

PL20541 - The Good, The Bad, The Admin

Lisa Darrah

Sr. Program Manager – PDG – Fusion Lifecycle

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Introductions



Lisa Darrah – Sr. Program Manager for PDG Fusion Lifecycle

- 17 years at Autodesk Started in Product Support, moved into QA and then Project Management
- Experience in Architectural, Manufacturing and Graphic Design
- Certified Project Management Professional

Follow along

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Lisa Darrah
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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Page 1

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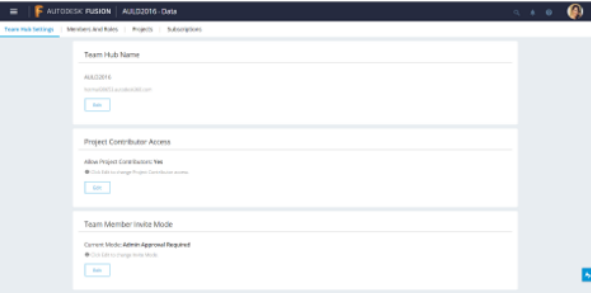
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Fusion Team Admin Overview.

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](#)

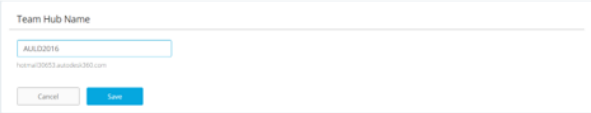
Admin Main Page Overview: Team Hub Settings

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



Team Hub Name:

Changing your Team Hub Name by selecting edit and then 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

Page 2

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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?

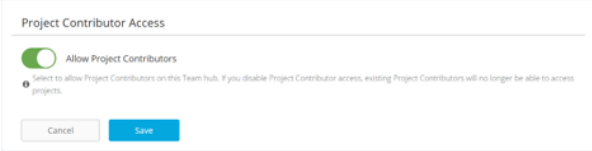
Consider the following questions

- 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

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

Page 3

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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

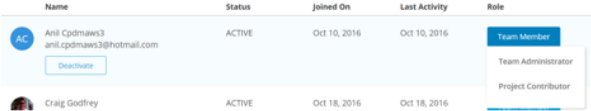
Page 4

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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.



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.

Deactive Invitations

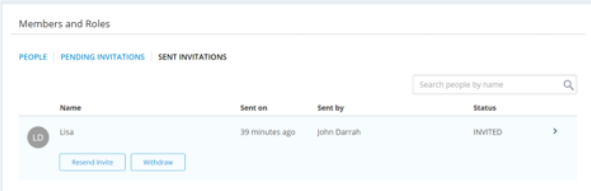
Page 5

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Admin Main Page Overview: Projects



Page 6

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Safe Harbor Statement

During the course of this presentation, we may make statements regarding future events and/or statements regarding planned or future development efforts for our existing or new products and services. We wish to caution you that such statements reflect our current expectations, estimates and assumptions based on factors currently known to us and that actual events or results could differ materially. Also, these statements are not intended to be a promise or guarantee of future delivery of products, services or features but merely reflect our current plans, which may change. Purchasing decisions should not be made based upon reliance on these statements. The statements made in this presentation are being made as of the time and date of its live presentation. We do not assume any obligation to update any statements we make to reflect events that occur or circumstances that exist after the date of this presentation.

A small but important request - Feedback

- Via the Survey Stations, e-mail or Mobile device
- Best to do it right after the session
- Instructors see the results in real-time



Class Summary

Questions you should ask:

- Are you the Team Administrator for Fusion Team?
- Do you know how to set up your Team site?

In this class you will:

- Answer these questions
- Give an overview of the Fusion Product Family
- Give an overview of the Administration options in Fusion Team
- Review the roles and options in Fusion Team Projects

** Note: This class is intended for Team Admins*

Who, What, and Why?

While knowing the various roles as a Fusion Team admin is important, knowing **how to define roles in Fusion Team** will help customize your Fusion Team experience.

Key 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

What is the Fusion Family

F AUTODESK® FUSION TEAM

Extends collaboration to all team members including external stakeholders, supply chains, and connects directly with Fusion 360 and Fusion Lifecycle.

