

# Projects

## What are projects?

**Projects** is a project-management/collaboration tool. Whether working on a new funding proposal, research paper or developing an application, projects are a great way to manage your data, workflow and communication. Projects can be created by groups or individual users, and may include multiple groups in the team.

With each project you get:

- a Git-based repository for data and apps with a built-in web browser;
- a Wiki area for project notes;
- To-do list management;
- a Facebook-like microblogging tool providing a stream of project updates from all team members, with the ability to comment on certain activities.

Projects can be accessed by going to **/projects** on your hub. You can read in more detail about all project features by going to **/projects/features**.

## Creating Projects

### Starting a Project

1. Login to your HUB.
2. Navigate to **<https://yourhub.org/projects>**.
3. Click **Start a project**.
4. Provide a title in the **Title** textbox. This should be the full name of the project.
5. Provide an alias in the **Alias** textbox. This is a short name for the project used in the project URL therefore spaces, special characters, or punctuation cannot be used.
6. Under *Describe your project* click **Yes, I'll do it now**.
7. Optionally, add a description of the project in the About textbox or upload an image to use as the project thumbnail.
8. Under *Include project in search?* select whether the project should be private or public. If public is chosen, then the project can appear in search results and have its basic information available for public viewing.
9. Click **Save all and continue** to move to adding initial team members.

### Adding Initial Team Members

1. Select the level of access that should be granted:

***Collaborator can:***

- Upload and manage project files.
- Edit project publications.
- Use available project tools.

***Manager can:***

- Invite or remove other team members.
- Change project information and global settings.
- Do everything a collaborator can do.

2. Start typing last name of the user to add in the **Individual** textbox, or the group name of the group to add in the **User Group** textbox.
3. An autocomplete box will appear below these textboxes with suggested users or groups (depending on the textbox used). Click on the suggestion that is associated with the user or group that should be added.
4. Click **Add** to have the user or group added to the team.
5. Repeat steps 1-4 above to add additional users or groups to the team.
6. Check the box next to the names of the users that should be removed and click **Delete**.
7. Click **Save all and continue** when finished adding users.

### Finalizing the Project

Depending on the HUB configuration, reading information on HIPAA or FERPA rules on privacy as well as agreeing not to store certain types of data may be required.

1. Read the statement:

"No, this project will **not** include any sensitive or restricted data such as HIPAA protected health information (PHI) or student information. I understand that this site cannot be used to store government restricted, export-controlled, or proprietary company data (without permission)." Check the box next to it to indicate agreement.

2. Click the word **Privacy Terms** to read the Privacy Terms.

3. To indicate agreement with this statement:

"Yes, I read, understand and acknowledge Privacy Terms as they relate to the use of this project. I am responsible for ensuring compliance with these terms for **all project members.**" Check the box next to it.

4. Click **Save all and continue.** The project is now ready to use.

## Adding a Project Thumbnail/ Editing Project Information

1. Login to your Hub.
2. Navigate to **<https://yourhub.org/projects>**.
3. Click on the **Project** you want to edit on the *My Projects* section.
4. Hover over the **Project Manager** text in the upper right and click **Edit Project**.
5. The project title can be changed by changing the text in the **Title** textbox.
6. The **About** textbox allows you to add/ change the description of the project.
7. Click **Choose File** in the **Picture** section to select a thumbnail image.
8. Find the image you want and click **Open**.
9. Click **Upload** to add the thumbnail to your Project.
10. After you have finished making the changes you want, click **Save Changes**.
11. The **Project info has been saved**. notice will appear at the top if the changes were successfully saved.
12. Click **Return to project page** to navigate back to the project.

### Editing the Team

1. Login to your HUB.
2. Navigate to **<https://yourhub.org/projects>**.
3. Click on the **Project** you want to edit in the *My Projects* section.
4. Click the **Team** tab on the left menu.
5. Click **Edit Team**.
6. If you do not see the **Edit Team** button and are listed as a Group Admin for this project then membership must be controlled on the Group level.

### Adding Team Members

1. Select either **Manager** or **Collaborator** depending on the level of access you want to give the user or group:

#### **Collaborator can:**

- Upload and manage project files.
- Edit project publications.

- Use available project tools.

