

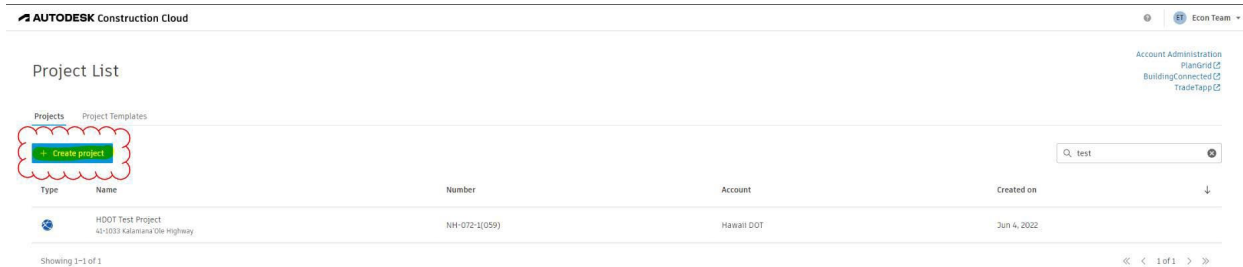
## Autodesk Construction Cloud Best Practices:

### 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).

The screenshot shows a 'Create project' modal form. It has a title bar with a close button (X). The form contains several fields: 'Project name \*' (text input), 'Project number' (text input), 'Account \*' (dropdown menu), 'Project type \*' (dropdown menu), 'Template' (dropdown menu), 'Address' (text input) with a link 'Enter address manually', 'Time zone' (dropdown menu), 'Start date' (calendar icon and 'Select date' text), 'End date' (calendar icon and 'Select date' text), 'Project value' (text input), and a currency dropdown menu (currently showing 'USD'). At the bottom, there are two buttons: 'Cancel' and 'Create project'.

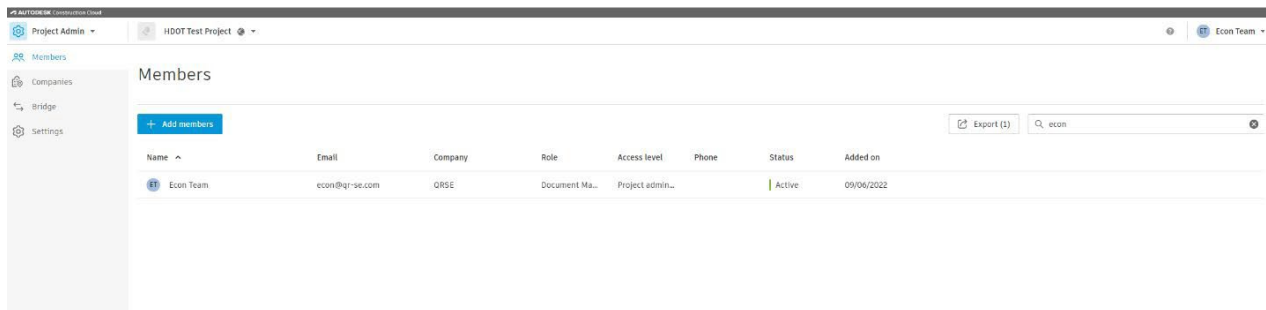
1. Enter the official project name for “Project Name”.
2. Enter the official project number for “Project Number”.
3. Select “Hawaii DOT” for “Account”.
4. Select “Project Type”.
5. Select **“Standard HDOT Template”** for “Template”.
6. Enter the project address.
7. Enter the start and end date.
8. Click “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:
  - E-Construction Support ([econ@qr-se.com](mailto:econ@qr-se.com))
  - HWY-L
  - HWY-C Members
  - BMP Auditors
- ✓ Add all members that need access to your project in ACC!

