PL21608

A Cohesive Approach to Data and Lifecycle Management over the Cloud

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Learning Objectives

- Learn how to use Fusion Lifecycle and Autodesk Cloud together, as a data storage system.
- Learn how to upload to and access data from the Autodesk Cloud.
- Learn how to manage data stored on the Autodesk cloud with Fusion Lifecycle.
- Understand the concept of pinning attachments and the various pinning policies.

Description

This class will provide an introduction to Cloud Product Data Management and give insights on how users can readily use Fusion Lifecycle software to manage their CAD and other relevant documents over the Autodesk Cloud. In addition to that it will also cover new features like the new attachment tab in Lifecycle and its capabilities

Your AU Expert(s)

Vaibhav Sabharwal

Vaibhav Sabharwal is a Product Owner for Fusion Lifecycle based out of the Autodesk Office in Singapore. He has a total of 10 years of experience. He has worked for Autodesk for 2 and a half years now, starting off as a Senior QA for Fusion Lifecycle and then moving on the Product Management role. He continuously strives to contribute to the growth and development of Autodesk, as much as he can

Adam Luttenbacher

Adam Luttenbacher is a principal user experience designer and chief product owner for Autodesk, Inc.'s Autodesk Drive. With over 14 years of data management experience, Adam has played a significant role in improving both the user's experience and the product quality of Autodesk's data management applications. Educating and interacting directly with the user community at Autodesk University each year has been a top priority for Adam.

What is Autodesk Cloud Product Data Management?

Cloud PDM is essentially a solution which allows you to access, manage, modify and revise your data over the Autodesk Cloud rather than the enterprise desktop PDM solutions, where the data is localized. The Autodesk vision of having data as an abstract entity, and having it at the center gives you more flexibility to access common data for all your applications.

Data at the center
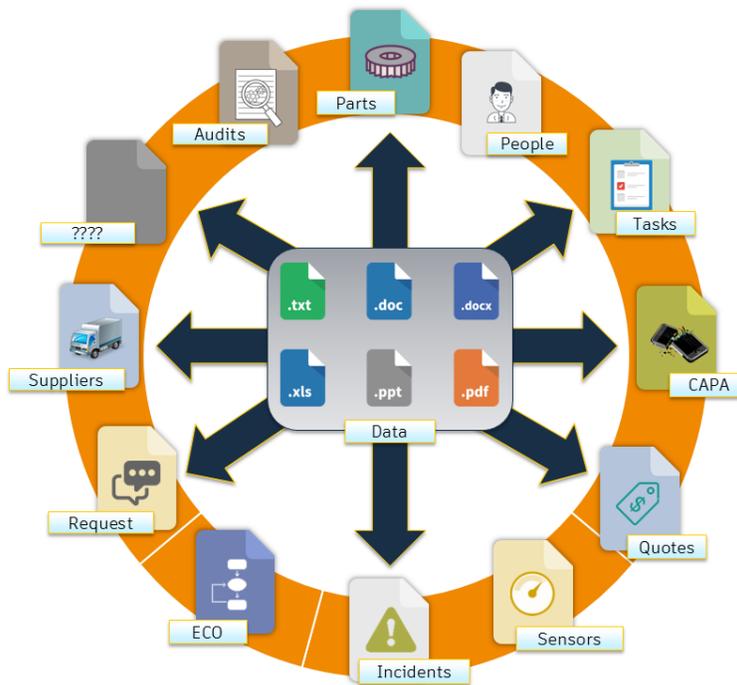
As you can observe, your data is centric, common and accessible to different workspaces covered by your Fusion Lifecycle instance. This essentially severs all dependency on data and makes it abstract.

The idea behind this strategy is to have one product platform and have a central storage of all customer data (files) over the Autodesk Cloud. The benefits include

- Viewing and managing files
- Managing Versions
- Managing Relationships

….All on the Autodesk Cloud

Understanding the Autodesk Drive

The Autodesk Drive is an in house solution to connect your desktop to the Autodesk Cloud, which gives you the ability to upload your enterprise data to the cloud, using the Drive, as seen in the pic above.