**Manager can:**

- Invite or remove other team members.
  - Change project information and global settings.
  - Do everything a collaborator can do.
2. Start typing last name of the user you'd like to add in the **Individual** textbox, or the group name of the group you'd like to add in the **User Group** textbox.
  3. An autocomplete box will appear below these textboxes with suggested users or groups (depending on the textbox you use). Click on the suggestion that is associated with the user or group you want to add.
  4. Click **Add** to have the user or group added to the team.
  5. Repeat steps 1-4 above to add additional users or groups to the team.

### Removing Team Members

1. Check the boxes next the names of the users you want to remove.
2. Click **Delete** to permanently remove the selected users from the group.

### Deleting a Project

1. Login to your Hub.
2. Navigate to **<https://yourhub.org/projects>**.
3. Click on the Project you want to edit in the *My Projects* section.
4. Hover over the **Project Manager** text in the upper right and click **Edit Project**.
5. In the lower right below the *Edit Info* box there is the text "Need to cancel project? You have an option to permanently *delete* your project."
6. Click on the word **delete** in that phrase.
7. Click **Yes, Delete** to verify that you intend to permanently remove the project.
8. The Project will now no longer exist.

### Changing the Layout of the "To-Do"

1. Navigate to "https://yourhub.org/projects" and log into the hub.
2. Locate a project and click on the blue title to open up the project.
3. Select the "To-Do" tab on the left side of the page.
4. To change the layout of the To-Do page, click the "Pinboard view" button or the "List view" button.
  - a. "Pinboard View" will sort the pins inside the To-Do from newest proceeding to oldest.
  - b. "List view" will sort the pins inside the To-Do from newest proceeding to oldest; pins will be stacked horizontally.

### Sharing Project Notes

1. Navigate to **<https://yourhub.org/projects>** and log into the hub.
2. Locate a project and click on the blue title to open up the project.
3. Select the **Notes** tab on the left side of the page.
4. Locate the note that you would like to share publicly.
5. At the bottom of the published note, click the blue link **Generate public link**.
6. A link will be provided in the pop-up.
  - a. This public link allows others to access content by people outside of your project team. You can send the link to anyone by pasting them into your emails, instant messages, and web pages.
7. To exit the pop-up, click the **Close this** button.



## Project Files

### Google Drive Connection for Project Files

We are excited to offer Google Drive connection for desktop syncing and collaborative editing of your Project Files. Connecting your project is a fast and easy process, which creates a dedicated remote folder shared between all joining project team members and synced with your local Project Files directory. Team members use their own Google accounts to connect and may use Google Drive syncing apps available for various platforms and devices. In addition, individual project files may be exported to Google Docs, a suite of editing tools that makes working together better.

■ [What is Google Drive? with Google Drive](#)  
[Connect your Project with Google](#)

### What is Google Drive?

**Google Drive** is a free service that lets you store all your files including documents, photos, videos and Google Docs online and access them anywhere. With Google Drive, you can create, share and keep all your stuff in one place.

Google Drive is available for:

- PC and Mac
- Chrome OS
- iPhone and iPad
- Android devices

[Learn more about Google Drive ›](#)

### Connecting your project with Google Drive

Project Files web browser now includes a **Connect** button showing remote services available for your project:

Project creator establishes the initial connection to Google Drive. For a project that is not yet connected, only Project Creator will see the **Connect** button. After the initial connection is established, all other project members will also see the button to connect and may follow the

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same connection process.

Clicking the **Connect** button opens Connections screen describing available services. To proceed with the connection, you follow the green Connect link:

When connecting to Google Drive, you need to be logged into Google with your preferred gmail account.

As soon as you login To Google, you will be presented with the Request for Permission screen. Our connector app needs your permission to view and manage files and documents in your Google Drive as well as view your basic Google account information including the email address and Google screen name.

**We only manage files stored in the dedicated shared remote folder that we create for your Project.** Your Google screen name and email address are required to properly record file revision history.

Upon successful connection, you are returned to the **Connections** screen in your project, which now shows connection details and includes a direct link to the shared remote folder in Google Drive:

### After you connect

#### Project Creator

If you are the Project Creator, you should now see a new folder created in the root of your Google Drive. The folder will have your project alias in its name, e.g. **Project:: myproject**. If you had any files in your project already, they would be copied to the remote directory during first sync.

#### Other project members

For all project members that connect after project creator, the new remote folder will appear under "Shared with me" directory in your Google Drive.

