

### Hub Users

The User Guide is a user manual for a Hub. It progresses step-by-step through the features of the site and how a user can accomplish such tasks as:

- [Personalize their Member Dashboard](#)
- [Start and manage a user group](#)
- [Submit a new Resource contribution](#)
- [Submit, comment on, and monitor support tickets](#)
- [Submit a new Publication contribution](#)
- [And more...](#)

# Frequently Asked Questions

## Changing your email address

To change your email address, you will need to login to the account where you want to change that email. After logging in, follow these steps:

1. Navigate to your **Dashboard**
2. Select the **Profile** tab
3. Locate the **E-mail** section and click **Edit**
4. Update your email in the drop-down form
5. Click **Save**
6. Confirm your new email

## What is CKEditor?

**CKEditor** is a WYSIWYG text editor designed to bring common word processor features to allow easy entry of content into web pages. Some features found in common word processors may not be found in the editor to preserve the design of the site. The editor can be found almost everywhere on the hub where content entry is available. This includes administrator interface content entry areas, as well as, the front user interface.

### Removing your IP Address from SpamHaus

If you use an IP address that is either a public IP or has been used prior by spammers, SpamHaus might have flagged your IP address as untrustworthy and blocked you. To request that your IP address be removed from Spamhaus' blocked list, follow these steps:

1. Navigate to <http://www.spamhaus.org/lookup/>
2. Grab your **IP Address**
3. Enter your IP Address into the **Enter an IP Address** field and click **Lookup**
4. Locate the red IP and click the linked reason underneath
5. Confirm you IP Address and confirm the reCAPTCHA question and click **Lookup**
6. Read the reason why and to delist your IP Address by clicking the **Click on this link to delist**
7. Your request will be pending which takes one to hours

### Where can I upload and embed a video file on the Hub?

You can embed videos from third party services, such as Youtube, and simply use the video Macro to embed the linked video.

You can also upload a video (.mp4) that lives on your computer to the Hub if you see **CKEditor** and a **Manage Files** section:

## HUB USERS

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Follow these instructions in order to upload and embed your video file:

1. Navigate to the section of the Hub where you want to embed your video file
2. Under **Manage Files** click **Choose File**
3. After selecting the file from your computer, click **Upload**
4. Click on the **Macro** button ( [ ] ) and grab the video macro ( **[[Video(FileName.mp4)]]** )
5. Click on **Source** and add the macro and fill in the name of the file
6. Click **Source** again and you should see the place holder for your file
7. Publish the content and you will see your video

# Video Tutorials

## Overview

Video tutorials provide step-by-step instructions and walkthroughs of various tools and components that hub users may find useful.

## How-To Videos

The HUBzero team is proud to present a growing series of How-to videos hosted on YouTube.

First, if you are new to our site and would like to know exactly what a Hub is and how Hubzero fits into the scientific community, watch this video produced by Michael McLennan, the former Director of HUBzero Platform for Scientific Collaboration.

In order to start using Hubzero or any other Hub, learn how to create an account and use your user dashboard by watching this short tutorial.

# Blog

## Overview

**Blog:** an update about achievements, goals, and aspirations in one's career.

The following blog levels are available on the hub:

1. **Site Blog** - blogs created by site administrators for the whole hub. These are displayed under <https://yourhub.org/blog>

**Note:** The site blog may also list group or member blogs with privacy set to public or registered members, depending on the display settings chosen by hub administrators.

1. **Group Blog** - blogs created by group members for the group. These are displayed under <https://yourhub.org/groups/yourgroup/blog> and may also appear in the site blog depending on the blog post's privacy setting and the hub's site blog display settings
2. **Member Blog** - personal blogs by any hub member. These can be found under <https://yourhub.org/members/membertextnumber/blog> and may also appear in the site blog depending on the blog post's privacy setting and the hub's site blog display settings

## Creating a New Blog Entry

Whether you are adding a member blog post, group blog post, or site blog post, the steps are the same, except for the entry point.

1. Navigate to the blog area you would like to post to
  - For member (profile) blog, that's <https://yourhub.org/members/yourmembertextnumber/blog>
  - For the group blog, it's <https://yourhub.org/groups/yourgroup/blog>
    - **\*\*Note:** Only site administrators can post from the site blog (<https://yourhub.org/blog>).
2. Click on **New Entry** to start a new post
3. Fill in the title of the entry
4. Write the content of the blog post in the entry box. This box has a toolbar to help with formatting your text
5. Upload any files you would like to add to the blog through the **Uploaded files** area and use a macro (a line of code) to embed the file(s) on your blog post. Click **Add Macro** to see available macros
6. Add tags to make your blog more searchable on the Hub
7. By default, users can comment on your blog post, but you may disable comments by

unchecking the box for **Allow comments**

8. Select the state of privacy to **Public**, **Registered members**, or **Private**
9. Select the times when the entry will be available to be viewed. Make sure to format the time with military time and the date to be year, month, and then date. If you leave the publish start and end fields blank, your blog post will be available immediately with no publish end date
10. Click the **Save** button at the bottom of the page to post your blog

## Editing a Blog Entry

**Note:** You may only edit your own blog post.

1. Navigate to the blog area where your post is listed
  1. For member (profile) blog, that's <https://yourhub.org/members/yourmembervnumber/blog>
  2. For the group blog, it's <https://yourhub.org/groups/yourgroup/blog>
  3. You may also edit your post from the site blog (<https://yourhub.org/blog>) if you see it listed there
2. Find the blog post you would like to edit and click on the **Edit** icon (symbolized by a pencil) for that post
3. Edit the content in the blog entry
4. Click the **Save** button at the end of the page to save the new changes

## Deleting a Blog Entry

**Note:** You may only delete your own blog post.

1. Navigate to the blog area where your post is listed
  1. For member (profile) blog, that's <https://yourhub.org/members/yourmembertext/blog>
  2. For the group blog, it's <https://yourhub.org/groups/yourgroup/blog>
  3. You may also delete your post from the site blog (<https://yourhub.org/blog>) if you see it listed there
2. Find the blog post you would like to delete and click on the **Delete** icon (symbolized by a trash can) for that post
3. You will need to confirm that you want to delete your blog post, along with all associated comments. After confirming, your post will be deleted

# Citations

## Overview

Citations are works that have cited or referenced a Hub or some piece of Hub content. Each citation links to the piece of content it references and is downloadable in either BibTex or EndNote format.

## Adding a Citation

1. Navigate to <https://yourhub.org/citations>
2. On the Citations home page, click **Submit a citation**
3. Start adding the Citation by selecting the **Type** of the Citation from the drop-down
4. Then, fill out all of the citation information that is needed
  1. **Note:** Information varies by citation type
5. Fill in the **Title/Chapter** of the Citation
6. Fill in the **Tags** and **Badges** for the Citation
  - a. Tags are key words that are separated by commas
    - a. (Example: negf theory, ion transport)
  - b. Badges are connecting words that indicate more complex tags
    - a. (Example: peer-reviewed, evidence-based)
7. Fill in the type of the resource or publication being cited along with the ID number of the item that is to be cited by this citation
  - a. Find the ID number of the publication or resource by navigating to the page of the document and then in the URL you can locate the ID number
8. Check the boxes to affiliate the organization with the citation and if your organization is to fund the citation
9. Click **Save** to save the new citation

### Importing Citations

**NOTE:** The citations import functionality is not guaranteed to be open to all registered hub users. The hub administrators can configure it as an administrator-only feature or turn it off all together.

1. Navigate to **<https://yourhub.org/citations>**
2. On the Citations main page, click **Import citations**
3. Upload a citation file
  - a. Click **Choose** and select the citation file
    - a. BibTex files (.bib), Text files (.txt), or EndNote files (.enw) are acceptable, but they must not exceed 4 MB in size
    - b. Click **Upload** once the file has been chosen
  
4. Review the uploaded citations and choose the appropriate action to take for each uploaded citation
5. Click **Save** to save the newly imported Citations

### Exporting a Single Citation

1. Navigate to **<https://yourhub.org/citations>** and click on **Browse the list of available citations**
2. Click on the citation you wish to export
3. Click one of the links to choose how the citation is to be exported. The two links are different by the type of file. Citations can be exported as BibTex or Endnote

### Exporting Multiple Citations

1. Navigate to **<https://yourhub.org/citations>**
2. Locate the Citations that you wish to export by clicking the **Browse the list of available citations**
3. From the available list of citations, check the boxes of the citations that are to be exported
4. On the side of the **Citations: Browse**, select the button of the format type that the exported citations should download as. A citation can be downloaded as an **EndNote** or a **BibTeX**
5. After selecting a format type, the citations will automatically be downloaded to your browser's download area

### Member Citations

1. **What is a member citation?**
  - a. This is a place to list the various publications and works you've authored or participated in. Show the world what you've done.
2. **Okay I saved my settings, what do I do now?**
  - a. You start off with a blank slate. You can manually input your citations through a form or you can import supported file formats (currently BibTeX or EndNote).
3. **I do not like the existing citation formats, how do I make my own?**
  - a. You are allowed one custom format. You can create it by going into the Settings page, and selecting *Your custom format*. The textarea will preserve the previously selected format in case you would like to do not want to start from scratch. If you want to start from scratch, simply delete the existing text and enter the *Key* of the field you want to insert. You can do this by either manually typing it the key into the textarea or simply click on the row corresponding to the key/value you would like to insert.
4. **Alright so I have entered or imported at least one citation, why is it yellow?**
  - a. When you import or manually enter a citation, it immediately goes into an unpublished state, meaning nobody but you can see the entry. You can "publish" the citation by clicking the publish button next to each individual citation or click the checkbox next to each citation you would like to publish and click "Publish selected citations".

- i. Once you publish a citation, the yellow background will disappear and it shall be counted in the total number of citations for your profile.

### 5. So what can I do with citation entries as a group manager?

- a. You can do three things:
  - i. Publish & Un-publish entries
  - ii. Edit entries
  - iii. Delete entries
    - i. Delete puts the citation in the “trashed” status – meaning it is NOT fully deleted. A Hub Admin can only fully-delete the entry. If you accidentally delete a citation from your group, you can contact the hub administrator to republish your citation.

