

Level Up Construction Project Management

How automations, insights, and AI help construction teams simplify workdays and make the right decisions.

 AUTODESK Forma





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Introduction

Construction project management has never been more demanding. Teams are juggling tighter schedules, labor shortages, evolving risk, all while managing nonstop coordination across the office, field, and extended project teams.

At the same time, many teams are still stuck working across disconnected tools, spreadsheets, emails, and point solutions that create data silos and slow everything down. Instead of making work easier, fragmented systems often lead to duplicate work, manual processes, inconsistent reporting, and limited visibility into what's actually happening on a project.

That's why construction teams are moving beyond basic project tracking tools and adopting more connected construction management platforms that bring workflows and project data together in one place. With the right foundation, teams can spend less time chasing information and more time driving projects forward.



01

Leveling up project management

Connected construction management platforms are changing what project teams should expect from their technology.

Today, leveling up project management means more than simply tracking tasks and storing documents. Teams need tools that help them move faster, cut down on manual work, and make smarter decisions in real time.

With connected workflows and shared project data, teams can automate time-consuming processes, streamline communication, surface risks earlier, and quickly turn project information into actionable insights. Instead of constantly reacting to problems, teams can stay ahead of them.

The following chapters explore examples of the automation workflows, reporting capabilities, and AI-powered insights that are helping project teams work more efficiently and keep projects on track. You'll also see how Autodesk Forma brings these capabilities together to simplify day-to-day work and improve project execution.



02

Get projects started faster

Project startup is one of the most time-consuming and administratively heavy phases of a project. Teams need tools that standardize processes, reduce repetitive setup tasks, and keep projects moving from kickoff to closeout.

Standardize and automate project setup

Project setup can quickly become inconsistent when recreating workflows, permissions and folder structures from scratch on every job. Those inconsistencies often lead to onboarding challenges, communication gaps, and disconnected execution later in the project lifecycle. Teams should have tools that make setup faster and help them repeat proven processes across projects.

Project templates in Forma help teams get projects up and running faster with preconfigured permissions, workflows, and data management standards already in place.

Teams can standardize folder structures, automate access permissions, and automatically configure workflow standards for RFIs, submittals reviews, meeting minutes, cost management activities, reporting, and more.

Instead of manually rebuilding workflows for every project, organizations can scale proven standards consistently across teams while still customizing templates to fit specific project or stakeholder needs.

The results:

- ✓ Faster project startup
- ✓ Reduced administrative effort
- ✓ More consistent execution from day one

Autodesk Assistant ✦

Assets

Files

Forms

Issues

RFIs

Submittals



Save time setting up submittals

Manually reviewing specifications and building submittal logs can take days or even weeks, slowing procurement, coordination, and field execution before work even begins.

With AutoSpecs in Forma, AI automatically analyzes specifications, identifies submittal requirements, and generates detailed submittal logs in minutes. Forma helps identify missing items or gaps that may be overlooked during manual review.

Submittals can then flow through connected review workflows with automated routing to the appropriate reviewers.

Instead of spending valuable time manually building logs, teams can accelerate procurement, improve coordination, reduce delays, and get projects moving earlier.

