

PL5676-P So Long, and Thanks for All the Tips

Michelle Stone and Mike Watkins

PLM 360 Product Management

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Your Instructors



Michelle Stone
PLM 360 Product Manager

Michelle is an Autodesk PLM 360 Product Manager. She is focused on managing the development of PLM Business Process Applications and helping customers expand their use of Autodesk PLM solutions to help drive greater return-on-investment and process improvements.

She enjoys sharing product knowledge and expertise with the community via Twitter (@stoneformation), Facebook, blogging, and the PLM Talk webinar series.



Mike Watkins
PLM 360 Product Manager

Mike has over 20 years design and manufacturing experience, to complement this He's been using Autodesk products and services for well over 20 years. Mike also has over 10 years using Dassault Systems, PTC and other CAD, PDM and PLM tools. He was part of the core team responsible for the launch of Autodesk PLM 360 and continues to be part of the product management team responsible for driving the product forward.

Through social media efforts Mike has contributed to reach a broad audience of over 500,000 viewers and followers annually from YouTube Channels, Facebook Pages, Blogs, and Twitter.

Class summary

Are you a change analyst looking for ways to monitor your change orders? Are you an engineer trying to analyze the impact of a change in design? Or maybe you're a product lifecycle management (PLM) administrator looking for effective configuration practices, or perhaps you have to train a department to use this fancy new PLM software. Spend 60 minutes with me and you'll come away with quite a few golden nuggets that you weren't aware of before.

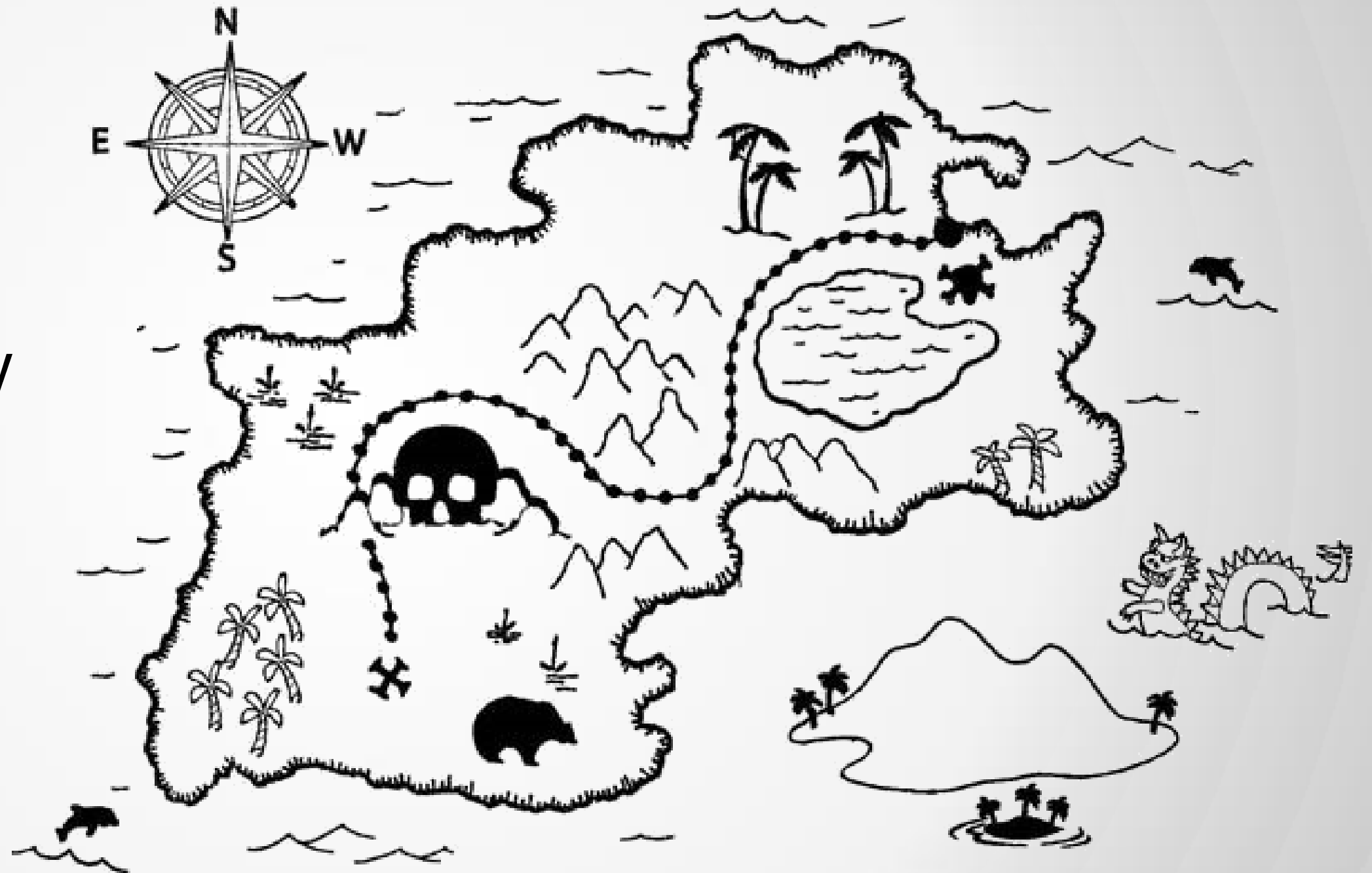
Key Learning Objectives

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

- Learn how to improve proficiency with Autodesk PLM 360 software
- Learn how to apply valuable Autodesk PLM 360 software shortcuts that save time
- Learn effective practices for customization/configuration/deployment
- Learn how to rely less on technical support