### 6. What is a COin?

- a. COinS (ContextObjects in Spans) is a simple, ad hoc community specification for publishing OpenURL references in HTML. In simpler terms, it is a method for embedding OpenURL data within a HTML page. There are plugins and other tools that can help locate the cited work in full-text in available areas on the Internet.

### 7. How do I associate an author of a citation with a my profile or another Hub User's profile?

- a. Within the edit form under the *Author(s)* field, the editor simply needs to start typing the member's **full name** or **username** and click the Add button. The autocompleting field should show the user's name and ID number to confirm the correct selection has been made. Once the association has been made, the user's name will appear in the entry as a link which will direct itself to the member's profile.

# Collections

## Overview

Collections are a quick and easy way to share, favorite, and organize information on a Hub.

**Note:** You must be logged in on the Hub in order to perform Collections functions other than looking through public collections.

## Collection Tabs

**Recent Posts:** anything that a user follows such as a collection or another user is placed here. Whenever the collection or user posts a new post, the new post will appear on the feed. The feed is the first tab bar at the top the page.

**Collections:** where all of the collections that have been created by the user are stored. Here collections can be managed and created.

## HUB USERS

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**Posts:** where all the posts from every collection are stored. Here posts can be managed and created.

**Followers:** this tab displays all of the users on the Hub that are following your account.

**Following:** this tab displays all of the collections and users that are being followed by you. In the tab, links are provided back to each followed item by clicking on the blue title.

### Posts vs. Collections

#### What is the difference between a post and a collection?

**Post:** A post is a singular piece of content that can be posted in a collection. A post can house a link or file with a description added to it. Posts can be collected or followed by other users on the Hub.

**Collection:** A collection houses all posts in one file. A collection must be produced before uploading content into the collection. The relationship of a collection and a post is similar to a filing system. The collection is the file and the posts are the documents or content that is placed in the file. Both posts and collections can be reposted or collected by users of the Hub. The privacy settings of a collection determine who can view the collection and its posts.

### What happens when you collect a post/collection?

When a user collects a collection or post on the Hub, the user is saving the information into his or her collections. When collecting a post, the content of the post is resubmitted as a new post in a collection owned by the user. When a collection is collected, the user is saving the collections URL as a new post in a collection owned by the user. Then the user can simply revisit the collected collection by clicking on the new post in the collection.

### Creating a Collection

1. Navigate to <https://yourhub.org/collections>
2. Select the **Collections** tab at the top of the Collections dashboard
3. Click on **New Collection** to create a new collection
4. Select the privacy of the new collection from the drop-down:
  - **Private**: A lock appears on private collections after creation. This just informs you that this collection is only viewable through your account.
  - **Public**: All hub users can view the new collection and the collection will appear in search engines on the hub.?
5. Input the title and description of the new collection
6. Click the **Save** button at the bottom of the page to save the new collection

### Editing a Collection

1. Navigate to <https://yourhub.org/members/>
2. Locate your profile and navigate to your collections tab
3. Select the **Collections** tab at the top of the Collections landing page
4. Hover over the collection that you would like to edit
5. Click the **Edit** button and make the changes on the details of the Collection

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6. Click **Save** to save the newly edited Collection

### Deleting a Collection

1. Navigate to <https://yourhub.org/members/>
2. Locate your profile and navigate to your collections tab
3. Hover over the collection that you would like to delete
4. Click the **Delete** button

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5. Confirm that you would like to delete the post and your post will be successfully deleted

### Creating a Post

1. Navigate to <https://yourhub.org/members/>
2. Locate your profile and navigate to your collections tab
3. On the collections Click on the **New Post** to add a new post to a collection
4. Add a link or upload an image by dragging the media into the directed boxes then fill in your title and description
5. Select the collection you would like to add the post to
6. Add tags to allow searches to find your post
7. Click **Save** at the bottom of the page, and your post will be added to the collection you chose

### Editing a Post

**Note:** You may only edit your own posts.

1. Navigate to the Collections area from your Dashboard (<https://yourhub.org/members/yourmembervnumber/collections>)
2. Select the **Posts** tab at the top of the Collections landing page
3. Click the **Edit** button and make your changes to the post
4. Click **Save** to apply your changes

### Deleting a Post

1. Navigate to <https://yourhub.org/members/>
2. Locate your profile and navigate to your collections tab
3. Open up a collection and hover over the post you would like to delete
4. Click the **Delete** button
5. Confirm that you would like to delete the post and your post will be successfully deleted

### Collection Feed/Recent Posts

#### Collection Feed:

Anything that a user follows, such as a collection or another user, is placed on a Collection Feed. Whenever the collection or user posts a new post, the new post will appear on the feed.

The feed is the page you land on when you go to the Collections area from your Dashboard (<https://yourhub.org/members/yourmembernumber/collections>), labeled "Recent Posts".

### How do I add to my Feed?

To add to the Collection feed, find a collection or user that posts information that is relevant to a study or research. Click **Follow** on a collection or **Follow All** to follow a user and all of their collections. To view all the users and collections that are currently being followed, click the **Following** tab, which is the last tab, at the top of the page.

### Collecting a Post

1. Navigate to <https://yourhub.org/collections/>
2. Navigate to a post or a collection and find a post that you would like to save or **Collect**
3. To collect a post, hover over the post and click the **Collect** button. This will re-post the original post into a different collection

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4. Select the collection or create a new collection for the post to be saved into. Add a description for the new post, then click **Save**
5. The post will now be re-posted into a new collection

### Collecting a Collection

1. Navigate to <https://yourhub.org/collections/>
2. To collect a collection, hover over the collection
3. Click the **Collect** button. This will add a new post to your collection with a link back to the original collection

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4. Select the collection or create a new collection for the post to be saved into
5. Add a description for the new post
6. Click **Save** and the collection will now be re-posted into a new collection

### Commenting on a Post

1. Navigate to <https://yourhub.org/collections/>
2. Navigate to a post or a collection and locate a post

3. Hover over the post and click the **Comment** button

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4. Type your comment into the text box
5. If you do not want your name to appear as the person who posted the comment, click the box for **Anonymous**
6. Click **Save** and your comment will be posted

### Liking a Post

1. Navigate to <https://yourhub.org/collections/>
2. Navigate to a post or a collection and locate a post
3. Hover over the post and a **Like** button will appear
4. Click the **Like** button and the post will count up for your like

### Unliking a Post

**Note:** Only a post you have previously **Liked** may be unliked.

1. Navigate to <https://yourhub.org/collections/>
2. Navigate to a post or a collection and locate a post
3. Hover over the post you have previously liked and the **Unlike** button will appear
4. Click the **Unlike** button and the post will be removed from your **Likes** section

### Following a User

1. Navigate to <https://yourhub.org/collections>
2. Find a collector or user of the hub that has collected information using Collections, whose posts and Collections you would like to follow. Click on the user's name
3. Click the **Follow All** button located on the right under the **Getting Started** button
4. Now all new posts and collections shall appear in your **Recent Posts** tab and the collector will appear under the **Following** tab on the Collections area from your Dashboard

### Unfollowing a User

1. Navigate to <https://yourhub.org/>

2. Navigate to your members dashboard and click on the **Collection** tab
3. Inside your member collection page, locate the **Following** tab
4. Click on the **Following** tab at the top of the Collections landing page
5. Click the **Unfollow** button for the user you would like to stop following, and the user's posts and collections will no longer appear on your **Recent Posts** tab. The user will also be removed from the list of users you follow.

## Following a Collection

1. Navigate to <https://yourhub.org/collections>
2. Click on the **Collections** tab
3. Find a collection by browsing through the collections listed, or use the search bar to find collections by keywords or tags. Once a collection has been located click on the title of the collection to view the posts
4. Inside the collection, click the **Follow** button to follow the collection

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5. Once the collection has been followed, all of the posts will appear on your **Recent Posts** tab

### Unfollowing a Collection

1. Navigate to <https://yourhub.org/collections/>
2. Navigate to a collection that you are currently following
3. Click on the **Following** tab at the top of the Collections landing page
4. Click the **Unfollow** button for the collection you would like to stop following, the collection's content will no longer appear on your **Recent Posts** tab

### Changing the Layout

**Note:** You have to be logged into your hub in order to complete the following tasks

1. Navigate to <https://yourhub.org/collections>
2. Locate a collection and click on the blue title to open up the collection
3. To the right of the tabs there are two icons that change the layout of the collection's posts
4. To change the layout, click the **View as a list** button or the **View as a grid** button
  - a. **View as a list** will sort the posts inside the collection from newest proceeding to oldest; posts will be stacked horizontally.
  - b. **View as a grid** will sort the posts inside the collection from newest proceeding to oldest; posts will be formatted into a grid.

### Sorting Posts

1. Navigate to a **Collection** that you wish to change the ordering
2. Click the **Edit** button and then from the *How posts are sorted* drop-down select **Created date** or **Defined ordering**
3. Click **Save** to save the new sorting method
  1. **Note:** You can sort the posts from the inside the collection by clicking on the different sorting buttons.

# Courses

## Overview

A course is an online class available through the Hub. The Hubzero courses platform offers many features to focused on interacting with classmates and professors alike. Watch lectures taught by world-class professors, learn at your own pace, test your knowledge and earn recognition for your achievements.

## Student Features

### Enrolling into a Course

Courses offer instructors and students many features to help facilitate the most engaging and interactive learning experience possible. Many of these features, like in-depth instructor videos, announcements, and more, are available right away, just by browsing the available courses. Some features require an extra level of personalization, and thus require enrollment in the course.

**Note:** Each course might have different registration constraints such as restricted enrollment dates or required payment.

