001 | 122A |
| MCTH-XXX-ZZ-M2-S-122B-SLAB PLAN SECOND FLOOR.pdf | V2 | MC... | XXX | ZZ | M2 | S | A5 | A001 | 122B |
| MCTH-XXX-ZZ-M2-S-123-OVERALL SLAB PLAN THIRD FL... | V2 | MC... | XXX | ZZ | M2 | S | A5 | A001 | 123 |
| MCTH-XXX-ZZ-M2-S-123A-SLAB PLAN THIRD FLOOR.pdf | V2 | MC... | XXX | ZZ | M2 | S | A5 | A001 | 123A |
| MCTH-XXX-ZZ-M2-S-123B-SLAB PLAN THIRD FLOOR.pdf | V2 | MC... | XXX | ZZ | M2 | S | A5 | A001 | 123B |
| MCTH-XXX-ZZ-M2-S-124-OVERALL SLAB PLAN FOURTH ... | V2 | MC... | XXX | ZZ | M2 | S | A5 | A001 | 124 |
| MCTH-XXX-ZZ-M2-S-124A-SLAB PLAN FOURTH FLOOR.pdf | V2 | MC... | XXX | ZZ | M2 | S | A5 | A001 | 124A |

Showing 154 items



Data Elements

Keep drawings, models, documents, and issues organized in one connected environment

Connect project data directly to RFIs, issues, cost, field workflows, and more for confident decision-making

View and access previous versions anytime for full transparency and use visual comparisons to clarify updates quickly

M101 (100% CD Set) | Building B

Plan HVAC L1

Compare sheets

Sheet A Change Sheet B Change

M101 Building B M101 Building B

Version set 100% CD Set Version set 75% CD Set

Cancel Compare

NOT FOR CONSTRUCTION

AUTODESK

Project Management & Architectural Modeling
Corporate Center, Pa
Chicago, IL 60601

Architectural Design
Blaine Shaws, LLC
Darien, IL 60531

Structural Design and Analysis
Safe Harbor Engineering, PC
11 Emerald Lakes, Suite 11
Aurora, IL 60009

MEP Design and Analysis
Spectrum Consulting Services, LLC
Los Angeles, CA 90001

Civil Engineering
Ruston Engineering Solutions, Inc.
Pittsburgh, PA 15222

Landscape Architecture & Community Planning
Ragotzke, LLC
Baltimore, MD 21201

Commercial Interior Design
CDP Group
San Francisco, CA 94104

| No. | Description | Date |
|-----|----------------------------|--------|
| 1 | M&B Interior Design | 3/1/10 |
| 2 | M&B Interior Revisions | 4/1/10 |
| 3 | M&B Construction Documents | 4/1/10 |
| 4 | M&B Construction Documents | 4/1/10 |

Autodesk
Snowdon Towers
Plan HVAC L1

Project Number: 7765328-33-M
Date: 8/1/2023
Drawn By: Author
Checked By: M101
Scale: 1/8" = 1'-0"



Reviews and Approvals

Build new submittals from specs with auto-populated fields and templates

Route for review and approval with structured multi-step workflows

Monitor status, due dates and close out with full audit trail

Submittals

Items Packages Spec sections

+ Create item

Export all

Title, spec, ball in court, or package

| Status | Num... | Spec | R... | Title | Type |
|------------------------------------|------------|------------------------|------|-----------------------|----------------|
| Open In review step 01/03 | 32900... | 329000 PLANTING | 1 | 1.5-A - Warranty | Warranty |
| Closed | 32900... | 329000 PLANTING | 0 | 1.5-C - Warranty | Warranty |
| Closed | 32900... | 329000 PLANTING | 1 | 1.5-D - Warranty | Warranty |
| Open In review step 01/01 | 32840... | 328400 IRRIGATIO... | 0 | 1.5-F - Attic Stock | Attic Stock |
| Open In review step 01/02 | 32840... | 328400 IRRIGATIO... | 0 | 3.8-B - Maintenanc... | Other |
| Open Reviewed | 32840... | 328400 IRRIGATIO... | 0 | 1.8-B - Warranty | Warranty |
| Required Waiting for submission | 32840... | 328400 IRRIGATIO... | 0 | 3.8-A - Maintenanc... | Other |
| Closed | 323136 ... | 323136 SECURITY ... | 1 | O&M Training And ... | O&M Manuals |
| Required Waiting for submission | 323136 ... | 323136 SECURITY ... | 2 | Warranty/Guarantee | Warranty/Gu... |

Showing 1-50 of 454

Submittals (21) #237200-1

Details Activity Log

Heat Recovery Unit

Closed - Approved as noted

See architect's comments attached.