Agenda

- Getting Started
- Administration
- Workflow
- Core Functionality
- Resources



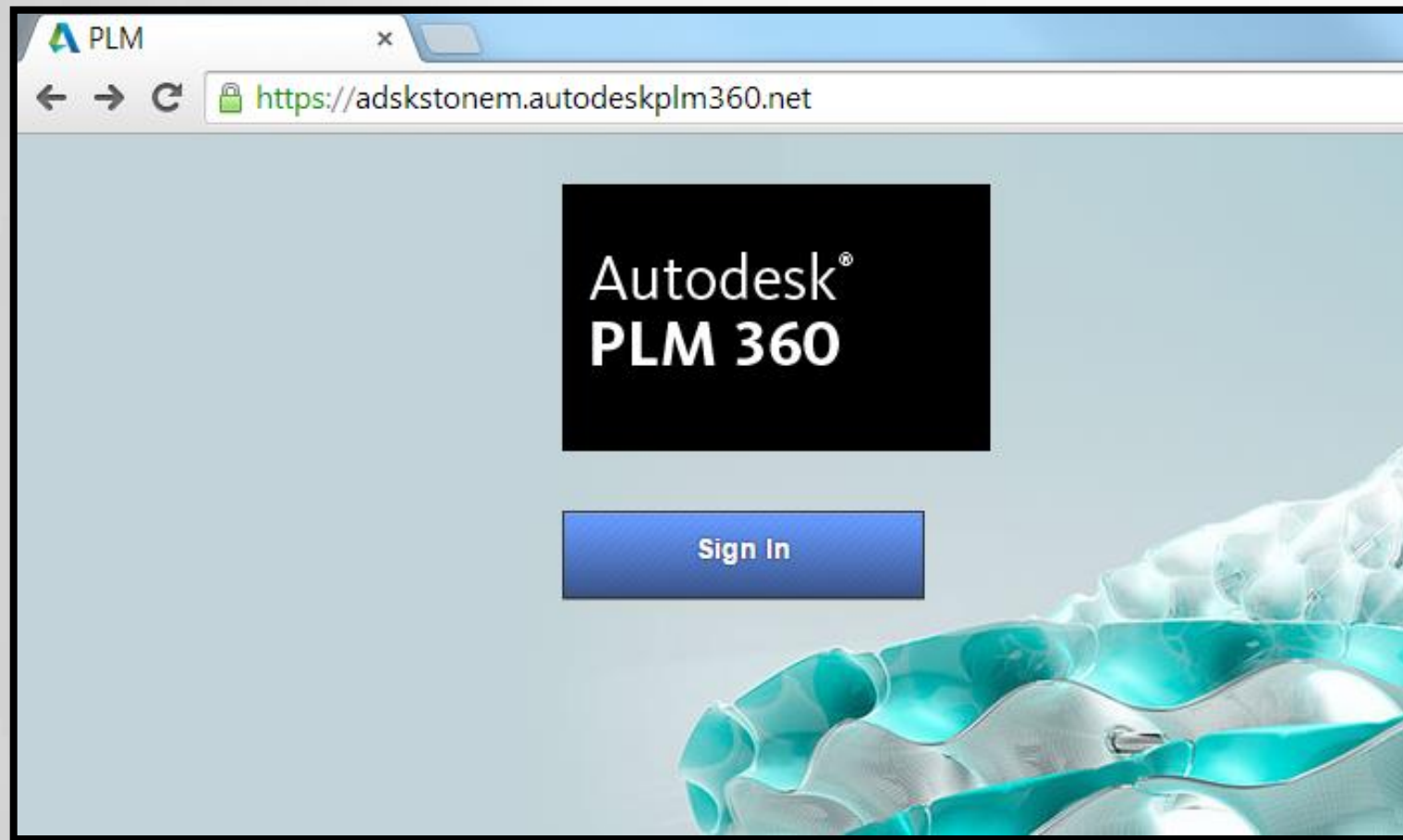
Autodesk PLM 360: 60 Tips in 60 Minutes

The Countdown Starts!



Getting Started

Autodesk ID and Login



- Use a supported browser
- Make sure users know their Autodesk ID needs to match what the admin sets in the tenant
- Forgotten Password – self serve!
- Set up rules for routing emails from Autodesk

Dashboard

Autodesk PLM 360

Michelle Stone - Dashboard

My Dashboard

Items by Category

My Outstanding Work

My Dashboard Links


Item	Workspace	Note
10-000665-01 - Ultrabright Flashlight	Items and BOMs	working flashlight example
Tip Tuesday	Aardvark	test bookmark
NI000001 - LED Flashlight NPI	New Product Introduction	New Product Introduction Process (NPI) using Stage ...
CA000001 - Light flickering when shaking	Corrective / Preventative Actions	Review this CAPA

My Recently Viewed Items

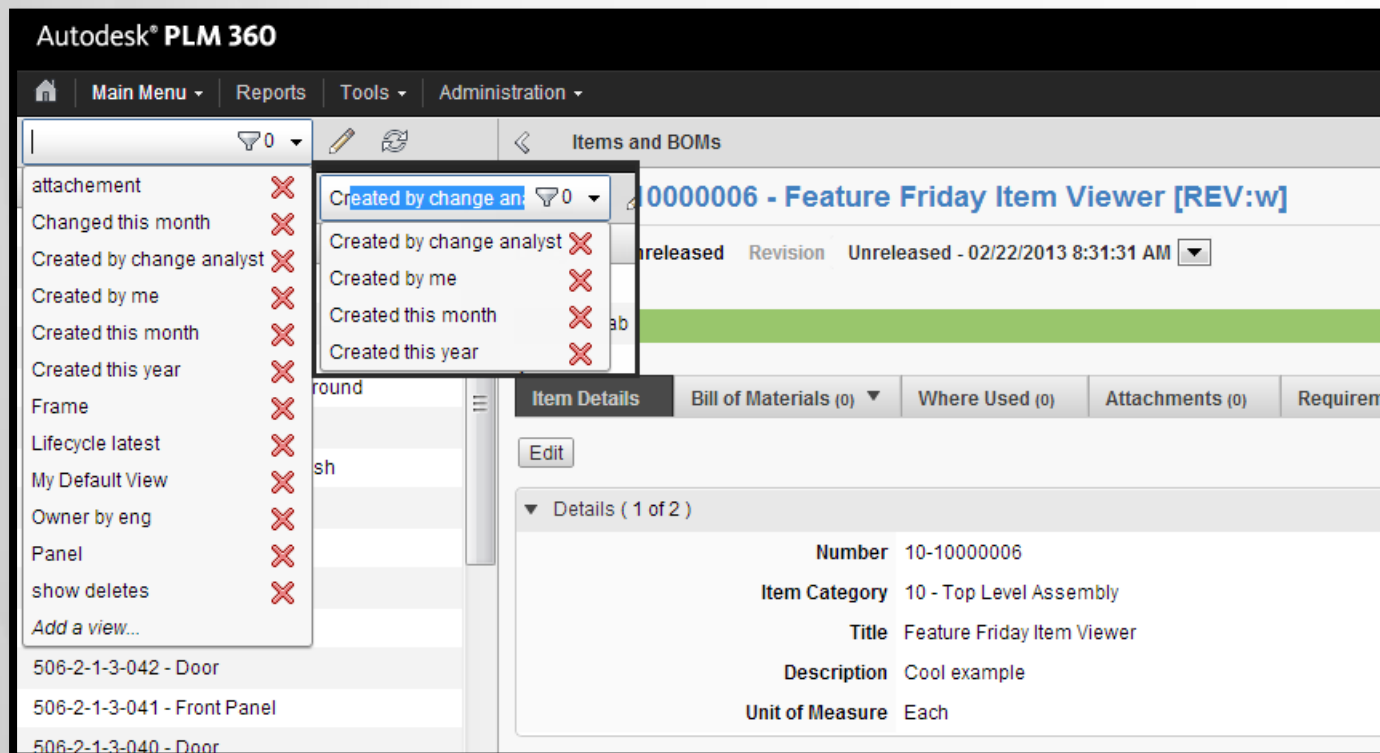
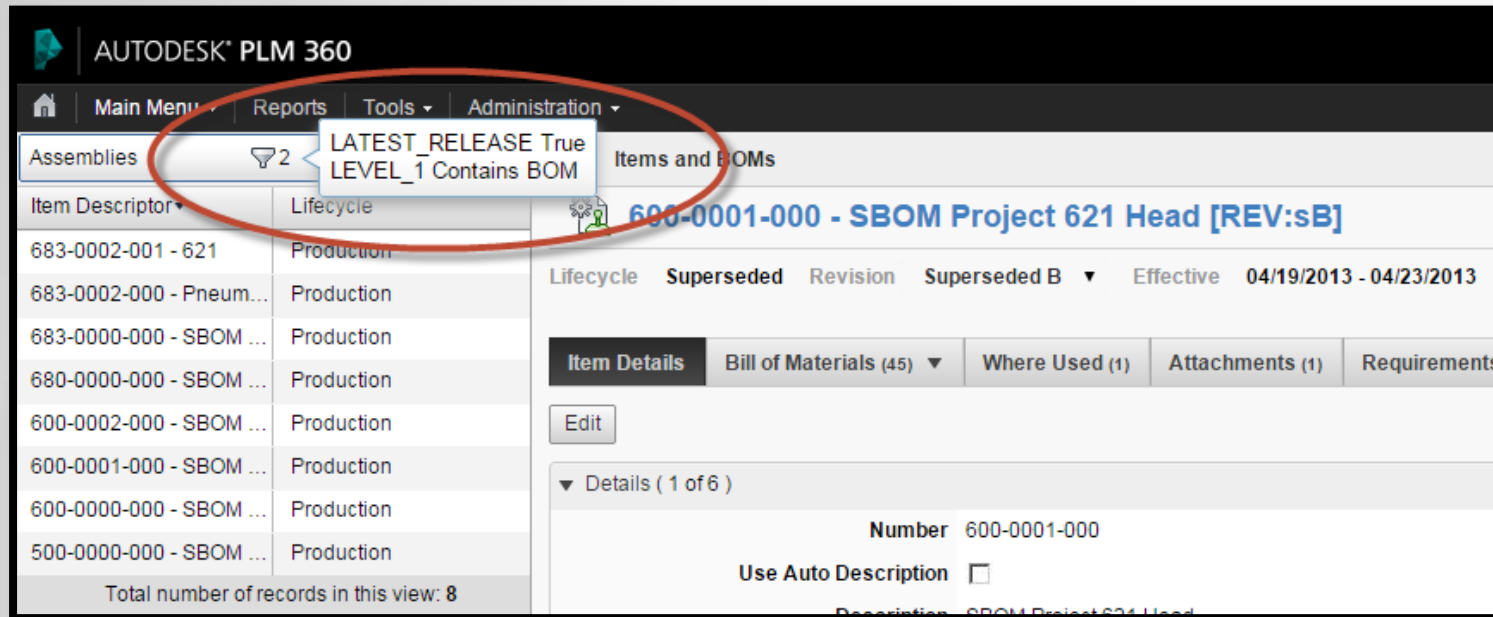
Item	Workspace
Tip Tuesday	Aardvark
TL000001 - test	Calibration
PR000002 - LED Ultrabright Engineering Deliverables	Project Management
NI000001 - LED Flashlight NPI	New Product Introduction
FF100002 - Feature Friday email example	Feature Friday
FF100003 - brian test	Feature Friday
Feature Friday	Aardvark
CAL000002 --	Tip Tuesday
CAL000013 - Comments -	Tip Tuesday
CAL000014 - Comments -	Tip Tuesday