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Unless something shared with you is stored in **My Drive**, it won't sync. Here's how to add the project folder from **Shared with me** to **My Drive**:

- Click **Shared with me**.
- Select the project folder.
- Click the **Add to My Drive** button. The contents of the project folder will automatically sync to the Google Drive folder on your computer.

### Desktop Google Drive app

To access synced project files right from your desktop, you can [download Google Drive](#). It's free and installs in seconds. Here is an example how your Google Drive folder may be accessed on a mac:

### Project Files browser

Now that the project is connected to Google Drive, the Project Files browser includes a few extra options.

The **Sync** button initiates a sync between local and remote files. Sync status is then shown to the left of the **Sync** button.

Files of certain types may be converted to Google format and back by clicking on the **start/stop Collaborative editing** button.

### Sync between remote and local files

Sync of local and remote project files happens automatically every hour, after each local change, or may be initiated manually by clicking on the **Sync** button in the Project Files browser.

Sync status will be shown to the left of the **Sync** button and will tell you the progress of current sync or time since last sync operation.

You cannot abort sync once it starts and you cannot initiate a new sync request until the current sync is complete. There may be a delay of one to several minutes imposed after each manual sync request. This is to prevent unnecessary repeated server requests and to make sure all changes get propagated and synced properly.

### Versioning and conflicts

During sync only the latest change on a file gets checked in. Intermediate changes that happened since last sync get omitted. However, because local changes get synced immediately after they occur, it is usually only remote intermediate revisions that may be omitted in joint file history. Frequent syncing helps keep as much revision history as possible.

In the case of a simultaneous change on the same file locally and remotely, the remote (Google) version prevails and gets committed over local version. We're working on adding proper conflict resolution mechanisms.

Meanwhile, detailed file revision history can be viewed locally by clicking on the **modified time** link for each file. There you can view diffs for text files and download older versions. The history will also show if the file was exported to Google for remote editing or brought back into the local repository.

## Collaborative Editing via Google

Connecting your project with Google Drive enables you to export local project files of certain types for collaborative editing in Google. When you send a file to Google for editing, it will be converted to appropriate Google Docs format ([Docs](#), [Sheets](#), [Slides](#)).

These are the file types that can be converted to a Google document, spreadsheet, or presentation:

- For documents: .doc, .docx, .html, plain text (.txt), .rtf, .tex\*
- For spreadsheets: .xls, .xlsx, .ods, .csv, .tsv, .txt, .tab
- For presentations: .ppt, .pps, .pptx
- For drawings: .wmf
- For OCR\*\*: .jpg, .gif, .png, .pdf

\* We've added support for LaTeX files conversion to and from Google Docs. TEX files will be exported to Google as text files, and imported back into the local repository as .TEX. You can compile your TEX file (both local and exported to Google) into a PDF right in the **Project Files** browser.

\*\* Optical Character Recognition (OCR) lets you convert images with text into text documents using automated computer algorithms. Images can be processed individually (.jpg, .png, and .gif files) or in multi-page PDF documents (.pdf). More on [Optical Character Recognition](#).

## Export local file to Google Docs

Select a file you wish to edit in you **Project Files** browser. If the **Start Collaborative Editing** button is active, it means that the file can be edited remotely.

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After export, your file will appear in your Project as a **Google Doc**:

In your **Google Drive** the file may appear with a .gdoc (or other) Google Doc extension.

Now you and your project collaborators may work on the file together in **Google Drive**. With Google's [Real-time collaboration](#) multiple people can edit Google Docs at the same time from different computers.

Back in your **Project Files** browser you can preview the remote file as a PDF or JPEG. For .tex files exported to Google, the preview will be a compiled PDF that you can download and save back into project.

### Import a Google Doc into the local repository

When you are happy with your edits of a Google Doc and wish to finalize the document for publishing in your Project or simply want to stop editing, you import the file back into the project repository. Select a remote file you wish to import and click on the **Stop Collaborative Editing** button. You'll get a choice of import formats:

Please note that original files in old Microsoft Office formats (.doc, .xls, .ppt) will be converted to the new formats (.docx, .xlsx, .ppt) when imported. If the name and format of the original file are preserved, the original file will be restored/overwritten in the local repository. If the name or format change, the file will be imported as a new file, with the revision history showing the connection.

# Databases

## DataStore Lite

Creating a searchable hub database from a spreadsheet with data is made possible by DataStore Lite within Projects.

