AUTODESK **UNIVERSITY** 2013

An Introduction to Autodesk® 360

Lisa Darrah – Autodesk
(Assistant/Co-presenter optional)

BO2197 This class provides an introduction to Autodesk 360 cloud-based products and services.

Learning Objectives

At the end of this class, you will be able to

- Explain what Autodesk 360 is
- Use tools within Autodesk 360
- Share files using Autodesk 360
- Collaborate using Autodesk 360

About the Speaker

Lisa is a Program Manager for Autodesk 360 and has been at Autodesk for 14 years. She started at Autodesk as a Product Support Engineer and then moving onto Quality Assurance and Project Management. Her knowledge of the various aspects of software life-cycle has helped her as a Program Manager to include the views from our customers while defining and driving the Autodesk 360 projects.

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Basics of Autodesk 360 Tech Preview

New Autodesk 360 Tech Preview

Autodesk 360 Tech Preview allows you to create or join an online workplace community. This work place community, which is powered by Autodesk 360 Tech Preview, provides you with tools to do everything that you do at work but with the added benefit of providing a single place to do it all.

For instance, many companies have an intranet site to engage employees for creating a sense of community, and to allow networking between employees, a content management system to manage information and knowledge, an email application to manage communication, and even several instant messaging applications to give immediacy to communication.

With Autodesk 360 Tech Preview, you no longer have to have separate systems to create community, to manage information, and to support communication.

In an Autodesk 360 Tech Preview -powered hub, you can

- *Create your own profile*
- *Connect with coworkers*
- *Collaborate with your coworkers*
- *Work in projects*
- *Search for and find people, projects, and items*

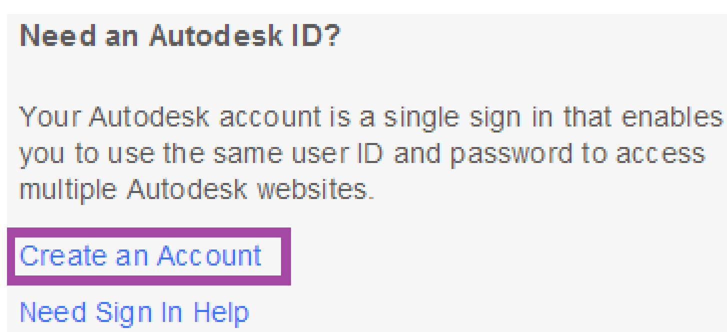
Create Profile

The Autodesk 360 Tech Preview gives you the option to sync up with your LinkedIn profile for easier profile creation. In this section we will go over the steps to create your profile

Set up your Autodesk ID

Autodesk 360 Tech Preview uses your Autodesk ID account to sign in. If you have not created an account yet, it is very easy and free to do. An Autodesk ID not only provides you with access to the Autodesk 360 Tech Preview, but it also connects you with a number of other Autodesk services, such as our discussion forums.

1. *Go to https://accounts.autodesk.com*
2. *Select **Create and Account***
3. *Fill in the information requested.*



★ *Tip: If you need to edit any of the information for your Autodesk ID, go to* http://forums.autodesk.com/ and select **Edit Account Information**

Creating a profile

After authorizing your Autodesk ID, sign into Autodesk 360 Tech Preview. You will be prompted to set up your profile. To make it easier to create your Autodesk 360 Tech Preview profile, you have the option to import your existing LinkedIn® profile into your Autodesk 360 Tech Preview profile. All profile information is optional, with the exception of your Display Name. You can edit your profile at any time.

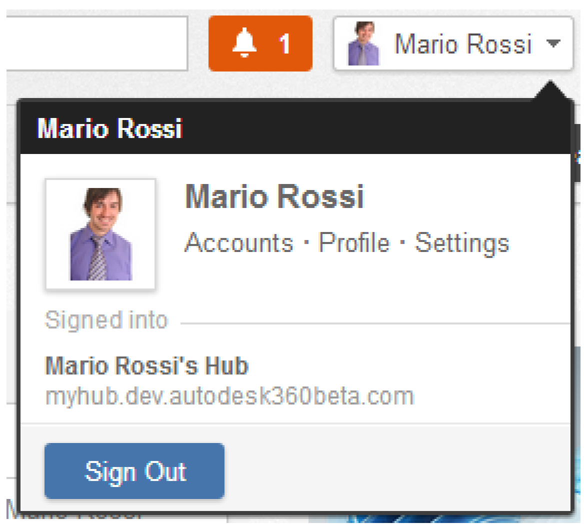
When you finish creating your profile, you are prompted to invite coworkers. Congratulations, your profile is complete! Autodesk360 Tech Preview will step you through a guided tour, reviewing the product's basic functionality.

Manage your account

If you need to change your profile information, there are a few areas you can access to change it as needed.