Start smarter to finish stronger

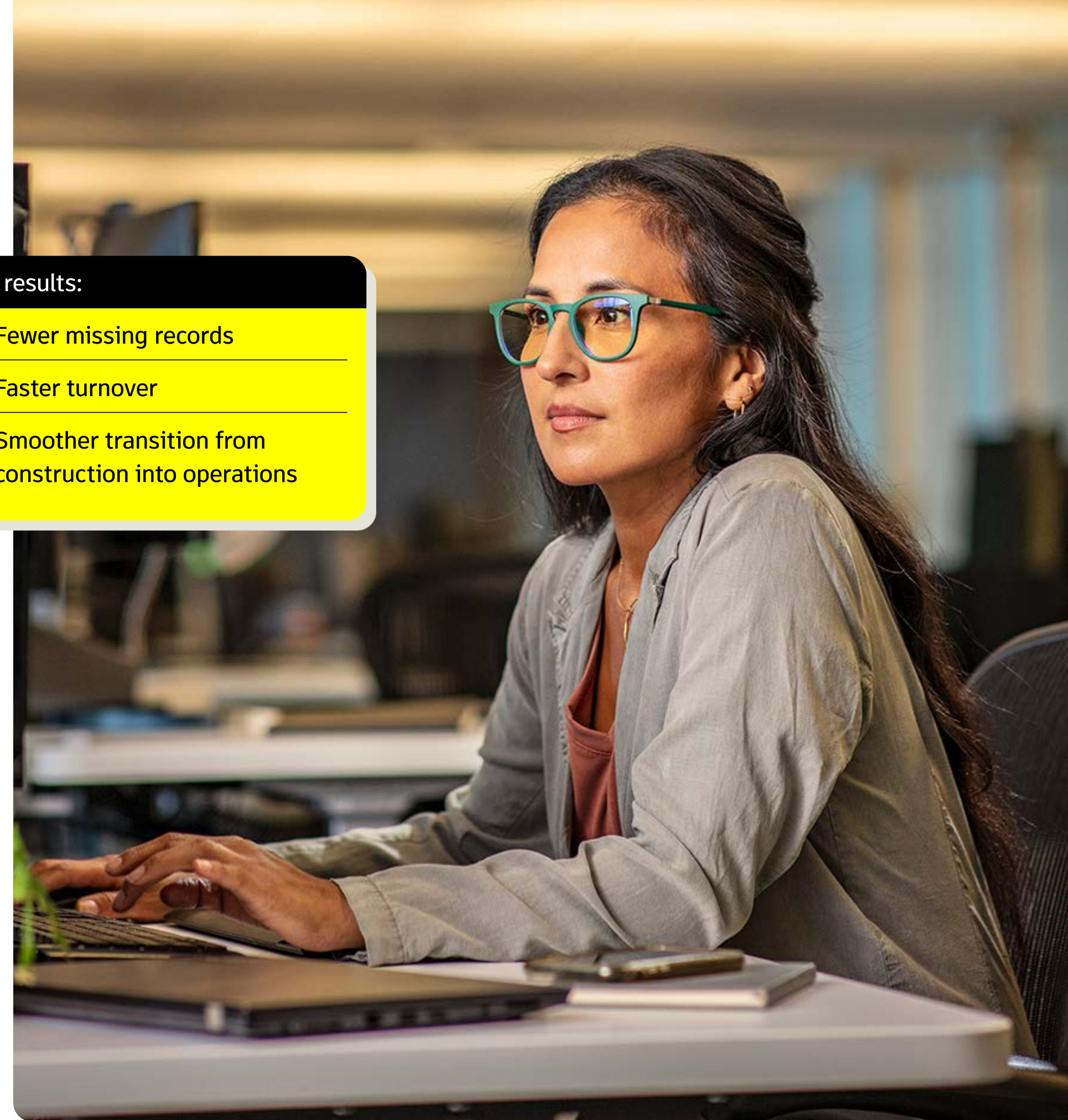
Closeout often becomes stressful because teams wait until the end of construction to organize manuals, warranties, as-builts, inspection records, and turnover documentation.

Forma helps simplify handover by allowing teams to standardize closeout requirements, folder structures, and asset organization from day one. Once guidelines are established, relevant project data, such as RFIs, submittals, sheets, and asset information, is automatically pulled into the handover package.

Instead of scrambling to collect documentation at project completion, teams maintain organized turnover information throughout the lifecycle of the project.

The results:

- ✓ Fewer missing records
- ✓ Faster turnover
- ✓ Smoother transition from construction into operations



03

Stay up to date, effortlessly

Construction teams generate enormous amounts of project data every day, but information only becomes valuable when teams can quickly access, understand, and act on it.

Automatic and real-time updates

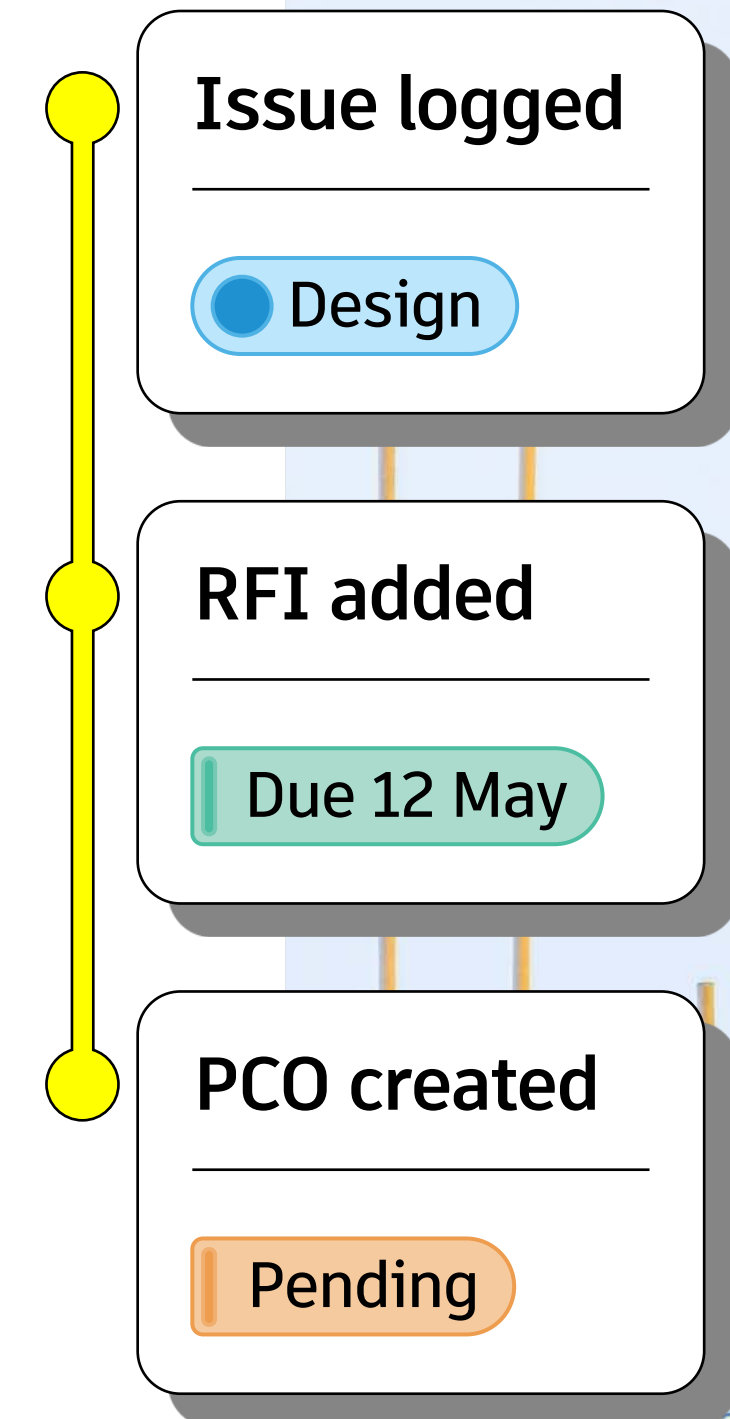
Construction projects change constantly, and outdated information can quickly lead to delays, rework, and costly mistakes. When teams rely on disconnected systems or manual updates, it becomes difficult to keep everyone aligned on the latest project status.