1. How to Access the Autodesk Drive? - The Navigation menu

Selecting the menu icon on the left of the header provided navigation to the following parts of Fusion Lifecycle, which is also a part of the modern UI we are building

- The Dashboard – View Outstanding Work, Bookmarked Items, and Recently Viewed
- Workspaces – Product Lifecycle Management (Collections of Items)
- Data – Product Data Management (Collection of data)
- Advanced Tools – Create Reports and Import Items into the System
- Administration – Manage the System Configuration and Security
- Autodesk Drive – Learn more about it and download it
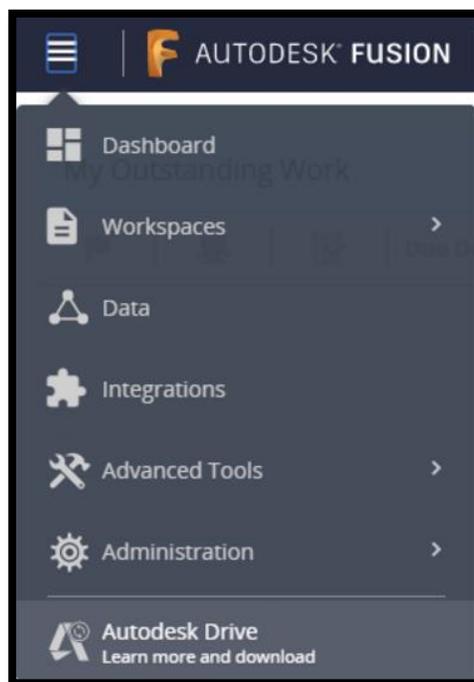
2. Installing the Autodesk Drive

A vignette carousal, will guide you through on how you can download and install the Autodesk Drive on your system. Once you reach the end of the vignette system, the application will prompt you to download the Autodesk Drive based in your system configuration. As shown below
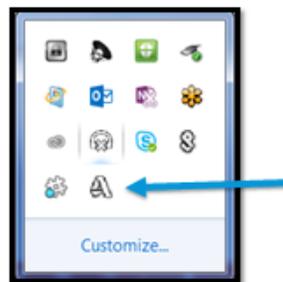
x64 **x86**

Install Autodesk Drive

Select the 64-bit (x64) or 32-bit (x86) download link to install
Autodesk Drive for a seamless **Fusion** experience.

Now once you have downloaded and installed the Autodesk drive on your system, you
have to login to the drive. The small icon on your toolbar tray will prompt you for the same

Customize...

Then you progress forward and sign into the system. Once you have signed into the drive,
a project space will open up for you to simply drag and drop you CAD data or documents
or any other design files/pdfs.

As you can see below, I am uploading a top level Solidworks assembly to the drive
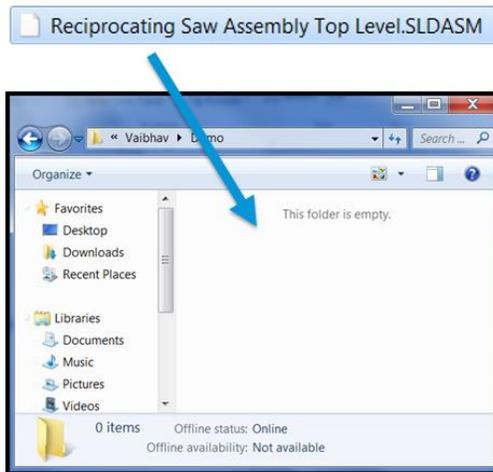
Now that Autodesk Drive has uploaded the data, it is available in the cloud. You can go back into Fusion to view the data and take a deeper dive into the Fusion data management functionality.