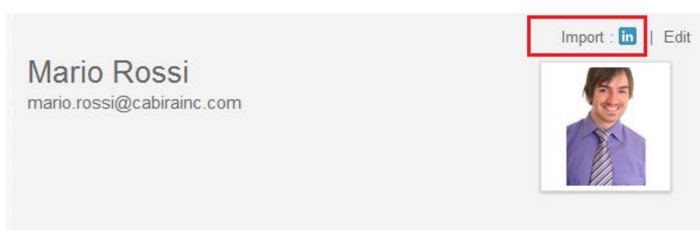
To edit your profile

1. *At the top of the page, click your name.*
2. *From the drop-down list, click Profile.*
3. *Your Profile page opens.*
4. *Click Edit.*
5. *Update the information and click Save.*



To import profile information from LinkedIn

1. *At the top of the page, click your name. From the drop-down list, click Profile.*
2. *Your Profile page opens.*
3. *Click the LinkedIn logo. Sign in to LinkedIn to allow access.*



4. *Matching information is imported automatically into your profile for you.*

5. *Click Save.*

To update your profile picture

1. *On your Profile page, mouse over the picture currently associated with your profile.*

2. *Click Change Photo. If no picture is associated with your profile, click Add Photo.*

3. *The Thumbnail Maker window opens.*

4. *Select the desired photo for your profile. (Note: Only jpg files are accepted)*

5. *Click Save*

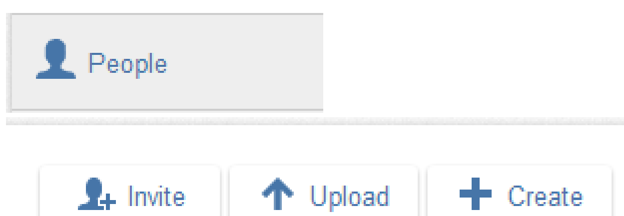
Connect

Autodesk 360 Tech Preview allows you to connect with people in a hub to leverage the power of collaboration at the work place. By inviting your coworkers to become a part of a project, you allow them to view information, and keep track of project activities.

Connect with People

To start interacting in your hub, you can invite people to your Hub to allow them access to the projects you are working on. There are a few ways to do this. You may have already invited users when you created your profile, but here are some other ways to invite users or see who is already a member of your projects

Invite your co-workers

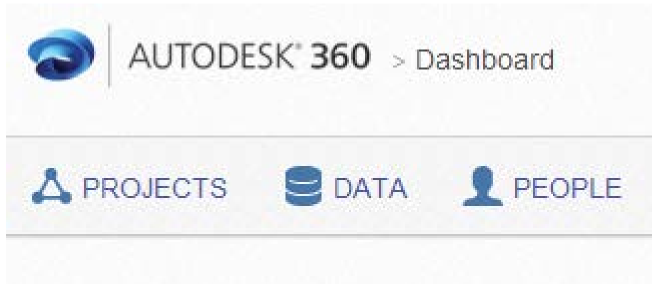


1. *On the navigation bar, click **Project***
2. *Select one of your projects*
3. *Click **People** in the Left hand menu*
4. *Click **Invite***

Find your coworkers

1. *On the navigation bar, click **People** Coworkers are listed in alphabetical order.*
2. *This will include members you are working on projects with*

You can filter your list by department, location, or by recently joined.



Connect with hubs

Autodesk 360 Technical Preview will have Company Hubs and Personal Hub options. The personal hub is similar to the current Autodesk 360, where you own the projects in your hub, you can be invited to other projects in personal hubs and you can be invited to projects in company hubs.

Company hub vs. personal hub

***Company hubs** may have the company logo at the top. As a Full member of the Company Hub, I will see*

- *Projects owned by you*
- *Projects you've been invited to from your company hub*
- *Projects you've been invited to from other personal hubs*
- *Projects you've been invited to from other company hubs*

***Personal hubs** will have the Autodesk 360 logo. In my Personal Hub I will see*

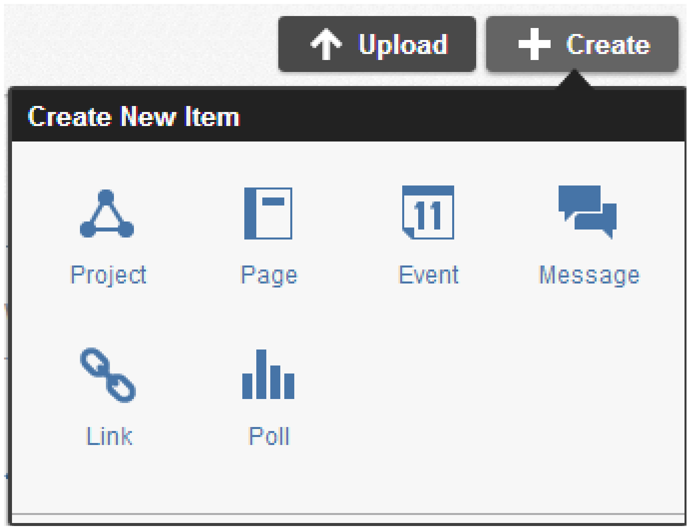
- *Projects owned by you*
- *Projects you've been invited to from other personal hubs*
- *Projects you've been invited to from other company hubs*

If you are a member of more than one hub, you can easily switch between them by selecting your info at the top right hand of the page. A listing of all the hubs you are a member of will be displayed.

Collaborate

Collaborating includes communicating, sharing information with your coworkers using files, messages, events, links, polls or wikis, and responding to these through discussions, and providing feedback, revising content, and uploading new versions of files. This helps you drive toward towards a finished product, a solution to a problem, a redefined process, a new service you want to offer customers, or closing a sales deal.

In Autodesk 360 Technical Preview, it enables you to do all of this using the Create and Upload tools. Once you post an item, your coworkers can respond to it and give you feedback in several ways.



The Upload button and Create Menu expanded

There are a number of items that are a part of the Create menu tools to help you to connect, communicate and collaborate with your coworkers every day.

