

CP500003

Fusion 360 Data Ownership and Fusion Team Configuration

Scott Moyse
CADPRO Systems New Zealand Limited

Learning Objectives

- Learn how to validate where all your company's Fusion 360 data currently resides
- Discover which account controls your company's Fusion 360 data
- Learn about where to manage employees' access to your Fusion 360 software versus your Fusion 360 data
- Learn how to configure Fusion 360 Team to suit your company

Description

Fusion 360 software installs and runs on Windows 10 and macOS, just like traditional applications. However, all of Fusion 360 software's data is synchronized to the Autodesk Cloud, hosted on Amazon Cloud servers, which provides numerous data management benefits. Having a high-level understanding of how Fusion 360 stores its data is critical for business owners who have chosen to use Fusion 360 as their digital design and manufacturing tool. What isn't obvious to business owners is this: The first employee to set up and use Fusion 360 in their business becomes the owner of all the data created with Fusion 360. This class will explain why and how business owners or IT managers can make sure they have control over their companies' intellectual property.

Speaker(s)

Scott Moyse is a Manufacturing, CAM & Data Management Technical Specialist for CADPRO Systems in New Zealand. He previously worked at SMI for over 9 years after moving from the UK while studying Motorsport Engineering. Starting out as design support, Scott quickly moved into programming their new CNC machine. Over the next 4 years he worked closely with both manufacturing & design to create & implement automated processes. This provided him with an invaluable insight into both departments' operations. In 2008 he moved back into design full-time, resulting in him taking the Design Manager position in 2009. For the last 3 years of that position, he implemented & managed Autodesk Vault Professional, improving communication, work allocation, organization & increased control over the design review process. Over the years he has been deeply involved in process formation, implementation & development in an ever changing environment. Since late 2013, Scott has been working for CADPRO Systems in New Zealand. He covers most of Autodesk's manufacturing focused design and engineering products. CAM is now his primary focus, supporting customers across New Zealand and Australia. Over the last few years, Scott has developed skills to write Post Processors for Fusion 360, HSMWorks and Inventor CAM as well as developing add-ins for Fusion 360. In his spare time, Scott runs ChipX, a CNC tooling and workholding company selling products to machine shops and makers in New Zealand and Australia.

AUTODESK UNIVERSITY

Contents

- The Problem 3
- The Solution..... 3
- The Autodesk Account..... 3
 - User Accounts 3
 - Contract Managers & Primary Admins..... 3
- Do You Already Have A Team Site? 4
 - Auditing Your Fusion 360 Data 5
 - What To Do With Your New Found Information? 6
- Creating Your First Team Site..... 7
 - What Do You Need?..... 7
 - Fusion Team Creation 7
 - Create In Product 8
 - Create from Autodesk Account..... 9
 - Common Fusion Team Creation Workflow 9
 - How Do You Add The Rest Of Your Employees To Your Team Site?..... 12
- User Management 13
- Project Management..... 14
- Summary 15

AUTODESK UNIVERSITY

The Problem

Autodesk® Fusion 360 installs and runs on Windows 10 & macOS, just like traditional applications. However, all of Fusion 360's data is synchronised to the Autodesk Cloud, hosted on Amazon Cloud servers, which provides numerous data management benefits. Having a high-level understanding of how Fusion 360 stores its data, is critical for business owners who have chosen to use Fusion 360 as their digital design & manufacturing tool.

What isn't obvious to business owners, is the first employee to setup and use Fusion 360 in their business, becomes the owner of all the data created with Fusion 360. This whitepaper will explain why and how business owners or IT managers can make sure they have control over their companies' intellectual property.

The Solution

The following sections of this whitepaper will walk you through the steps for either setting up Fusion 360 & Fusion Team correctly for your company, or ascertaining the current state of your setup, so that you can get the software configured to suit your needs.

There is a lot to this process if you are in the latter situation. So, if you feel the scope of this document is beyond your skill level or would take longer than what you have time for, please feel free to get in touch with us and we would be happy to assist you.

The Autodesk Account

To use any Autodesk products or services, you need an Autodesk account to log into Autodesk websites or licensing servers.

User Accounts

Passionate Autodesk users typically have an online profile that they are proud of and would like to maintain and carry forward as they progress through their professional career.

As a business owner or IT manager, you must decide if you are happy for employees to use that account while working for your company. The Autodesk account has a unique ID and like most other accounts on the internet, the email address can be changed at any time. My personal Autodesk account is currently set to use my CADPRO email address, whereas in my previous job, it was tied to the work email address I had at the time.

Your employee can create and use a 2nd account with their company email instead if that's your preference. It just makes it more inconvenient for them to switch between Autodesk accounts often.

Either way, the important thing to understand is that an Autodesk account typically represents an individual and the email address on that account can be changed at any time.