DAIKIN Heat Recovery Unit.pdf

Final response set by Keenan Bruni (ACS-TSE-Construction) on Sep 10, 2025 at 8:44 AM | All project members can see the completed submittal

General information

Description

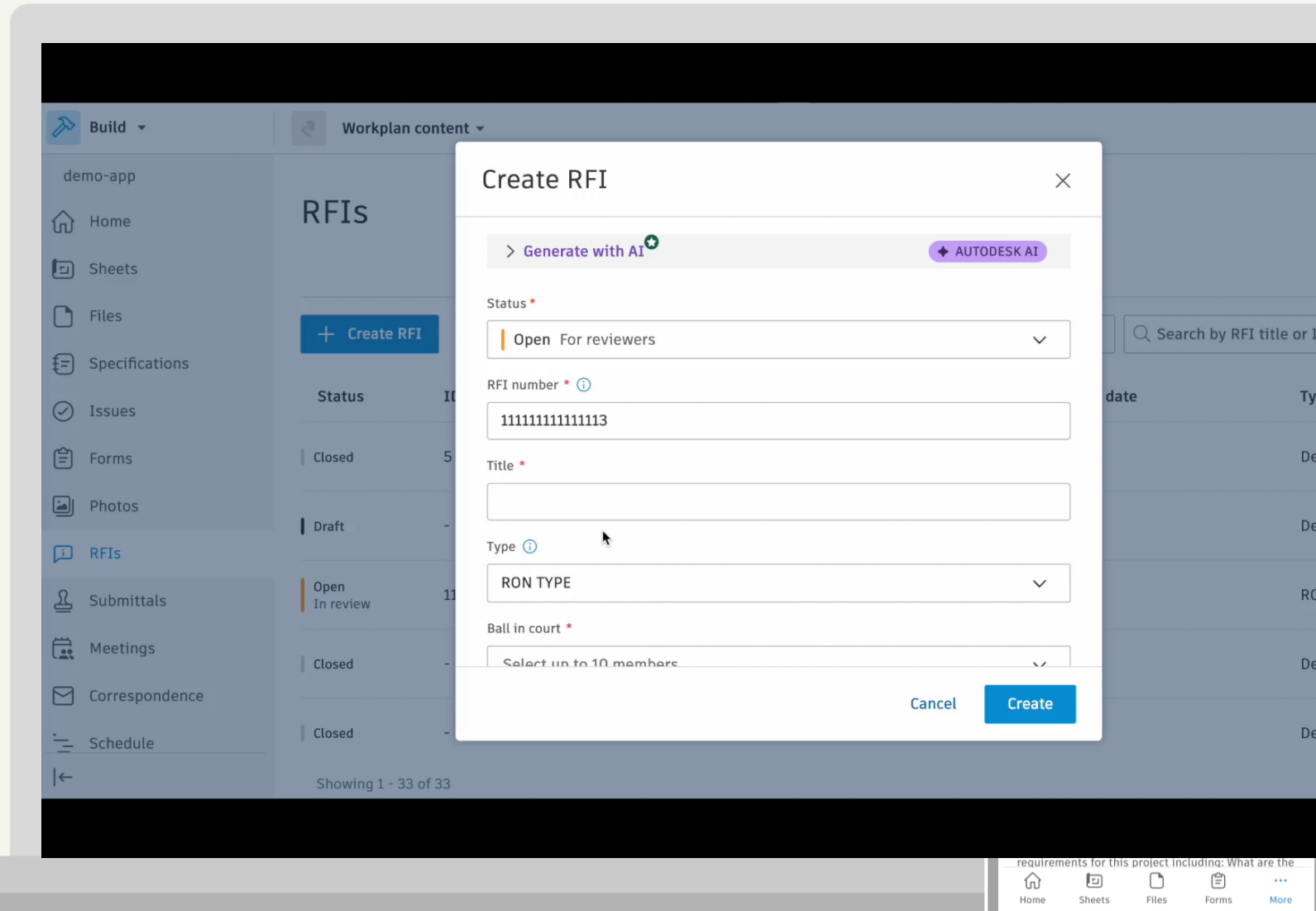
DAIKIN Energy Recovery Ventilator 300
VAM300GVJU