To enroll into a course:

1. Navigate to **<https://yourhub.org/courses>**
2. Look for a course either by searching on the search bar in the Courses page, or browsing through the list of courses on that page. To see an extended list of courses, click **Browse the catalog**
3. Once you have found a course you'd like to learn more about, click on the title of the course
4. On the Course's Overview, click on **Go to Course**
5. Once enrolled, you will be on your way to better your knowledge on topics related to your field of interest

### Tracking Course Progress

As a student, the course will track your personal progress. To view your progress in a course:

1. Navigate to the course and from the course overview, click on the **Go to Course** button
2. Click on the **Progress** tab to view the progress overview page
3. A chart will appear displaying information about your overall progress in the course versus where the course instructor thinks you should be
4. Here is a breakdown of the progress information chart:
  - a. **The Running Man:** This figure displays the course's progress. Course instructors predetermine where students should be by setting dates for each section of the course. The "Running Man" helps indicate what a student has completed in the course.
  - b. **The Progress Bubbles:** These blue bubbles that the "Running Man" runs on indicates how much progress a student has completed in each area. The bubble will be all the way filled in blue with a check mark to indicate that all the material has been completed for that section.
  - c. **Your Current Score:** This percentage is the student's current score in the course. The grade is calculated by the 'grading policy' that is predetermined by the hub administrators.
  - d. **Quizzes Taken:** The number of quizzes taken by a student out of the total amount of quizzes in the course.

## HUB USERS

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- e. **Homework Submitted:** The number of homeworks submitted by a student out of the total amount of homeworks in the course.
- f. **Exams Taken:** The number of exams taken by a student out of the total amount of exams in the course.
- g. **Grade Breakdown:** A list of all the sections in the course. The percentage listed on the right side is the section's grade percentage.

## Course Manager Features

### Course Administrator Features

Though the platform has been designed to be simple and self-serve, there are also plenty of options to keep you busy. Follow the tutorials below to help clear up those options, or dive deeper into the intricacies of the HUBzero courses platform!

**NOTE:** You must be logged in and must have special privileges (role of Instructor, Manager, etc.) in order to perform/access the features below.

### Editing the Course Overview Page Content

1. Go to the course's overview (<https://yourhub.org/courses/{course alias}>)
2. You may edit any of the following from the course overview page:
  - **Course Title & Short description:** allows the change of the title of the course, short description, and addition of tags. To edit, click the edit button, make your changes, and click "Save".
  - **Course Overview Long description:** allows the editing of the long description of the course displayed in the Overview tab. To edit, click the "Edit" button, make your changes, and click "Save".
  - **Offerings:** an offering is a collection of materials (lectures, quizzes, etc.) that represents a version or edition of a course. If no offerings exist for the course, you will see a "Create an offering" button. If offerings exist, you will see a "New" button under the Offerings tab to create an offering. To create the first or an additional offering, click the corresponding button and provide at least the title for your new offering and click "Save".
  - **Course Overview Pages (tabs):** you may add more pages (tabs) for additional content via the "Add page" button or edit existing added pages via the "Edit" button found under each added tab. Just click the corresponding button, add content or make your changes to an existing added page, and click "Save".
  - **Instructors or Managers:** allows management of special user permissions in the course. Clicking "Manage" will enable you to:
    - i. Add users and assign them a privileged role in the course. Default roles are Instructor and Manager. Additional roles may be available depending on what the hub administrators have made available.
    - ii. To add a user, enter their username or hub ID in the field (the field supports multiple entries separated by a comma), and select the role you would like to assign. Click **Add** and if successful, a **Changes saved** message will appear and the added user(s) will be listed below with the assigned role.

- iii. Change assigned role by selecting a different role from the drop-down next to the user's name. A **Changes saved** message will appear upon successful role switch.
- iv. Remove special privileges by clicking the box next to their name and clicking the **Remove** button and that will remove them from that position.

## Building the Course Outline

Course managers and instructors are able to build and customize their course outline. All the materials that need to be completed by students will be stored for student access throughout the course.

### Creating the Outline

1. Navigate to the course's overview (<https://yourhub.org/courses/coursealias>) and click **Go to Course** to access the course
2. On the course's dashboard, click **Outline**, and then click **Build outline** to begin editing
3. An outline is organized into units that are broken down into categories such as **Lectures, Homework, Exams, and References**. To add a new unit:
  - a. Click **Add a New Unit**
    - i. To edit the unit, hover over and click **New Unit**
    - ii. Click **Save** after any changes to the unit
4. When the unit is created, the hub's default categories (Lectures, Homework, ect.) appear. To edit a category:
  - a. Hover over the category title, and click **Edit**
  - b. Click **Save** after any changes to the category
5. Add all documents and materials needed for the course by creating asset groups under each category. To add a new asset group:
  - a. Click **Add new** in the categories where the material will be held
    - a. **Note:** See instructions below for detailed instructions on adding material to an asset group.
6. Click **Done** to navigate back to the outline

### Adding Material to the Outline

1. To add documents such as a lecture, homework, or exam, you can upload the document by dragging a file onto the page or adding the file by four other options:
  - a. **Attach a link:** Insert links to webpages by typing them into the box with commas to separate out multiple links.

- b. **Embed a Video:** Embed a Youtube or Kaltura videos by pasting the video embed code.
  - c. **Include a Wiki Page:** Create a wiki page by adding a new wiki page along with any references that will be attached to the wiki page.
  - d. **Browse for Files:** Browse the files on the computer and add them to the category directly. These documents will be downloadable for users to access. This upload option will be used when creating a gradable document using a PDF.
2. Once an attachment has been added the system will check to make sure that the files are not corrupted, and then you can edit the title and availability of the course material
  3. All four options allow multiple files to be uploaded at once

### Adding Graded Documents

1. To add quizzes, exams or other gradable documents, upload the file as a PDF
  - i. **Note:** Only PDFs can become gradable documents.
2. You will be asked, **What do you want to do with these files?**
3. Select **Create a quiz/exam**
4. Fill in the title of the document
5. At each question, click and drag your cursor to select the entire question and all the answers. This will create a yellow box around the area of the question
6. Click beside each possible answer to create a radio button. These radio button will be what the student can select when answering the question
5. Finally, click the correct radio button that is next to the correct answer. Repeat this process next to all of the questions. When you are done creating the answer bubbles, click **Save and Close**
6. Check the box on the right to publish the homework/quiz/exam, and then a pop-up will appear with deployment settings
  - i. **Note:** All deployment dates must now be set on the administrative end.
7. Select the time limit by clicking the arrows up or down in the **Time limit** text field
8. Select the number of attempts allowed by clicking the arrows up or down in the **Attempts** text field
9. Select the settings of what a user can see after they take the homework/quiz/exam:
  - i. Select from the radio buttons the setting for what users will be able to see when the homework/quiz/exam session is open and when it is closed:
    - i. **Only confirmation that their submission was accepted:** Users will not see their scores until after the session is closed.
    - ii. **Their score:** Users will only be able to see their score but not the answers.
    - iii. **A complete comparison of their answers to the correct answers:** Users be able to view their score and the answers to the homework/quiz/exam.
11. Click **Create deployment** to save the settings for the gradable document

12. You can always edit each homework, quiz, or exam again after submitting it by clicking the small pencil icon next to the document's name

### Adding Prerequisites

Course items can now have prerequisites. These items must be completed prior to accessing the item for which the prerequisite applies. Prerequisites can be enabled for units and assets. These items can have other items of like kind as their prerequisite (i.e. assets can require assets and units can require units).

#### Adding Prerequisites to a Unit

1. Navigate to a course overview
2. Click on **Go to Course** to enter the course
3. Select the **Outline** tab and then click on the **Build Course** button
4. To add a prerequisite to a unit, click on the title of the Unit
5. Under **Prerequisites** choose the unit from the drop-down
  - a. The prerequisite that you chose will determine the order of the course, such as making Unit 1 a prerequisite for Unit 2 forces students to complete Unit 1 before moving on to Unit 2.
6. The prerequisite will be automatically saved

#### Adding Prerequisites to an Asset

1. Navigate to a course overview
2. Click on **Go to Course** to enter the course
3. Select the **Outline** tab and then click on the **Build Course** button
4. To add a prerequisite to an asset, hover over the asset and click the **Edit** or pencil icon
5. In the **Edit Asset** pop-up, locate the **Prerequisites** section and choose the prerequisite for this asset from the drop-down
  - a. The prerequisite that you chose will determine the order of the course, such as making Asset 1 a prerequisite for Asset 2 forces students to complete Asset 1 before moving on to Asset 2.
  - b. Only published assets can be selected as a prerequisite.
6. The prerequisite will be automatically saved

### Deleted Assets

**Deleted Assets** is a button available on the course-building page, where you can restore deleted content. If you are in the process of building a course you can remove content in the course outline but clicking the **Delete** button or trashcan icon beside the title of the file. If something is accidentally removed from the outline, you can retrieve it but accessing the **Deleted Assets**:

1. Navigate to the course that is currently being built
2. Go into the course and from the Overview page, click on the **Outline** tab
3. Click on **Build outline** to access the content of the course
4. Inside of **Build Outline**, click on the **Deleted Assets** button to access all deleted material
5. To restore a deleted item, just click the **Restore** button next to the file that you wish to add back to the course outline
6. Any changes will be automatically saved

### Adding an Image to Pages using CKEditor

1. Navigate to a course and then click on the **Pages** tab inside the course
2. Select the **Add Page** button to create a new page or edit a previous page but clicking the "Edit" or pencil icon
3. Under the **Content** field, click or drop an image to upload the picture
4. The uploaded file will appear on the right side of the **Upload** field
5. Copy the URL that appears under the image
6. Place your cursor in the section of the page where the new image is to be placed
7. Click the **Image** button, and a pop-up of **Image Properties** will appear
8. Under the **Image Info** place the copied URL in the URL field
9. Fill in the settings if you wish to alter the dimensions of the image
10. Click **OK** to save the image properties
11. The image will be automatically placed into the content of the page
12. Click **Save** to save the new image and preview the image in the course's page

# Events

## Overview

Do you have an upcoming event that you would like to share with other Hub users? The Events component allows you to share planned social occasions through a community calendar. Events can include conferences, meetings, seminars and specific categories specific to your community.