My Checked Out Attachments

Attached to Item	Resource Name	File Name	Check Out Date
Ultrabright Flashlight Waterproof - Brochure - External	LED Ultrabright Flash Light	LED Ultrabright Flash Light.png	04/26/2012

- You can get back to your dashboard from My Home Page Icon  or see a preview in the Dashboard link
- If you tend to have a lot of items in My Outstanding Work, use the Dashboard link once in the workspace
- Add charts to your dashboard

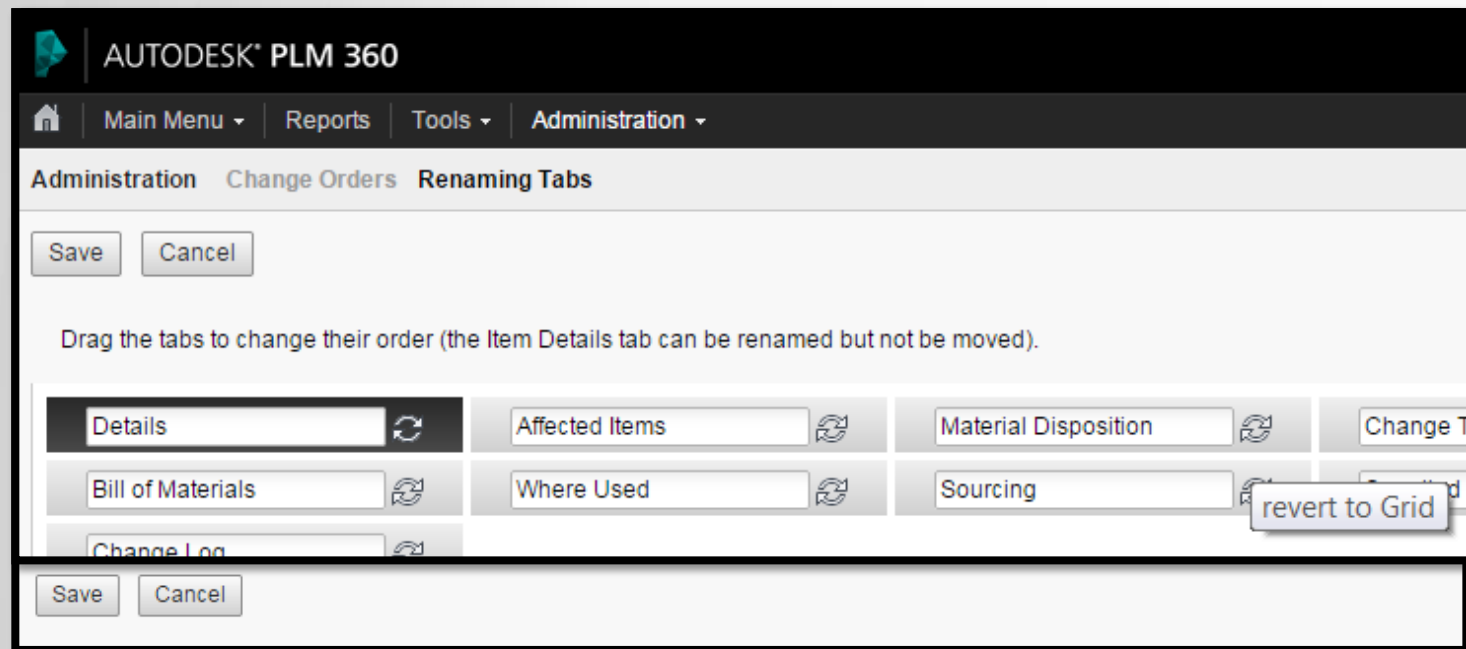
Navigation



- Hover over item view to see which filters are set
- Use Instant Search to narrow results
- Views like Created This Week/Month/Quarter are useful – particularly with mobile app

Administration

Workspace Settings and Descriptors



- Think about workspace type before creating real data
- Have any fields used in the descriptor be mandatory
- Tab names can be seen in URL or when you hover in settings

Item Details

The image shows two overlapping screenshots of a software interface. The top screenshot is titled 'Editing a Field' and contains the following fields:

Field name	<input type="text" value="Title"/>	The field name is the name you wish to be displayed on the workspace for this field.
Field ID	<input type="text" value="TITLE"/>	Automatically populated using Field Name. You can not edit the ID, and it must be unique to the workspace.
Field description	<input type="text" value="Summary description of the change"/>	Enter the description you want to appear next to the field when users are creating or editing an item in the workspace.
Data Type	<input type="text" value="Single Line Text"/>	Select a format for the field, e.g., Date, Paragraph, Image etc.