Grid and List View
The standard view is a list view. To view the data as a grid, choose the grid view button.
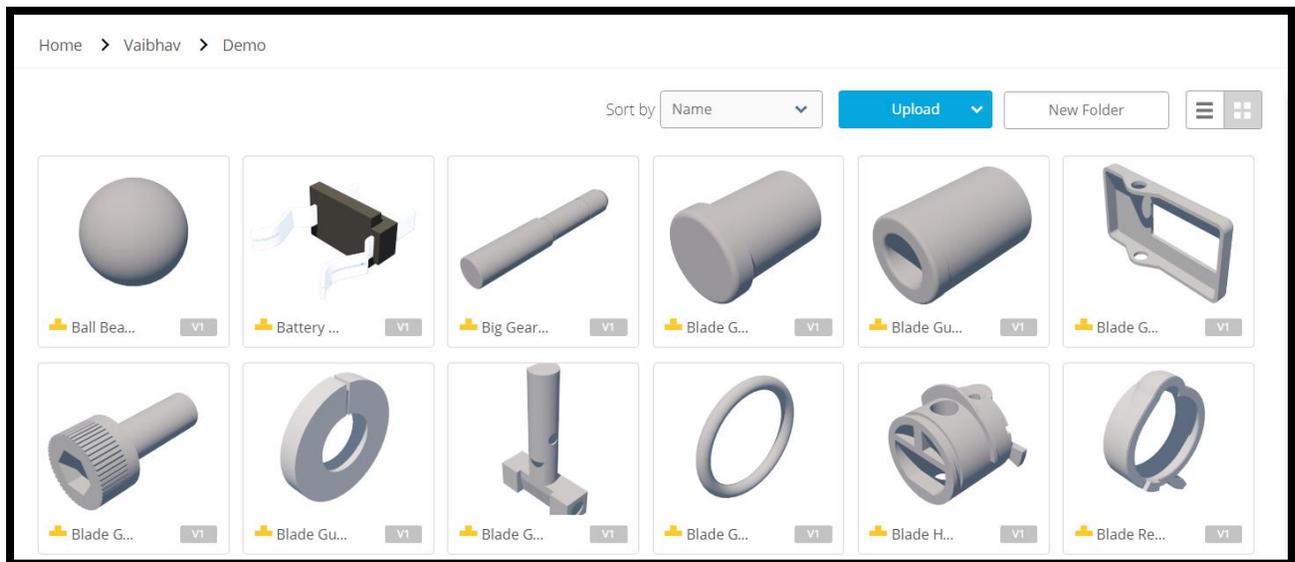
**Understanding how to manage data using attachments**

1. Attaching Data

On the modern Fusion Lifecycle UI, we have introduced a new attachments tab using which you can manage data that you just uploaded. Attachments are simply references to your files that reside in the Autodesk Cloud, but as they are attached to an item in Fusion Lifecycle, they give a definition to the item. In this section we will cover how you can attach files stored in the cloud to your items

Once you click on Add on the attachment tab of an item in a workspace in Fusion lifecycle to open up the attachment modal. The attachment modal dialog is a display of the structure that your data is stored in the Autodesk Cloud. You can drill down to the file you need to add or simply search for it. And once you have located your file, you can simply add to the tab
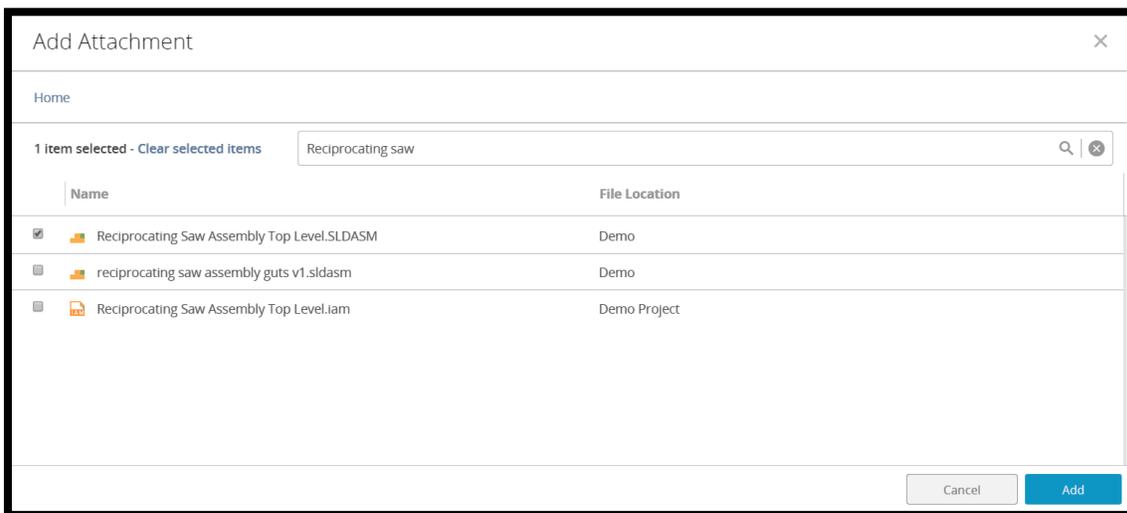
2. Viewing Data