**Note:** Users must first log in to the hub in order to create or delete an event.

## Creating an Event

1. Navigate to <https://yourhubname.org/events>
2. Select **Add an Event** located on the right-hand side
3. Select the category of the Event:
  1. **General:** an event that is the broadest category for events.
  2. **Workshop:** an event that is a clinic for users.
  3. **Seminar:** an event that hosts a speaker or presentation.
  4. **Meeting:** an event similar to conferences.
4. Fill in the title of the event along with a description about the event and whom the event pertains to
5. Fill in the location of the event, the website/url that pertains to the event or where event information is stored, and add tags to connect the event to tag topics
6. Set the date and time of the event using the drop down calendar from the boxes. An event can last multiple dates as an expanded time frame. The time span of the event is calculated in military time
7. Select the time zone that the event is held in for this helps set up the time frame of the event for users in different time zones
8. Click **Save** to add the event to the Hub calendar

### Deleting an Event

**Note:** A user can only delete events they submitted.

1. Navigate to **<https://yourhubname.org/events>**
2. Select the event that is to be deleted
3. On the overview page of the event, select **Delete**
4. The event will be deleted automatically from the calendar on the Hub

# Feed Aggregator

## Overview

The Feed Aggregator is a component which allows feed managers to collect articles from several RSS feeds and to selectively combine them into one site-sponsored RSS feed.

**Note:** The feed aggregator controls are only available to hub managers. Hub users can access the feeds, but cannot create or add to the feed.

## Accessing the Feed URL

1. Navigate to **<https://yourhubname.org/feedaggregator>**
2. To view the feed URL, click on the **Generate RSS Feed** button
3. The aggregator link will be generated into a pop-up box with a blue highlighted link
4. Copy the link into any readers that accept RSS feeds as input

# Forum

## Overview

A forum, or message board, is an online discussion area where people can hold conversations in the form of posted messages.

Forums have a specific set of jargon associated with them; e.g. a single conversation is called a **thread** or discussion.

A discussion forum is hierarchical or tree-like in structure: a forum can contain a number of sections, each of which may have several categories. Within a forum's category, each new discussion started is called a thread, and can be replied to by as many people as so wish.

**Note:** Users must be logged in to the hub in order to participate in the forum.

## What is a section?

Sections are a way to organize or group related categories (topics). By default, sections are sequenced alphabetically by title.

## What is a category?

Forum categories are a simple way to group related threads or discussions together. When a category is locked, no new threads may be created within that category. Typically, a locked category will be indicated as such by a padlock icon.

## What is a thread?

A thread (sometimes called a discussion) is a collection of posts displayed from oldest to latest. A thread is defined by a title, an additional description that may summarize the intended discussion, and an opening or original post (common abbreviation OP, which can also mean original poster), which opens whatever dialogue or makes whatever announcement the poster wished. A thread can contain any number of posts, including multiple posts from the same members, even if they are one after the other.

### Creating a Thread

1. Navigate to **<https://yourhubname.org/forum>**
2. Select a category under which to create a new discussion thread
3. Once the category has been opened up, click **New Discussion**
4. Next, enter content into the fields. Only required fields must be filled in
5. Select the **Make discussion sticky** option ensures that the thread will appear at the top of the threads listing, regardless of age
6. Select the **Closed thread (no new posts)** option to disallow any new posts from the new discussion
7. The category that was chosen previously will appear in the drop-down. To change this, choose another option
8. Next, add a title, such as the question or main topic of the new discussion thread
9. Insert the main content in the **Comments** field. Use CKEditor to add to the text. Then, enter tags or key words that can connect the discussion to other parts of the Hub in the Your Tags field
10. To attach a file to add outside sources to the new discussion thread, click **Browse** and select the file. A description of the file is optional
11. Select the **Post Anonymously** option to keep your name from appearing in the thread. Then, click **Save**

### Editing a Thread

1. Navigate to **<https://yourhubname.org/forum>**
2. Select a category
3. Once the category has been opened up, click the **Edit** (pencil) icon next to the discussion thread
4. After editing, click **Save** to save changes
  1. **Note:** Only the discussion thread creator can edit it.

### Adding a Comment

1. Navigate to **<https://yourhubname.org/forum>**
2. Select a category
3. Once the category has been opened up, choose a discussion thread to comment on
4. Enter the comment content into the **Comments** field
5. Enter tags (keywords) into the Tags field, if applicable
6. Select the **Post Anonymously** option to keep your name from appearing in the thread.  
Then, click **Save**

# GeoSearch

## Overview

GeoSearch is a world map that provides pin points where members, jobs, events, and organizations are located. These organization and member pins are only created when a user adds the address or location point of their organization and makes their profile private. Job and event pins are created when the creator of the job or event makes the content public on the Hub. This feature allows users on the Hub network with users around the world and view potential organizations, events, and/or jobs near them.

## Pinpoints

These pinpoints are all the available locations and items available from the Hub. Users can filter out different pins by unchecking the boxes on the right of the map.

- **Organizations:** organizations on the Hub, their location is pinpointed on the map for display only.
  - **Members:** members currently logged into the Hub, can view the member's profile if they have made their profile public and the organization field filled out.
  - **Jobs:** available positions posted from the Hub, links to the job posting are available at the bottom of each pin.
  - **Events:** events posted on the Hub, each event pin has a link to the main event page from the pin
- These pinpoints are all the available locations and items available from the Hub. Users can filter out different pins by unchecking the boxes on the right of the map.

# Groups

## Overview

Groups are a way to connect people with a common interest. They are also an easy way to share content and conversation, either privately or with the world. Group members can:

- Post content that only other group members are allowed to see.
- Export their content to other web sites, and brand it with their own logo.
- Upload a group logo and use it as the group identity.
- Create events on the group calendar that only group members can attend.

## Managing Groups Overview

## Creating/Deleting Groups

### Creating a Group

**\*\*\* All registered users can create a group on the hub.\*\*\***

1. Log in to the Hub
2. Navigate to <https://yourhub.org/groups>, then click the **Create a New Group** button
3. On the **Create a New Group Page**, first fill in the **Group ID** which is the group's name that is in the URL
4. Fill in the group's title or the name of the group that user's will see
5. Fill in tags to connect your group with words to make it easier to find using Hub searches. A tag is like a subject, keyword, or category
6. Create the public and private group descriptions. The public description will allow any users of the Hub view a brief overview of the group. The private description will allow group members understand any group goals or concepts
7. Under **Membership Settings Join Policy**, select the button next to the access level you would like to give to members:

- a. **Public:** Any user on the Hub can join the group.

- b. **Restricted:** Qualifications are given that predetermines who can join. These restrictions have to be added into the credentials. The group manager must approve these group members.
  - c. **Invite Only:** A group manager has to send an invite any new group members to the group.
  - d. **Closed:** No one can join the group unless they are added from the back-end of the Hub.
8. Under **Privacy Settings**, select a discoverability setting for the group:
  - a. **Hidden:** A hidden group is not listed on the front-end of the Hub, and any content is unavailable to any user that is not a member of the group.
  - b. **Visible:** A visible group can be found on the Hub through regular searches.
9. Set access permissions for each tab by using the drop-down to select who can access or control each component in the group
10. For the **Group Email Settings**, check the box to automatically subscribe new group members to the group email thread or discussion thread
11. Once all the group's content has been filled in, then save the new group by clicking **Save Group**. Once the initial group has been saved, pictures and files can be uploaded to the group

## Deleting a group

**\*\*\*To delete a group you must be the manager of the group and the sole member.\*\*\***

1. Log in to the frontend of the Hub and locate the group that is to be deleted and click the group title to open into the home page
2. On the group home page, hover over the **Group Manager controls**
3. In the drop-down, select **Delete Group**

## HUB USERS

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4. You will be taken to a page to confirm all items in the group that will be lost
5. The group will be permanently deleted from the Hub

# Member Functions

## Inviting Users

Group managers can invite both hub users and unregistered users to join their group.

1. From the **My Groups** section on your **Dashboard** page, select the group
2. Click the **Members** tab, and then click **Invite Members**
3. Type in the name of the user you would like to invite (notice that the auto completer assists in finding already register hub users) or the email address of the person
4. You may include a message with your invitation in appropriate box
5. Click **Invite** and they will receive the invite in their email

## Assigning Group Member Roles

1. Navigate to the main group page and click on the **Members** tab
2. Click **Add a New Member Role** button to create a new membership role

3. Add a role title in the text box and check the boxes next to the permissions that you want to have the new role to have, then click **Save**

4. Click on the **Assign Role** link and in the pop-up change the membership status in the drop-down

5. Click **Assign Role** to save the new membership role

### **Promoting/Demoting a Group Member to Group Manager**

Groups can have multiple managers. As a group manager, you can promote other group members or demote other managers depending on the level of permissions they need in order to provide for the group.

## HUB USERS

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1. Go to the main group page and click on the **Members** tab
2. Locate the member and find the arrow button to the right of the member's name
3. The arrow will point up if the member is a regular group member and the arrow will point down if the user is a group manager
  1. To Promote a Group Member: Click the arrow button that is pointing up

2. To Demote a Group Manager: Click the arrow button pointing down

3. These changes in status will be automatically saved

**Note:** Giving another user manager access will give them the ability to promote/demote others, including you! Be sure to only give trusted users this access. You can alternatively create and assign roles which will give some extra management permissions. See **Assigning Group Member Roles**

## Customization

### Customizing a Group's Look

1. On your main group, click on **Group Manager** and click on **Edit Group Settings**
2. Use the box on the right side of the page to upload a photo. Choose that photo from the drop-down box in the **Group Logo** section
3. Specify access to individual tabs within the group in the **Group Access** section by selecting the desired option to the right of item in the list
4. Click **Save Group** to save your changes
5. To customize all the group pages at once, click on **Manage Group Pages** in the **Group Custom Content** section. This will take you different interface away from the group customization area, please save all other changes before making this customization

### Customizing a Group's Calendar

Users can subscribe to a group calendar two separate ways:

1. [Download](#): They can download a group calendar of events and import that into their calendar off the HUB.
2. [Subscribe](#): They use a calendar application such as iCal or Outlook to subscribe to the group calendar.

### Downloading the Group Calendar

To download a group calendar, navigate to a group's calendar tab. If you scroll down, under the calendar of events you should see a box titled "Subscribe", which looks like the image below

Here you can pick which of the group calendar's you want to download. After you have made your choices simply click the *Download* button. A iCalendar file (.ics) will be downloaded by your browser, which you can then import into any calendar application with iCalendar support.

[Here is a list of applications with support for iCalendar files \(.ics\) ?](#)

### Subscribing to the Group Calendar

Subscribing to a group calendar has 1 major benefit over downloading a group calendar; changes made to the group events on the HUB are reflected in the subscribers calendar.