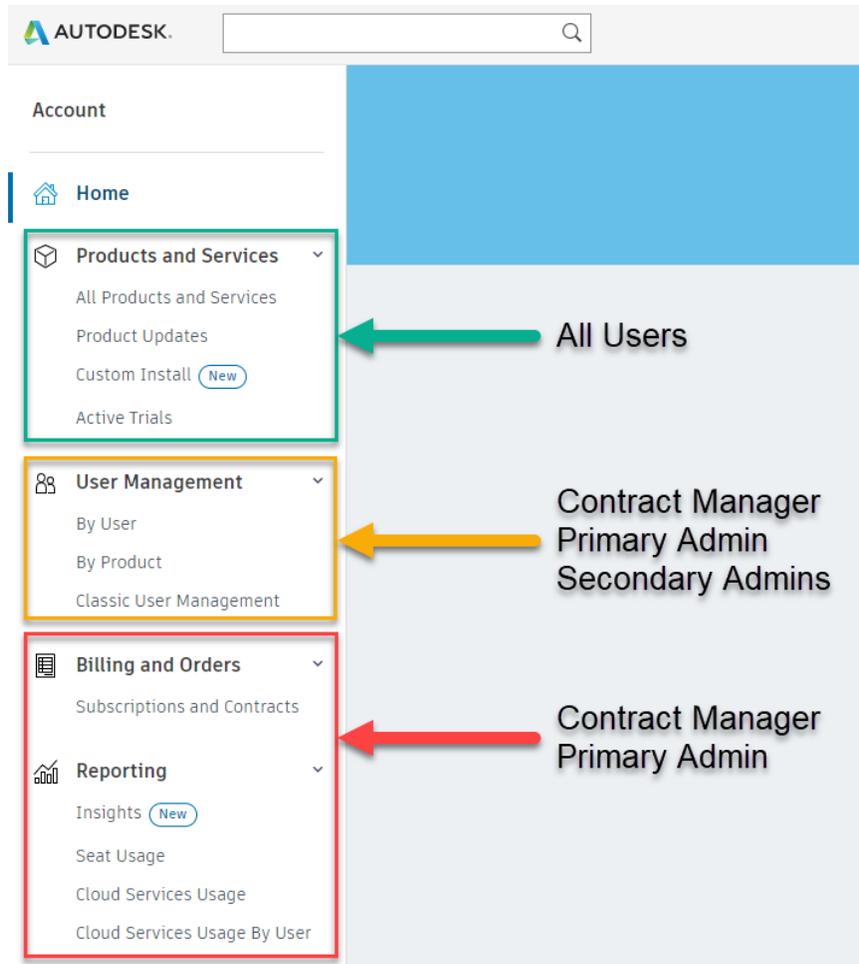
Contract Managers & Primary Admins

Autodesk user accounts can have different levels of privilege. The account which subscribes to a new product or service, will be the Contract Manager and Primary Admin for the contract that subscription belongs to. The Contract Manager account email is the one that will receive future invoices for renewals, they can also reassign the Primary Administrator role to a different user if they desire.

A Primary Administrator can add or remove Users to their account and assign Autodesk products and services to them as they see fit. They can also make those users Secondary

AUTODESK UNIVERSITY

Admins if they would like help administering the company's users and Autodesk product assignment.



All of this functionality is available via the manage.autodesk.com website.

IMPORTANT

Please understand this website ONLY allows companies to control access to their software and NOT their Fusion 360 data. To control access to your data, you need to administer your Fusion Team Site.

Do You Already Have A Team Site?

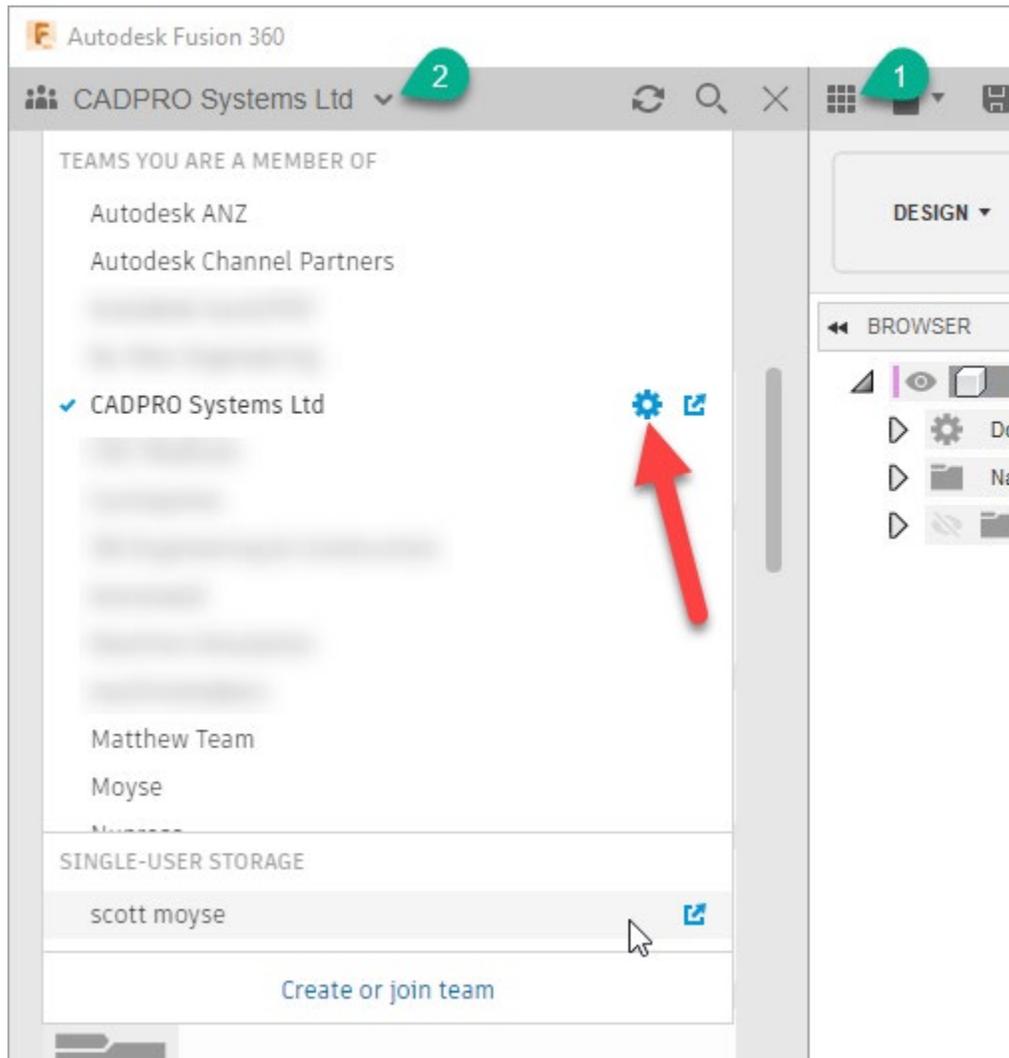
If you already have employees using Fusion 360, they will be using either:

- Single User Storage
- Or:
- An existing Team Site

AUTODESK UNIVERSITY

Auditing Your Fusion 360 Data

To find out where your data is currently stored, get each of your Fusion 360 users to launch Fusion 360, then click on the icon of 9 squares (1), then click on the drop-down menu at the top of the Data Panel (2). Take note of what you see there for each Fusion 360 user.