**Note:** You must be logged in on the hub and inside a project in order to use this feature.

A .csv (comma separated values) file containing the data is required to create the database. A spreadsheet program such as Excel can be used as long as the file is saved in the .csv format. The first row should contain the labels for each data field/column. Each row below represents a unique data entry. If the database is to contain links to files stored in the project, provide a column with the case sensitive name and extension of each file (e.g. "projectstep1.png").

## Creating a Database

### Upload the File to the Project

1. Navigate to <https://yourhub.org/projects>.
2. Locate the project where the database is to be added in the *My Projects* section, or use the **Start a project** button to create a new project (for help with creating a project, go to: <https://hubzero.org/documentation/1.3.0/users/projects>).
3. Click **Files** underneath *Assets* on the left project menu.
4. Click **Upload**.
5. Drag and drop the .csv file as well as any files that are to be linked in the database into the **click or drop file** textbox. Alternately, click the **Click or drop file** box and select the .csv file as well as any additional files to add (ctrl + click to select multiple) and click **Open**.
6. Click "Upload now!" and the file(s) will be uploaded.

## Create the Database - Step 1: Select the File

1. Click **Databases** underneath *Assets* on the left project menu.
2. Click **Create a database** in the upper right.
3. Select the .csv file that contains the data for the Database from the list.
4. Click **Next**.

## Create the Database – Step 2: Verify Data

1. Click the pencil **Edit** icon underneath a column heading to make changes to it.
2. On the **General** tab of the *Column Properties* window, several values can be set:

**Label (Required)** – This is the title that is shown for the column.

**Description** – A column description can be provided here. The user will see this description when clicking on the column title.

**Width** – This column accepts a numeric pixel value. With this set, the column will remain fixed at the specified width.

**Units** – This column accepts a unit of measure (e.g. inches, meters, liters) and will show underneath the column heading.

3. On the **Column Type** tab of the *Column Properties* window, select the appropriate column type from the drop down list:

**Text [small]** – This column type should be used to display a title or short description of the entry.

**Text [large]** – This column type should be used for a long description or text that is more than one sentence.

On either text Column Type, check “Limit text to a single line” to prevent the provided text from wrapping. If the length of the text exceeds the width of the column, it will truncate what displays and the user can click on the text to view the entire content of that particular field.

**Image** – This column type will display a preview of the image directly in the data field. This can be either a URL to an image on the web, or the name of an image contained in the Project files.

**Link** - This column type will provide a hyperlink to the file specified. It can either be a full URL link to the page, or the name of a file contained in Project files.

Check **Repository Files?** and choose the Repository Path from the drop down if the images or files are contained within the Project.

4. On the **Other** tab of the *Column Properties* window the content alignment, text color, and background color can be configured.
5. Click **Update Column** to save all changes made.
6. When you have verified all the columns look as intended, click **Next**.

# Create the Database - Step 3: Title & Description, Finish

1. Type a title and description to the Database in the text boxes provided.
2. Click **Finish** to finalize all changes and make the database available.

## Updating a Database

### Change the Database File

1. Navigate to **<https://yourhub.org/projects>**.
2. Click on the Project that contains the Database that needs updating.
3. Click on **Databases** underneath *Assets* on the left project menu.
4. Click the name of the .csv file being used by the database in the **Files** column to download the file.
5. Open the file on your local machine using a spreadsheet application or text editor.
6. Make the changes to the file that are required and save, ensuring that the file name remains the same name as the original source file.
7. Navigate to **Files** underneath *Assets* on the left project menu.
8. On the Files page within the project, click **Upload**.
9. Drag and drop the updated .csv file into the **click or drop file** box and click **Upload now!** Alternately, click the **Click or drop file** box, select the file, click **Open** and then click **Upload now!**.
10. The .csv file contained on the project files has been updated, but additional steps will need to be taken in order to update the database, as discussed in the next step.

## Update the Database

1. Within the project, click on **Databases** underneath *Assets* on the left project menu.
2. Click **Update Database** next to the database that requires updates since changes have been made to its original .csv file.
3. Verify the columns shown are correct, especially if changes were made to the data and/or additional columns were added.
4. Also click **Edit** below the column label to change its column type as well as add optional information to the column (such as a column description).
5. Click **Next** when finished.



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6. Provide a title and description (perhaps indicate an update was made) and click **Finish**.