- *Communicate by different kinds of messages*
- *Share information by posting links and all kinds of files including media files*
- *Add events to calendar using events*
- *Ask questions using polls,*
- *Create content using wiki pages*

Send Messages

Autodesk 360Tech Preview provides you with a number of ways to communicate with your coworkers. The Message option allows you to send messages to individuals, a Project, or to the whole hub. Content in messages can be much the same as content you might put in an email message.

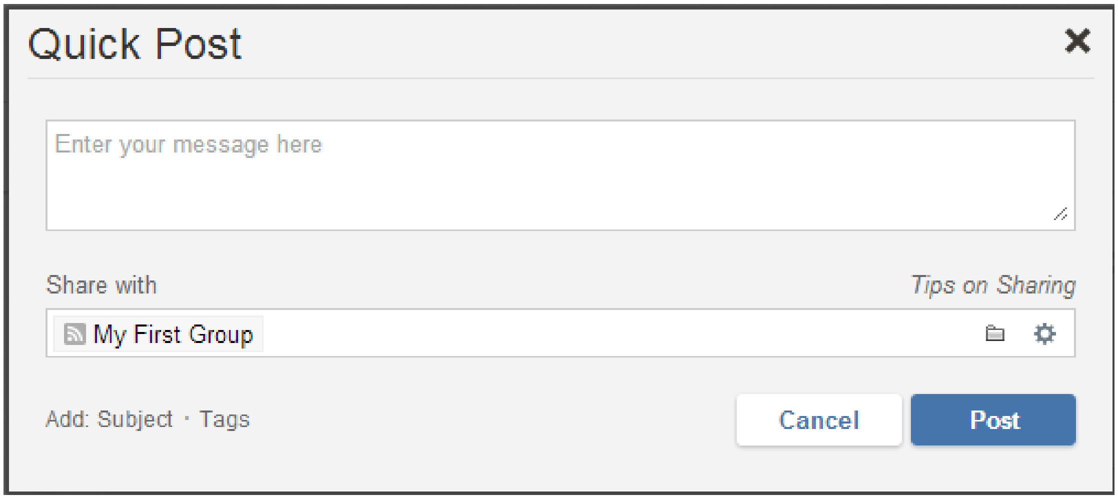
When to use Message

Use Messages for all important communication that you might want to access and refer to in future.

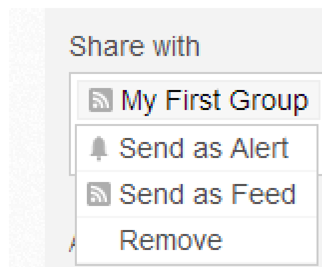
- *You can add a subject and Keywords, or tags to messages*
- *You can set privacy options.*
- *There is no character limit.*
- *For all project messages, you can choose where to store them (My folders or Project folders).*

To post a message

1. *Click Create>* ***Message****.*

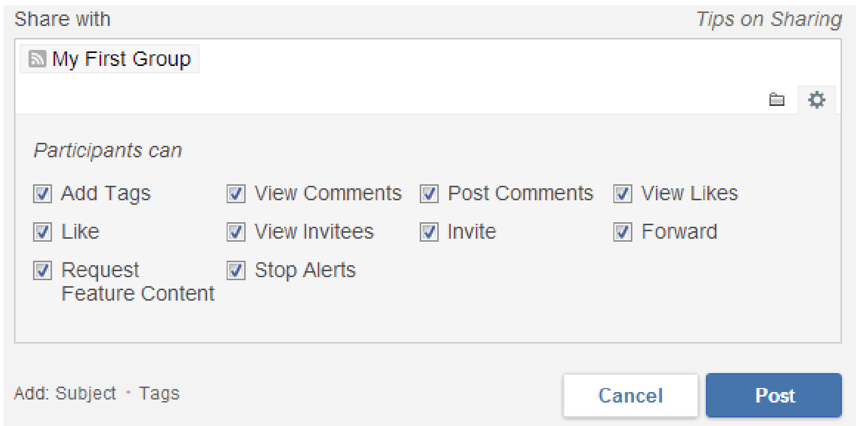


2. *Enter your message in the box.*
3. *To post a message to selected individuals and/or projects, click in the* ***Share with*** *box and enter their names separated by commas.*
4. *To send an alert to selected projects, click in the* **Share with** *box and enter project names, mouse over the project name and select* ***Send as Alert****.*



5. *Click the Storage icon and select where you want to store the item.*

6. *Click the Item Preferences icon and select the options for the item. Enable or disable the options to control how people can interact with the item.*



7. *Optional: Click **Subject** and enter it in the box.*
8. *Optional: Click **Tags** and add keywords separated by commas.*
9. *Click **Post***

★*Tip*★ *While posting an item Send as Feed option is available only for projects. You can only Send as Alert to selected individuals*

Share information

The Create and Upload tools allow you to share information with specific coworkers, projects, as well as the whole company hub. You can share links and all kinds of files using the different options in these tools.

When you share information using the upload tool, everyone who can view the file can:

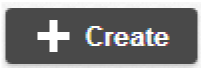
- *View the file online*
- *Leave comments*
- *View all conversations related to the item in one place*
- *Edit files and upload new versions*
- *Download the file*
- *View and access all versions of the file*

This provides several advantages over sharing files through email or even on the intranet.