To subscribe to group calendar follow the same steps described above to download a calendar but instead click the [Subscribe](#) button. This will open the default calendar application on your calendar with a dialog box asking if you would like to subscribe to this calendar. If the groups calendar access setting is restricted to Registered HUB Users or Group Members, you will also be prompted for you HUB login and password.

### Subscription FAQs

- [Can I subscribe with Google Calendar?](#)

#### 1. Can I subscribe with Google Calendar?

Currently Google Calendar doesn't support private or authenticated calendar subscriptions, which is good for the security of your data, but bad if you like having all you calendars in one place. Only if a group's calendar access setting is set to [Any HUB Visitor](#) will users be able to subscribe with their Google Calendar. This setting can be changed at anytime by any group manager, in the group customize interface.

An alternative for Google Calendar users is that they download and import a group calendar following the steps described above.

## Customizing Group Pages

### Managing Group Pages:

1. Log in to the frontend of the Hub and access a Group that allows users access to managing pages in the Group
2. Hover over the down-arrow, next to the **Group Manager** button
3. Select from the drop-down the **Manage Group Pages** button
4. From there you can manage all of the pages inside of the Group

### Creating a Group Page:

1. Log in to the frontend of the Hub and access a Group that allows users access to managing pages in the Group
2. Hover over the down-arrow next to the Group Manager button
3. Select from the drop-down the Manage Group Pages button
4. On the Manage Pages tab, click on the New Page button
5. Fill in the title into the title field and alias into the alias field for the new page
  1. Note: Page alias' can only contain alphanumeric characters and underscores. Spaces will be removed.
6. Then, fill in the content of the new page in the content text box
7. Select the publishing settings status from the drop-down:
  1. Published- the page is available on the Hub's frontend
  2. Unpublished- the page is unavailable to the Hub's frontend but can be accessed still by the creator and on the backend of the Hub
8. Select the privacy settings from the drop-down:
  1. Inherits overview tab's privacy setting- The previous setting of the overview tab also is enabled for this page
  2. Private Page- Accessible to only members of the Hub
9. Underneath the Settings, select a category from the Category drop-down, and the settings you want for Comments from the drop down
10. Click Save Page to save the new page and the newly added content

### Embedding PHP or Javascript Code in a Group Page (advanced feature):

It is possible to insert PHP or Javascript Code into a Group page to allow more flexibility when constructing a page. This is a feature meant for developers to provide advanced capabilities the page. Due to security considerations, a page approver must be assigned on the administrator Group interface under "Options". This is a textbox that is expecting a comma separated list of usernames who will be messaged when a page containing PHP or Javascript code is submitted. Until the page is approved, the previous version will be displayed or a message indicating the page needs to be approved, if there exists no previous version.

### Editing a Group Page:

1. Log in to the frontend of the Hub and access a Group that allows users access to managing pages in the Group

2. Hover over the group management button
3. Select from the drop-down the **Manage Group Pages** button
4. Inside of Manage Group Pages, select the **Manage Pages** tab and then locate the page that needs editing
5. Click on the arrow next to the page's **Manage Page** button
6. From the drop-down select **Edit Page** to begin editing the page's content
7. Edit the content inside of the group page and then click **Save Page** to save the newly edited content

### Deleting a Group Page:

1. Log in to the frontend of the Hub and access a Group that allows users access to managing pages in the Group
2. Hover over the down-arrow next to the **Group Manager** button
3. Select from the drop-down the **Manage Group Pages** button
4. Inside of Manage Group Pages, select the **Manage Pages** tab and then locate the page that needs deleting
5. Click on the arrow next to the page's **Manage Page** button
6. From the drop-down select **Delete Page** and the page will automatically be removed from the group and the Hub

### Creating a New Page Category:

1. Log in to the frontend of the Hub and access a Group that allows users access to managing pages in the Group
2. Hover over the down-arrow next to the **Group Manager** button
3. Select from the drop-down the **Manage Group Pages** button
4. Navigate to the **Manage Page Categories** tab
5. Click on the **New Page Category** button and then fill in the title and select the color for the new category
6. Click **Save Category** to create a new category

### Editing a Page Category:

1. Log in to the frontend of the Hub and access a Group that allows users access to managing pages in the Group
2. Hover over the down-arrow, next to the **Group Manager** button
3. Select from the drop-down the **Manage Group Pages** button
4. Navigate to the **Manage Page Categories** tab
5. Locate the category that needs editing and by the **Manage Page Category** button click the arrow

6. From the drop-down select **Edit Page Category** and then edit the content inside of the page category
7. Click **Save Category** once finished to save the newly edited content

### Deleting a Page Category:

1. Log in to the frontend of the Hub and access a Group that allows users access to managing pages in the Group
2. Hover over the down-arrow, next to the **Group Manager** button
3. Select from the drop-down the **Manage Group Pages** button
4. Navigate to the **Manage Page Categories** tab
5. Locate the category that needs to be deleted and by the **Manage Page Category** button click the arrow
6. From the drop-down select **Delete Page Category** and the page category will be automatically removed from the group and from the Hub

### Group Forum: Digest Emails

Group members have the ability to receive emails from the group forum. The group member can be emailed every time another member creates a new post in a forum. Each group member can manage their own settings so they receive new posts in the group.

1. Navigate to the main Group page then click on the **Forum** tab
2. Inside of the Group Forum, locate *Email Settings* and click on **Change your settings**
3. In the pop-up determine the preferred email setting by clicking the check box next to *Email me about new posts in this group*
4. Then, select the radio button next to the preferred emailing time frame of receiving group forum emails **Individually as new posts are made** or **As part of a (Daily, Weekly, Monthly) digest email**
5. Click **Save** to save the email setting changes

# Group Citations

## What is a group citation?

Within a group, a citation is a listing of a product resulting in work done by a group or a group member. As a group manager, you can choose to display citations curated by a group manager-only or citations that were produced by members of your group.

## Why am I being redirected to the settings page?

If you are a **group manger**, the plugin needs to know a few things before you start using it such as which citations to show, whether or not to show badges or tags, enable COinS, and which citation format to use. Make your selections and then click **Save**. You will be redirected to the following page to get started using.

## Okay I saved my settings, what do I do now?

If you selected **Display group-attributed citations only** within the settings page, you start off with a blank slate. You can manually input your citations through a form or you can import supported file formats (currently BibTeX or EndNote).

## I do not like the exiting citation formats, how do I make my own?

Your group is allowed one custom format. You can create it by going into the Settings page, and selecting *Custom format for the group*. The textarea will preserve the previously selected format in case you would like to do not want to start from scratch. If you want to start from scratch, simply delete the existing text and enter the *Key* of the field you want to insert. You can do this by either manually typing it the key into the textarea or simply click on the row corresponding to the key/value you would like to insert.

## Alright so I have entered or imported at least one citation, why is it yellow?

When you import or manually enter a citation, it immediately goes into an unpublished state, meaning that anybody who is not a group manager cannot see the entry. You can **publish** the

citation by clicking the publish button next to each individual citation or click the checkbox next to each citation you would like to publish and click **Publish selected citations**.

Once you publish a citation, the yellow background will disappear and it shall be counted in the total number of citations for that group.

### So what can I do with citation entries as a group manager?

- a. You can do three things:
  - i. Publish & Un-publish entries
  - ii. Edit entries
  - iii. Delete entries
    - i. Delete puts the citation in the **trashed** status – meaning it is NOT fully deleted. A Hub Admin can only fully-delete the entry. If you accidentally delete a citation from your group, you can contact the hub administrator to republish your citation.

### A citation is listed, but I do not have the ability to edit, delete, or unpublished it. Why not?

You have enabled the **Display group-attributed and group member-attributed citations** option. The entries that do not have the permission to publish or un-publish belong to a group member.

### What is a COin?

COinS (ContextObjects in Spans) is a simple, ad hoc community specification for publishing OpenURL references in HTML. In simpler terms, it is a method for embedding OpenURL data within a HTML page. There are plugins and other tools that can help locate the cited work in full-text in available areas on the Internet.

### How do I associate an author of a citation with a Hub User's profile?

Within the edit form under the *Author(s)* field, the editor simply needs to start typing the

## HUB USERS

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member's **full name** or **username** and click the Add button. The autocompleting field should show the user's name and ID number to confirm the correct selection has been made. Once the association has been made, the user's name will appear in the entry as a link which will direct itself to the member's profile.

# Group Forum

## Forum Email Digest

On each Hub there is a way for users to receive daily/weekly/monthly digest emails containing all of the posts that have been made inside of a Group's Forum. To sign up to receive these emails, follow these steps:

1. Navigate to a group your choice and click on the **Forum** tab
2. Inside the **Forum**, locate the right column on the page and locate the **Email Settings** area
3. Click on the **Change your settings** link and from the pop-up manage your email settings
  1. First, check the box next to "Email me about new posts in this group and send me those emails..."
  2. Secondly, select the way in which you want to receive forum posts by selecting "Individually as new posts are made" or "As part of a (Daily, Weekly, or Monthly) email digest"
    1. **Note:** To determine the frequency, select the time frame (i.e. daily, weekly, or monthly) from the drop-box
4. After managing your settings click **Save**

# Help and Support

## Overview

If a hub user is having difficulties, or a component is not behaving correctly, a user can submit a ticket addressing the issue, and the HUBzero team will work on fixing the issue as soon as possible.

## Support

This component allows users to find content, gain community help, and receive support. The support component can be accessed through the ? icon on every page or through the Hub dashboard.

## Tickets

Users can create tickets when they experience a problem on the Hub that is not answered in Questions and Answers or Knowledge Base. Tickets are ways to report bugs or issues that they experienced with the Hub.

## Submitting Tickets

There are several different ways to submit a support ticket. You can select the ? icon found in the upper corner of a Hub, which will drop-down a support ticket form. Or, you can navigate to **/support/tickets/** and click submit a ticket from the **Support** page.