Now that you have your data on the tab, you can view it using the Large Modal Viewer in fusion.
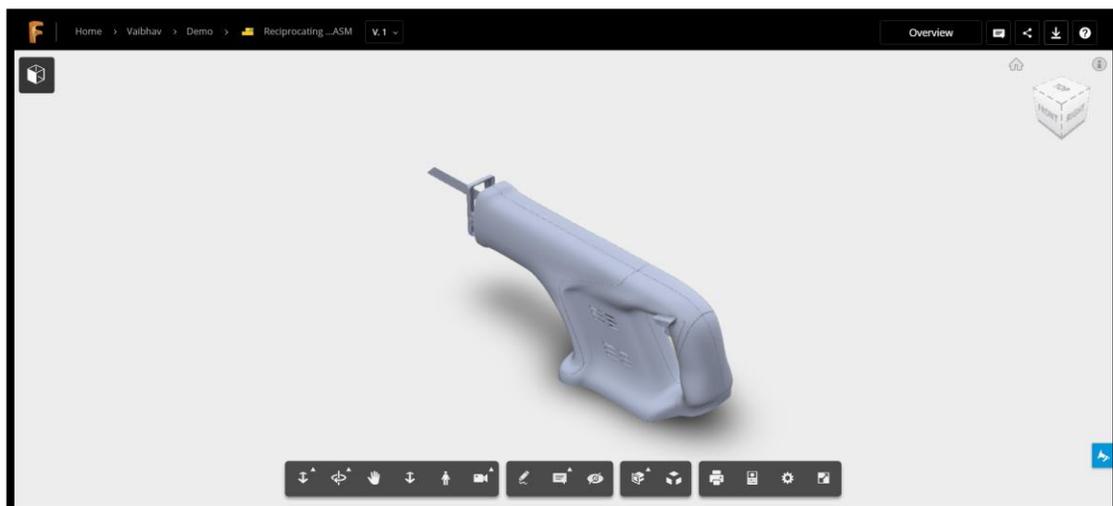
With the help of the large modal viewer you can not only view the assembly but you can

- Orbit the assembly 360 degrees
- Put mark-ups to the assembly
- Explode the assembly
- Add comments to the assembly
- Isolate your sub-components in the assembly file

These additional capabilities enhance the overall user experience of file interaction in Fusion.

3. Operating on Data

Lifecycle gives you the capabilities of

- Downloading the file, based on permissions to download or not.
- To view where the files resides inside the cloud i.e. the containing folder
- To de-link or remove the file from the attachments tab. Remember that when we remove the attachment, it simply de-links itself from the attachment. However, it does stay on the cloud and also on any other item that it is attached to.
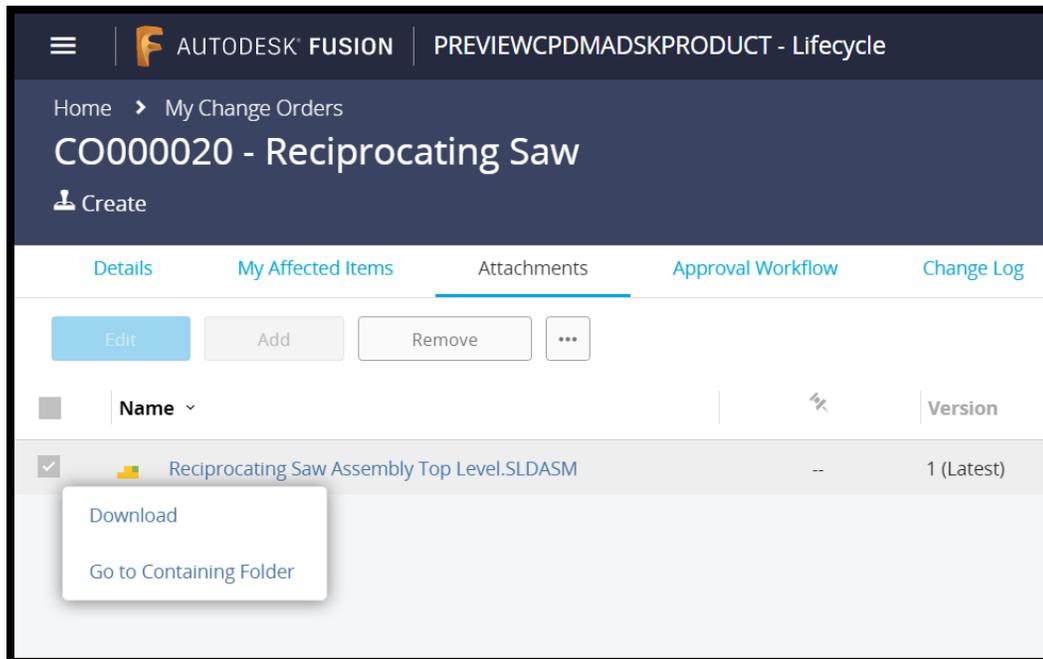
Attachment Pinning

