

Forma Build Field Execution & Project Control for Site Engineers

Target Audience

This course is designed for site engineers, field engineers, project coordinators, supervisors, QA/QC personnel, and construction professionals who need to manage drawings, site records, issues, RFIs, submittals, and project information using Forma Build.

Course Objective

The objective of this course is to develop the practical skills required to use Forma Build for day-to-day site engineering and construction-information workflows. Participants will learn to work with project access and permissions, drawings and revisions, field observations, forms, issues, RFIs, submittals, reporting, and closeout while maintaining traceable and reliable project records.

Course Outcomes

Participants will be able to:

- Configure and navigate a Forma Build project using appropriate roles, permissions, project settings, and document structures.
- Manage drawings and revisions while verifying that field teams are working with current project information.
- Create and maintain issues, forms, photographs, and site observations with supporting project records.
- Assign responsibility and due dates and monitor field items through their workflow.
- Prepare and track RFIs and understand the submittal review process.
- Generate reports and assemble traceable records for project closeout.
- Verify workflow outputs, identify configuration errors, and document unresolved exceptions.
- Apply consistent field-documentation practices across web and mobile workflows.

Course Outline

The course comprises **24 hours of theory and practical labs and is divided into 8 progressive chapters** covering Forma Build project setup, controlled document management, field documentation, issue management, responsibility tracking, RFIs, submittals, reporting, and closeout. Guided hands-on exercises are included throughout the course to reinforce learning and evaluate understanding of the concepts covered.

Module 1. Establishing a Controlled Forma Build Project

- Understand the Forma Build project environment and information structure.
- Navigate project tools, documents, drawings, and related project information.
- Organize project information using a practical folder and naming structure.
- Understand project members, companies, roles, and responsibilities.
- Apply appropriate access and permission settings.
- Review initial project and tool settings before field use.
- Identify how incorrect permissions, naming, or setup decisions can affect downstream workflows.
- Verify project setup against an acceptance checklist.
- **Lab 1: Configure and Validate a Site Engineering Project Workspace**

Module 2. Drawing Management and Revision Control

- Navigate drawings and locate information required for site activities.
- Upload and prepare drawing information for field use.
- Review drawing metadata and document identification.
- Understand drawing versions and revision history.
- Compare revised information with previous project information.
- Verify that the correct drawing revision is available for field use.
- Trace a drawing-related result back to its source information.
- Record discrepancies and unresolved document exceptions.
- **Lab 2: Upload, Review and Verify a Revised Construction Drawing**

Module 3. Capturing Site Information with Forms and Photos

- Understand the role of forms, checklists, photographs, and observations in site documentation.
- Select and complete appropriate forms and checklists.
- Record site observations consistently.
- Attach photographs and supporting information to field records.

- Review completed records against defined acceptance criteria.
- Maintain traceability between observations and their supporting evidence.
- Document incomplete information and unresolved exceptions.
- **Lab 3: Complete a Site Inspection Record with Checklist, Photos and Evidence**

Module 4. Creating and Managing Construction Issues

- Understand the issue-management workflow.
- Record clear and actionable site issues.
- Categorize issues and provide meaningful descriptions.
- Add location information, photographs, drawings, and supporting references.
- Assign issues to responsible project participants.
- Set and monitor due dates.
- Review issue status and follow-up requirements.
- Verify that issue records contain sufficient evidence for resolution.
- **Lab 4: Document, Assign and Verify Three Site Issues**

Module 5. Responsibility, Due Dates and Field Follow-Up

- Understand how assignment and due dates support field accountability.
- Identify the correct responsible party for an action.
- Apply realistic due dates to field records.
- Review open, overdue, and completed items.
- Trace assigned work back to its originating record.
- Diagnose incorrect assignments and workflow settings.
- Maintain a concise assumptions and exceptions log.
- Verify completed actions against expected results.
- **Lab 5: Assign, Track and Validate a Set of Field Actions**

Module 6. Managing RFIs and Information Clarification

- Understand the purpose of RFIs in construction information workflows.
- Identify when a field question should be formalized as an RFI.
- Prepare an RFI with appropriate description and supporting references.
- Understand RFI roles, permissions, assignments, and workflow responsibilities.
- Follow RFI progress through review and response.
- Connect supporting drawings, issues, and project information where applicable.
- Review the returned information and maintain a traceable record.

- **Lab 6: Prepare and Track a Field RFI from Question to Recorded Response**

Module 7. Understanding and Tracking Submittals

- Understand the purpose of construction submittals.
- Recognize typical submittal information and supporting documents.
- Understand responsible contractor, manager, reviewer, and stakeholder responsibilities.
- Review submittal assignments and due dates.
- Follow the submission and review sequence.
- Understand responses, revisions, and closure.
- Review the submittal log for outstanding actions.
- **Lab 7: Review and Trace a Sample Submittal Through Its Approval Workflow**

Module 8. Reporting, Verification and Project Closeout

- Review project information required for reporting and closeout.
- Filter and verify issue, form, RFI, and submittal records.
- Generate appropriate project reports.
- Check reported information against source records.
- Document unresolved exceptions before closeout.
- Organize completed records and supporting evidence.
- Review outstanding actions before final handover.
- Prepare a concise closeout record for the completed workflow.
- **New content:** Apply cross-tool reference checks to strengthen traceability between related project records.
- **New content:** Perform a field-to-office verification using Forma mobile workflows and synchronized project information.
- **Lab 8: Produce and Validate a Site Engineering Closeout Package**