Submitting a Ticket from Any Hub Page:

1. On the page where you discovered a bug, select the ? icon
2. The support component will drop down; fill out the required fields with detailed information about the issue, question or request, to help the Hub support team understand the problem you are currently experiencing
3. Attach a screenshot of the issue or the area you have a question about or change request
  - a. **Hint:** Make sure that you include the URL in the screenshot. This helps the support team locate the issue faster and see what is wrong
4. Submit the ticket, and then you will be able to see your ticket in the **Tracking Ticket System** or in **My Tickets** on your account dashboard

Submitting a Ticket from Support:

1. Navigate to **/support/tickets**
  1. You will be prompted to **Login** with your Hub account
2. Click the **New Ticket** button
3. Fill out the required fields with detailed information about the issue, request or question you have
4. Attach a screenshot of the issue or the area you have a question about or change request
  - a. **Hint:** Make sure that you include the URL in the screenshot. This helps the support team locate the issue faster and see what is wrong
5. **Review** your ticket and then click **Submit**

6. Once your ticket has been submitted you can click **New Report** to submit another ticket
7. Track your tickets in the **Tracking Ticket System** or in **My Tickets** on your account dashboard

### **Terse Ticket Comment Emails**

**Note: Only Hub Administrators and Support ACL can control this feature**

If your Hub is HIPAA certified or you are currently stripping out information from your support ticket emails, Hub administrators and members of the ACL can manage what comments they post and how much information is sent in email from each posted comment.

As a Support ACL member or Hub administrator, you will be able to see a "Terse" check box under each comment you post.

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If the box is unchecked, the recipient(s) of the ticket comment will receive an email containing the ticket number and the entire comment that was posted. If the box is checked, the recipient(s) will receive an email only containing the ticket number and the following statement, "A new ticket comment has been submitted. Visit the support center to view details."

If your Hub has the [Enabling Privacy/Minimal Information Mode in Support Emails](#) turned on in the /administrator interface, then the Terse checkbox will be automatically checked for each comment posted by Hub user and ACL/Administrators, but ACL/Administrators will be the only ones who can uncheck the box.

# Knowledge Base

## Overview

The knowledge base is a searchable component which houses helpful articles and frequently asked question. Users can search keywords to find articles.

## Finding an Article

1. From the hub homepage, click the question mark and then selecting **Knowledge Base**.  
Alternatively, navigate to the URL **<https://yourhubname.org/kb/>**
2. Search for the article by typing in key words in the search bar
3. Once found, click on the title of the article to view

# Members

## Overview

A Member Area is each individual user's space within the Hub. Your member profile contains many sections including your dashboard, your profile, a wiki, a blog, and many more. Each member has the ability to use or not use each of these sections how they want. Some of the more important sections will be discussed in more detail below.

# Dashboard

## Member Dashboard

The Member Dashboard section is the user's landing page after logging in successfully. It has a number of modules that contain items for easy access, for example the **My Sessions** module which lists any of your current tool sessions and also shows your storage space usage.

## Personalizing Your Dashboard

You have the option to personalize your Dashboard by adding, removing, or rearranging modules. This customization feature allows you to fit the Dashboard to your personal needs. Once it has been personalized, it will appear how you arranged it at each login.

### To add a module to your Dashboard:

1. Place your mouse pointer on the **Add Modules** button in the upper right hand corner of the screen. This button allows you to add a module
2. A box will appear with a list of modules available. Click the **Install Module** button next to the module you would like added to your Dashboard
3. After clicking **Add**, the new module will appear on your dashboard

### To remove a module to your Dashboard:

1. Place your mouse pointer over the upper right hand corner of the box, and click the **X** that appears
2. A **Remove** button will appear. Make sure to click the Remove button to confirm the removal

### To rearrange your modules:

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1. Place your mouse on the top of the module you wish to move until a cursor appears
2. Press and hold down the button on the mouse or other pointing device to grab the module
3. Drag the module to the desired location, and drop it by releasing the button

# Profile

## Member Profile

The Member Profile section contains specific details about the user, ranging from their name to email address, phone number, and personal website.

## Editing Your Profile

The Member Profile has a new **edit in place** feature to help users edit their profile easier and faster. To edit your profile, first navigate to your Member Profile. You should see a screen similar to the picture above. Simply click on the edit link along the right side of any profile field to start editing that field. A hidden pane should slide down and you should see fields to edit that specific field of your profile. This is also where you can set the privacy level for that specific field. When you're done editing, click the Save Button and your profile will be updated. Clicking the Cancel Button will disregard your changes.

## Profile Privacy

All Member accounts on the HUB are created with a default privacy setting of **Public**. Users can make their profiles more private by editing their profiles. Under each section of their profile that

they don't wish to publicize, they can click the **Edit** and change the **Privacy** to **Public**, **Registered**, or **Private** from the drop-down.

- Privacy settings:
  - **Public:** All visitors to the Hub who are logged in or not logged in can see this information
  - **Registered:** Only registered users who are logged into accounts can see this information
  - **Private:** Only the owner of the profile can view this information

### Uploading/Updating your Profile Picture

All Member accounts on the HUB will be created with a default Profile Picture that is a silhouette. To edit your Profile Picture, first navigate to your Member Profile. You should see a semi-transparent black button over your current Profile Picture that says **Change Picture**. Clicking that link will bring up a popup to upload a new photo or remove your current one (if its not set to the default silhouette).

To Upload a new picture click on the black button that says **Upload an Image**. Your computer should display a file browser to select an image. After you select an image the file will be automatically uploaded and once complete should be displayed in the preview area within the popup. If you are happy with the newly uploaded image click the **Save Changes** Button and your profile should refresh with the new profile picture set.

*\*\*Note: You will see your profile picture on every section of your Member area, but you must navigate to the Profile section with your Member area first in order to upload, update, or remove your profile picture.*

# Projects

## Overview

**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 into 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 manager for the 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**. 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

5. Click on the word **delete** in that phrase
6. Click **Yes, Delete** to verify that you intend to permanently remove the project
7. 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, locate 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**

### Projects: How do you connect Google Drive in a Project?

**Note:** The creator of the project must connect their Google Drive prior to others adding on their Google Drives to the project.

1. Navigate to **<https://yourhub.org/projects>**
2. Access the project that you wish to add your Google Drive to
3. ?Inside of the project access the **Files** tab and locate the **Connect** button
4. Click the **Connect** button and then click the second **Connect** button, which will redirect your page to Google
5. If you have already logged on to Google with an account, Google will remember that account. If you wish to login with that account confirm the message that "Hubzero would like to: Have offline access". Click **Accept** to confirm
  1. ?**Note:** If you do not wish to login with that account, you will have to log out of Google and sign in with a different account. Then repeat the steps above
6. Then you will be relocated back to the project confirming your Google Drive connection to the project
7. If you have other team members in your project, they will be able to connect their Google Drives to the project now

### Projects: How can I view file history in Projects?

Each project comes with a [Git](#) repository to store your files and data. With this comes a built-in web file browser, which reads the repository and allows to do multiple-file uploads, delete, rename and move files around, compile LaTeX files into PDF, as well as view file history, diff revisions and download all previous versions. In addition, we are now working on a solution for you to use the full power of Git for advanced file management through direct Git commands.

To view file history, click on the date in the **Modified** column in the Files area. This will show you the history of the file, and any previous versions if they have been uploaded.

### Projects: What are “My To-Dos” in Projects?

Inside of Projects there is a special feature where tasks can be posted and assigned to members of the project. On the right side of the page under the lists of to-do's are the **My To-do's**. This is the list of all to-do lists assigned to you. The default to-do list is a list of all to-do's inside of the project. You will see your personally owned to-do lists by clicking on **My To-**

**do's**. To add a new to-do list, simply click on **Add**. When you create a new to-do item, you can choose from the list any of the to-do lists you created. You will not be able to add to **My To-do's** because this is a default list that is automatically populated with to-do items assigned to you.

### **Why does my file say N/A in my Project files?**

It defaults to N/A if no timestamp is found. Whatever command it's using to retrieve the timestamp is either not returning it or not returning it in a way the PHP code is expecting.

# Project Files

## File Quota Usage

Every Project that is created is given a specific amount of GB for files and databases. To check on the usage of quotas follow these steps:

1. Navigate to your Project and click on Files
2. At the bottom of the Files page, click on the bar labeled Disk Usage
3. You will be taken to a page that breaks down the amount of space you have left and the space that has been used by uploaded files

Now, if you are apart of a larger project and would like to request a quota increase for your project, then follow these steps:

1. Navigate to the frontend of the Hub and in the URL address bar of your browser type in (<http://yourhub.org/support/tickets>)
2. Inside the Support system, click on New Ticket located in the upper right of the screen
3. In the ticket fill out this information:
  1. Name:
  2. Project Name:
  3. Grant Title:
  4. Grant PI:
  5. Grant Agency:
  6. Grant Budget:
  7. Short Explanation about your Project:
4. Once you have filled out this information, click Submit, then a Support Team member will be in touch

## Project File Connectors

Hubzero allows for files to be shared either on a repository owned by the Hub or connect to other file management platforms. Project File Connectors allow for these third party file management systems to enable files uploaded on the Hub yet stored in their system. Follow these instructions to set-up and provide Project File Connectors to your users:

1. Navigate to the third party file management system of your choosing, such as **Google Drive** or **Dropbox**
2. Set-up either a new project or application and fill in information about the Hub in order to obtain an **API key** and **API secret** upon saving
3. Make sure you set the callback address to your Hub and indicate the appropriate file system
  1. **Example:** When setting up a Google Drive API connector to redirect to YourHub, the following callback should be used  
- <https://yourhub.org/callback/googledriveAuthorize> (?)

4. Once the **API key** and **API secret** have been created successfully, navigate back to the **/administrator** interface and **login**
5. Hover over **Extensions** and select from the dropdown **Plug-in Manager**
6. Search or locate the appropriate plugin connected to the file system
  1. **Example:** If the file system chosen is Google Drive, one would select the **Filesystem - Google Drive** plugin
7. Click on the title of the plugin and change the status to **Enabled**
8. Insert the **API Key** in the **Client ID** and the **API Secret** in the **Client Secret**
9. Fill in an further information as necessary then click **Save & Close**
10. While still at the **Plug-in Manager**, search for and click the **Projects - Files** plugin.
11. Scroll down until you see an option for **Default Action**, and set it to **Connections (view available connections)**.
12. Navigate to a **Project** you would like to setup a new file system
  1. **Note:** You must be a manager of the Project in order for you to set-up the File System
13. Click on **Files** and then click on **New Connection** and choose the file system from the dropdown
14. Choose to bypass the secondary step of connecting to the same API

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

# Newsletters

## Overview

Keep up with the HUBzero team! Our Newsletter is the place to learn about developing research, new features, and updates on new hubs being rolled out.