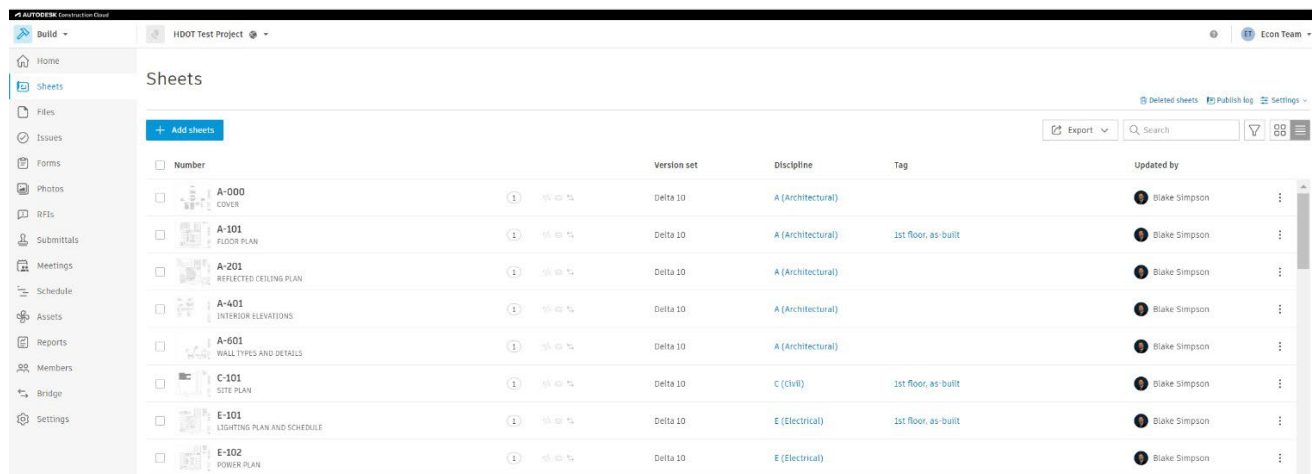
## Reminders When Adding Members:

- 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.

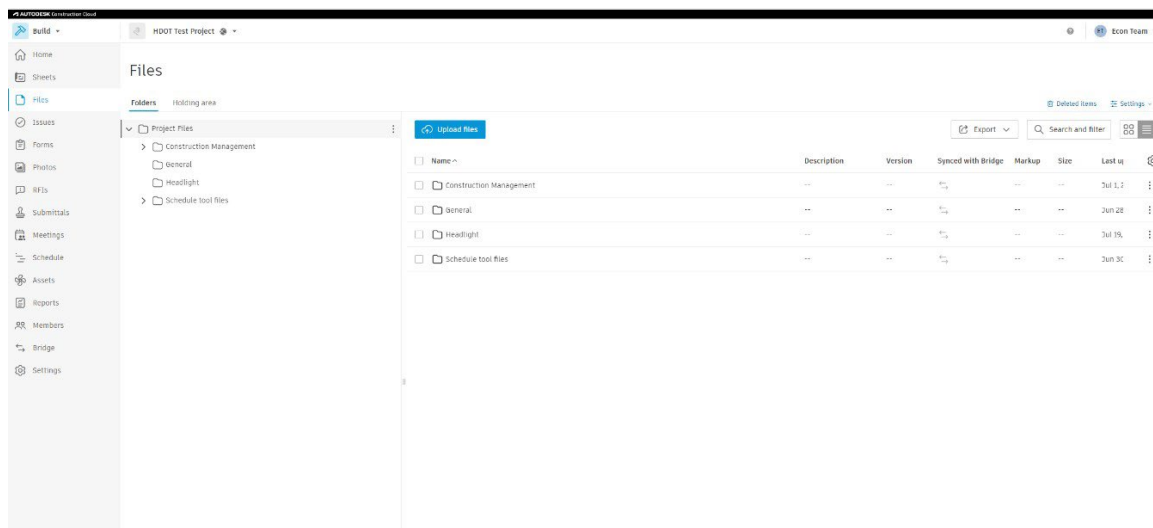
## 2. Sheets:



Number	Version set	Discipline	Tag	Updated by
A-000 COVER	Delta 10	A (Architectural)		Blake Simpson
A-101 FLOOR PLAN	Delta 10	A (Architectural)	1st floor, as-built	Blake Simpson
A-201 REFLECTED CEILING PLAN	Delta 10	A (Architectural)		Blake Simpson
A-401 INTERIOR ELEVATIONS	Delta 10	A (Architectural)		Blake Simpson
A-601 WALL TYPES AND DETAILS	Delta 10	A (Architectural)		Blake Simpson
C-101 SITE PLAN	Delta 10	C (Civil)	1st floor, as-built	Blake Simpson
E-101 LIGHTING PLAN AND SCHEDULE	Delta 10	E (Electrical)	1st floor, as-built	Blake Simpson
E-102 POWER PLAN	Delta 10	E (Electrical)		Blake Simpson