If a Fusion 360 user has any Team Sites listed under the “TEAMS YOU ARE A MEMBER OF” section and there is a blue gear icon next to it, then the user is the administrator of that Team Site. It is also highly likely that they are the owner of that Team Site as well.

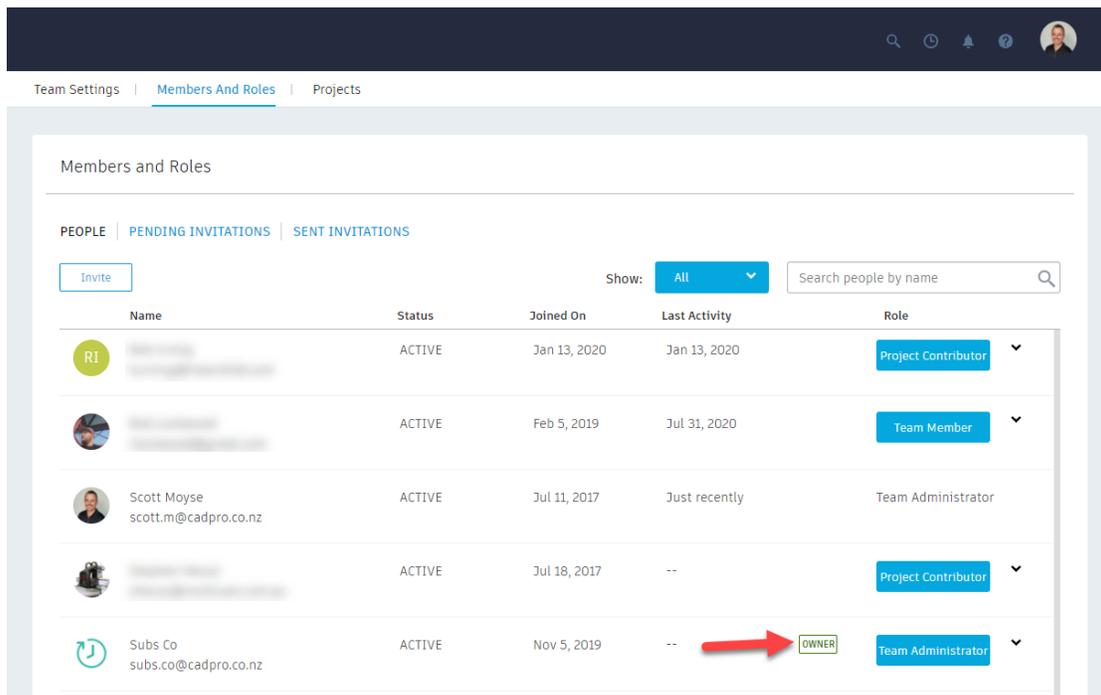
It's possible that there are multiple Team Sites with the same name, but different URLs. So, as part of your Fusion Team audit, click on the gear icon, then take note of the URL in the address bar of the resulting browser window.

AUTODESK UNIVERSITY

What To Do With Your New Found Information?

If you click on the blue gear icon for each of the Team Sites across all of your Fusion 360 users, it will take you to the administration backend for that Team Site. Switch to the Members And Roles tab, then scroll down and look for the account marked as the Owner. Take note of that user account and email, as it's likely we will need to get that changed to a generic company email only accessible by HR/IT, or the business owner.

At this point, it's also worth taking a mental note of which accounts are listed here and the Roles each of them have.



Refer to the [User Management](#) section of this White Paper for more information about what the different roles listed here mean.

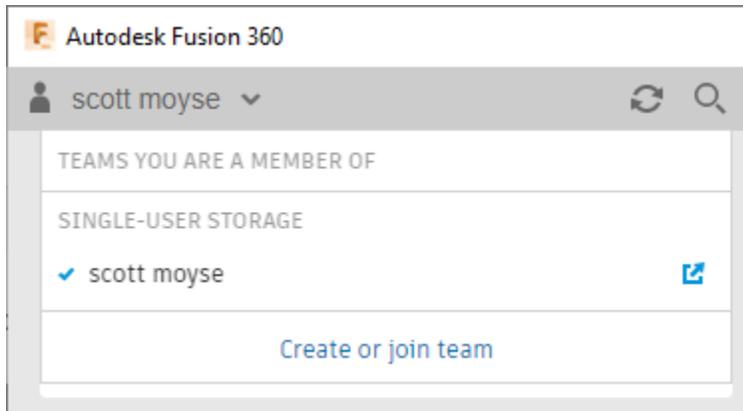
Unfortunately, it's not currently possible to change which account is the Owner of the Team Site from the user interface. However, this is something CADPRO Systems can help you to change.

You now have a good amount of information to decipher how you would like to proceed from a data structure standpoint. CADPRO have helped dozens of companies to get their Fusion 360 data structure cleaned up and their Team Sites configured correctly. If you would like us to help with yours, please get in touch via support@cadpro.co.nz and supply as much information as you can, we will then reply with how to proceed.

AUTODESK UNIVERSITY

Creating Your First Team Site

If you don't already have a Team Site, then you have probably been using Fusion 360 for quite a while. When you navigate to your Single User Storage site, you will notice the URL is myhub.autodesk360.com. Another clue is the icon on the left side of the Team switcher drop-down will be a single person, instead of 3 people.



If you don't have a Team Site setup yet, your Team Switcher drop-down in the Fusion 360 Data Panel will look like mine does in the image above. If this is the case, it's now time to move on from Single User Storage and get access to more features and control via the use of a Team Site. Let's get you setup:

What Do You Need?

1. A generic 'master' company email account
 - a. This should be an email controlled by the business owner, the IT department or Human Resources.
 - b. It's best if the email uses your company domain name.
2. That email needs to be associated with an Autodesk Account.
 - a. If that account is also the Contract Manager or Primary Admin for your Autodesk subscriptions, then it will simplify management moving forwards.
3. This Autodesk Account needs to have a commercial Fusion 360 or Fusion Team subscription assigned to it.

Fusion Team Creation

The first Fusion 360 user from your company to launch and sign into Fusion 360 will be prompted to create a Fusion Team Site.

