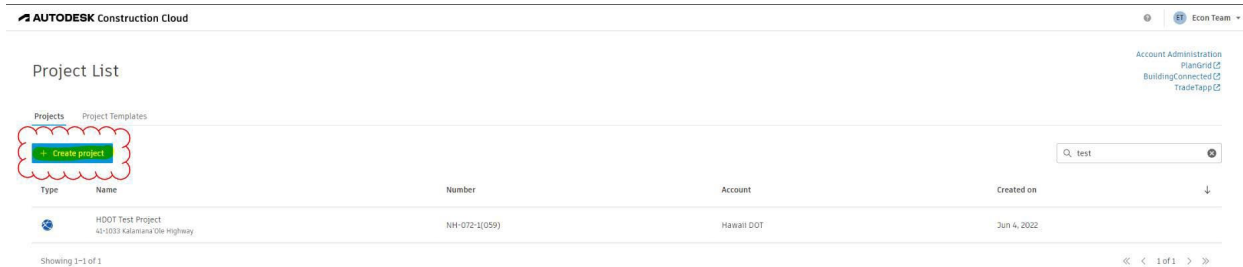# Autodesk Construction Cloud Best Practices:

Setting Up a New Project in ACC

PROJECT CREATION:

You must be a project administrator to create a new project in ACC.

- ✓ Navigate to your "Project List" in ACC.
- ✓ Click on "Create Project".

- ✓ Once the blue button is pressed, the empty project fields will pop up (as seen below).

1. Enter the official project name for "Project Name".

2. Enter the official project number for "Project Number".

3. Select "Hawaii DOT" for "Account".

4. Select "Project Type".

5. **Select <u>"Standard HDOT Template"</u> for "Template".**

6. Enter the project address.

7. Enter the start and end date.

8. Click "Create Project" at the bottom right corner!

Your project is now created! Please proceed to the following steps to properly set up your project settings in ACC!

INITIAL PROJECT SETTINGS:

Once the project is created, there are various module specific settings that need to be set up to properly run the project on ACC.

1. Members:
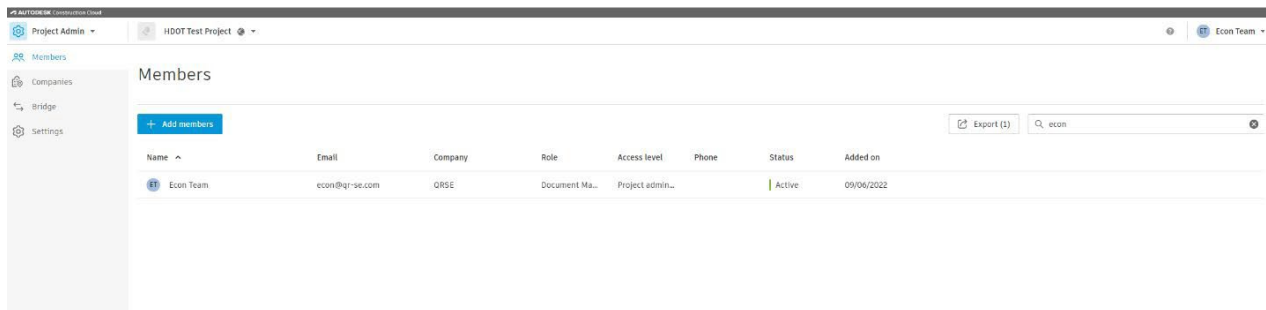
✓ Navigate to the "Members" module to manage the members on your project.

• Due to the HDOT Template, the members below will already be added to the project:

   o E-Construction Support (econ@qr-se.com)