F AUTODESK® FUSION 360™

Connect your entire product development process in a single cloud-based platform that works on both Mac and PC.

F AUTODESK® FUSION LIFECYCLE

Includes product data management capabilities, making it the first ever end-to-end PLM solution in the cloud.

F AUTODESK® FUSION CONNECT

Internet of Things (IoT) Cloud Service to easily connect, analyze, and manage remote products.

C AUTODESK® CONFIGURE ONE

Made for manufacturers who design and build configurable, multi-option, and customizable products.

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The Admin.



Admin Main Page Overview: Team Hub Settings

- People
 - Changing your Team Hub Name
 - How project Contributors access the project
 - Determine how Team Members can be invited to the hub
- Members and Roles
 - See all your Hub members and their Role.
 - Modify the roles of the Hub Members.
 - Status of their Invitations

Demo



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: Project Access Roles

- 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

Demo



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			✓

Fusion Team and Fusion Lifecycle

- Early integration with Fusion Lifecycle
- Admin Options in Fusion Team Vs Fusion Lifecycle
- Fusion Team:Data Admin in Menu vs Profile option

Demo

Class Suggestions to check out

[PL20897 - Fusion Lifecycle 101: Wait, It Can Do That?](#)

[PD18157 - Fusion 360 101: Introducing Fusion 360](#)

[PL21651 - Picking the Low-Hanging Fruits to Drive Early Adoption](#)

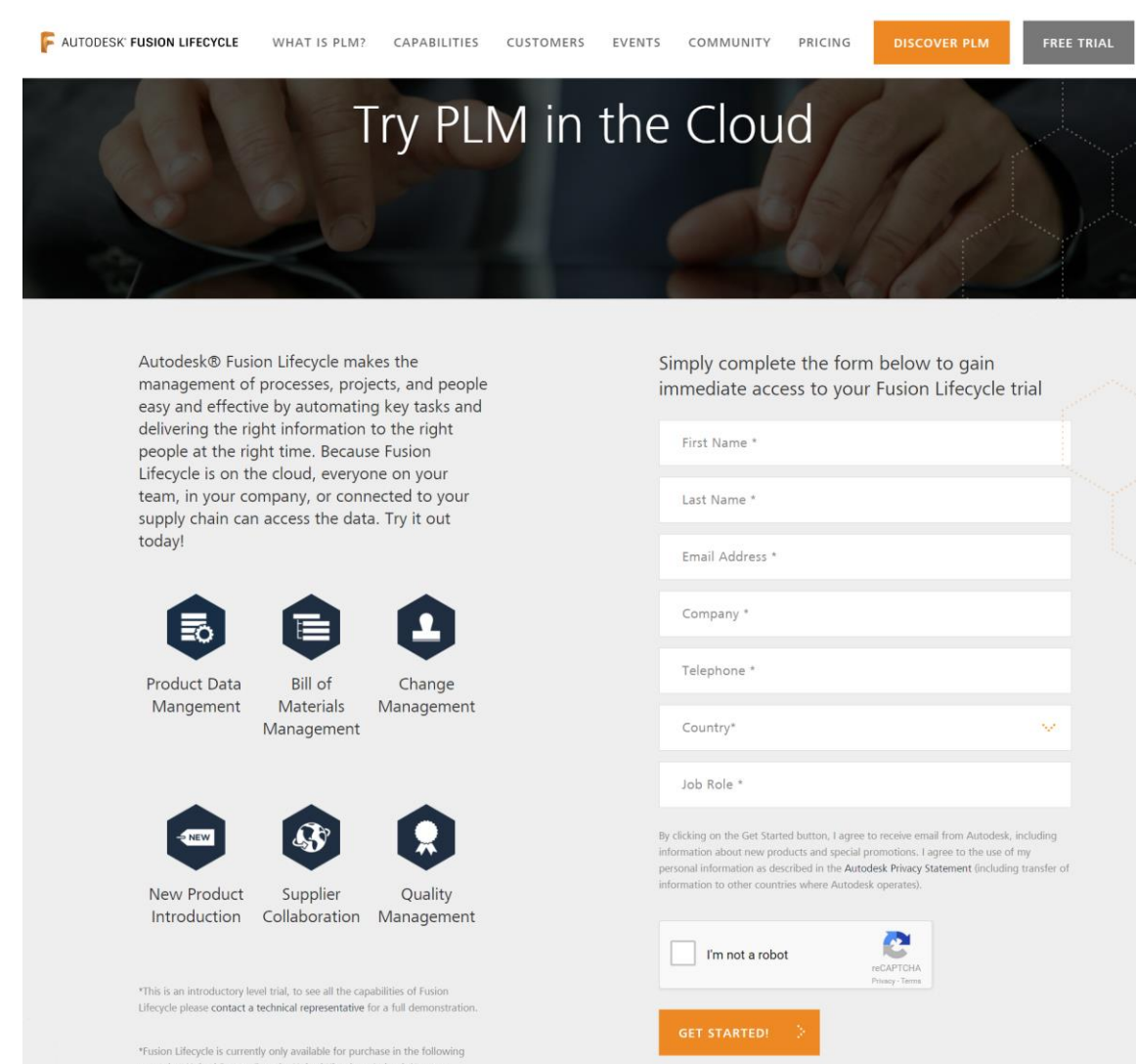
[PL20489 - Fusion Lifecycle Features you aren't using - but should be](#)