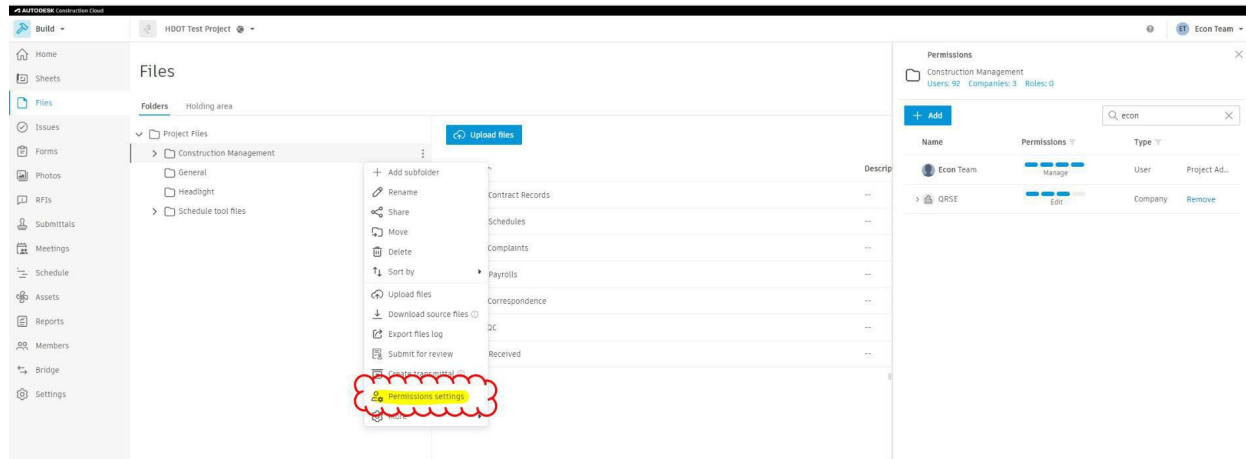
✓ Be sure to upload your project plans to the “Sheets” module!

## 3. Files:

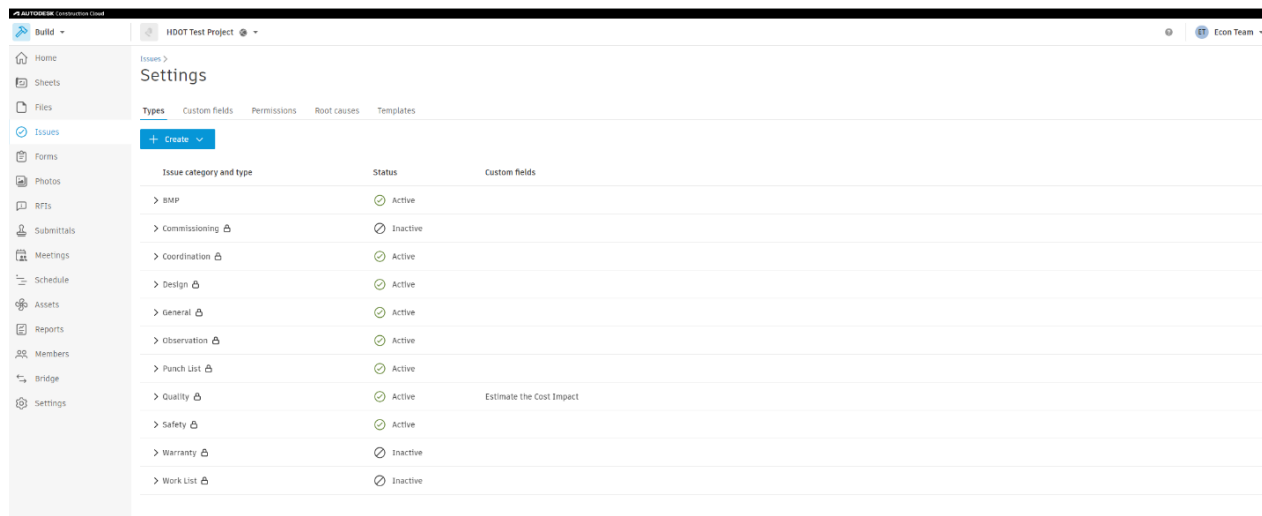


Name	Description	Version	Synced with Bridge	Markup	Size	Last up
Construction Management		1	Delta 10			Jul 1, 2
General		1	Delta 10			Jun 28
Headlight		1	Delta 10			Jul 14
Schedule tool files		1	Delta 10			Jun 30

- ✓ 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.