The bottom screenshot is titled 'Change Orders' and contains the following sections:

Summary (1 of 6)

Number	Auto-generated
* Title	<input type="text"/>
Priority	<input type="radio"/> HIGH <input type="radio"/> LOW <input type="radio"/> MED

Details (2 of 6)

* Change Reason Code	<input type="text" value="-- Select --"/>	Choose the reason code that best describes why this change is being made.
Description of Change	<input type="text"/>	Describe in detail what is changing.

- Group by sections, use matrices
- Use cloning of fields for rapid prototyping and keeping UI consistent
- Use Description fields to guide end users, particularly when validators are used


Validators

Validation	Variables	Variable Values	Variable Description	Delete
Required				
Editing a Field				
Default Value			Define the default value for all occurrences of this field.	
Make this a Computed Field				
Validation	Variables	Variable Values	Variable Description	Delete
Conditionally Required	Conditioning value	High	Value of the conditioning field that determines that this field is required.	
	Conditioning field	Severity	Name of the field that determines if this field is required or not.	
Add Validation...				
Validation	Description	Variable Description		
Basic Validation				
Required	Validates that the value for a given field is entered.			
Unique	Checks that this field is unique among all non-deleted records of this workspace	Name of the field to be validated against.		
Decimal Number	The value entered must be a valid positive or negative decimal number			
Regular Expression Input Mask	Validates format according to a regular expression.	Regular expression of the mask to be evaluated against.		
Format Validation				
Dependency Validation				
Uniqueness Validation				
Unique	Validates that the combination of 2 field values is unique within a workspace.	Name of the second field. Name of the first field.		
Unique CSV Entries In BOM	Validates that each CSV in BOM tab are unique.			
Unique With Wildcard	Validates that a field is unique within a workspace. Can specify a number of wildcard characters both before and after the value that will be ignored from uniqueness check.	Number of characters from the end of the value that are to be ignored. Number of characters from the start of the value that are to be ignored.		

- Validators can be used to define additional uniqueness constraints for identifiers
- Use format and dependency validators to enforce data entry conventions
- Use Minimum Length to make sure you get all the meaty details

Advanced Print Views

Details	
Number	CAL000021
Name	PL5676
Title	So Long and Thanks for all the Tips
Description	Are you a change analyst looking for ways to monitor your change orders? Are you an engineer trying

Pretty as a Picture	
Image	

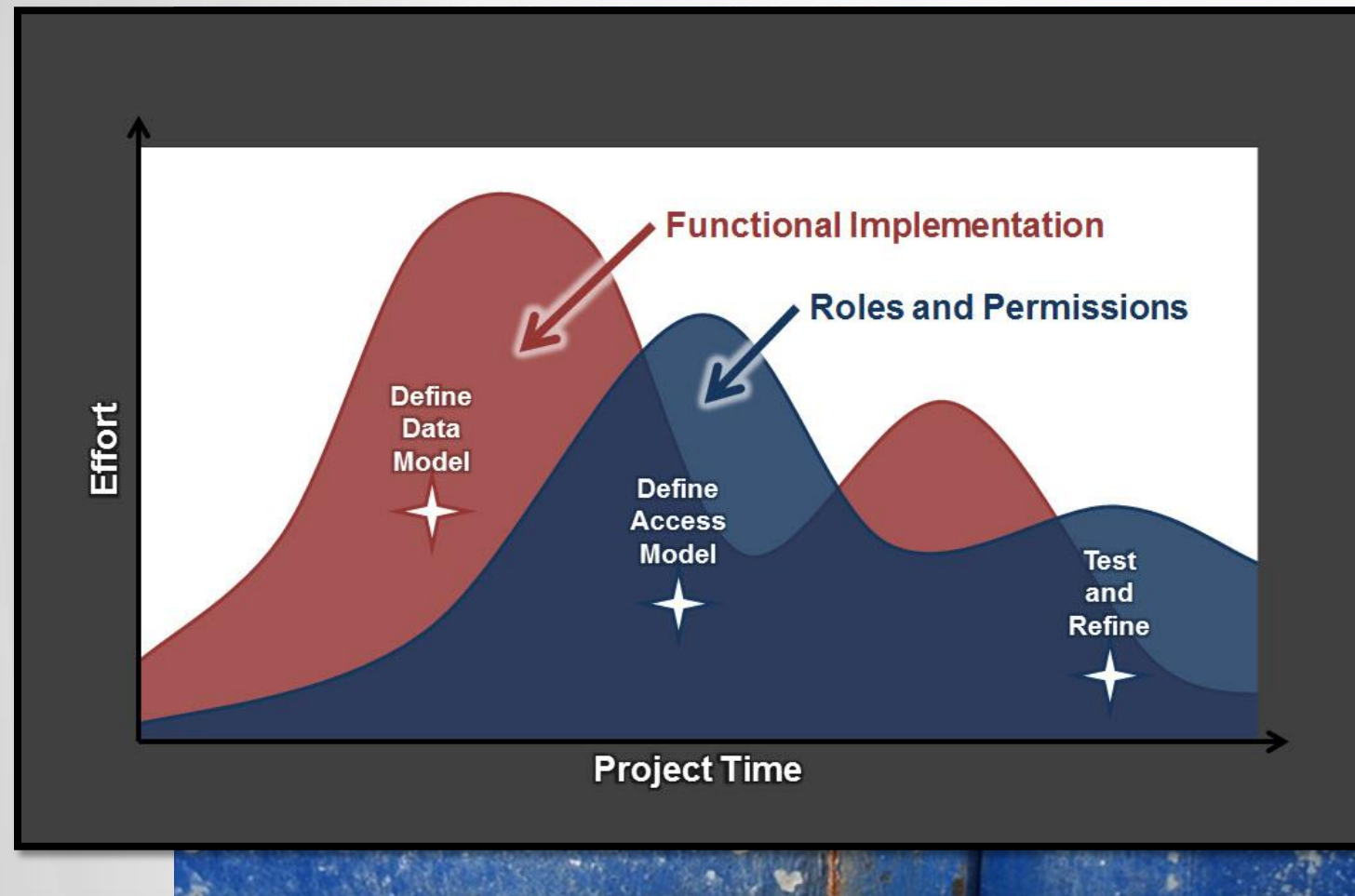

```

${workspace.metadata.itemDetails.sections["Details"].fields.NAME.title}
${workspace.metadata.itemDetails.sections["Details"].fields.TITLE.title}
${workspace.metadata.itemDetails.sections["Details"].fields.DESCRPTION.title}
${workspace.metadata.itemDetails.sections["Pretty as a Picture"].name.value}
${workspace.metadata.itemDetails.sections["Pretty as a Picture"].fields.IMAGE.title}


```

- You can easily copy and paste from Word
- Use the HTML editor in conjunction with your favorite authoring tool
- To include images, you need to wrap it in ``


Access Controls



- Consider different roles in a workspace beyond Read Only and Read Write
- If you have extra Participant Licenses, consider assigning to non-trained users then promote
- Wait to define access model until data model is in place

Scripting

Administration


 **Autodesk Services Implementation Tracker**

Autodesk PLM Services May 23, 2013

Manage your Autodesk implementation with the Autodesk Services Implementation Tracker, powered by PLM 360. Build your implementation plan in Phases of Service and the initial state of the system. This is the most effective way to manage your project.