Getting started quickly, which is encouraged via the nature of the self-serve online culture, is where the problems can start. If the first user isn't the business owner, IT or HR manager, then the employee will become the **owner** of the Team Site and the data contained within it.

When I refer to the role of Owner, I need to be clear this is quite different to the Team Administrator role. A Team Site can have more than one Team Administrator, but only a single Owner. If that employee leaves and changes the email address on their Autodesk account, they continue to be the owner of the Team Site and its data.

AUTODESK UNIVERSITY

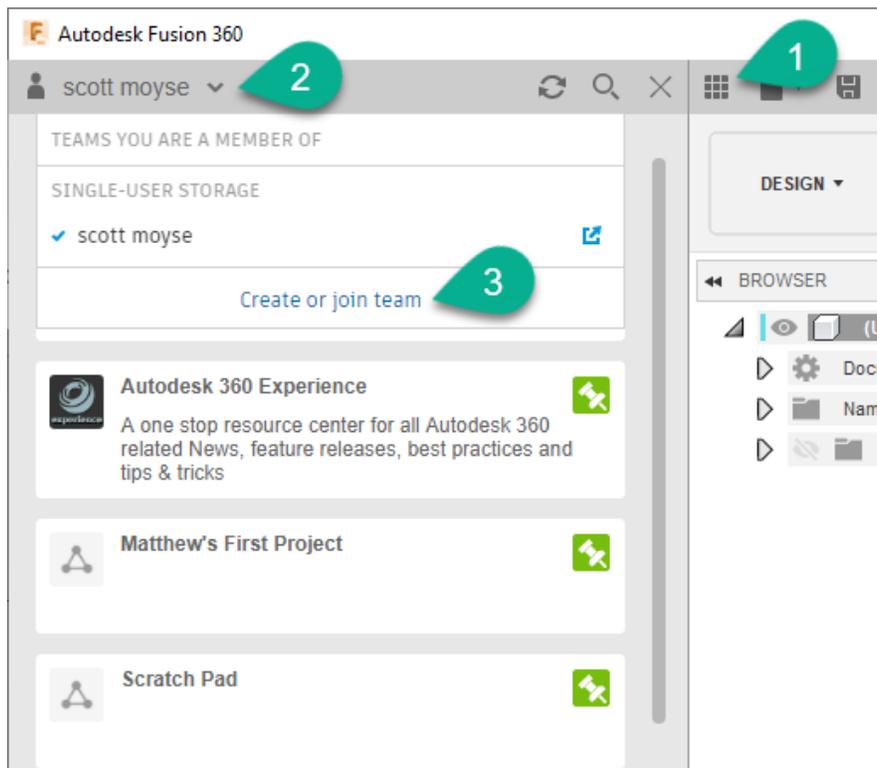
A secondary and relatively minor impact to consider, is that the email address used in the user's Autodesk account will influence the resulting URL of the Team Site. If they are using an email with the company's domain name, then that domain will become the sub domain of the Team Site. i.e: john.smith@acmegroup.com will result in a url of acmegroup.autodesk360.com. Any subsequent Team Sites created with the same email domain will get a suffix added to the subdomain; acmegroup1.autodesk360.com. However, if the account uses Gmail or Outlook.com etc, the subdomain will be generic; gmail123456.autodesk360.com.

There are two ways to create the Team Site. The following two sections describe where to find the entry points to kick off Team Site creation. Your Autodesk Account is the best place to create a Teams Site if you are only administering Fusion 360, rather than using the product as well as administering it.

Create In Product

The first time you launch Fusion 360 and sign in, the second window you are presented with is the very first one shown in the [Common Fusion Team creation workflow](#) section.

If you have an older account and are currently using Single-User Storage, then you won't be prompted to create a Fusion Team Site each time you launch Fusion 360. Instead, you can kick off the process via the Data Panel.



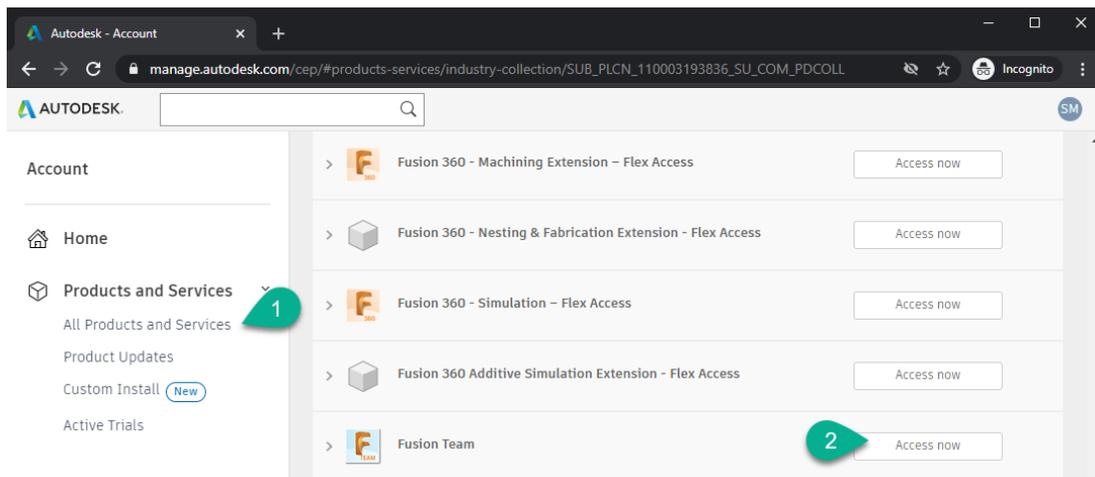
Open the Data Panel (1), click the Team Switcher drop down at the top (2), then select **Create or join team**.

AUTODESK UNIVERSITY

Create from Autodesk Account

If you don't have a commercial Fusion 360 subscription, but you need to administer and create your company's Fusion Team Site, you will need a subscription to Fusion Team. To begin with though, you can use the commercial Fusion 360 subscription you have already purchased to achieve this. You will need to have this assigned to you instead of your employee.