Home Sheets Files Forms More

Standardize and control data collection with custom RFI creation forms and automatic routing to single or multiple reviewers

Connect the field and office by linking RFIs to supporting references, escalating issues, and creating an air-tight audit trail from question to resolution

Use Quick Create to auto-populate RFI fields from sheet markup context — raise questions faster without switching tools



The screenshot displays a software interface for creating an RFI. A modal dialog titled "Create RFI" is open, featuring the following fields and options:

- Generate with AI:** A button labeled "Generate with AI" with a plus icon, and a purple button labeled "AUTODESK AI".
- Status:** A dropdown menu with "Open For reviewers" selected.
- RFI number:** A text input field containing "11111111111113".
- Title:** An empty text input field.
- Type:** A dropdown menu with "RON TYPE" selected.
- Ball in court:** A dropdown menu with "Select up to 10 members" selected.
- Buttons:** "Cancel" and "Create" buttons at the bottom right.

The background interface shows a sidebar with navigation options: Home, Sheets, Files, Specifications, Issues, Forms, Photos, RFIs (highlighted), Submittals, Meetings, Correspondence, and Schedule. The main content area displays a table of RFIs with columns for Status and ID. A search bar at the top right is labeled "Search by RFI title or ID".



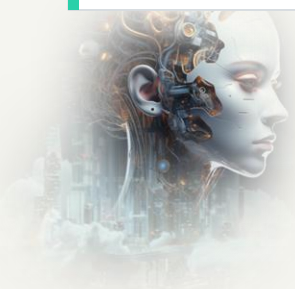
Data from the Field

Search photos by tag, location, or date and pull up any site image in seconds for reports, RFIs, or issues

Autodesk AI automatically applies location, date, and content tags to every photo captured on site

Manually correct or add custom tags when needed — giving teams full control over categorization and searchability

The screenshot displays a web-based photo gallery for the 'Seaport Civic Center'. The interface includes a search bar at the top, navigation tabs for 'Gallery' and 'Map', and a '+ Add' button. A 'Settings' icon is visible in the top right. The main area shows a grid of 20 photos, each with a thumbnail and a caption including a file ID (e.g., IMG_20180328_124022) and a timestamp (e.g., Mar 28, 2018 12:40 PM). A sidebar on the right, titled 'Filter Photos', allows users to filter by Title, Location, Date taken (selected), Date added, Photo type, Referenced by, Tags, and Uploaded by. A 'Clear filters' button is at the bottom of the sidebar.





Data from the Field

Access centralized sheets, files, and models — version history confirms what is current with the field mobile app

Create and assign quality, safety, or punch list issues directly from the mobile app with photos, locations, and sheet references attached

Autodesk AI suggests issue type, location, and assignee based on photo content — reducing manual data entry

The image displays two screenshots of the Autodesk mobile application interface. The left screenshot shows a project page for 'PRJ-26-E04' with a 'Welcome, Jonathan.' message and buttons for 'Take photo' and 'Daily Report'. The right screenshot shows a project page for '25_Towers Block AU' with a 'Welcome, Lior.' message and buttons for 'Quick create issue', 'Design', '(Sample) Daily Rep...', and 'Take photo'. Both screenshots show a 'Work status' section with 'Your assigned work' and 'Project work' lists, and a 'Recently viewed' section for sheets and files.