Sharing links

You can share a link with your coworkers, a Project or the hub using the Link option in the Create menu.

To post a link:

1. *Click Create* 

> Link

2. *Enter the URL in the box*

3. *To post a link to selected individuals and/or projects, click in the Share with field and enter their names separated by commas.*
4. *To send an alert to selected projects, click in the* Share with *box and enter project names, mouse over the name and select* ***Send as Alert****.*
5. *Click the storage icon and select where you want to store the item.*
6. *Click the item preferences icon and select the options for the item. Enable or disable the options to control how many people can interact with the item.*
7. *Optional: Click* ***Tags*** *and add keywords separated by commas.*
8. *Click* ***Post****.*

Post or share files

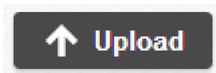
The Upload tool allows you to upload and share a variety of files types:

- *File: All file types*
- *Presentation: ppt, pps, pptx, odp, pdf, ps, sxi*
- *Video: flv, mp4*
- *Photo: png, bmp, jpeg, gif, jpg, psd*

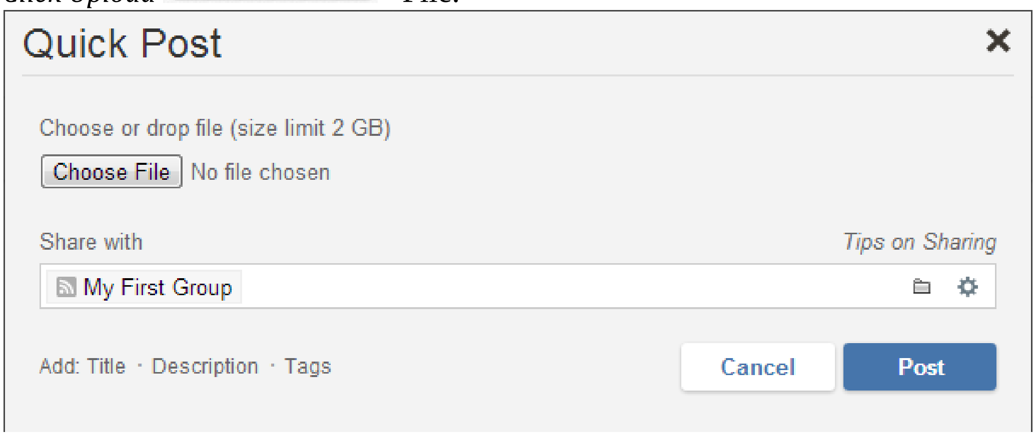
Some examples for posting files:

- *For review: You may ask a project or selected individuals to review the file and give their comments. You can then edit and upload a revised version of the document.*
- *For reference or information: You may post the file to share information with everyone, a Project, or a few individuals (for example, policy documents, process documents, reference tools, job aids, and so on.)*
- *To store a file and its versions:Yyou may want to post a file and its versions here for personal reference*

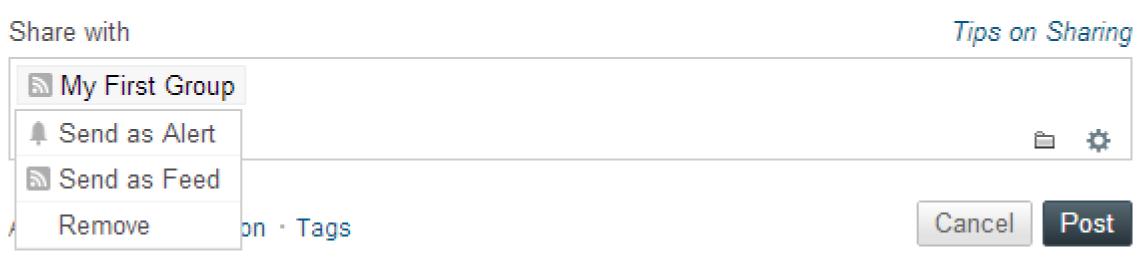
To post a file:

1. *Click Upload* 

 > File.

