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 manager for this project, then it is likely that this is a project that was created within a Group. If this is the case then all 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 Feed Module

Users can subscribe to a feed module inside of Projects and receive email updates whenever there is activity inside the Project. To enable the Project feed updates, follow these steps:

1. Navigate to the **Project** of your choosing.
2. Inside of the Project, locale the **Feed Module** and click on *Subscribe to feed updates*.

3. Inside the Feed Module, select the categories that you wish to receive updates about, then click **Save**.