## Viewing Newsletters on the Hub

The Newsletters component can be found at <https://yourhub.org/newsletter>. Any newsletters that are set to be public will be available to view on this page.

**Note:** You must be logged in on the hub in order to perform Newsletter functions other than viewing public newsletters.

## Subscribing to a Mailing List

Users can sign up to receive newsletters via e-mail by subscribing to mailing lists. To subscribe to a public mailing list:

1. Navigate to <https://yourhub.org/newsletter>
2. On the Newsletters home page, click **Subscribe to Mailing Lists**
3. Check the mailing lists that appeal to your best interest
4. Click **Save Mailing List Subscriptions**
5. The system will send an email with the subject **Confirm Email Subscription to '[mailing\_list\_name\_here]' on [hubname\_here]** and you must click the given link in the email to confirm your subscription and start receiving newsletters

## Unsubscribing from a Mailing List

1. Navigate to <https://yourhub.org/newsletter>
2. On the Newsletters home page, click **Subscribe to Mailing Lists**
3. Under **My Mailing Lists**, uncheck the mailing list(s) you would like to be removed from
4. Click **Save Mailing List Subscriptions** and you will be unsubscribed from the mailing list(s) you selected

# Publications

## Overview

A step – by – step guided system that walks you through publishing research products, including datasets and white papers. Through Publications, all published research will obtain a DOI, license and go through a curation process before being published. Publications can be published through a Project or as a stand-alone publication on the Hub.

When publishing data through Publications, the primary content is selected first and then the publication is described through a title and abstract. Authors are added and can be modified to determine specific roles such as Submitter and Author. Images and supporting docs can then be uploaded, followed by choosing a publishing license, such as Creative Commons and adding Tags to determine the category of the Publication. Finally, DOIs and release notes can be added before the Publication is fit to be reviewed and submitted for Hub curators to review.

Hub curators are Hub members who have elevated permissions to access all “pending review” publications. Some set-up has to happen before curation can be completed. Curators can review all the parts of the Publication and make notes to areas where further work has to be completed before the publication is officially published. This is a crucial step for once a Publication is published, it will be available for the world to read and cite.

While Publications comes with pre-defined categories, the grouping in which the content is affiliated such as workshop materials, and master types, the content type such as file type, administrators can modify and add new contributable areas specific to their field of interest. Administrators can manage categories and master types from the /administrator interface along with adding new licenses, batch create Publications and manage all drafted to published Publications.

## Publication Through a Project

### Benefits

Creating a publication through a Project has many benefits, including:

- Allows for a consistent team to collaborate on a Publication or set of related Publications.
- Using the Publications feature through a Project allows Databases to be added to a Publication for public viewing.
- Integration with storage mechanisms such as Google Drive.
- Project team members will automatically show in the list of authors to choose from, making it easy to add the same authors to several different Publications.

- Gives related Publications a shared public Projects page that users can view to look at related Publications that were a part of the same Project.

### Creating a Publication Through a Project

1. Navigate to the Project you'd like to use to create a Publication. If you want to view a list of Projects you manage or be able to create a new project go to **<https://yourhub.org/projects>**
2. Click **Publications** on the left menu bar inside the project
3. Click **Start a New Publication**
4. Select the type of Publication you would like to create

### Select the Primary Content

1. Click **Add a File** in the *Primary Files* area
2. From the *Select Files for Publication* area, choose the file(s) that will be considered primary files in your publication. There will be another section for selecting or uploading secondary files. **Note:** If you want to upload a file that has not yet been uploaded to the project, click **Browse**, choose the file, and click **Upload**. Then select it from the list
3. Once the files have been selected, click **Save Selection**
4. Click **Next**

### Describe the Publication

1. Type a descriptive yet concise title in the *Publication Title* text box. Click **Next**
2. In the *Abstract* textbox, provide a short (max 255 characters) abstract for your publication. Click **Next**

**Note:** The *Abstract/Description* textbox should be used to provide the reader information about the publications purpose, and should not be used to deploy the publication's content

3. In the *Publication Description*, describe your publication in detail
4. Click **Next**

### Add Author(s)

1. Click **Select Author(s)** in the *Publications Authors* area

**Note:** If you are adding a Publication from a Project, then all Project team members will be listed.

2. Select the authors by clicking their names
3. Press *Save Selection* to add the authors
4. If you do not see an author listed, click **Add an Author** at the bottom of the section.  
**Note:** You can add an new author by typing their name in the box to look them up (registered hub users), or simple type their information if they do not have an account. Click **Add Author**
5. In the box that appears, ensure the name looks correct and type in the author's institution. Optionally you can provide the author's e-mail address
6. Click **Save**
7. All authors that will listed on the publication will show under *Publication Authors*
8. If you want to change the order which the authors are listed, **click and drag** the author name and move the name up/down the list
9. Once you are satisfied with the list of authors, click **Next** to move to the next step

### Add Gallery Images & Supporting Docs

1. Click **Add A file** underneath *Image Gallery*

**Note:** Accepted image formats are PNG, JPG, JPEG, GIF, and BMP

2. Choose the image from the list of files, or use the Quick Upload option to upload one
3. Select the files, and click **Save Selection**. The images that have been uploaded will be

listed underneath the *Gallery Images* section

4. Repeat the steps to upload supporting docs, but click **Add a File** in the *Support Docs* area
5. Press **Next**

### Select a License

1. Click on the **Choose License** link
2. Select the license, and Press **Save Selection**
3. Click the **Read full license terms** link to review the license
4. After reviewing, check the box next to **I have read the license terms and agree to license my work under the <License Type> License** to confirm you have read it
5. Click **Next**

### Add Tags

1. Type tags into the *Publications Tabs* field
2. Type a comma or press Enter after typing a tag word or phrase to provide additional tags
3. Under **Category** click the radio button next to the Category that best fits the publication
4. Click **Next** to save the tags and move to the next step

### Add Citations to Related Resources

1. If the related resource has a DOI, type it in the textbox
2. A preview of the citation associated with that DOI will appear below
3. If you want to add this citation, click **Add Citation**
4. You can repeat the steps above to add additional citations
5. Alternately, if the citation does not have a DOI, click **Enter Manually** -> fill in the requested information -> click **Save Citation** when finished
6. When finished adding citations to related resources, click **Next**

### Add Release Notes

1. In the text box, you can type in any notes related to this specific version of the Publication
2. Click **Next**

### Review and Submit

1. On the *Publication Review* page you can review your publication
2. You can edit any of the steps by clicking on the link of the section name you want to change (e.g. Description, Authors, Content, etc.)
3. Add a Publication Date to the *Publishing settings*
4. Leave additional comments for administrators when submitting the publication in the Comments area
5. Ensure all publication authors have read the Terms of Deposit, viewable by following the **Terms of Deposit** link, and then select the radio button next to **I an all publication authors have read and agree to <HUB> Terms of Deposit**
6. Click **Submit draft**

### Creating a Stand-alone Publication

**Note:** You must be logged into your HUB account to create a Publication.

There are many benefits to creating publications through a Project (discussed above). However, you can create a stand-alone publication by following the steps below.

#### Start a Publication

1. Navigate to **<https://yourhub.org/publications>**
2. Click **Start Publishing**
3. On the *Publications: Submit* page, click the **Start a new Publication** link

**Note:** You will notice that there is a **Start a new Project** link on this page as well. This tutorial focuses on creating a stand-alone Publication NOT created within a Project, so ensure you use the **Start a new publication** link.

#### Select the Primary Content

1. Click **Publish Files** underneath the **Start a new project** button.
2. Then click **Add a File** in the *Primary Files* area
3. From the *Select Files for Publication* area, choose the file(s) that will be considered primary files in your publication. There will be another section for selecting or uploading

secondary files. **Note:** If you want to upload a file that has not yet been uploaded to the project, click **Browse**, choose the file, and click **Upload**. Then select it from the list

4. Once the files have been selected, click **Save Selection**
5. Click **Next**

### Describe the Publication

1. Type a descriptive yet concise title in the *Publication Title* text box. Click **Next**
2. In the *Abstract* textbox, provide a short (max 255 characters) abstract for your publication. Click **Next**

**Note:** The *Abstract/Description* textbox should be used to provide the reader information about the publications purpose, and should not be used to deploy the publication's content.