**Settings**

Types Custom fields **Permissions** Root causes Templates

[+ Add permissions](#)

Members can always view issues assigned to them, either individually or through a role or company. [Learn more](#)

Name	Email	Type	Permissions
> Admin		Role	Manage member permissions
> Architect		Role	Create for my company
BIM Manager		Role	Create for my company
> Construction Manager		Role	Create for my company
> Document Manager		Role	Manage issues
> Engineer		Role	Create for my company
> Foreman		Role	Create for my company
> Inspector		Role	Create for other companies
> Project Engineer		Role	Manage issues
> Project Manager		Role	Manage issues
> Superintendent		Role	Manage issues
VDC Manager		Role	Create for my company

✓ Edit/Adjust the issue role permissions if needed.

## 5. Forms

**Forms**

Forms **Templates**

Templates (12)

Lane Closure Request F...

Archived Templates

Create Import Edit Archive

Name	My permissions	Created by	Type	Last updated
Lane Closure Request Forms				
BMP Daily Inspection	Manage, Review	Kaithaole Cobb-Adams	Daily Report	Sep 23, 2022 at 05:39 PM
BMP Inspection	Manage, Submit, Review	Cameron Michel	Other	Sep 22, 2022 at 10:52 AM
BMP Monthly Compli...	Manage, Submit, Review	Econ Team	Other	Sep 22, 2022 at 10:52 AM
Certified Payroll Chec...	Manage, Submit, Review	Kaithaole Cobb-Adams		Aug 3, 2022 at 07:00 AM
Daily Force Account...	Manage, Submit, Review	Chord Medeiros	Daily Report	Jul 25, 2022 at 06:26 PM
DOT-4-439-Labor Co...	Manage, Review	Kaithaole Cobb-Adams	Other	Aug 16, 2022 at 01:03 PM
HDOT Inspector Rain...	Manage, Submit, Review	Econ Team	Daily Report	Dec 7, 2022 at 09:57 AM
(Sample) Daily Report	Manage, Submit, Review	Autodesk	Daily Report	Jun 4, 2022 at 10:23 AM
(Sample) Daily Safet...	Manage, Submit, Review	Autodesk	Safety	Jun 4, 2022 at 10:23 AM
(Sample) Job Hazard...	Manage, Submit, Review	Autodesk	Safety	Jun 4, 2022 at 10:23 AM
(Sample) Time Sheet	Manage, Submit, Review	Autodesk	Time Sheet	Jun 4, 2022 at 10:23 AM
Traffic_Control_Insp...	Manage, Submit, Review	Econ Team	Daily Report	Dec 2, 2022 at 07:40 AM