Library Scripts

- Unique Name
- Approval_Boa
- ApprovalsFun
- createMile Sto
- createNewlter
- getUserName
- isOwner
- NS_Integratio
- opSearchObj
- WorkflowDate



- Install the Implementation Tracker
- Make use of library scripts
- Bee careful with spelling

Odd and Ends



Administration Security

Users: 4 Active 0 Inactive 0 Deleted
4 of Unlimited Professional; 0 of Unlimited Participant

Groups: 16 Groups
Roles: 45 Roles

Users Groups Roles

Save Cancel * Required fields

Group Details

Name Engineering

Description

Group IP Access

Allow access from all IP addresses

Restrict access to these IP addresses

IP/Range	Description
1.1.1.01 - 1.1.1.08	Only allow access in this range

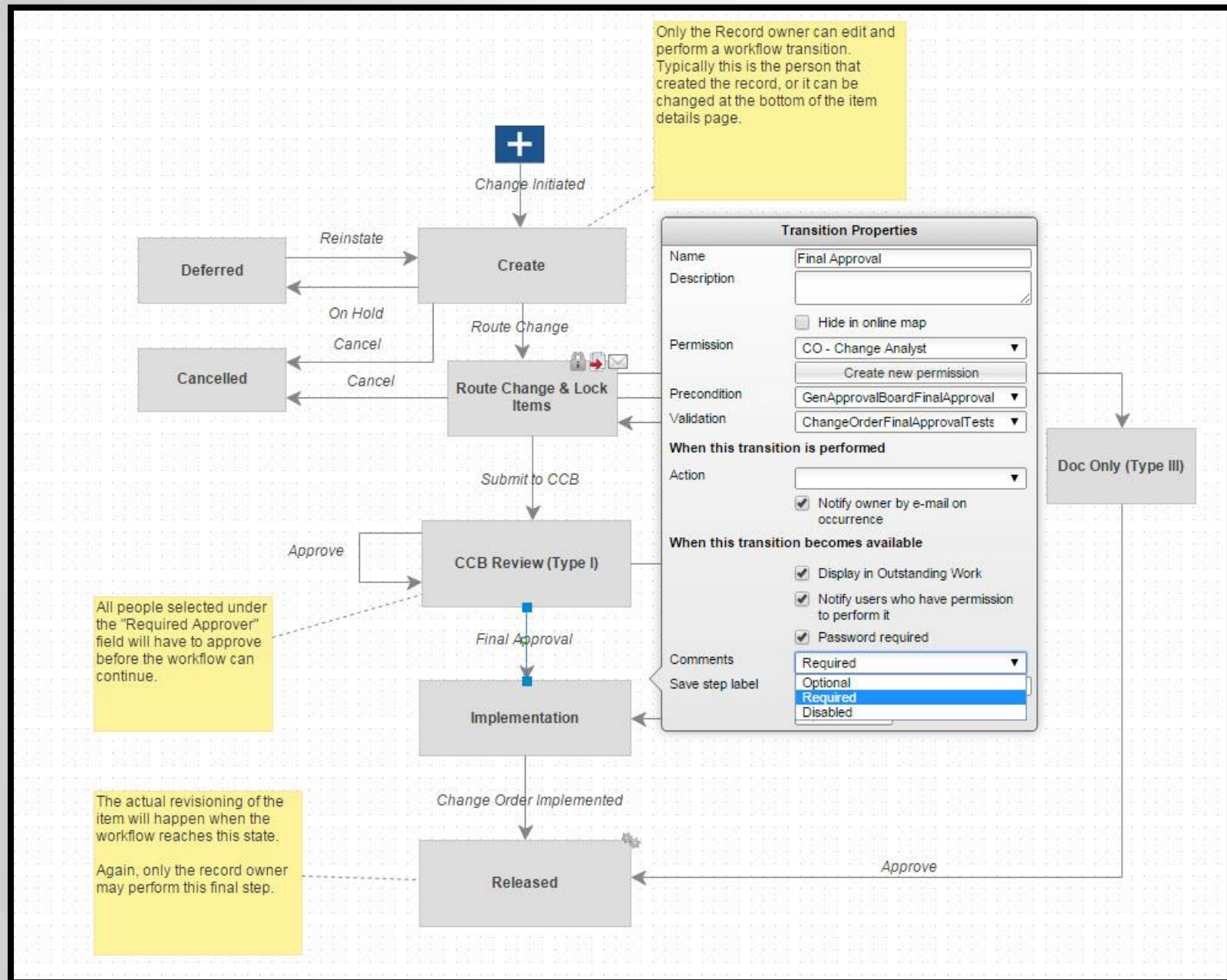
Add Edit Remove

Save Cancel * Required fields Add

- Consider purge to be equivalent to truncate and use with caution once live
- General settings: update email and support settings
- Use IP address whitelisting for sensitive information