   o HWY-L

   o HWY-C Members

   o BMP Auditors

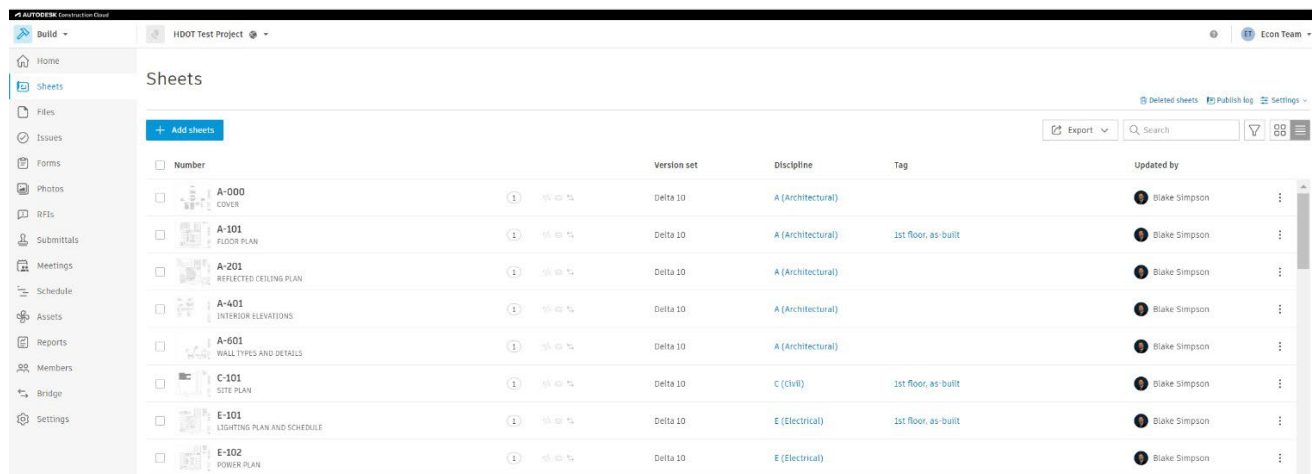✓ Add all members that need access to your project in ACC!

Reminders When Adding Members:

- Assign all members a "role" (Inspector, Contractor, Engineer, and more).

- Most members' project access level should be a "project member". **The access level "project administrator" should only be given to engineers that need to have full access to the ENTIRE project.**

- Contractor accounts that are added should be assigned "project member" level access and given a Contractor role (Contractor Admin, Contractor Engineer, Contractor PM).

- Assign the member corresponding company they work for.
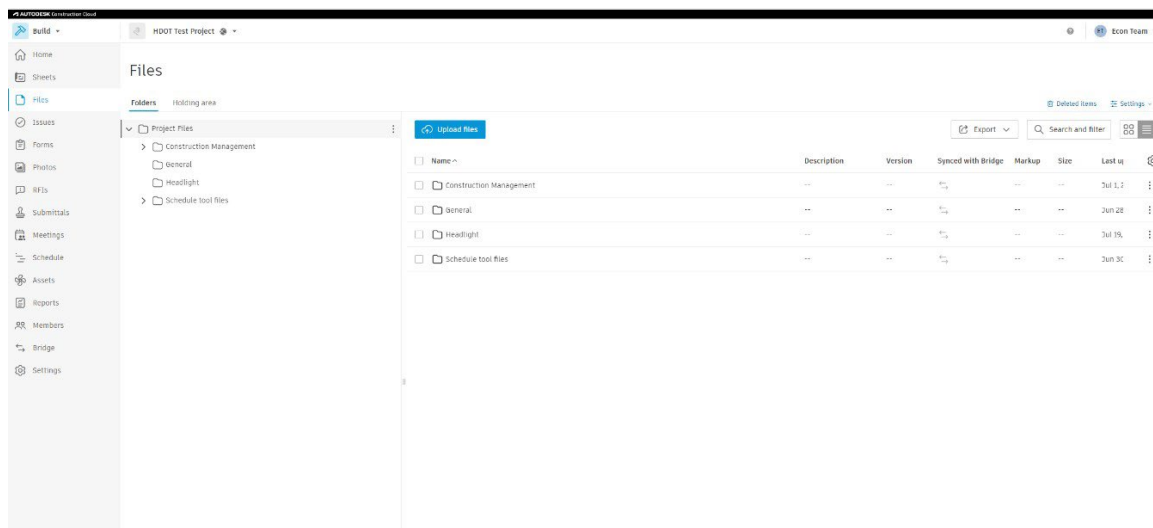
2. Sheets:

- ✓ Be sure to upload your project plans to the "Sheets" module!

3. Files:

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✓ Add members, roles, or companies to the "Construction Management" folder if needed.

   ✓ From the HDOT Template, the automatic file permission settings are:

      ▪ Construction Management Folder – Project engineers and admin have access.