Forma helps keep teams connected with real-time updates across schedules, drawings, RFIs, submittals, issues, and cost workflows. When information changes in the office, field teams can immediately access the latest project data from mobile devices, helping reduce communication gaps and avoid working from outdated information.

Automated notifications and activity tracking help keep stakeholders informed without relying on emails or calls. Connected workflows also give teams better visibility into downstream impacts, like potential change orders and issue-related cost activity as project conditions evolve.

The results:

- ✓ Instead of spending time chasing updates across systems, teams can make faster decisions with confidence knowing everyone is working from the same up-to-date information.



Organize and search project documentation

Specification documents are essential to construction projects, but manually navigating hundreds of pages can slow coordination and increase the risk of missed requirements.

Forma simplifies specification review with AI-powered specification sectioning that automatically organizes documents into structured, searchable sections. Teams can quickly locate requirements, understand responsibilities, and identify potential risks without manually digging through lengthy documents.

The result

- ✓ **Faster access to information**
- ✓ **Better coordination**
- ✓ **Reduced risk of missed details**

Keep project costs connected

Cost management works best when it is connected directly to project execution. When budgets, change management, RFIs, schedule, and field issues live in separate systems, teams often spend valuable time manually reconciling information and identifying financial impacts too late.

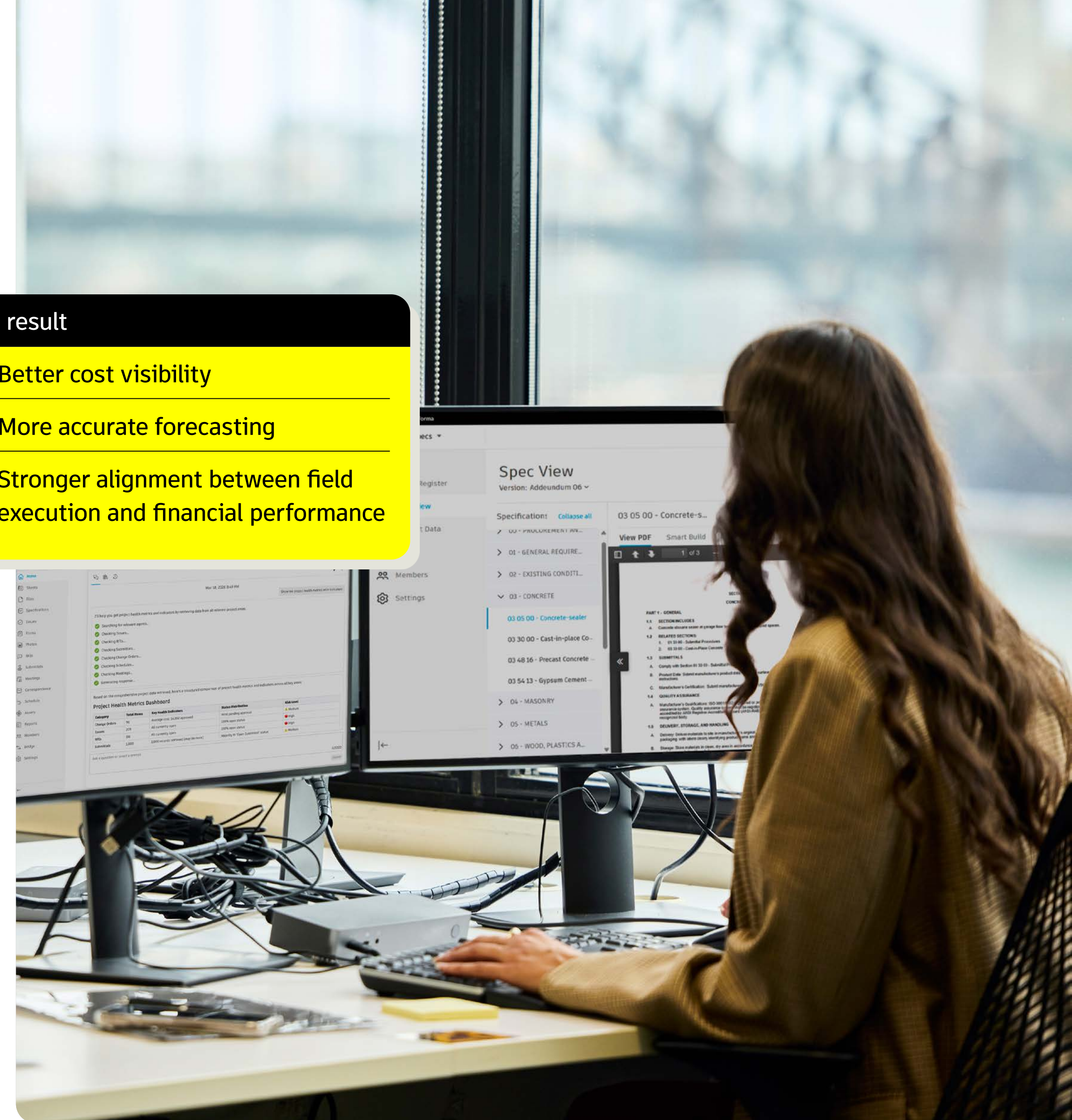
Forma connects cost management activities directly to project and field workflows so teams can see budget impacts, committed costs, forecasts, and change activity update in real time as project conditions evolve.