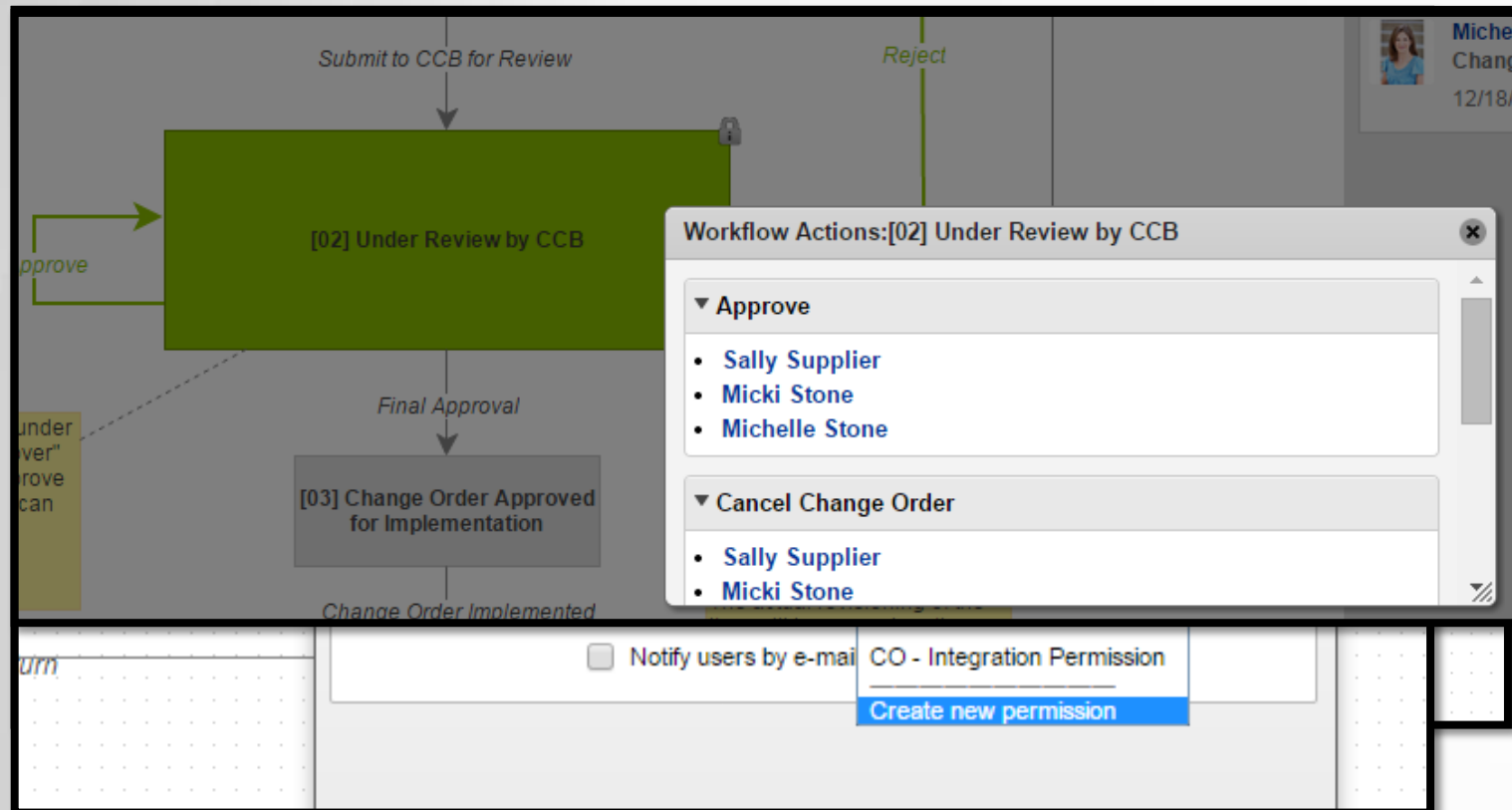
Workflow

Workflow Editor



- Copy and Paste workflows
- Map out As-Is to To-Be
- Use features like Notes, Password Required, and Comments (Required, Optional, or Disabled) to make workflow more efficient

Escalations/Delegation/Reminders



- Remember to enable 'Ignore pre-condition scripts' for escalations
- Consider setting up a special workflow permission for a smaller escalation team
- When delegating, use the interactive workflow map to determine candidates

Notifications

Change Orders

CO00018 - PL1731 Start Spreading the News - 1 - Low

State [01] Preparing Change Order Workflow Actions Select a workflow action...

Item Details Affected Items (0) Attachments (0) Workflow Actions Actions Notifications (1) Change Log (9)

Add Edit

Current Notification List

#	Event Type	Notification Event	Groups to Notify on Workflow Action	Users to Notify on Workflow Action
12	S	[03] Change Order Approved for Implementation	Service	<input type="checkbox"/>

Add Edit

- If users are not getting workflow notifications, verify they didn't disable on their profile.
- Use the Actions Notifications tab for ad-hoc notification or subscription to events

Core Functionality

Items and BOMs

The screenshot displays the 'Items and BOMs' interface for item '680-0000-000 [REV:w]'. The 'Item Details' tab is active, showing the following information:

- Number: 680-0000-000
- Use Auto Description:
- Description: SBOM Mech Upper Bushing
- Unit of Measure: Each (circled in red)

The 'Classification' section shows:

- Classification: BOM
- Level 2: SBOM THERMAL
- Level 3:
- Class Number: 680
- Class Description: 680 - BOM - SBOM THERMAL -

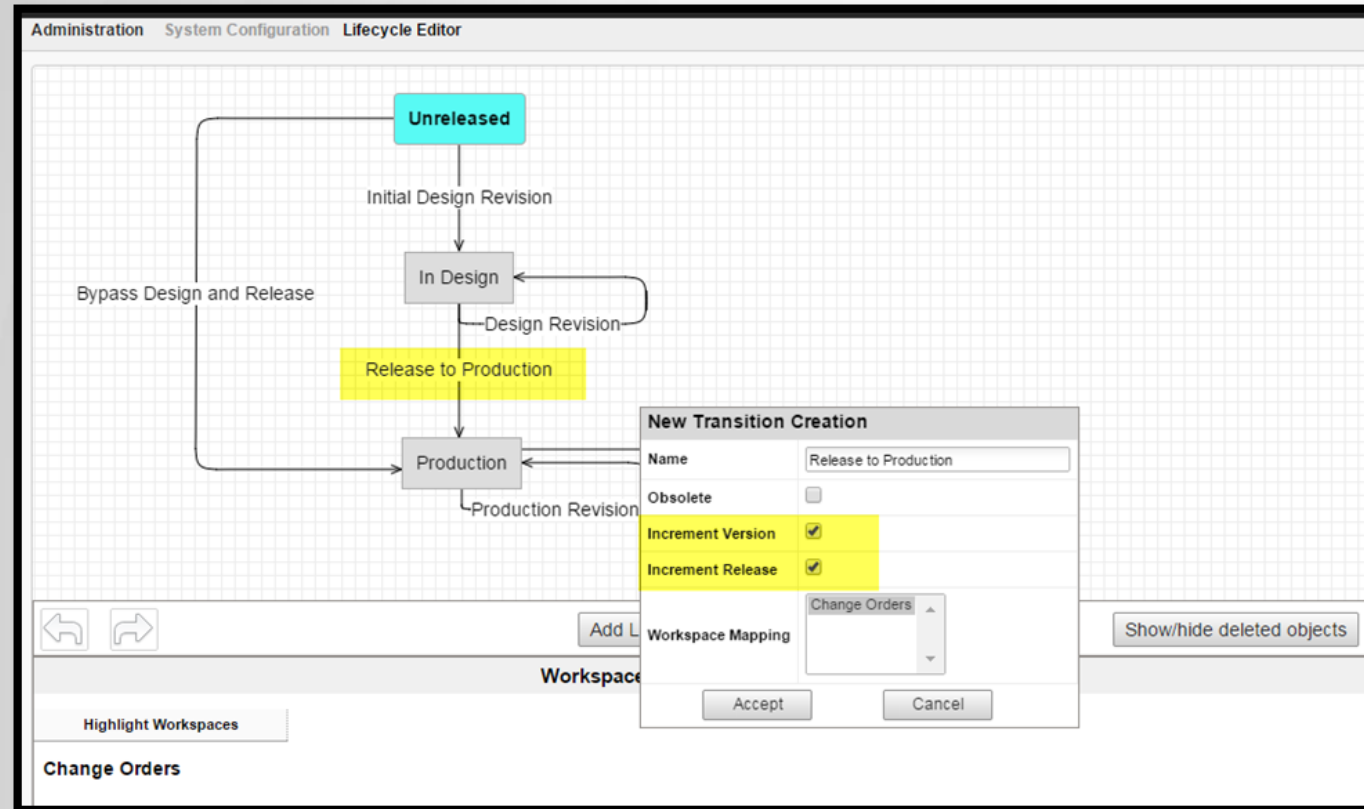
The 'Bill of Materials Settings' section is highlighted with a yellow box and includes:

- BOM Quantity Length: 5
- BOM Quantity Precision: 1

Other visible settings include 'Revision Control Settings' with 'Working Version Always Available' set to Yes and 'Revision Number Generation' set to Automatic.