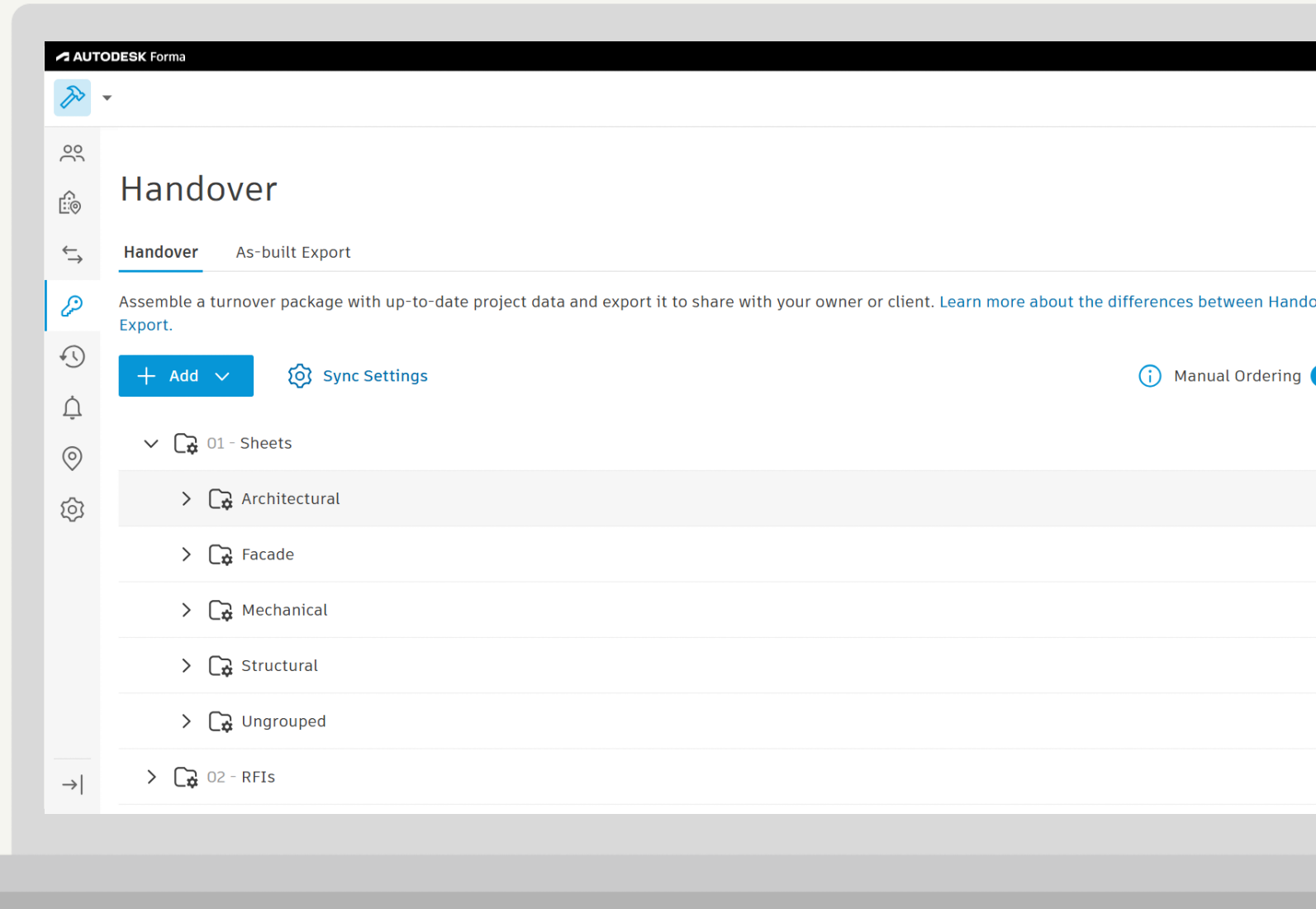


Project Closeout

Automatically compile and organize closeout documents by folder through the project

Leverage construction data in operations with all live hyperlinks, photos, and markups

Export an organized handover package for turnover





Analytics & Intelligence

Track schedule, cost, quality, and safety indicators in real time — with early warning triggers for at-risk items

Aggregate data across all projects in one view for executive reporting and cross-project benchmarking

Export data in formats compatible with BCA's SGBuildEx data exchange platform for seamless regulatory reporting

AUTODESK Forma

Insight | East Residence Hall

DASHBOARDS

- My Dashboard
- Risk
- Design
- Model Analytics
- Project Controls
- Quality
- Safety
- Coordination
- Executive Overview
- Issues
- Project Managers
- RFI Progress
- Safety & Inspections ...
- Superintendent
- Data Connector**
- Insight Builder
- Reports

Data Connector

Extractions | Power BI Templates

Forma Build
Quality KPIs - Design & Document Review

Project Name: [Input]
Project Value: \$32.41M | Total COC (approved): 4.00M

Owner Change Order Project Value: 12.34%

Design Issues per million \$ of project value

Average time to close design issues: 9 Days

Overdue submittals trend

High-risk RFIs per million \$ of project value

Average time to approve submittals: 20 Days

Average time to close quality issues: 50 Days

Quality KPIs (Design & Document Review) - Project

Project Account ACC v3.0

Last updated: 8/12/2024

Track and analyze your Design and Document Review performance metrics.