Teams can also reference cost activities directly within RFIs, issues, meeting minutes, schedule tasks, and change workflows to maintain visibility and context.

Built-in approval workflows and forecasting capabilities help teams manage financial risk, improve accountability, and make faster decisions with more confidence.

The result

- ✓ **Better cost visibility**
- ✓ **More accurate forecasting**
- ✓ **Stronger alignment between field execution and financial performance**



AI project-level agent

Construction teams lose valuable time searching through project documents, reports, and workflows for answers. While AI tools are becoming more common in construction, many still require separate platforms, manual uploads, or disconnected workflows.

Autodesk Assistant in Forma helps teams interact with connected project data using natural language. Instead of manually searching across systems, teams can ask questions and receive contextual answers pulled directly from their project information.

Assistant can help summarize documents, surface project risks, answer questions, automate workflows, and provide real-time insights directly within the platform.

The results:

- ✓ **Faster access to information**
- ✓ **Less manual searching**
- ✓ **Quicker decision-making**

Autodesk Assistant ✨

Show all open high-risk RFIs

Generate with AI



Personalized project dashboards

Construction teams manage a constant stream of information, and it can be difficult for individuals to know what needs attention and where to focus.

Project Home in Forma gives every user a personalized, customizable view into their work, responsibilities, and project status. Instead of manually tracking assignments and updates, Forma helps organize and surface the information most relevant to each team member.

Teams can quickly see assigned tasks, outstanding RFIs and submittals, recent activity, milestones, open issues, weather forecasts, quality and safety trends, and high-risk areas surfaced by AI. Because Project Home is customizable, teams can tailor dashboards to match individual roles and workflows.

The results:

- ✓ A more organized project experience with less time spent searching for updates

04

Automate manual workflows

Construction teams manage constant coordination, approvals, and documentation.

Manual workflows slow teams down, increase administrative work, and make it harder to keep projects moving forward efficiently.

Teams need tools that simplify execution and automate repetitive tasks so they can focus on delivering projects successfully.

Speed up work on site

Field teams move quickly, and documentation is often one of the first tasks to get delayed when teams are under pressure. But incomplete issue documentation can create communication gaps, missed follow-up, and increased project risk.

Project teams need workflows that simplify documentation while improving visibility and accountability across the office and field.

Forma helps accelerate issue creation with AI-powered capabilities built into mobile workflows. Teams can capture photos, answer a simple prompt, and automatically generate detailed issues with relevant context included. AI helps populate issue details and reduce the amount of manual typing required in the field. Simply review and edit before submission.