      ▪ General Folder – Everyone has access (including Contractors).
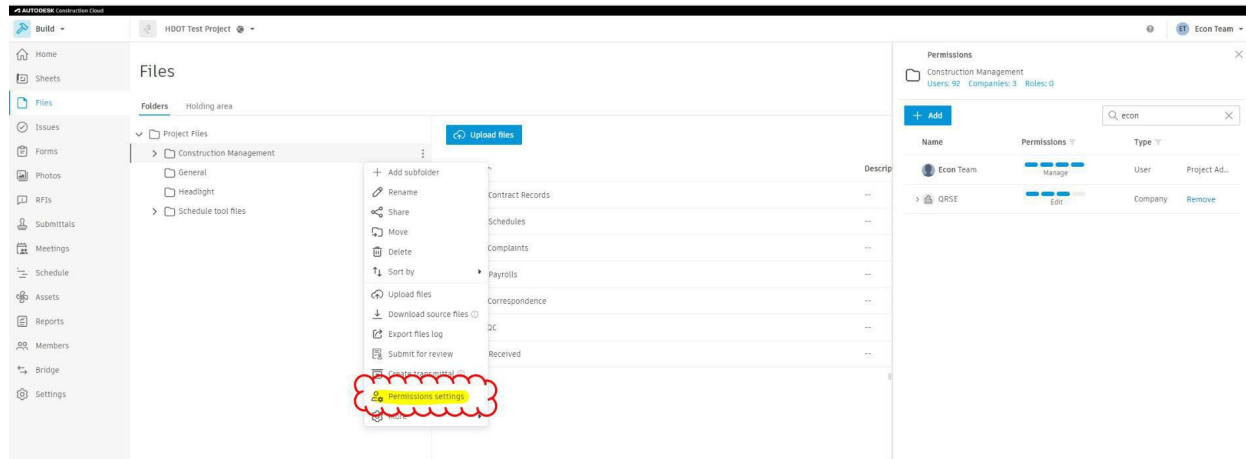
4. Issues
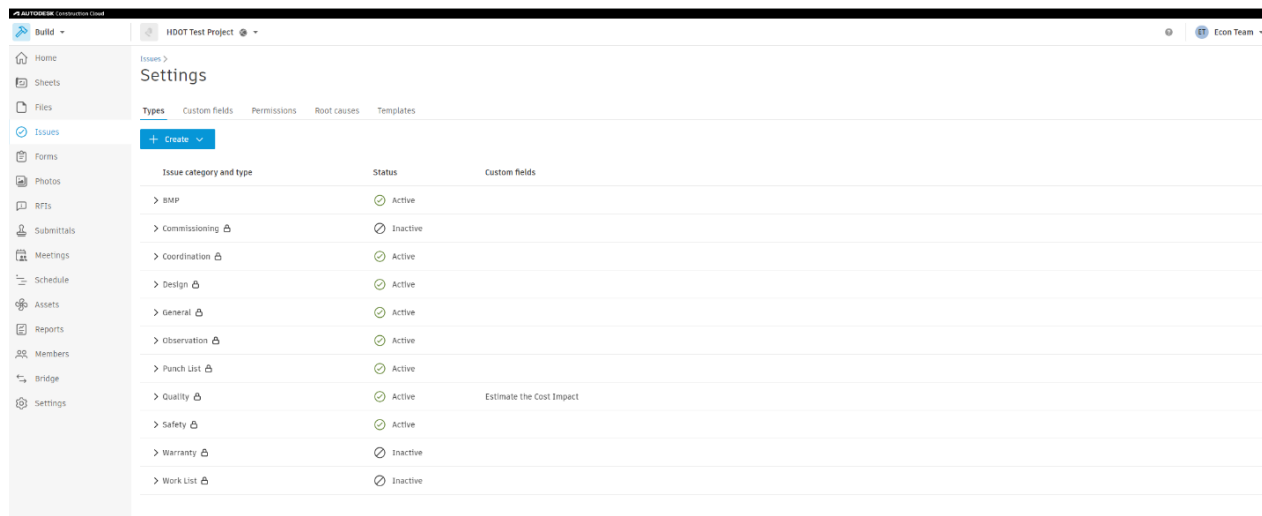
✓ Add ALL issue types needed to your project!

Note: As seen above, there are already standard issue types automatically generated from the HDOT template.

    ✓ Edit/Adjust the issue role permissions if needed.

5. Forms

   ✓ Add Editors, Reviewers, and Managers to each individual form template.

- Editor – Member(s) who can create a form using the subject template.
- Reviewer – Member(s) who will see the submitted forms using the subject template.
- Manager – Member(s) who can edit the subject template's settings.