CSV template | Connector template

Forma Build
Quality KPIs - Field Quality Control

Project Name: [Input]
Project Type: [Input]
Form Type: [Input]

Average time to close quality issues: 10 Days

Average time to close issues from a form: 7 Days

Forms with issues

Form completion rate

Outstanding quality issues per million \$ of project value

Quality KPIs (Field Quality) - Account

Project Account ACC v1.3

Last updated: 8/19/2024

Track and analyze your Field Quality performance indicators.

CSV template | Connector template

Forma Build
Quality KPIs - Field Quality Control

Project Name: [Input]
Form Type: [Input]

Quality issues per million \$ of project value

Average time to close quality issues: 9 Days

Issue Breakdown

Quality KPIs (Field Quality) - Project

Forma Build
Quality KPIs - Model Coordination Issues - Account

Project Name: [Input]

Average of Days to Close by Project Name

| Project Name | % Overdue model coordination issues |
|--|-------------------------------------|
| TSS AD&X Office | 14.53% |
| PM MEP | 13.12% |
| East Residence Hall - ACS 15 [MM,QA,Int] | 9.70% |
| TSE Certification Project - ABT | 7.88% |
| Carrollton AD&X Office | 5.88% |
| IM&MS Certification Project | 3.58% |
| C. O. Drive Project Drive | 3.45% |
| East Residence Hall - AU 2022 | 2.63% |