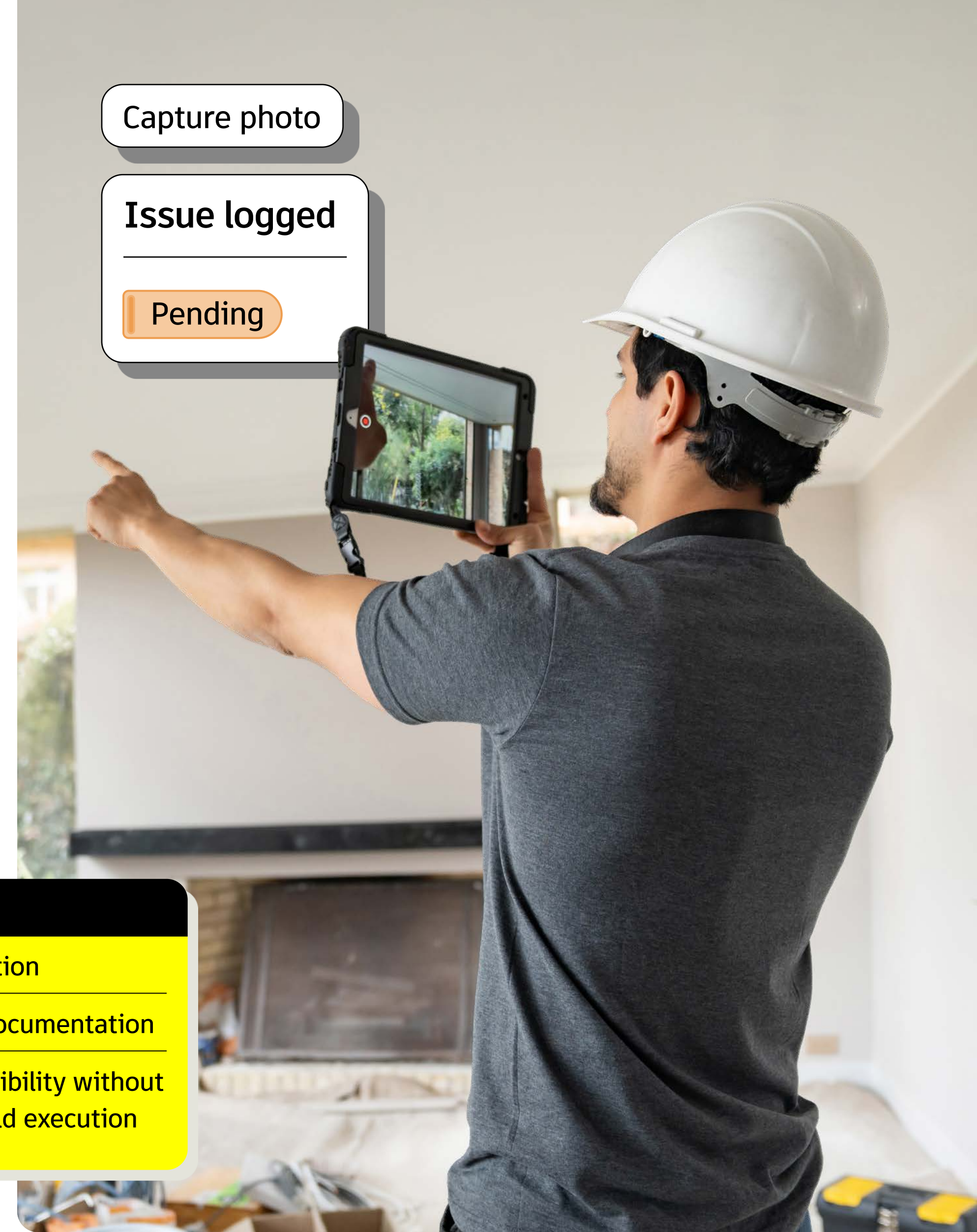
Capture photo

Issue logged

Pending

The results:

- ✓ Faster issue creation
- ✓ More complete documentation
- ✓ Better project visibility without slowing down field execution



Get questions answered faster

Construction projects depend on timely clarification, but manually creating RFIs can be repetitive and time-consuming.

Forma helps simplify workflows with AI-powered RFI creation. Users can enter a prompt or project question, and Forma will generate a context-rich draft RFI using connected project information.

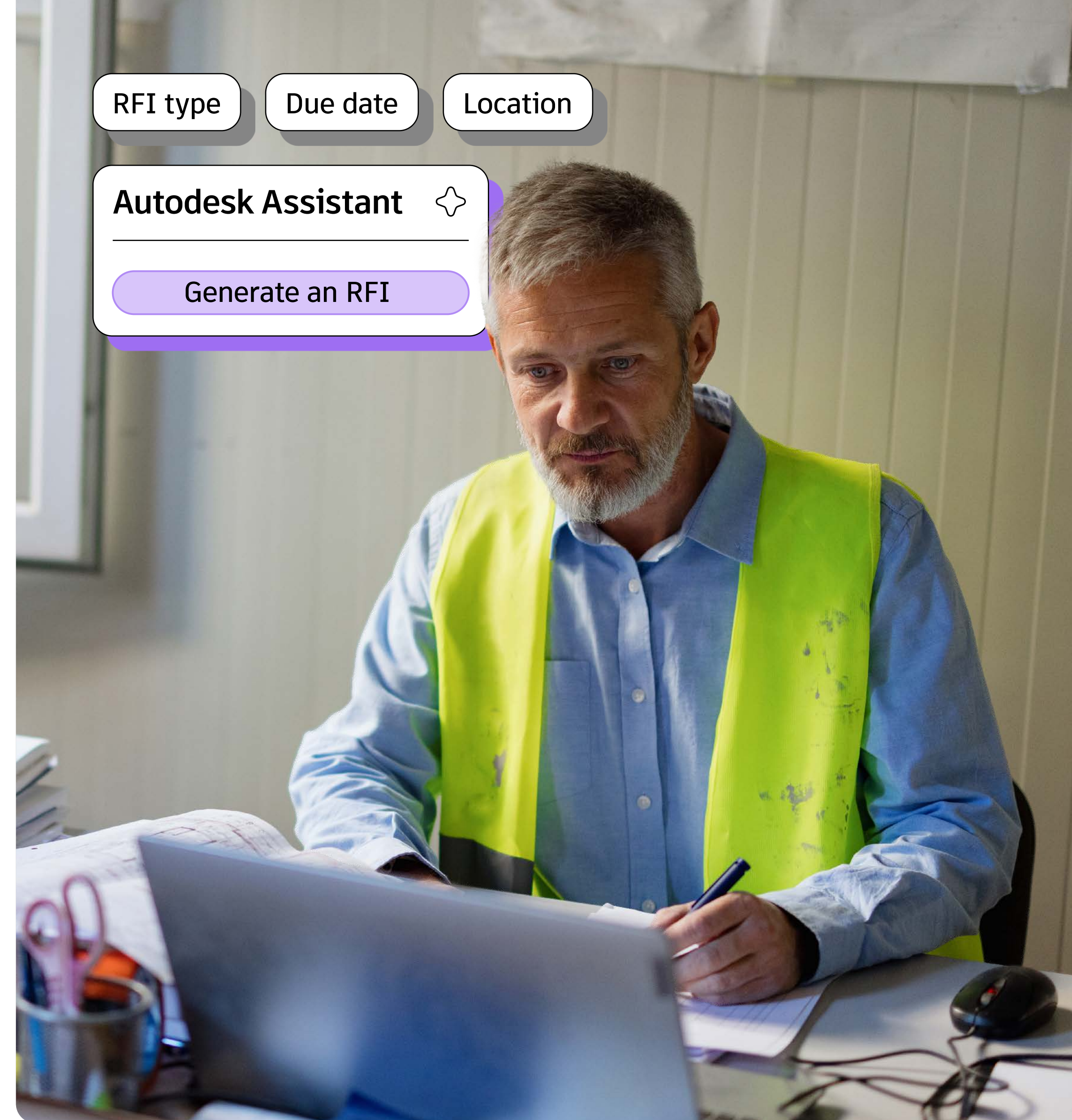
AI can help populate fields such as RFI type, due date, and location details while surfacing related documents and relevant project context that may otherwise be missed.