**Edit Form Template**

Delete

Replace PDF

Form Components

Customize your form

☐ Weather  
Automatically add weather based on your project address

☒ Notes  
Include a notes field at the bottom of every form

**Contributors**  
Contributors can fill out and submit forms.

Econ Team x Project Admins (82) x  
Project Members (290) x

**Reviewers**  
Reviewers can review all submitted forms.

Econ Team x Project Admins (82) x  
Document Manager x

**Managers**  
Managers can only edit template settings.

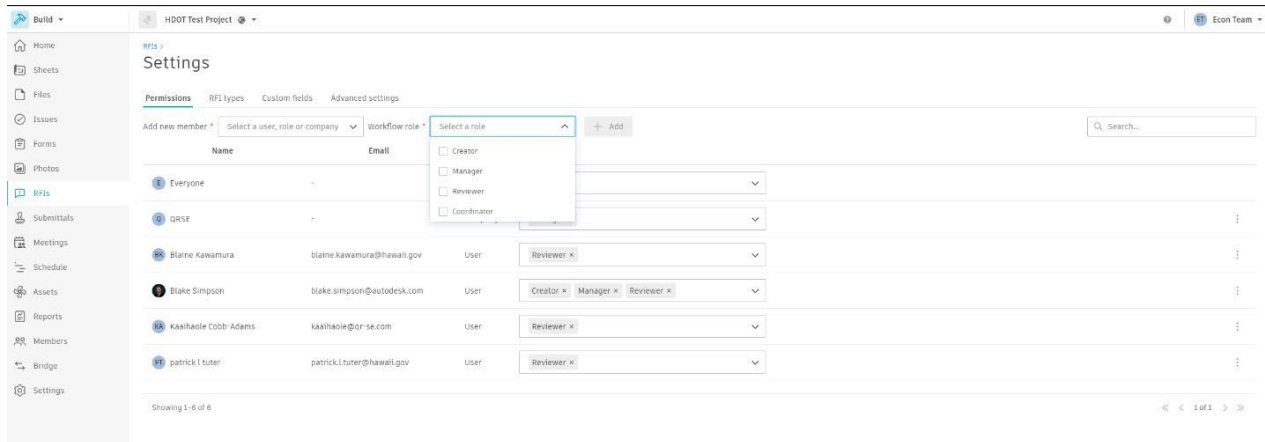
Econ Team x Project Admins (82) x

Cancel Save

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

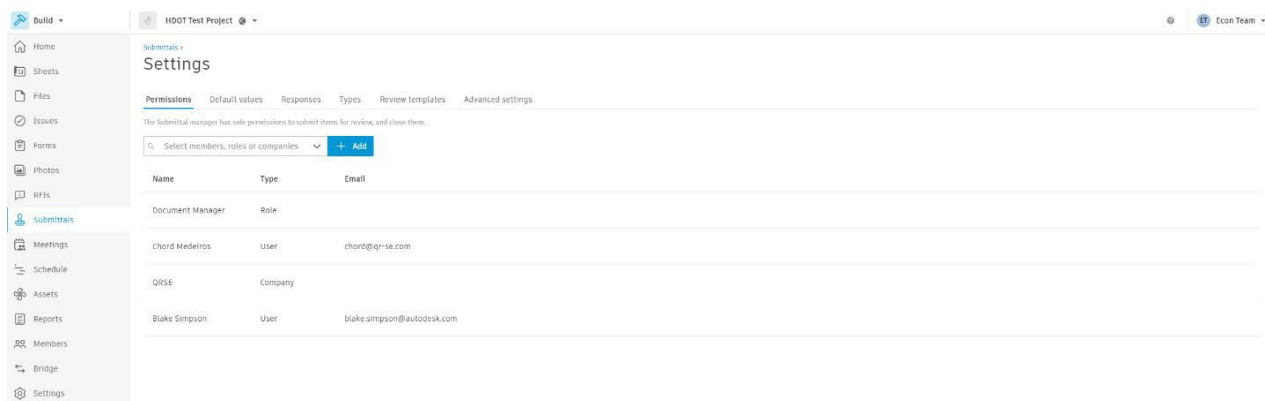
- Editor – Member(s) who can create a form using the subject template.
- Reviewer – Member(s) who will see the submitted forms using the subject template.
  - Manager – Member(s) who can edit the subject template's settings.

## 6. RFI



- ✓ 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.

**Build** ▾

HDDOT Test Project

**Submittals**

## Settings

Permissions **Default values** Responses Types Review templates Advanced settings

**Default manager**

Team member automatically set as the manager for items created by subcontractors.

Select a member

- Allison Kagawa  
HWY-LR Material Cert./Research Section
- Allyn Tabata  
QRSE
- Anita Joaquin  
HWY-LB Asphalt/Bituminous Section
- Ben Garde  
QRSE
- Blake Simpson  
bobr@qr-se.com

Clear

**Default review time**

Reviewer due dates are automatically set as the submittals move to a reviewer.

30 Days

**Default watchers list**

Members, roles, or companies set as watchers for new items created.

Foreman × Executive × Construction Manager ×

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

**Build** ▾

HDDOT Test Project

**Submittals**

## Settings

Permissions Default values Responses **Types** Review templates Advanced settings

**+ Add type**

Type

- Attic Stock
- Certificates
- Documentation
- LEED
- Mix Design
- Mockup
- O&M Manuals
- Other
- Product Data
- Qualification Data
- Reports
- Samples
- Schedule
- Shop Drawings
- Test Data
- Warranty/Guarantee

✓ Add any additional submittal type needed for your projects.