Quality KPIs (Model Coordination Issues) - Project

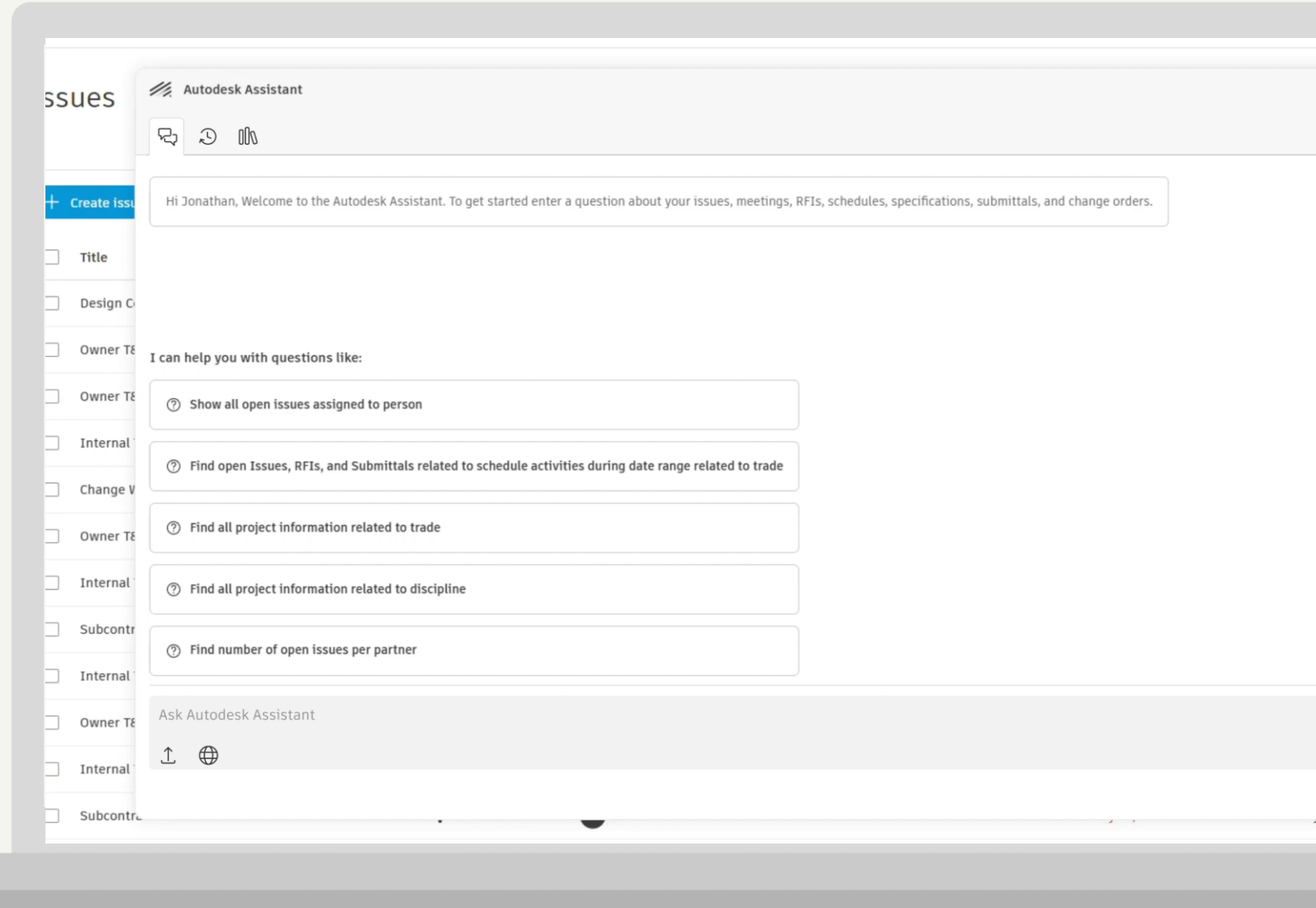


AI

Ask questions in plain language and get answers drawn from your live project data — RFIs, specs, drawings, and more

Save prompts to your Prompt Library and review detailed chat history

Quickly access help content when you need guidance



Autodesk **trust** principles for AI

Building integrity & trust
into Autodesk AI



Responsible

We hold ourselves to high standards in acquiring and managing data as well as training and delivering fair and safe AI models.



Transparent

We are forthcoming about the design, development, and intended use of AI systems and data.



Accountable

We are committed to respecting the choices of our customers and aligning to laws and regulations.



Reliable

We are rigorous in building AI systems that strive to provide accuracy, validity, and consistency.



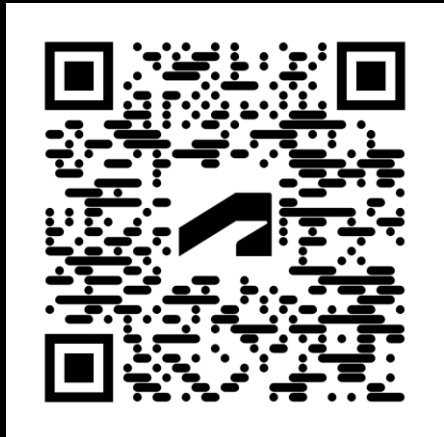
Safe & Secure

We employ robust practices throughout the AI lifecycle to protect customer data, intellectual property, and privacy, and to produce safe outcomes.

Different types of AI need different approaches

Some Autodesk AI-powered features don't use machine learning and don't require data for training. For those that do, Autodesk uses various data sources. Learn more in the Trusted AI section of Autodesk's Trust Center.

AUTODESK TRUST CENTER



AI Transparency Card

Construction Cloud
Photo Autotags

Description
Automatically adds up to 50 con
metadata to photos.

Feature informatio

| |
|-----------------------|
| Feature functionality |
| Model source |
| Primary technique |

Trust ingredients

| |
|-----------------------|
| User directed feature |
| Personal data |
| Data source(s) |
| Choice format |
| Encryption at-rest |
| Encryption in-transit |
| Other safeguards |

For more information on our Tru
consult our Trust Center.

AI Transparency Card

Construction Cloud, Docs
Automated Specifications Sectioning

Description
Specification tool design to automatically splits apart large
specification documents into easily digestible sections.