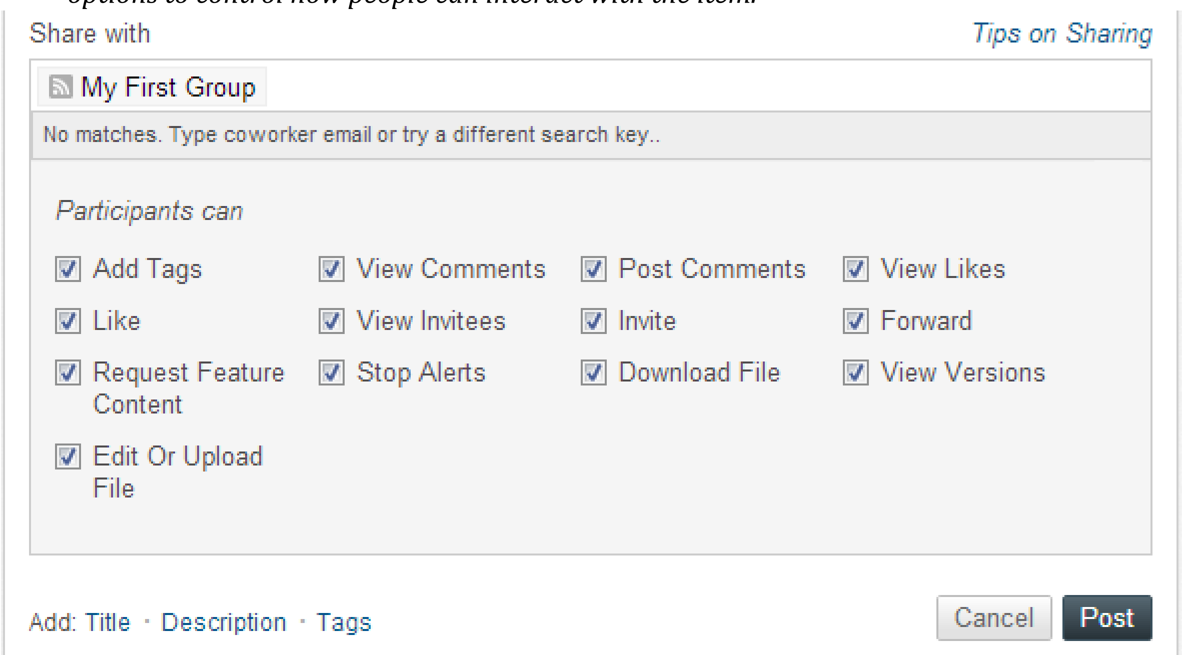


2. *Click **Choose File** and select the file you want to upload.*
3. *To post a file to selected individuals and/or Project/s, click in the* Share with *filed and enter their names*
4. *To send an alert to selected projects, click in the Share with box and enter project names, Mouse over the name and select **Send as Alert.***



5. *Click the storage icon 🗀 and select where you want to store the item.*

6. *Click the Preferences icon*  *and select the options for the item. Enable or disable the options to control how people can interact with the item.*



7. *Optional: Add a title and description, in the respective boxes.*
8. *Optional: Click **Tags** and add keywords separated by commas.*
9. *Click **Post**.*

★Tips★

- *Add a description to let your coworkers know what the file is about and why you're sharing it with them.*
- *Add tags that will help you and others find the document quickly when they search for it.*

Keep Current

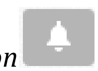
Autodesk 360 Tech Preview provides several ways for you to keep up to date with activities that are specifically meant for your attention, public activities within the hub, and activities and items that you are particularly interested in.

Alerts

Items that are posted for your personal attention are received as alerts in your personal hub. Alerts can include any of the following:

- *Items sent to you privately*
- *All updates to items that you requested alerts on using the Alert me option*
- *Hub or project items in which the sender included you in the Share with field - Alert me is turned on for these items by default, so you will get alerts on updates to the item*
- *Hub or project items to which you responded – Alert me is turned on automatically when you comment, like, or upload a new version of a file*
- *Items for which sender alerted the project you are member of*
- *Other activities related to people and projects, such as, invitation to join a project, request to join a project you are moderating, and so on*

How Alerts work

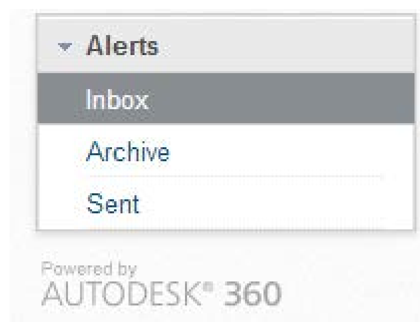
When you receive new alerts, you will see the Alerts icon  *with the number of alerts on the top of your Dashboard. You will get an email notification depending on your email preferences for alerts.*

There are 3 sections within Alerts: Inbox, Archive, and Sent.
The Inbox has two sections: Unread and All.

- *Unread: Contains all unread messages*
- *All: contains all read and unread messages that you have not archived*

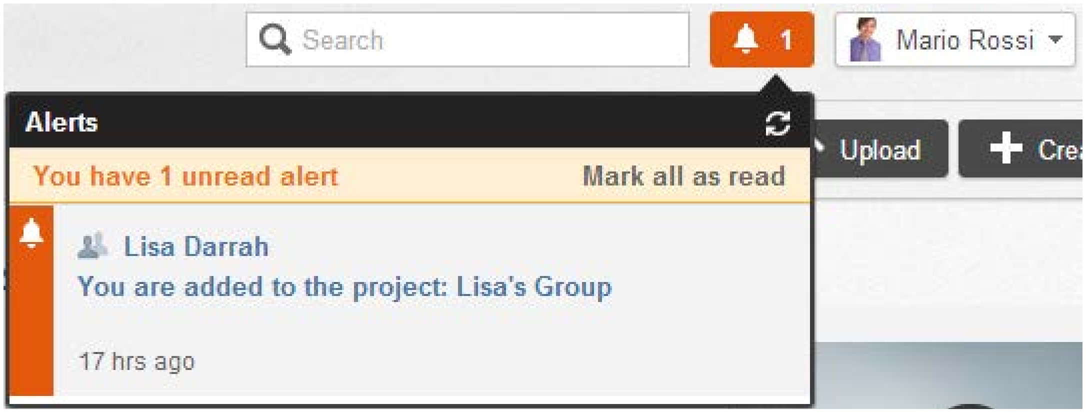
Archive: Contains all items you archived.

The Sent folder contains all private items you sent and items you alerted people or project on.