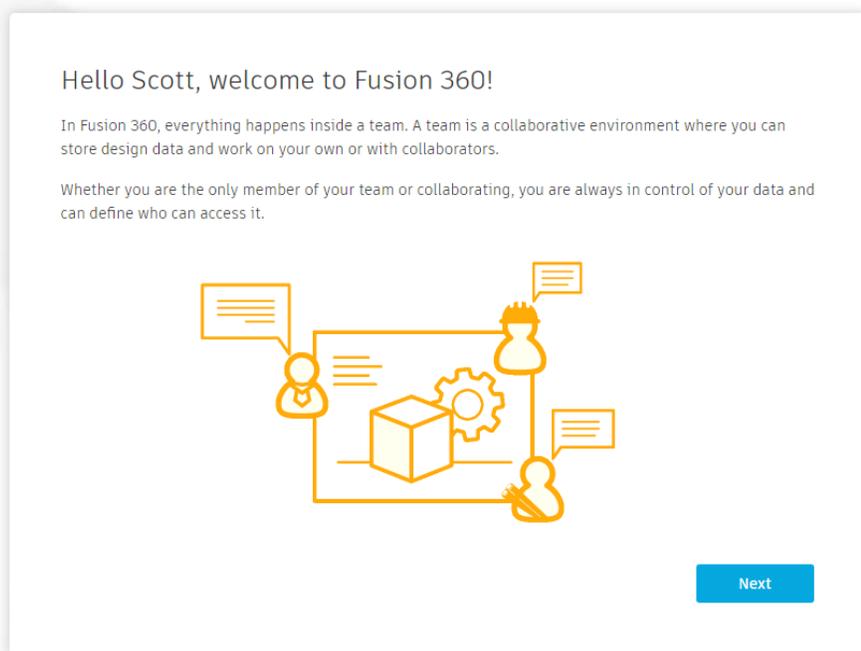
To kick off the Fusion Team Creation workflow, log into your [Autodesk Account](#), and navigate to **All Products and Services** page. Look for the Fusion Team service in the resulting list and click on **Access now**.

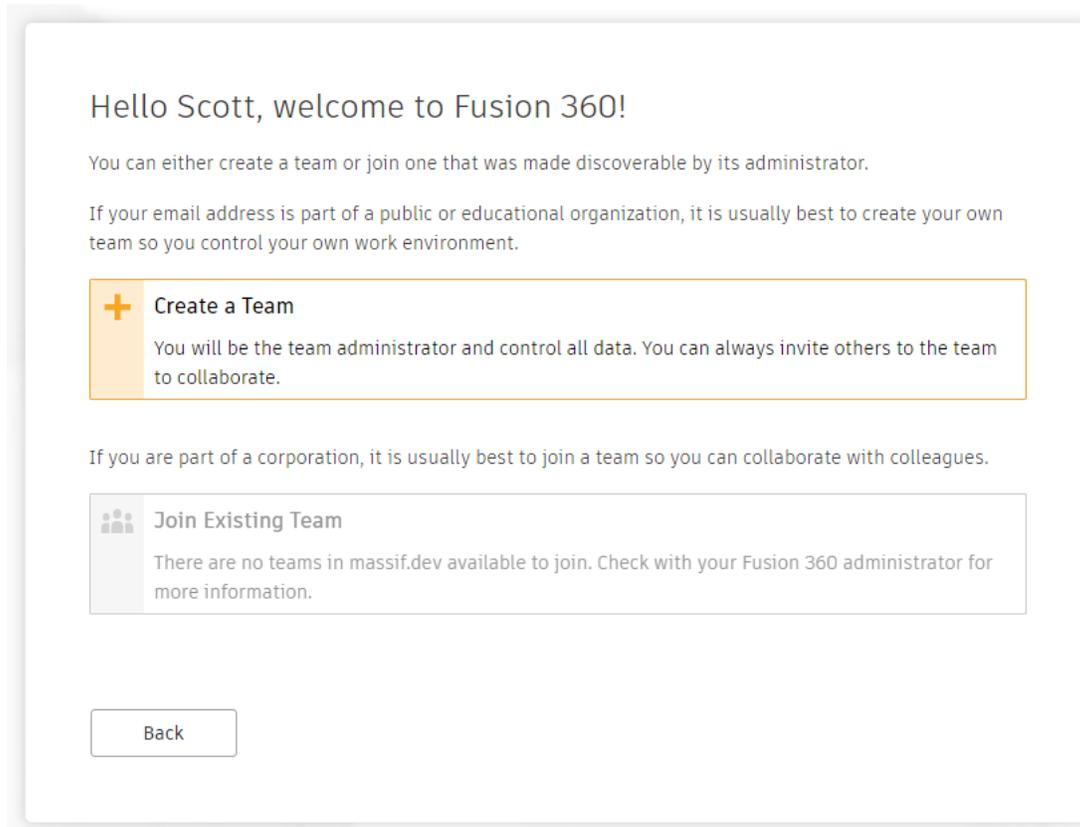


Once you have clicked access now, if you do not already belong to a Team Site, you will be presented with the following Fusion Team creation workflow.

Common Fusion Team Creation Workflow

Once you have started the Fusion Team Site creation process, the workflow is the same with both methods. As a starting point you will be presented with the following window.