6. RFIs
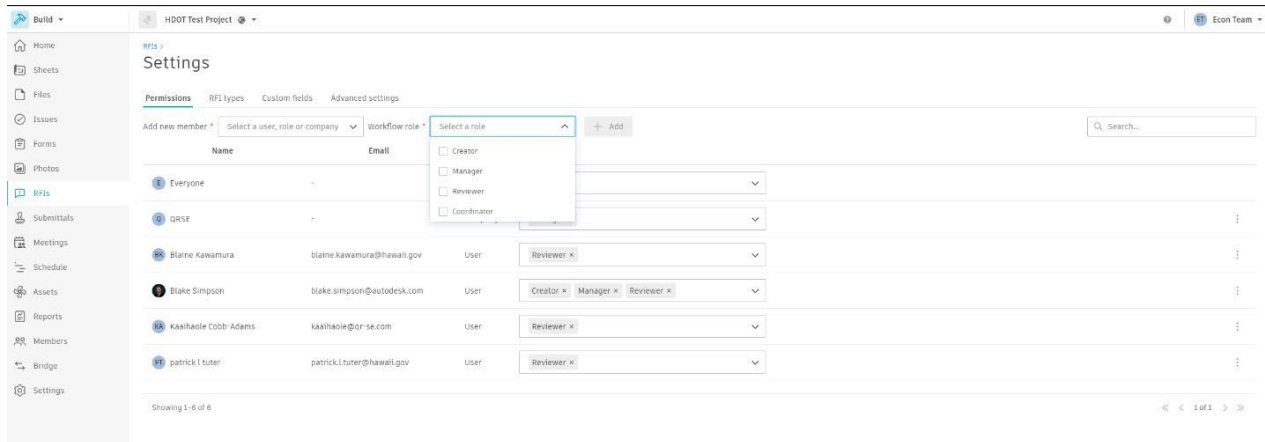
✓ By default, everyone who is added to the project will have access to create an RFI (Everyone has the **"creator"** role).

✓ You must add anyone who will be managing RFIs (processing RFIs from contractors and sending them to reviewers) as an RFI **manager**.

- Managers will have FULL access to ALL RFIs.

✓ You must add anyone who will be potentially reviewing RFIs as a **"reviewer"**.

- Example: Designers, Project Engineers and more.

7. Submittals
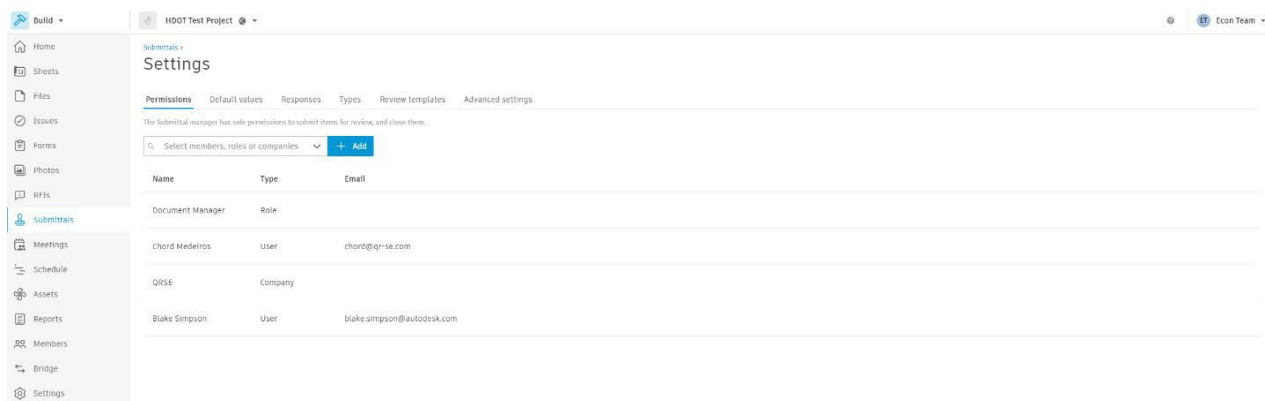
✓ Add the submittal manager(s) for your project.

✓ The submittal managers on your project have FULL access to ALL submittals. They can push through all submittals at any point in the submittal workflow process.

✓ The submittal manager will process the submittals submitted by the Contractor and create a review workflow depending on the submittal. Once reviewed, they will close and distribute the submittal, or send it back to the Contractor for more revisions.

✓ Set the default submittal manager, default review time, and default watchers list.

✓ Add any additional submittal type needed for your projects.