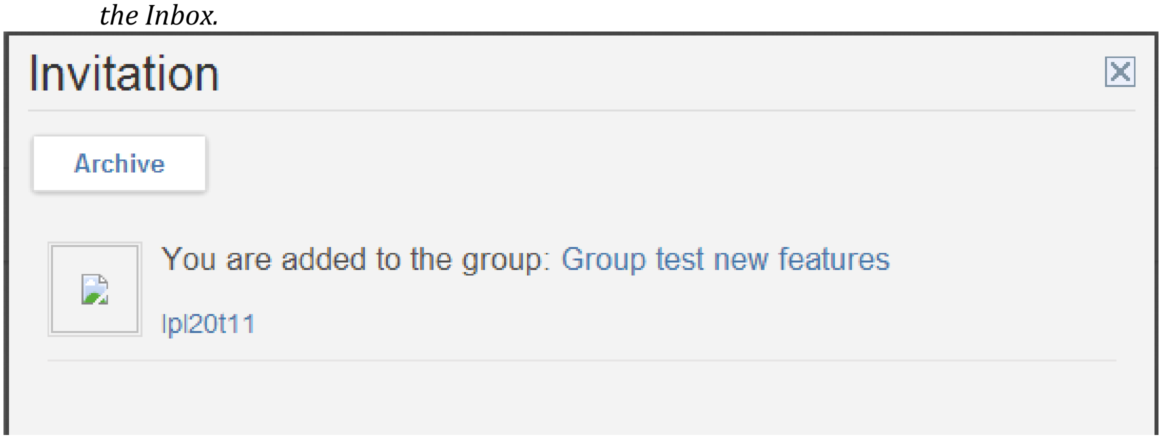


Accessing alerts

1. *Click the* ***Alerts*** *icon.*
   The Alerts Inbox will open.



2. *To view an item alerts, click the title of the item. After you view an item in Alerts, it will be moved to Alerts > All.*
3. *To archive an item, click **Archive**. All archived items will be available in the Archive section of the Inbox.*



To reply to alerts

- *Comment below an item. Click **Comment,** enter your text, and click Post.*
    - *Reply by email if you receive email notifications, without signing into Autodesk 360 Tech Preview. Comment by replying to the email notification.*

To stop alerts:

1. *Click View the item*
2. *Click **Stop alerts**.*

★Tips★

- *Once you stop alerts for an item, the item will be deleted from your Inbox Archive folder.*
- *Item preferences set for an item will determine if you can choose to stop receiving alerts for an item your coworker posted.*

Activity

The Activity feed provides a live update of all public activities within a hub and open project activities. Everyone in the hub receives identical updates within the Community feed.

How the Activity feed works

Within the Activity feed, the newest activity or the most recently posted item appears on the top. When someone makes a change to an item or comments on it, the item does not move to the top. When you delete an item, it is removed from the Activity feed.

Public activities

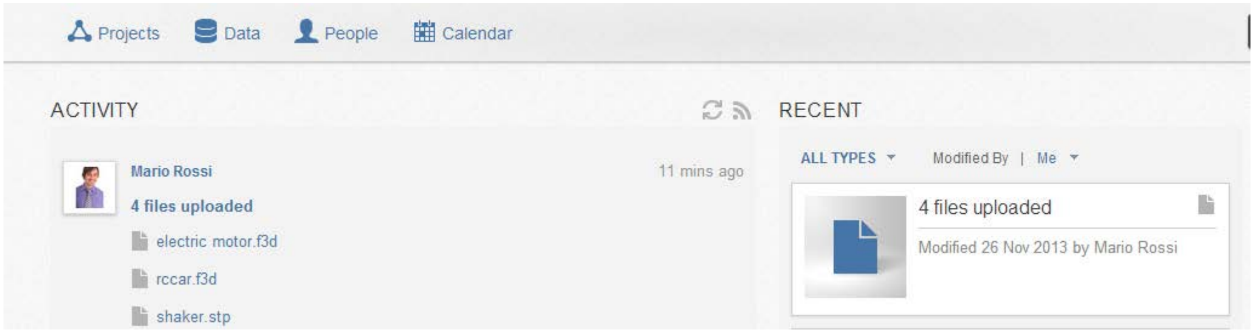
The following are public activities:

- *Project creation (Open and Closed projects only)*
- *Activities of open projects*
  - *Someone joins an open project*
  - *Project items for which Add to Community is selected*
  - *Project profile changes*

Interacting with the Activity feed

In addition to providing updates, the Activity feed provides ways for you to respond to an item, view information about a project or person, start interactions with a project or person, as well as a way to view new updates on an item. In addition to viewing updates, you can also:

- Subscribe to the Activity feed
- Refresh the Activity feed to see new posts
- View item type and privacy information
- Take action on items without opening it
- Open items and take actions on it
- Check for updates to items
- Start interactions with people and projects by accessing Create and Upload tools
- Access profile or dashboard
- Start or stop following items



Work In projects

Autodesk 360 Tech Preview provides several ways for you to keep up to date with activities that are specifically meant for your attention, public activities within the hub, and activities and items that you are particularly interested in

What are projects?

Projects provide a way for you to easily communicate and collaborate with people you regularly work with or share interests with. These may be people within your department or company unit or people in other departments within the company, or even people outside the company, such as vendors, partners, and customers.

Work includes interacting in several ways by sending messages to each other, sharing files and information, and creating content. In the past, messages are sent using email, files are posted to a server or ftp site, and content is created using one or more content applications.

Within an Autodesk 360 Pro -powered community, you can bring all your interactions with the people your regularly work with to one place by creating a project. All project members will have access to a project space where they can share content, communicate, and collaborate. You can even invite guests to certain types of projects to make it easier to communicate and collaborate with people outside the company.