[PL22007 - Fusion Lifecycle Admin 101](#)



Try Fusion Lifecycle

- Free 30 day Trial
- <http://www.autodeskfusionlifecycle.com/tryplm/>



The screenshot shows the Autodesk Fusion Lifecycle website's registration page. The header includes the Autodesk Fusion Lifecycle logo and navigation links: WHAT IS PLM?, CAPABILITIES, CUSTOMERS, EVENTS, COMMUNITY, PRICING, DISCOVER PLM, and FREE TRIAL. The main heading is 'Try PLM in the Cloud' over a background image of hands holding a transparent sphere. Below this, a paragraph describes the benefits of Fusion Lifecycle. To the right, a form asks for personal and company information to gain immediate access to a trial. The form fields are: First Name *, Last Name *, Email Address *, Company *, Telephone *, Country* (with a dropdown arrow), and Job Role *. Below the form is a reCAPTCHA 'I'm not a robot' checkbox and a 'GET STARTED!' button. At the bottom, there is a disclaimer about the trial and a list of countries where it is available.

AUTODESK FUSION LIFECYCLE WHAT IS PLM? CAPABILITIES CUSTOMERS EVENTS COMMUNITY PRICING DISCOVER PLM FREE TRIAL

Try PLM in the Cloud

Autodesk® Fusion Lifecycle makes the management of processes, projects, and people easy and effective by automating key tasks and delivering the right information to the right people at the right time. Because Fusion Lifecycle is on the cloud, everyone on your team, in your company, or connected to your supply chain can access the data. Try it out today!


Product Data Management


Bill of Materials Management


Change Management


New Product Introduction


Supplier Collaboration


Quality Management

Simply complete the form below to gain immediate access to your Fusion Lifecycle trial

First Name *

Last Name *

Email Address *

Company *

Telephone *

Country* 

Job Role *

☐ I'm not a robot 

GET STARTED! 

*This is an introductory level trial, to see all the capabilities of Fusion Lifecycle please contact a technical representative for a full demonstration.

*Fusion Lifecycle is currently only available for purchase in the following countries: United States, Canada, United Kingdom, Ireland, Norway.

Fusion Lifecycle Beta



- Participate in the Fusion Lifecycle Beta
 - See what's coming in the next release
 - You have the power to shape the roadmap

<https://beta.autodesk.com/callout/?callid=%7bEBA96C46-58FC-49E3-954B-C45E8F67E320%7d>

More Questions? Visit the AU Answer Bar

- Seek answers to all of your technical product questions by visiting the [Answer Bar](#).
- Open daily from [8am-6pm Tuesday](#) and [Wednesday](#); [8am-4:30pm Thursday](#).
- Located outside [Hall C, Level 2](#).
- Meet Autodesk developers, testers, & support engineers ready to help with your most challenging technical questions.