Teams still review, edit, and approve RFIs before submission, maintaining oversight while reducing manual effort.

Forma supports customizable RFI workflow templates that allow admins to establish default managers and reviewers for each type of RFI. Once submitted, RFIs are automatically routed to the appropriate ball-in-court based on type.

The results:

- ✓ **Faster RFI turnaround**
- ✓ **Improved consistency**
- ✓ **Quicker communication that helps keep projects moving**





Connect the field to costs

Field issues rarely exist in isolation. Small problems can quickly impact schedules, budgets, and downstream coordination. When issue management and cost workflows are disconnected, it becomes difficult to understand the full financial impact of project changes.

Forma helps connect operational and financial workflows by allowing teams to generate Potential Change Orders directly from issues or RFIs while maintaining the full context and history of project changes.

Connected workflows help teams track how field issues impact budgets, change events, and downstream cost activity in real time.

Instead of recreating information across multiple systems, teams can track issue status, approvals, review progress, and associated cost impacts in one connected workflow. As updates are made, changes automatically sync across workflows, helping teams maintain visibility, accountability, and alignment between field and office teams.

The results:

- ✓ **Faster review cycles**
- ✓ **Better coordination between field and office teams**
- ✓ **Clearer visibility into project risk and financial impacts**

05

Gain quick and comprehensive insights

Construction teams can't afford to waste time chasing information across disconnected systems.

But when reporting, analytics, and project updates live in separate tools, teams struggle with delayed decisions, inconsistent data, and limited visibility into project performance.

A connected construction management platform brings project data together in one place, helping teams turn real-time information into actionable insights. With connected reporting, predictive analytics, and centralized dashboards, teams can identify issues earlier, make faster decisions, and keep projects moving with greater confidence.



Real-time reporting

Project reporting should help teams make decisions, not create additional administrative work. But many teams still spend hours manually compiling updates, chasing field information, and reconciling information across disconnected systems.

Forma helps simplify reporting by connecting live project data directly to reporting workflows. Automated daily reports and configurable templates allow teams to generate reports using real-time information from RFIs, issues, inspections, forms, submittals, schedules, field activity, and more.

Field teams can capture weather, manpower, delays, deliveries, and site activity directly from their mobile devices, so information is documented as work happens instead of hours later.