There are two main project related pages within Autodesk 360 Tech Preview:

- *The All Projects page*
- *The Project Dashboard – The home page for each project*

Project types

In a company Hub, you can create three types of projects: Open, Closed, or Secret.

While determining your project type, the main thing to consider is the content that will be shared within the project. If the content is relevant to the whole community, create an open project, if the content is relevant only to people working on a project or within a department, create a closed project

Note: All Personal Hubs projects are set to secret

- ***Open projects***
  - *Open projects are suited for community needs. Membership is open to all community members and project content is also visible and accessible to everyone in the community.*
- ***Closed projects***
  - *Closed projects are suited for departmental, company unit, or organizational needs, where activities and content are meant only for project members. Although it is visible to everyone in the community, membership is by approval only and project content is visible only to members.*
- ***Secret projects***
  - *Secret projects are suited for teams, projects, or departments that work on confidential or sensitive information. It is only visible to members and membership is by invitation only.*

★ Best practices for project settings★

While creating a project make sure that you select the appropriate options or settings for your project.
Category
The project category gives an indication of the purpose of a project.
Although it is not mandatory for you to assign a category to your project, it is recommended that you do so. Assigning a category makes it easier for people to find your project.

Tags

Tags serve a two-fold purpose:

1. *They help your coworkers find the project when they search for the tag.*
2. *They are a way to let the community know where a project's expertise or interest lies. Project tags are listed on the project profile page. Additionally, when public items are posted with the same tags, they are added to Tagged Items in the Project Home page. These allow project members to quickly access and respond to public items that are tagged with same keywords.*

Guest membership

Guest membership is an option for closed and secret projects. It allows you to invite people outside the community to a project. They may be partners, vendors, or customers.
If your work requires you to share content and collaborate on a regular basis with people outside the community, make sure you enable guest membership.

Default Follow settings

When project members follow a project, they receive updates on project activities in Activity Feed. As a project moderator, you can set the Default Follow option so that new project members automatically start following the project. In general, it is better to let project members decide if they want to follow a project.
However, if your project is working on time-sensitive projects where it is crucial that all project members are aware of all updates, you can enable this option.

Creating a project

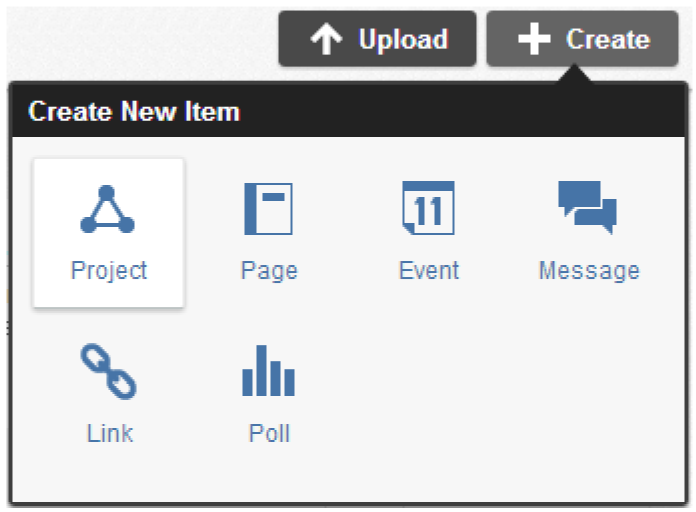
Anyone in the company hub can create a project. While creating a project, you can:

- *Include the purpose of the project*
- *Assign the project to a category*
- *Set the project type*
- *Set default settings for the project*

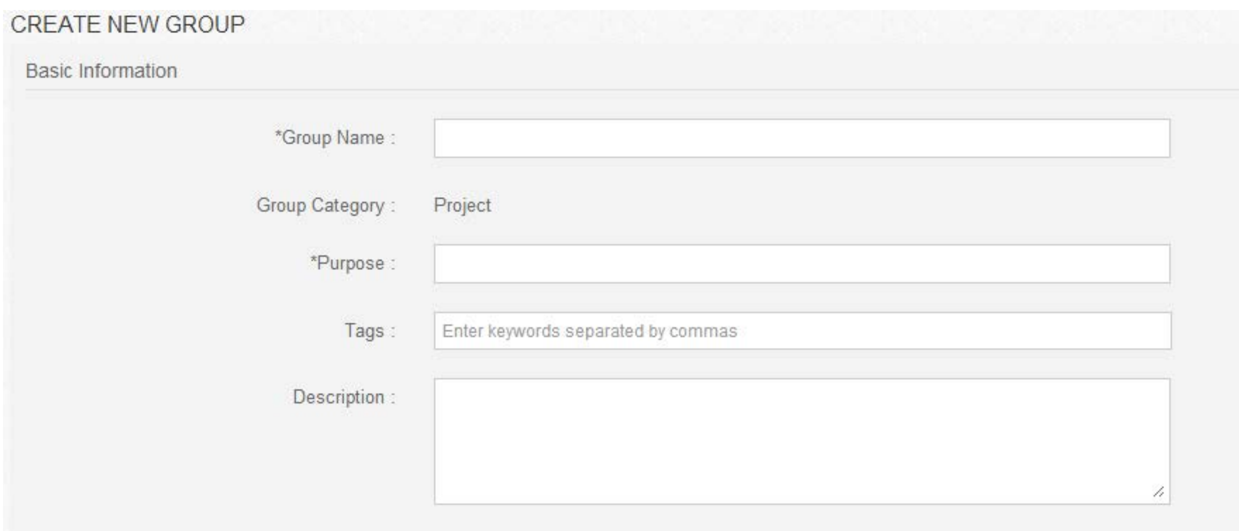
All information you provide while creating a project will be available on the Project dashboard page.
You will also be able to edit project settings on the Project Profile page.
By default, the person who creates the project is the project moderator.