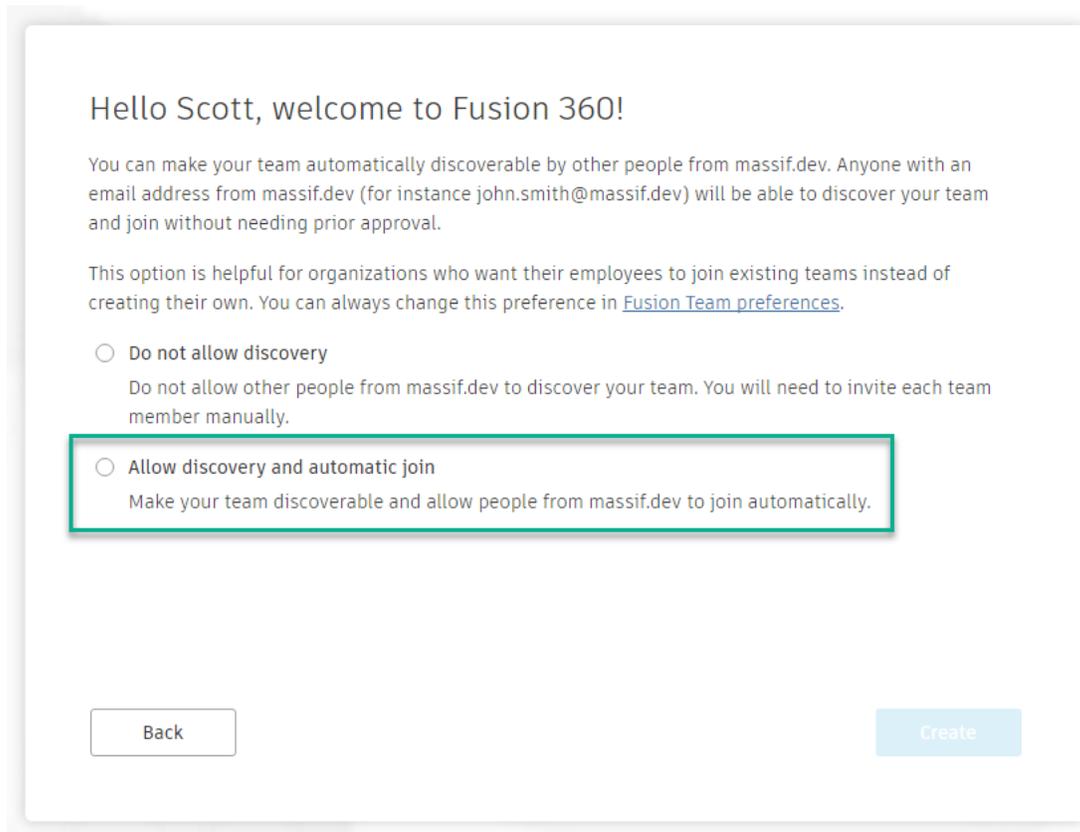




Once the first time Fusion 360 user clicks past the welcome screen, they are presented with the options above. In this case, there are no other Team Sites available to join. This is either because one doesn't exist yet or a previous employee set one up but didn't turn on Auto Discovery for the company's domain.

If you are signing into Fusion 360 with the 'master' generic company email account, then you should click on Create a Team and continue the process of setting up your Team Site. If you are an employee, you should stop at this point and establish whether anyone in your company has already set up a Teams Site. The next screen will ask for the name of your Team Site, but this doesn't have any bearing on the subdomain used in the Team Site URL.

AUTODESK UNIVERSITY



Hello Scott, welcome to Fusion 360!

You can make your team automatically discoverable by other people from massif.dev. Anyone with an email address from massif.dev (for instance john.smith@massif.dev) will be able to discover your team and join without needing prior approval.

This option is helpful for organizations who want their employees to join existing teams instead of creating their own. You can always change this preference in [Fusion Team preferences](#).

Do not allow discovery
Do not allow other people from massif.dev to discover your team. You will need to invite each team member manually.

Allow discovery and automatic join
Make your team discoverable and allow people from massif.dev to join automatically.

This screen will appear if you are signing in with an account that's using a custom domain name. It will not appear if your account is connected with a Gmail or Outlook.com email. This scenario would be a significant security issue, hence why it is disabled.

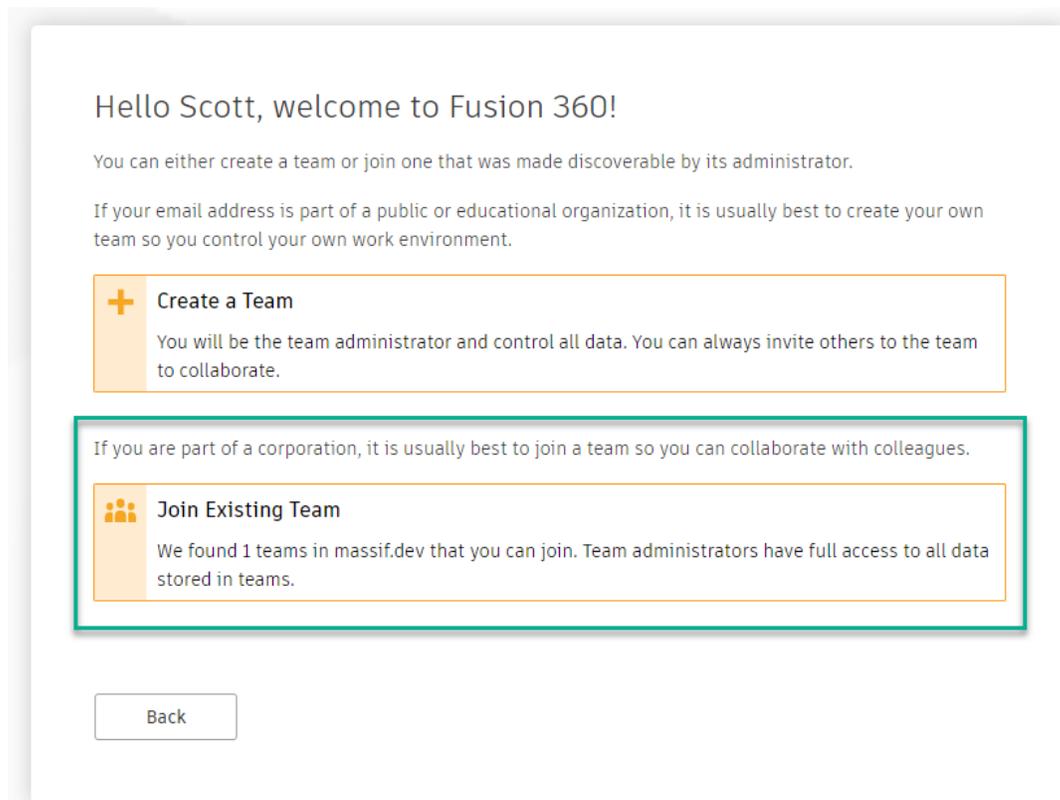
As a Team Administrator within a business, you should absolutely be turning on **Allow discovery and automatic join** on this screen. You do not want to end up with multiple Team Sites for each Fusion 360 user with data spread across all of them.