- Use the new Sequencer functionality for creating part numbers
- You specify BOM quantity length and precision in General Settings
- You can only import the Unit of Measure if you have a field in the Item Details tab of that type

Lifecycle and Effectivity

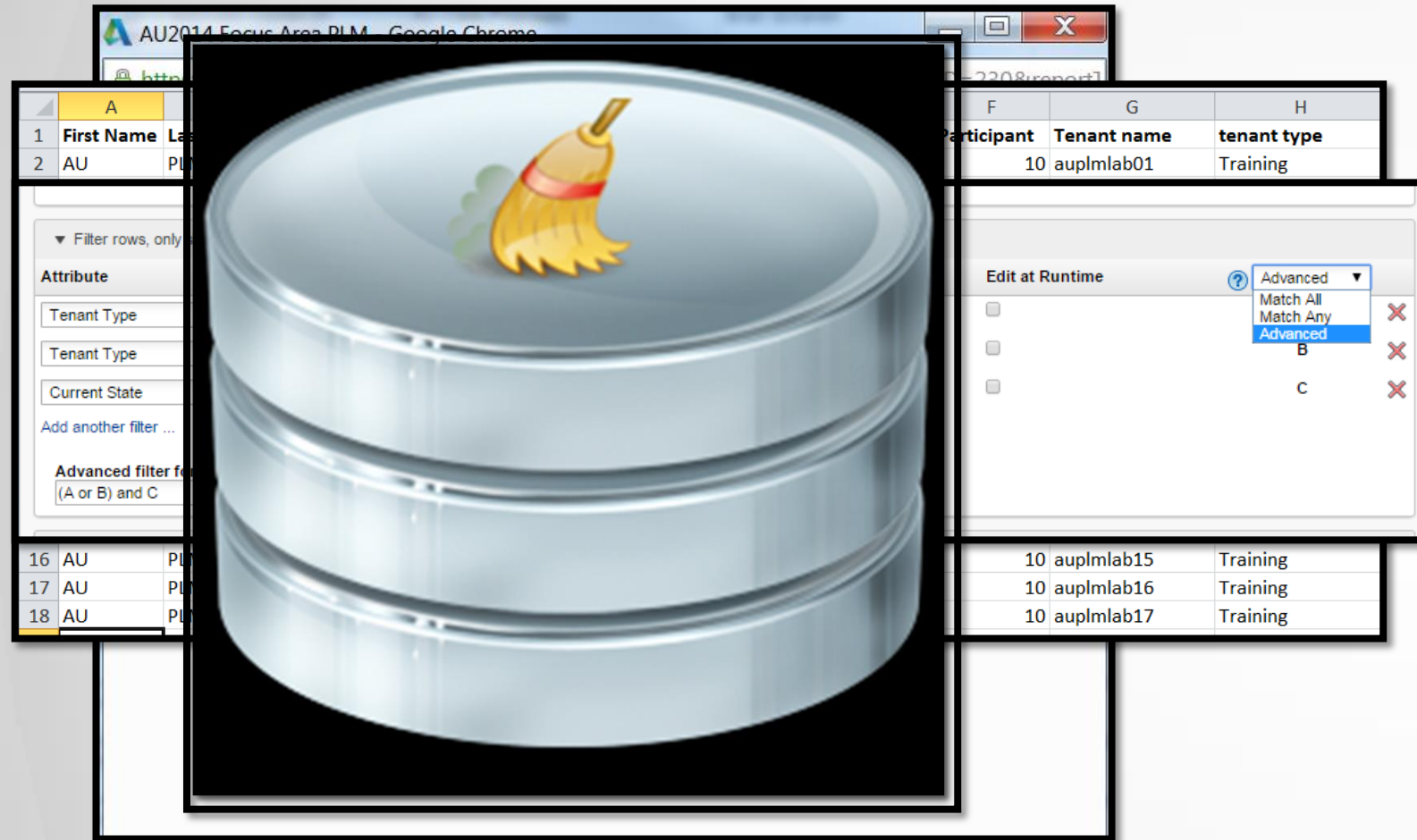


- Be sure to review Increment Version and Increment Release settings
- Remember to set effectivity if you want a date different than On Release

The screenshot shows the 'Change Orders' interface for a change order titled 'CO000009 - Power supply test failure'. The state is 'Create'. The 'Affected Items' tab is active, showing a table with columns for '#', 'Item', 'Lifecycle', 'Effectivity', 'From', 'To', and 'Action'. The first item is '300-0433-000 - TRANSISTOR N-CH SD MOS POWER 25V 55A 14mOHM MAX @ 4.5V DPAK [REV:w]'. The 'Effectivity' column shows 'On Release' and a date picker set to 'November 16, 2014'.

#	Item	Lifecycle	Effectivity	From	To	Action
1	300-0433-000 - TRANSISTOR N-CH SD MOS POWER 25V 55A 14mOHM MAX @ 4.5V DPAK [REV:w]	Production Revision	On Release			

Reporting/Importing



- Think before making Public
- Use Advanced Filtering to apply Boolean Logic
- Create a report then use to drive import
- Use Mass Delete rather than purge