Feature information

| | |
|-----------------------|-----------------------|
| Feature functionality | Automate |
| Model source | Open Source |
| Primary technique | Classification |

Trust ingredients

| | |
|-----------------------|--|
| User directed feature | Yes |
| Personal data | No |
| Data source(s) | Customer content (e.g. Specification document layouts) |
| Choice format | No |
| Encryption at-rest | Yes |
| Encryption in-transit | Yes |
| Other safeguards | Aggregated, Anonymized |

For more information on our Trusted AI practices,
consult our Trust Center.



ISO 42001 Certified

Key takeaways

Standards create speed

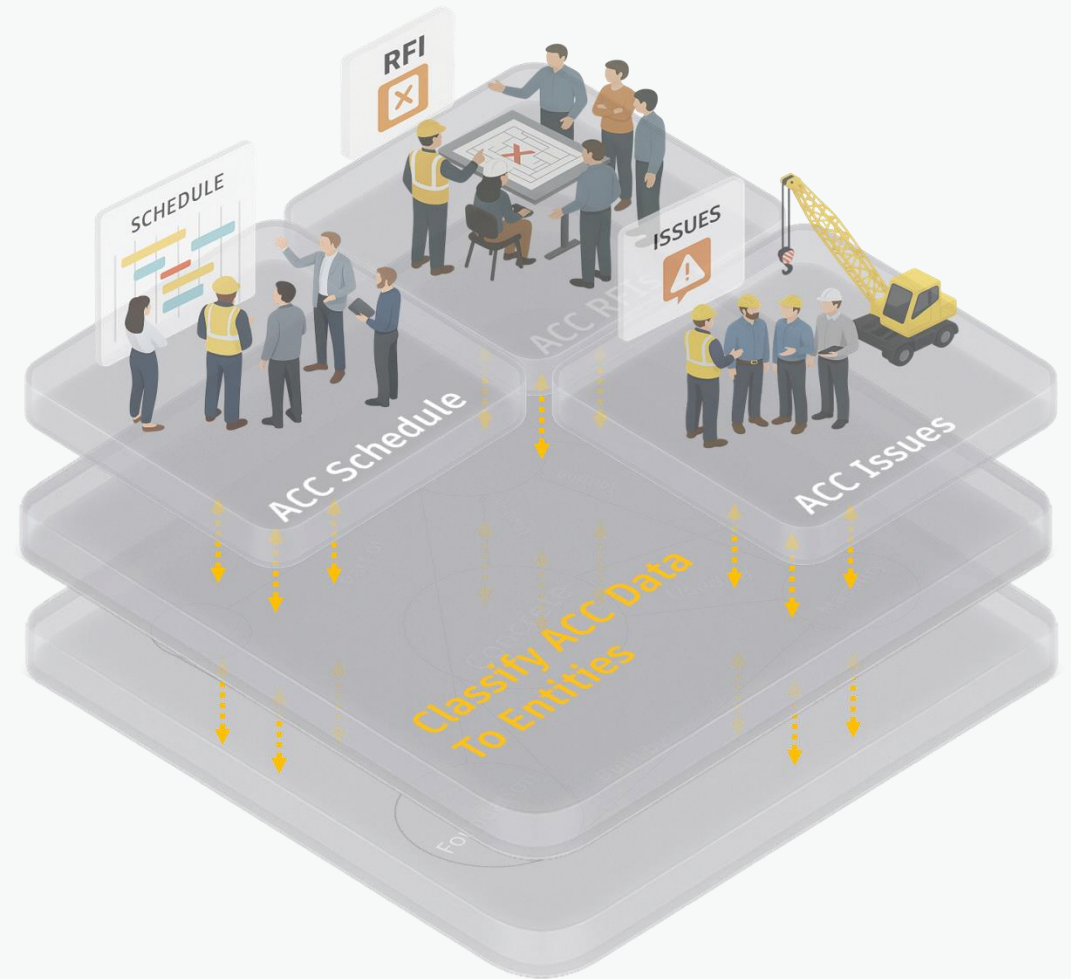
Templates, folder structures, naming, permissions, and review states make the right path easier.

Context creates trust

Version history, linked RFIs, issues, submittals, photos, and approvals make decisions traceable.

Data creates insight

Dashboards, data connectors, AI and APIs turn project records into action and portfolio learning.



Smart filing is not about where documents live.

It is about how project decisions move.

Find it. Trust it. Act on it.





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