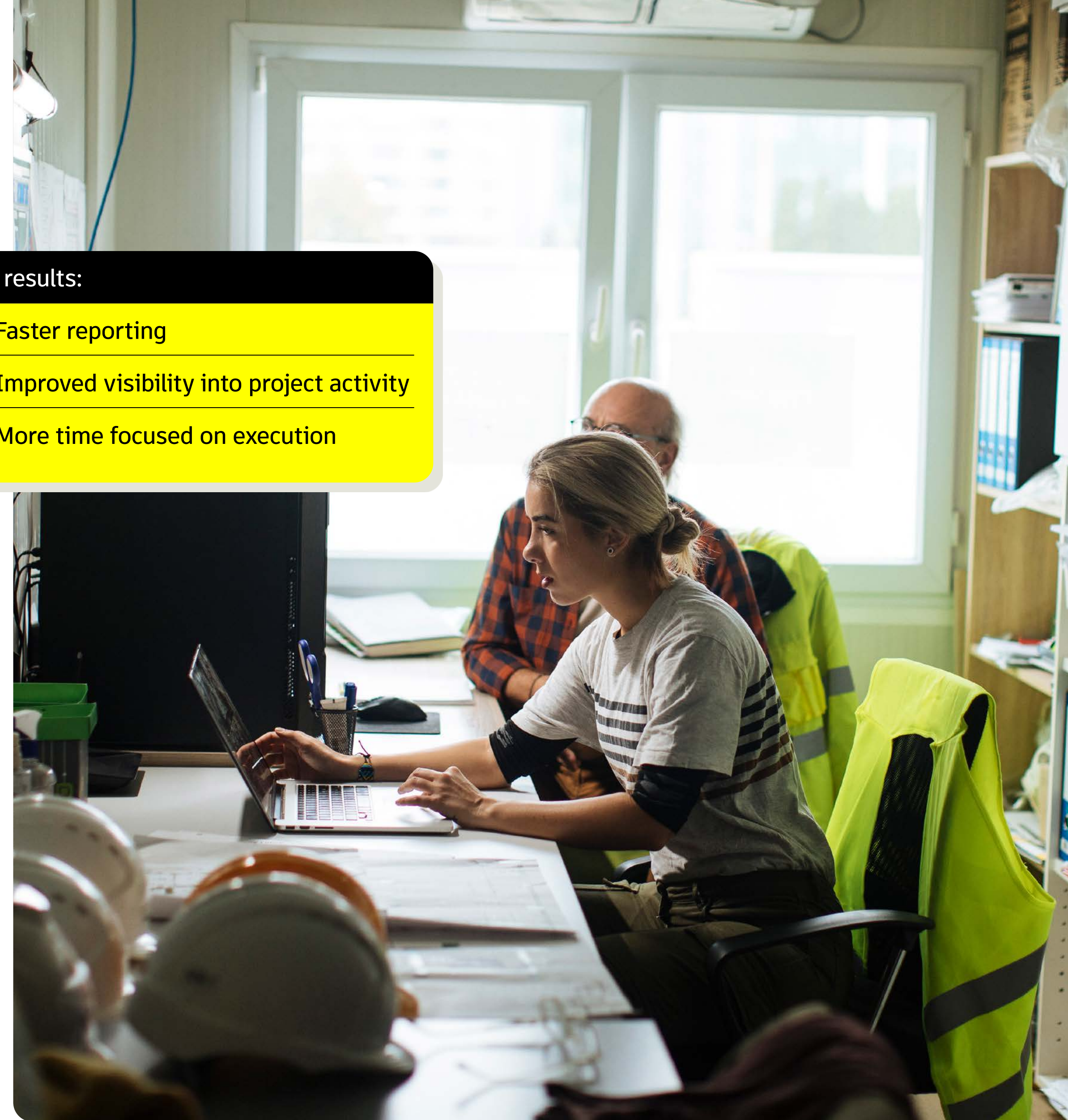
On the financial side, connected cost management reporting gives teams clearer visibility into budget performance and changes over time.

Features like Budget Snapshots allow teams to capture and compare budget versions at key milestones, making it easier to identify changes, track variances, and understand how decisions impact the overall financial health of a project. Instead of piecing together cost information from spreadsheets and disconnected reports, teams can quickly spot budget deviations and act earlier.

Project managers can standardize reporting workflows, schedule recurring reports, and automatically distribute updates to stakeholders. Since reporting is connected directly to project workflows, information stays current, consistent, and easier to track across project teams.

The results:

- ✓ **Faster reporting**
- ✓ **Improved visibility into project activity**
- ✓ **More time focused on execution**



Monitor risk automatically

Construction risk is constantly evolving throughout the lifecycle of a project. But in disconnected environments, risk signals are often buried inside emails, spreadsheets, logs, or quality reports that teams don't see until issues have already escalated. Without centralized project data, teams are forced to manage risk reactively instead of proactively.

Construction IQ helps teams proactively identify and prioritize risk using machine learning and connected project data. By analyzing RFIs, issues, inspections, and quality observations across workflows, Construction IQ surfaces high-risk items and highlights trends that may impact cost, quality, safety, or schedule.

Instead of manually reviewing disconnected reports and project data, teams can quickly focus on the issues that need attention most. Because insights are connected directly to live project workflows within Forma, risk visibility stays current throughout the project lifecycle.

Autodesk Assistant further simplifies risk monitoring by helping teams quickly surface insights from their project data using natural language. Teams can ask questions about project health, open issues, quality concerns, or schedule risks and receive fast, contextual answers without manually searching through reports or dashboards.