Once this step is complete, the Fusion Team Site is created and made available within Fusion 360.

AUTODESK UNIVERSITY

How Do You Add The Rest Of Your Employees To Your Team Site?

If your employees all have company emails with company domains and you have enabled **Allow discovery and automatic join**. Then when they sign into Fusion 360 for the first time they will be presented with the following screen, where the Join Existing Team option has been enabled:



Make sure they select the **Join Existing Team** option.

They can Create a Team of their own, but this will be a duplicate Team Site with the URL derived from the email domain name.

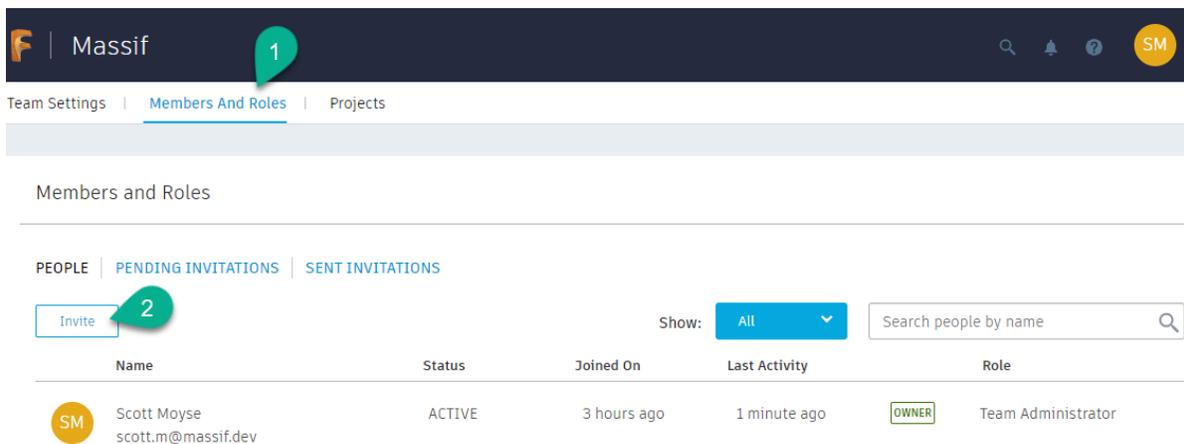
If their Autodesk account is using a public email domain like Gmail, Hotmail.com or Outlook.com etc, they will not be able to join an existing team. So instead the Team administrator will need to explicitly invite the employees Autodesk account into your Team Site. To find out how to do this, refer to the User Management section.

User Management

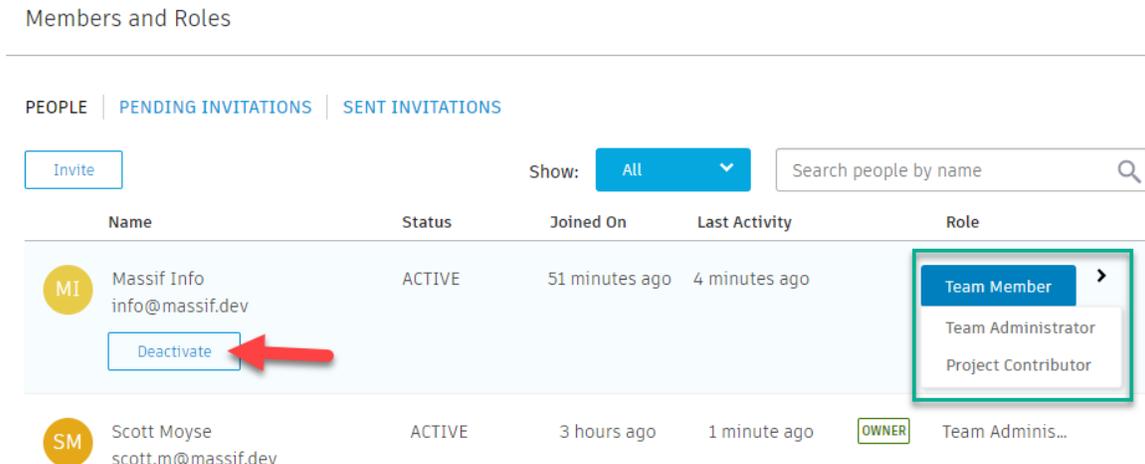
You must be a Team administrator to invite and remove users from your Team Site. Navigate to your Team site admin settings via the gear icon shown in the [audit section](#) or by using this URL:

<https://<yoursubdomain>.autodesk360.com/g/admin/manage/roles/people>

Any employees with non-company domain emails will need to be invited to this so that they become Team Members. If you do this before they sign into Fusion 360 for the first time, they will not be prompted to setup a Team Site. However, they will need to accept the Team Site invitation email first.



Once the user has accepted the invitation, they will appear in the People tab of the Members and Roles tab. You can modify their Role by clicking on the blue button. Team Members can create new Projects in your Team Site and see a list of an Open type Projects. Project Contributors can't create new Projects and can only see Projects they have been invited to collaborate in. Clicking Deactivate will suspend their access to your Team Site entirely:



For further information please refer to the [Administer team members and roles](#) help page.

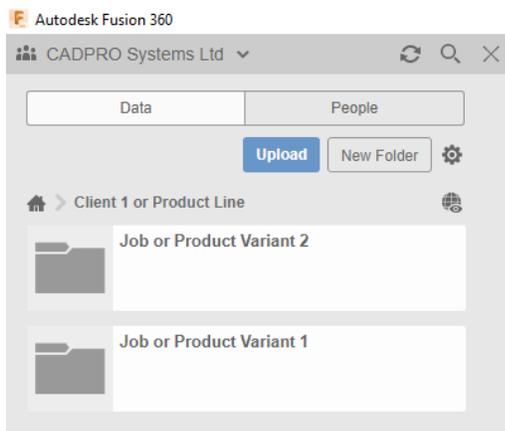
AUTODESK UNIVERSITY

Project Management

Your Fusion 360 data can only be stored inside Projects within your Team Site. Projects can contain folders and any file types, including native Fusion 360 designs.

