



PL20541

The Good, The Bad, The Admin

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Autodesk – Sr. Program Manager – PDG Fusion Lifecycle

Learning Objectives

- Discover the various roles in Fusion Team, from team owner to project contributor
- Determine how to define the roles in your team to best utilize your membership
- Discover other ways to access your team on the web or mobile devices and how quickly you can interact on a project
- Learn time-saving tips around the features and functionality in Fusion Team

Description

You have your Fusion Team hub, you have your members, now what? Are you wondering how to use Fusion Team and what to do to get the most out of it? Do you know what roles to assign to the members of the teams? Are you wondering how to take your communication and collaboration to the next level as the team admin? Some of the responsibilities encountered as a Team Admin can be overwhelming. But as an Admin you can fully utilize the capabilities of Fusion Team to make sure your project is communicated, shared, and reviewed based on your settings. This presentation will discuss Fusion Team and the difference between roles, each role's capacity, and the management of those roles. Laying the foundation for cross collaboration in your project will help get the job done faster, eliminate having data scattered in various tools, and make your project a success. This session features Fusion Team.

Your AU Expert(s)

Lisa Darrah is a senior program manager for A360 cloud-based products and services, and she has been at Autodesk, Inc., for 17 years. She started at Autodesk as a product support engineer and then moved onto quality assurance and project management. Her knowledge of the various aspects of software lifecycle has helped her as a program manager to include the views from Autodesk customers while defining and driving the A360 cloud-based products and services projects.

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Fusion Team Admin Overview

Are you the Team Administrator for Fusion Team? This handout will provide you with an overview of the Administration options in Fusion Team and review the roles and options in Fusion Team projects. This handout can be used as a reference while walking through Fusion team, or while watching the class [online when it is posted](#)

Admin Main Page Overview: Team Hub Settings

As an admin, you will have access to the following page with the following options:

The screenshot shows the Autodesk Fusion Team Hub Settings page. The header includes the Autodesk Fusion logo and the team name 'AULD2016 - Data'. The navigation bar shows 'Team Hub Settings' as the active tab, with other options like 'Members And Roles', 'Projects', and 'Subscriptions'. The main content area has three sections:

- Team Hub Name:** Displays 'AULD2016' and the email 'hotmail30653.autodesk360.com'. There is an 'Edit' button.
- Project Contributor Access:** Shows 'Allow Project Contributors: Yes' with a note 'Click Edit to change Project Contributor access.' and an 'Edit' button.
- Team Member Invite Mode:** Shows 'Current Mode: Admin Approval Required' with a note 'Click Edit to change Invite Mode.' and an 'Edit' button.

Team Hub Name:

Changing your Team Hub Name by selecting edit and then save.

The screenshot shows the 'Team Hub Name' edit dialog box. It contains a text input field with the value 'AULD2016', the email address 'hotmail30653.autodesk360.com', and two buttons: 'Cancel' and 'Save'.

Project Contributor Access:



Project Contributor access is allowed on team hubs by default. Determine at the outset if you do *not* want to allow Project Contributor access. If you turn off access after users have joined as Project Contributors, they will lose access to their projects. If you re-enable access however, they will regain access to the projects.



Note! Should I allow Project Contributors on the Team Hub?

Consider the following questions

- Do you want to invite external collaborators like customers, vendors, or design partners to your projects?
- Do you want to restrict the number of users who create projects on the hub?

If your answer is Yes to any of these, you want to allow Project Contributors.

To change Project Contributor access

1. On the Administrator Console, select Team Hub Settings > Edit in the Project Contributor Access section.
2. Click the Toggle switch for Allow Project Contributors > Save.

Project Contributor Access

☒ Allow Project Contributors

Select to allow Project Contributors on this Team hub. If you disable Project Contributor access, existing Project Contributors will no longer be able to access projects.

Cancel Save

Team Member Invite Mode:

Team Members can always be invited by Team Administrators, regardless of the setting you select here. The following settings determine whether Team Members may be invited by Team Members.

- By Team Administrators only
- By Team Members but subject to approval by a Team Administrator or directly by Team Administrators + auto-approve users from a specific domain
- By Team Members and Team Administrators

The default setting for Team Member Invite Mode is set to Admin Approval Required.



Team Member Invite Mode

How do you want new Team Members to be invited to this hub? Select an option below.

☐ Admin Invite Only

Hub Administrators must add new Team Members from the Admin console.

☒ Admin Approval Required

Team Members can invite. Hub Administrator must approve membership of all new Team Members.

☐ Automatically approve email-ids for these domains

Enter the domain to auto approve

Enter domains separated by commas. Example: companyname1.com, companyname2.com

☐ No Admin Approval Required

Team Members can invite. Anyone who signs up becomes a Team Member.

Cancel

Save

Once you have made your selection on the preferred setting, select save to confirm the changes.

Admin Main Page Overview: Members and Roles

On the Members and Roles tab, there is the People tab, Pending Invitations and Sent Invitations.

Members and Roles

PEOPLE | [PENDING INVITATIONS](#) | [SENT INVITATIONS](#)

[Invite](#)

Show: [All](#)

Search people by name

Name	Status	Joined On	Last Activity	Role
Anil Cpdmaws3 anil.cpdmaws3@hotmail.com	ACTIVE	Oct 10, 2016	Oct 10, 2016	Team Administrator
Craig Godfrey	ACTIVE	Oct 18, 2016	Oct 18, 2016	Team Member
Lisa Darrah lisa.darrah@autodesk.com	ACTIVE	Oct 10, 2016	Oct 19, 2016	Team Administrator

People Tab



The Hub members and their status, when they joined, their last activity and their Role are listed. Changing the role of a member can be done by selecting a member, and select the drop down.