Pinning of attachments, in literal terms means to pin a specific version of an attachment to the item it is attached to. This can be done both explicitly and implicitly. Explicit pinning means that the user himself goes ahead and selects a version of the particular attachment to pin. Whereas on implicit pinning, the user has no role to play. The system decides what version of the attachment should be pinned to the item.

1. Benefits

- Pinning gives you more access control over data, depending on whether you require that based on your business process. A good example of this would be that, if an item is in the middle of a workflow, and is in the process of approval, in the meanwhile a new version is uploaded, and that might contaminate data and thus portray wrong information after approval.

- It also allows multi-versioning the same data over different lifecycle items, for better collaboration in your business process. So you could have the same data across multiple items but different versions.

2. Types of Attachment Pinning policies

- Explicit Pinning

  - ➢ "To Version" Pinning Policy

    This policy allows the user to select a version that he or she want to pin to for an attachment to a particular item. Unless the user decides to change the policy, the attachment shall remain pinned on the same version to the item. Benefits of this policy is that it gives you the flexibility to select from a lineage of versions and you don't have to always view the latest. Designers would find this policy quite helpful.

	Name ⌄	Pinning Policy	Version	Created By	Type
⋯ 🔖	DEMO05.DWG	To Version	1 ▾	ao.zhang@autode...	CAD File
🔖	DEMO04.DWG	On Lock	5 (Latest)	ao.zhang@autode...	CAD File
🔖	DEMO03.DWG	On Lock	4	ao.zhang@autode...	CAD File
🔖	DEMO02.DWG	On Lock	3	ao.zhang@autode...	CAD File
🔖	DEMO01.DWG	On Lock	2	ao.zhang@autode...	CAD File
			1		

- Implicit Pinning

  This kind of pinning policy is governed by the system and the user has no control whatsoever over deciding which version the attachment is pinned to

  - ➢ "On-Lock" Pinning policy

    The on-lock policy is governed by the lock state of an item. When an item enters a locked, and an attachment has been set to an on-lock policy, then the latest version of the attachment that was available when the lock on the item occurred, the attachment would be pinned to that version, and would remain pinned to that version regardless of how many future revisions the same attachment has. This kind of policy is particularly useful for maintain business processes that involve change orders, and the approver should have access to

the design file/CAD file that was submitted to him, regardless of whether the designer has made further changes to the design file. Perfect for maintaining data consistency.

➢ "Float" Pinning policy

This policy essentially means that the attachment is free from a link to its version for an item. The latest version of the attachment would always be exposed. This is particularly useful when the user was to review changes as and when they occur, for a particular business process.

Conclusion

You have now seen the basics of Cloud Product Data management using the Autodesk Cloud. You should now be comfortable in installing the Autodesk Drive, uploading data to the drive. Also, you have seen how data can be viewed over Fusion in both the list view as well as the thumbnail view. In addition to that, you have learnt how to manage your data using the attachments tab which involves adding files, accessing them, operating on them and finally pinning them to specific versions for a Fusion Lifecycle item. You should now be able to revise files and using them amongst different workspace items to manage your business process.

If you would like to try the product you can go to our website and sign up for a free 30-day trial and try all what you have seen here. Simply go to the site below, fill out the form, receive and email, and log in to your environment.

http://www.autodeskfusionlifecycle.com/tryplm/