You control the access to your data via Projects. Team Members and users outside of your organisation can be invited to Projects for the purpose of collaboration on Designs. When you invite a user, who is not a Team Member of your Team Site, they will be listed as a **Project Contributor** within the **Members And Roles** tab of your Team Site admin page.

Project Contributors can have either Editor or Viewer roles on a Project. With the Viewer role resulting in them having Read-Only access to the data.

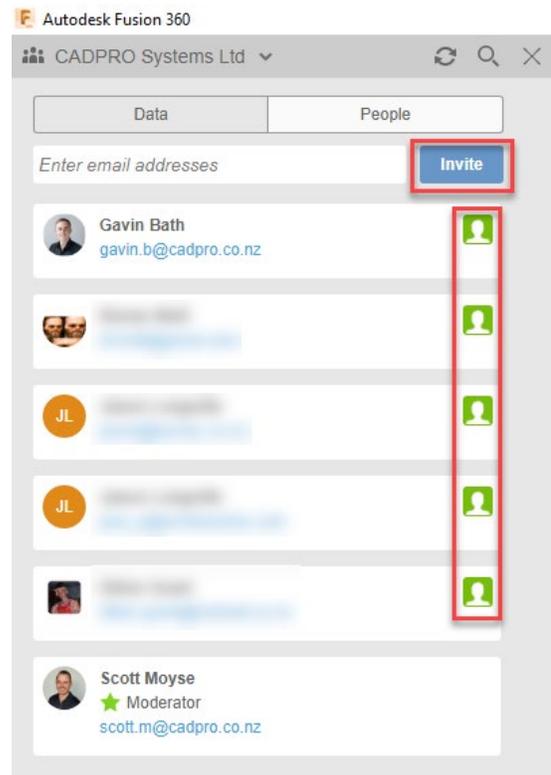


As a result, you would typically use one Project per client or design contract where you need to control access to the data for that context. Then, within the Project you might create one folder per job if the Project is a client based one. In the past I have created a Project for a product, then sub folders have contained variants of that product.

Each Project has at least one Project Admin, who has control over the Project Type and who can access the Project.

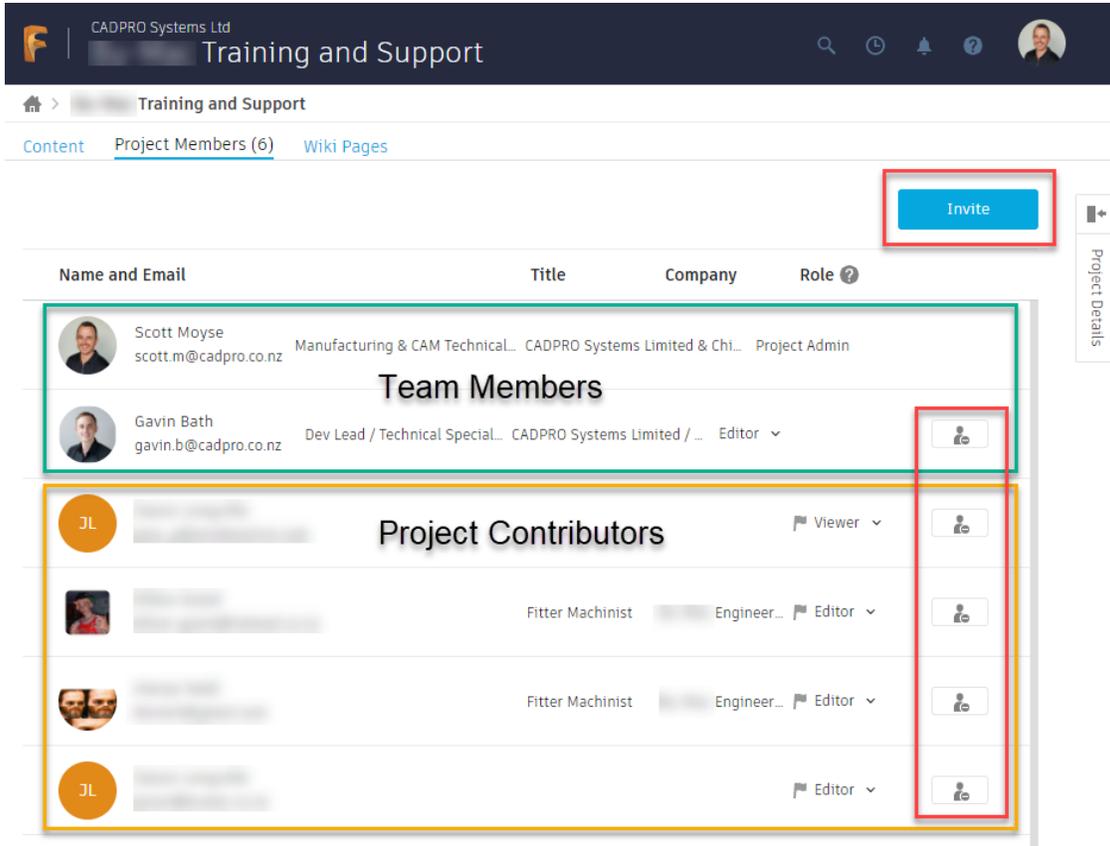
Project Members can be administered from two locations:

1. The People tab for a Project within the Data Panel in Fusion 360.
 - a. This method will result in the invited user having the Editor role.



AUTODESK UNIVERSITY

2. Via the Project Members tab for a Project on the Fusion Team website.
 - a. This method allows you to choose between Editor or Viewer roles.



For more information about Project Types and the differences between roles, please refer to the [Manage People in projects Fusion Team help documentation page](#).

Summary

Once you have everything setup, you will have an Autodesk account which is in control of who can use your Autodesk software subscriptions and who can access your Fusion 360 data. Just remember each time a member of staff joins or leaves your company, you will have administrative tasks to complete in the following locations:

1. Autodesk Software subscription user management is carried out using:

manage.autodesk.com

2. Fusion 360 Data access user management is carried out using:

<https://<YourTeamSubDomain>.autodesk360.com/g/admin/manage/roles/people>