To create a project:

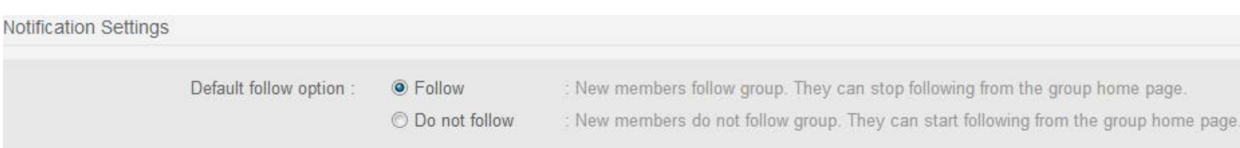
1. *From either the dashboard or from the All Projects page, Click Create> Project*



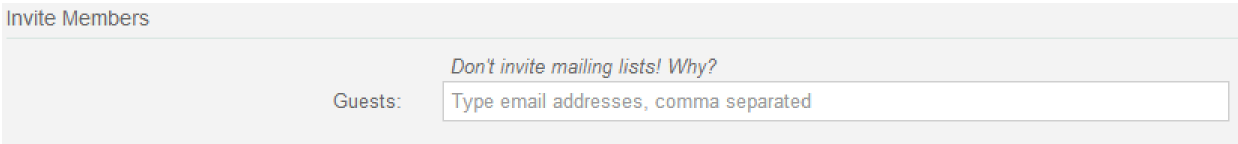
2. *Enter information in the Basic Information section.*



3. *Select the Default follow option for new members.*



4. *In the Invite Members section*
    a. *Enter names of users or projects separated by comma in the* Users and projects *box.*
    b. *Enter email addresses of guests separated by comma in the* Guests *box.*



5. *Click **Create**. The project dashboard will open.*

Find and join projects

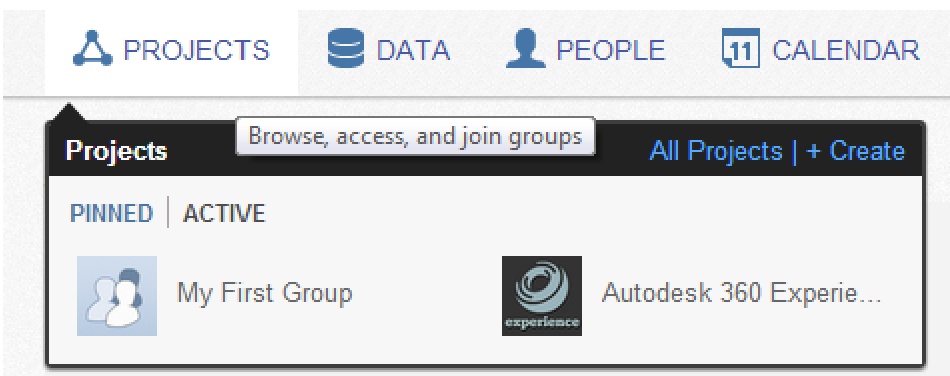
You can find projects through the All Projects page, and by searching for projects.

- *The All Projects page lists all Open and Closed projects within the hub. You can search for projects or browse projects by category.*
- *You can also search for projects using the Search box. The results will show all open and closed projects that have a matching name, tag, department, description, or purpose.*

Find projects

To view recent projects:

1. *From the dashboard, on the navigation bar, mouse over projects to open the projects menu. The most recent projects are shown*



2. *Click on the project you want to view*

To browse all projects:

1. *From the dashboard, on the navigation bar, click projects and browse through the projects.*
2. *Click on the project you want to view*

Searching

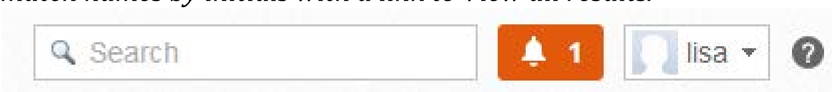
In this section, you will find topics that help you:

- *Understand how the search functionality works*
- *Become familiar with the options on the Search page*
- *Learn to search effectively and find people, projects, and items*

- *The different ways to refine your search results.*

How Search works

You can search for people, items, and projects using the Search box on the top right. The Search box at the top of the page has auto suggest feature which populates results for people and projects that match names by initials with a link to View all results.



*When you search for people, projects, or items using the Searchbox or the Search page (All), the results show all people, projects, and items that contain **the whole word** in the name, profile information, title, description, tags, and content within items like files, Wiki pages, and blogs.*

Search results show the most relevant results on top.

You can also search for people from the People page and for Projects from the All Projects page. Search functionality works in the same way in these pages, but of course, the results will only show people or projects.

Search results can also be filtered.

After you have your results, you can filter them by:

- *Item*
- *Created by*
- *Group Category*
- *Stored in a specific group*

Once you select the items, the filter will be applied immediately.