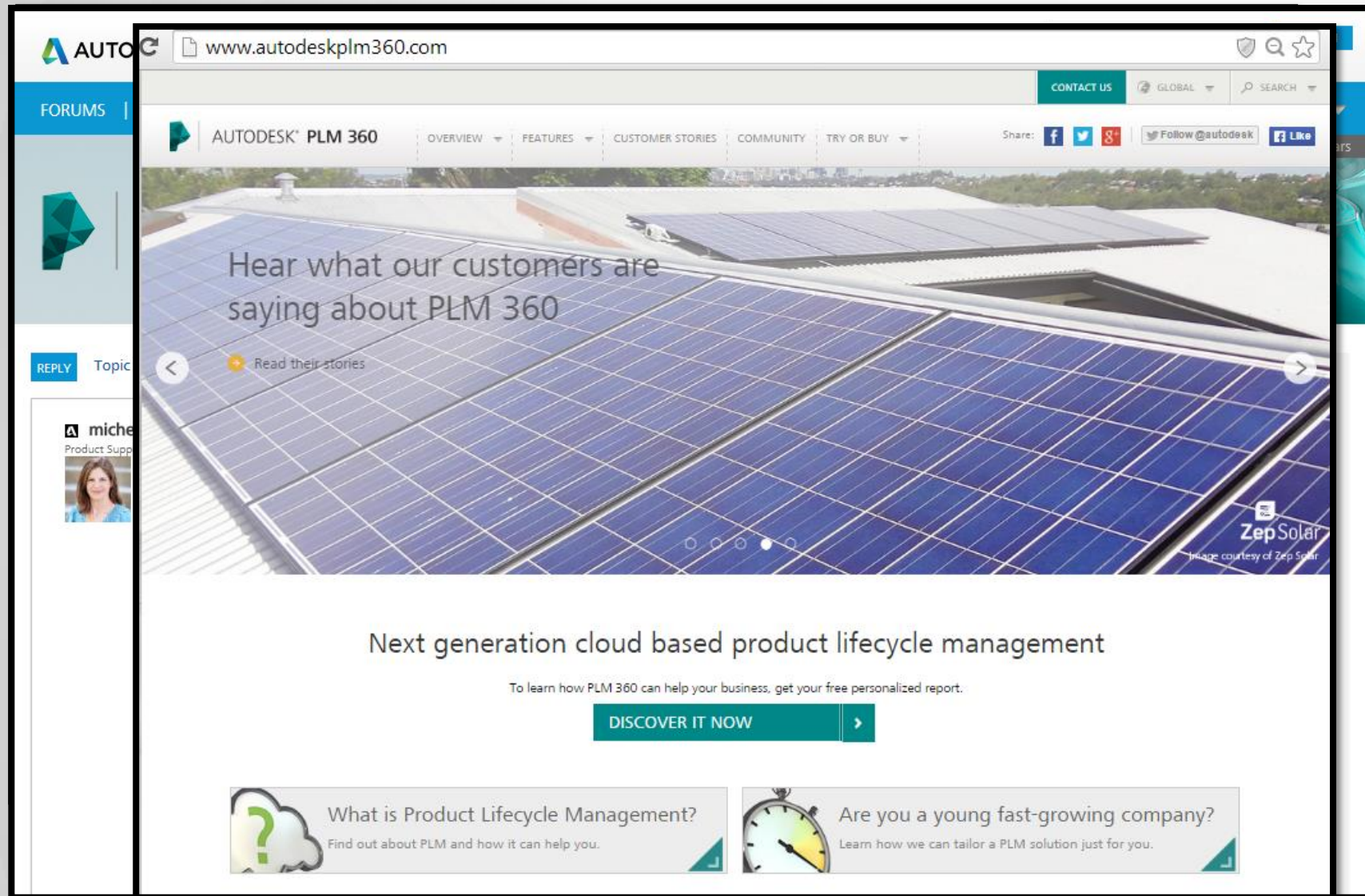
Resources

Technical Support

The screenshot shows the Autodesk PLM 360 Help site. At the top, it says 'AUTODESK® PLM 360 | HELP' and 'Michelle Stone' with a language selector set to 'English'. Below the header is a navigation menu with 'Discover Learn Connect'. The main content area has a welcome message: 'Welcome to the Autodesk® PLM 360 Help site, where you can discover, learn and connect. Start by seeing What's New.' There are four main sections: 'Get Started' (What is PLM 360?, What's New, Connect to Your Site, Learn the Basics, Get to Know the UI, Manage Your Profile), 'Learn' (My Home Page, Workspaces and Items, Bill of Materials, Workflow and CM, Reports and Charts, Imports), 'Manage' (Security, Workspace Manager, Workflow Management, Lifecycle Management, System Configuration, Scripting), and 'Get Social' (PLM 360 Community, PLM 360 Forum, PLM 360 IdeaStation, PLM 360 Under the Hood). Below these is a 'Watch PLM 360 in Action' section with three video thumbnails: 'Product Development with Autodesk PLM 360', 'Change Management Out-of-the-Cloud', and 'Quality Management with Autodesk PLM 360'. The footer includes a Creative Commons license notice and the 'AUTODESK Knowledge Network' logo.

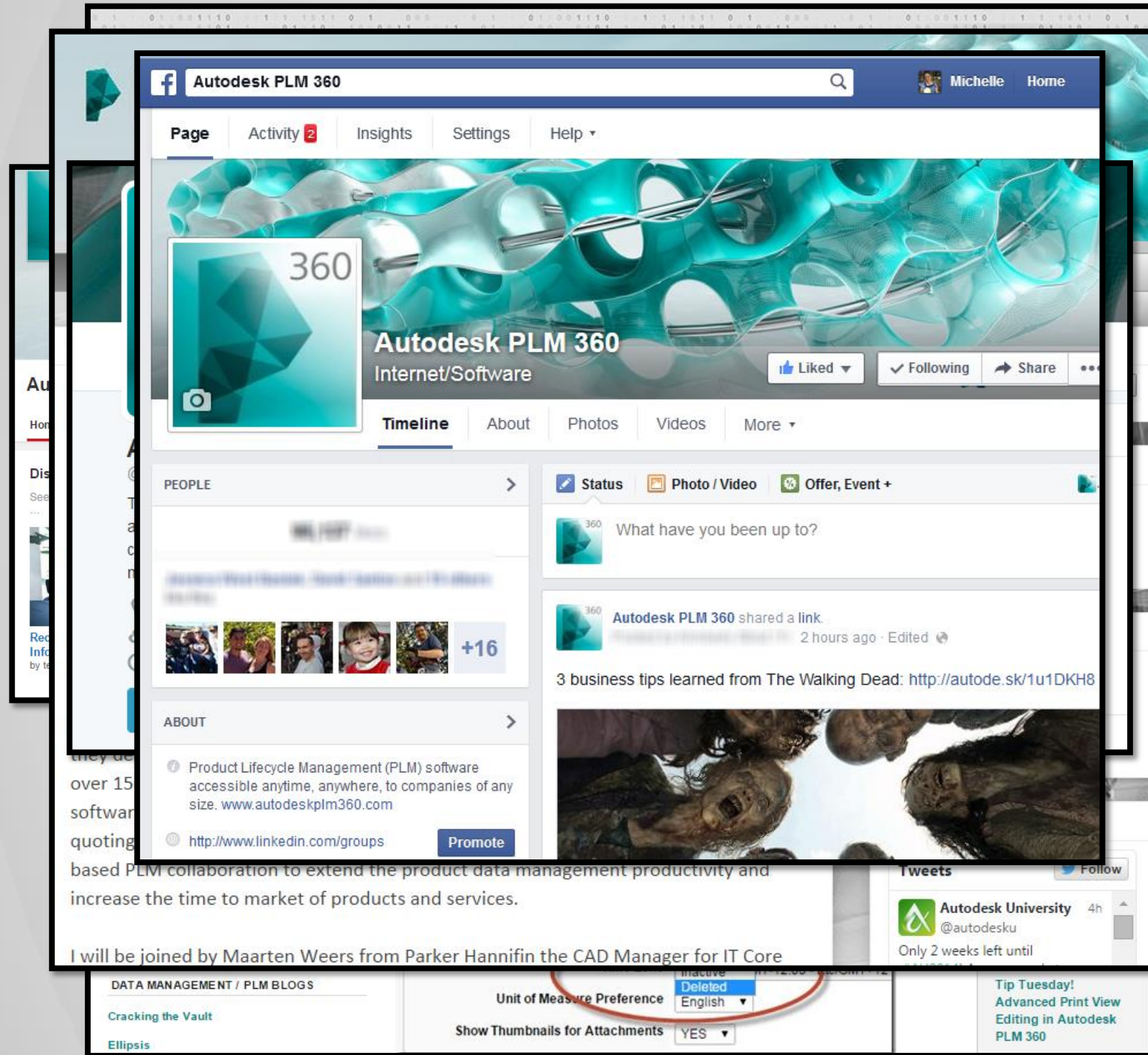
- Subscription Center for Technical Support
- Team Viewer
- Help

Community



- Forum
- IdeaStation
- PLM Talk
- PLM 360 Home Page

Social Media



- PLM TV (YouTube)
- **Under the Hood**
- **Autodesk PLM 360 with Mike Watkins**
- Twitter
- Facebook



PHOW.

Questions?

Survey Says...

Make sure your voice is heard by completing your surveys!

Please take the time to complete your survey for this and every class you attend at Autodesk University.

Autodesk uses this information to know what classes to offer in the future.