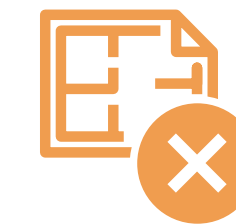
The results:

- ✓ Together, Construction IQ and Autodesk Assistant help teams identify risks earlier, prioritize action faster, and create a more proactive approach to project management

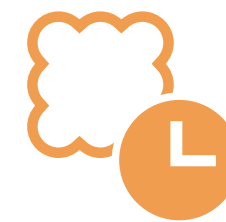
Risk



High Risk



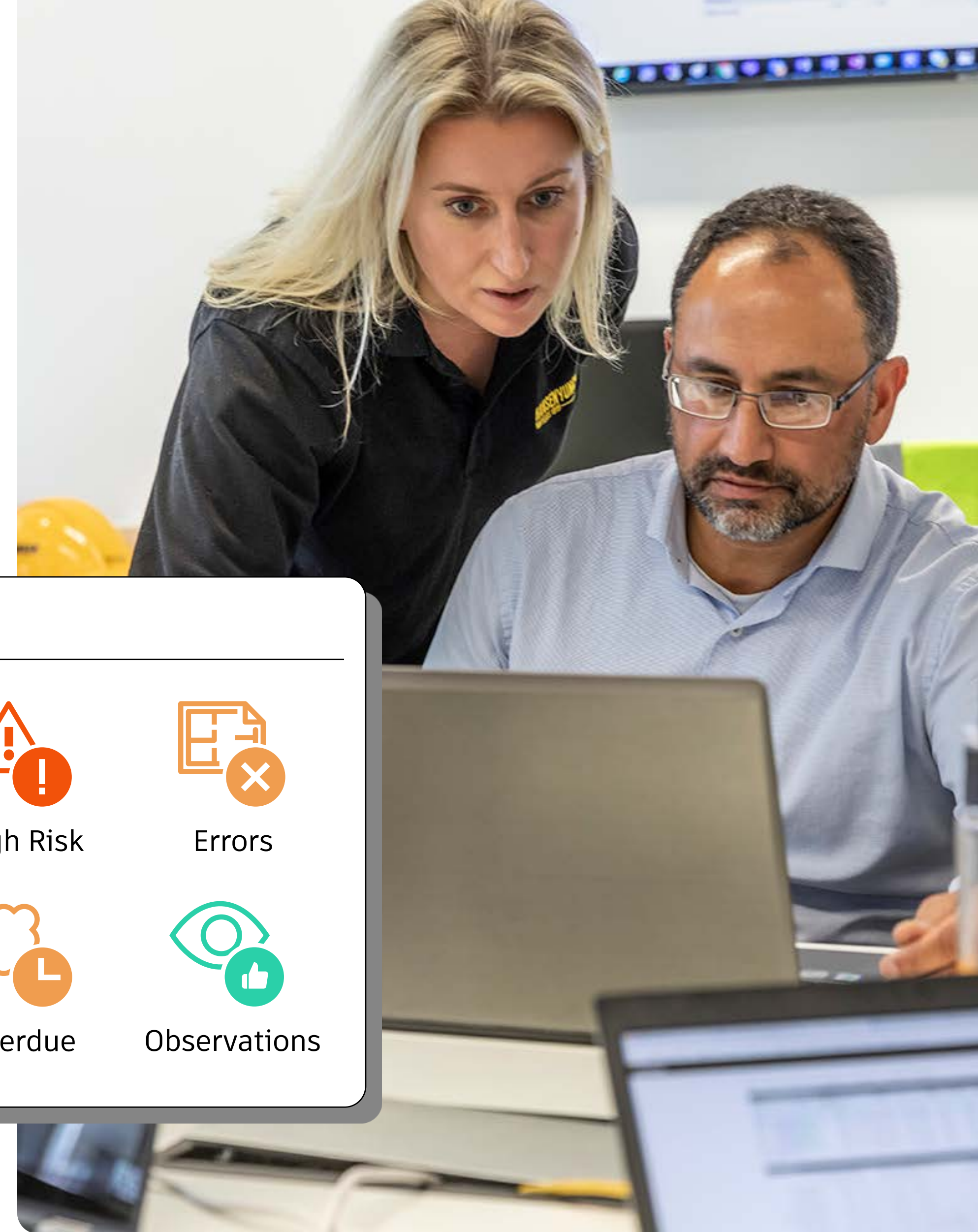
Errors



Overdue



Observations



Build quick, customized dashboards

Teams make decisions every day that depend on fast access to accurate, trustworthy information. But when data is spread across reports, spreadsheets, and systems, teams lose time trying to understand performance, progress, and risk.

Insight Builder helps project management teams turn connected project data into clear, actionable dashboards directly within Forma. With customizable, drag-and-drop dashboard creation, teams can quickly build reports tailored to project goals and stakeholder needs without relying on data specialists or third-party BI tools.

Project managers can monitor open issues, track quality and safety trends, identify workflow bottlenecks, and gain real-time visibility into project performance from a single location. Because dashboards are connected directly to live project workflows, teams always have access to current information instead of static reports that quickly become outdated.

The results:

- ✓ **Instead of relying on manual reporting and disconnected systems, Insight Builder gives teams real-time insights that improve visibility, collaboration, and decision-making**



Conclusion

Connected project management is about more than giving teams access to data. The most effective solutions help teams work smarter by integrating workflows across project management, field execution, design coordination, and cost management.

When project data is connected in one platform, teams can automate repetitive tasks, simplify communication, improve reporting, and access insights that support faster and better decisions.

Meanwhile, smart automations reduce manual work and help teams stay focused on execution, and accessible insights help project teams understand project health, identify risks earlier, and keep stakeholders informed.

The result is a simpler, more connected project management experience that helps teams save time, reduce friction, and focus on delivering successful projects.





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