Name	Status	Joined On	Last Activity	Role
 Anil Cpdmaws3 anil.cpdmaws3@hotmail.com Deactivate	ACTIVE	Oct 10, 2016	Oct 10, 2016	Team Member Team Administrator Project Contributor
 Craig Godfrey	ACTIVE	Oct 18, 2016	Oct 18, 2016	

Now the options to change the role from Team Member, to Team Administrator to Project Contributor are visible for selection. You can also see the option to deactivate a user.

Pending Invitations

In the Pending Invitations tab, this is where invitations that are pending admin approval will be displayed.

Members and Roles				
PEOPLE PENDING INVITATIONS SENT INVITATIONS				
Search people by name 				
Name	Sent on	Sent by	Status	
 Lisa	1 minute ago	John Darrah	INVITED	Reject Approve

Here the option to reject or approve the invite is available.

Sent Invitations

This is similar to the pending invitations, but the option to resend the invitation or withdraw it is available.



Note! Why Should I have more than one Admin?

Consider having more than one admin on your site so that you can have someone else that can approve and administer the hub because of:

- Time off: People take time off for vacations, personal or medical time and a back up admin is needed.



- Change of ownership: In the instance that someone leaves the company, having a back up admin will ensure that the day to day business is not impacted.

Members and Roles

[PEOPLE](#) | [PENDING INVITATIONS](#) | [SENT INVITATIONS](#)

Search people by name

Name	Sent on	Sent by	Status
Lisa Resend Invite Withdraw	39 minutes ago	John Darrah	INVITED

Team Hub Roles at a glance

	Team Administrators	Team Members	Project Contributor
Project Creation	✓	✓	
Browse and Join Projects	✓	✓	
Invite Team Members * Requires Team Admin Approval	✓	* ✓	* ✓
Invite Project Contributor	✓	✓	
Can Upload Files	✓	✓	✓
Can SEE other Members	✓	✓	
Can Approve Invitations from other contributors	✓	✓	
Can approve and share public links	✓	✓	
Right to assign hub-level roles to users	✓		
Can purchase seats	✓		

Admin Main Page Overview: Projects

Team Administrators can manage projects and project members in the following ways. They can:



- View projects and project information
- Filter projects based on status
- Transfer, archive, and restore projects
- Delete archived projects
- Change a user's role within a project

The screenshot displays the 'Projects' tab in the Autodesk Fusion Administrator Console. The header includes navigation links for Team Hub Settings, Members And Roles, Projects (selected), and Subscriptions. The main content area shows a list of projects with the following details:

Name	Type	Created by	Created on	Status
Admin Project	Secret	A360	Oct 10, 2016	ACTIVE
C-3PO 2 project members	Closed	Craig Godfrey	4 hours ago	ACTIVE
Demo Project	Open	A360	Oct 10, 2016	ACTIVE

For the 'C-3PO' project, there are buttons for 'Archive', 'Manage Roles', and 'Transfer'.

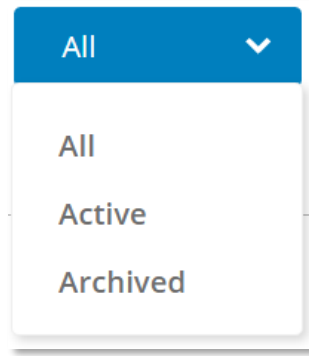
Archive and Restore Projects

Team Administrators can archive and restore projects from the Projects tab in the Administrator Console. You can also filter projects to see all archived projects. Archiving a project means:

- Project members can no longer access this project.
- Existing content in the project will no longer be accessible to project members, including you.
- No new content/activity can be added to the project.
- The project and its content will no longer appear in search results or in the Projects list.



After you archive a project, as an Admin, you will still be able to view the archived projects and restore them by selecting the option in the Show Filter drop down.



To archive a project, select the project on the Project tab > Archive > Archive.

To restore a project, select the project on the Project tab > Restore.

Manage Project Roles

Within a project, there are three roles: Project Administrator, Editor, and Viewer. The person who creates the project is the default Project Administrator. Everyone in a project is a project member. The project role of a user determines the following:

- Level of access to project data
- Actions they can take on data
- Right to invite project members and change their roles

Project member roles are visible to all members of a project and the Project Members Project role can be specified at the time of inviting a user to a project. Only a Project Administrator can change the role of project members.



Manage Roles | Luke
✕

Project Members

Show: All ▼

🔍

NAME AND EMAIL	TITLE	ROLE ?
Lisa Darrah lisa.darrah@autodesk.com	Senior Program Manager -...	Project Admin
John Darrah		Viewer ^ Editor Project Admin 🗑️

Only a Project Administrator can change the role of project members.

Admin Main Page Overview: Project Access Roles

	Viewer	Editor	Project Admin
View Files(online), folders, comments (view and post) and people	✓	✓	✓
Discussions & Calendar Access to conversations and events	✓	✓	✓
Get Link and Live Review Get link for shared files and initiate live review		✓	✓
Edit, Upload, Download Copy, move, rename, and delete files/folder		✓	✓
Manage Sharing Enable and set public sharing, invite others to the project		✓	✓
Project Admin Project settings, approve people in the project, set access levels			✓



Transfer Projects

Team Administrators can transfer projects across hubs provided they are Team Members on the hub that they are transferring the project to. Team Administrators who are not members of at least one other Team hub will not see the Transfer option.

To transfer a project:

1. Select the project > Transfer.
2. Select the Team hub that you want to transfer the project to > OK.



Note! When would I need to transfer a project?

If your organization has purchased a new hub subscription and requires projects to be moved to that hub, you will need to transfer projects.



Note! What should I do to ensure that my project is transferred successfully?

Make sure the destination hub has the same Project Contributor and Team Member Invite settings as the source hub.