3. In the *Publication Description*, describe your publication in detail
4. Click **Next**

### Add Author(s)

1. Click **Select Author(s)** in the *Publications Authors* area

**Note:** If you are adding a Publication from a Project, then all Project team members will be listed.

2. Select the authors by clicking their names
3. Press *Save Selection* to add the authors
4. If you do not see an author listed, click **Add an Author** at the bottom of the section.  
**Note:** You can add an new author by typing their name in the box to look them up (registered hub users), or simple type their information if they do not have an account. Click **Add Author**
5. In the box that appears, ensure the name looks correct and type in the author's institution. Optionally you can provide the author's e-mail address
6. Click **Save**
7. All authors that will listed on the publication will show under *Publication Authors*
8. If you want to change the order which the authors are listed, **click and drag** the author name and move the name up/down the list
9. Once you are satisfied with the list of authors, click **Next** to move to the next step

### Add Gallery Images & Supporting Docs

1. Click **Add A file** underneath *Image Gallery*

**Note:** Accepted image formats are PNG, JPG, JPEG, GIF, and BMP

2. Choose the image from the list of files, or use the Quick Upload option to upload one
3. Select the files, and click **Save Selection**. The images that have been uploaded will be listed underneath the *Gallery Images* section
4. Repeat the steps to upload supporting docs, but click **Add a File** in the *Support Docs* area
5. Press **Next**

### Select a License

1. Click on the **Choose License** link
2. Select the license, and Press **Save Selection**
3. Click the **Read full license terms** link to review the license
4. After reviewing, check the box next to **I have read the license terms and agree to license my work under the <License Type> License** to confirm you have read it
5. Click **Next**

### Add Tags

1. Type tags into the *Publications Tabs* field
2. Type a comma or press Enter after typing a tag word or phrase to provide additional tags
3. Under **Category** click the radio button next to the Category that best fits the publication
4. Click **Next** to save the tags and move to the next step

### Add Citations to Related Resources

1. If the related resource has a DOI, type it in the textbox
2. A preview of the citation associated with that DOI will appear below
3. If you want to add this citation, click **Add Citation**
4. You can repeat the steps above to add additional citations
5. Alternately, if the citation does not have a DOI, click **Enter Manually** -> fill in the

requested information -> click **Save Citation** when finished

6. When finished adding citations to related resources, click **Next**

### Add Release Notes

1. In the text box, you can type in any notes related to this specific version of the Publication
2. Click **Next**

### Review and Submit

1. On the *Publication Review* page you can review your publication
2. You can edit any of the steps by clicking on the link of the section name you want to change (e.g. Description, Authors, Content, etc.)
3. Add a Publication Date to the *Publishing settings*
4. Leave additional comments for administrators when submitting the publication in the Comments area
5. Ensure all publication authors have read the Terms of Deposit, viewable by following the **Terms of Deposit** link, and then select the radio button next to **I an all publication authors have read and agree to <HUB> Terms of Deposit**
6. Click **Submit draft**

### Creating a Database Publication

1. Navigate to a **Project** and click on the **Files** tab
2. Click on **Upload** and then **Upload a CSV** file into the **Project**
3. Navigate to **Databases** tab and then click on **Create a database** button in the upper right hand corner
4. Select the file from the drop-down and then click **Next**
5. Verify the data and then click **Next**
6. Add a **Title** for the database and a **Description** and then click **Finish**
7. Start a **New Publication**
8. Click on **Databases** and then click on the database that you just created and walk through the Publications creation steps to finish publishing the new Database publication

### **Adding a Thumbnail Image in a database field**

- 1) Within the Publication, click **Update the Database**
- 2) Click the **Edit** button on the column you're wishing to display the thumbnail
- 3) Click the Column Type tab and change the type to **Image**
- 4) Check the box **Repository Files**
- 5) Click **Update Column**

# Curation

## Curation Workflow

### Curation: Assign Reviewers to Publications

1. Navigate to <http://yourhub.org/publications/curation> to view the list of Publications pending review

2. Click **Assign** to delegate the task of curation to a member of the HUB

**Note:** *Anyone with an account on the Hub can be assigned to review a Publication. IF the user is not a member of the curator's group, they will only have access to review the Publications which they are assigned. Only ONE curator can be assigned to review a Publication at a time.*

3. Type the name of the member being assigned this Publication in the text box and click **Save**

### Reviewing a Publication:

1. Click **Review** next to a publication to start the review process on that publication
2. All items and context will be listed, Click the **Looks Good** button (the checkmark) next to an item to approve it, or click the **Requires Changes** button (the no symbol) to indicate the item needs changes

## HUB USERS

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3. If the publication has already been reviewed once before, the author may have disputed changes. This will show as a yellow **Changes required** button with the author comments shown on the page
4. If additional changes are needed, type and explanation in the textbook that appears and click **Request Changes**

5. Once all items have been reviewed, click the button that lights up on the bottom blue bar. **Approve Publication** will only appear if all individual items were approved. Otherwise, click **Kick back to authors**

### **Author: Make Requested Changes:**

1. Navigate to the link provided in the e-mail notification that the publication has been reviewed, or go to the Publications list inside the project
2. Click **Make Changes**

## HUB USERS

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3. The areas that require changes will show in red text with an **X** next to the title of the area
4. Requested changes must be made or disputed in order to re-submit
5. Click the **Dispute this** link next to an item in order to dispute a requested change
6. Type the reason for disputing in the text box and click **Save**
7. Once all areas have a checkmark next to them and are either green (Changes were made/no changes required) or yellow (changes were disputed) the **OK to submit** link will appear
8. Click **OK to submit**. Finish providing the requested information and click **Re-submit draft to be published**
9. The reviewer will now be able to view all changes or disputes

# Managing Publications

## Managing Documents on a Publication

Primary documents for a Publication can be added by clicking on the **Add a File** button. Find the files from your computer by clicking on **Choose Files** then click **Upload**. Once the files have been uploaded, select the files (your selection will be confirmed with a green check mark), then click **Save**. Your files will be successfully uploaded to the Publication.

To remove files from a Publication, hover over the file that needs to be removed and locate the **Trash** icon that pops up to the right of the file. Click the **Trash** and the file will disappear from the file list.

# Questions and Answers

## Overview

The Questions and Answers area of the Hub is a place to exchange knowledge about things that are not found in the Knowledge Base. Ask a question that's relevant to your community or help other users by providing an answer to their questions.

**Note:** You must be logged in on the Hub in order to perform Questions and Answers functions other than reading posted questions and answers.

## Submitting a Question

1. Navigate to **<https://yourhub.org/answers>**
2. Click on **New Question**
3. If you do not want your name to appear as the person who posted the question, click the box for **Post a question anonymously**
4. Add tags for searches to locate your question or other related questions
5. Ask a brief question in the **Short question** field. You may add more details under the **Long question** field
6. Once completed, click **Save** and your question will be posted in the hub's Questions and Answers section

## Answering Questions

1. Navigate to **<https://yourhub.org/answers>**
2. Click on the **Everything** tab to view all questions on the Hub
3. Search for questions to answer by using keywords or tags to locate the question. Click on the question that you would like to answer
4. Click on **Answer this question**
5. Fill in your response. If you do not want your name to appear as the person who posted the answer, click the box for **Post response anonymously**
6. Submit the answer by clicking **Save**

## HUB USERS

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# Registration

## Overview

Registration is a way for community members to submit identification records to the Hub in order to gain access to the site. Common requirements are to state a name, username, choose a secure password and validate an email address. Once registered, community members can become Hub users with the ability to submit content on the Hub.

## Creating an Account on a HUB

1. Navigate to the front page of the HUB (e.g. <https://yourhub.org/>)
2. Click the **Register** link
3. Under the *Login Information* section, provide a username in the **User Login** textbox. It can only contain lowercase letters and numbers. No spaces or punctuation can be used in the username
4. Press tab or click to the **Password** textbox. If the text that appears below **User Login** states that the User login name is not available, then repeat the previous step with a different username
5. Provide a password in the **Password** textbox. Ensure it follows the list of rules mentioned below the **Password** textbox
6. Repeat the same password in the **Confirm Password** textbox

7. Under the *Contact Information* section provide a name in **First Name, Last Name** textboxes
8. Provide a valid e-mail address in the **Valid E-mail** textbox

**Note:** The e-mail address must be valid since a confirmation e-mail will be sent that has an activation link that must be used to activate the account

9. Under the *Receive Email Updates* section, select from the drop down on whether or not to receive email updates from the HUB
10. In the *Human Check* portion, type the characters shown in the image in the textbox directly below the image. If the image didn't appear or is unclear, click the **click to renew CAPTCHA** link to refresh
11. Under *Terms & Conditions* click the **Terms of Use** link to open and read the terms. Check the box provided to indicate agreement to the terms
12. After verifying all information provided is correct, click **Create Account**
13. Check the inbox of the e-mail provided for the confirmation e-mail
14. Navigate to the activation link provided in the e-mail. Provide the account credentials when prompted to login. Once logged in, the account will be successfully activated

# Resources

## Overview

Ask yourself if you would search the web to find the information you have and if it is relevant to your Hub community. If the answer is “yes” (Oh boy! Another tech report!) then put them up as a Resource for your community to enjoy. Some tech reports can be a goldmine of good information. If these are not your own tech reports, seek permission from the original authors before posting them—perhaps just a simple email exchange letting them know what you’re planning to post and asking their permission. As you upload each report, be sure to copy the abstract into the resource description so users can see at a glance what the report is about. Credit the authors of the report as authors of the resource; remove yourself from the list or give yourself “contributor” status if you had nothing to do with the original report. Give each report good tags, so users browsing the tags can find related work. But if you consider the question about the utility of this content more carefully and the answer is a weak “maybe,” then upload a few reports or move them lower in your priority queue. If the answer is “no,” then skip them.

## Resource Default Types

Users may contribute many types of resources. The type of Resource a user can contribute will vary from Hub to Hub, yet the default resource type list includes:

- **Courses:** University courses and short courses with lectures and associated teaching materials.
- **Downloads:** Spreadsheets and other items that are available for download but don’t fit into other categories.
- **Publications:** Articles, technical reports, theses, and other documents, usually in PDF or DOC format.
- **Seminars:** A type of lecture, usually recorded with voice or video.
- **Series:** Collections of lectures, publications, and other resources presented as a list.
- **Teaching Materials:** Supplementary materials such as study notes, guides and other documents that are used in training or teaching.
- **Tools:** Simulation and modeling tools that can be accessed via a web browser.
- **Workshops:** A collection of lectures, seminars, and materials that were presented at a workshop.

### What is a Parent Resource versus a Child Resource?

In any filing system, a naming device is used to explain the main files and their subfiles. The main file is the Parent to all of the subfiles within that folder. These subfiles are called Children. At Hubzero, we use this standard naming device to describe the relationship between Resources and Sub-Resources. The main resource is the Parent and any sub-resources that are directly placed under the Parent are called child or children resources.

### Creating a Resource

**Note:** You must be logged in to your HUB account to create a Resource.

#### Starting a Resource

1. Navigate to <https://yourhub.org/resources/>
2. Click **Submit a Resource**
3. Click **Get Started**
4. On the *Resources: New* page, click on the type of Resource that closely matches the Resource being submitted

#### Step 1: Compose

1. Under *About*, provide a title in the **Title** textbox
2. In the **Abstract/Description** textbox, provide a description of the contribution. This is typically one or two paragraphs
3. Images can optionally be included within the **Abstract/Description** textbox:

1. Under *Manage Files* click **Choose File**

**Note:** This is NOT where the main Resource file(s) are uploaded. That is done during the next step: Attach.

2. Locate the image to include and click **Open**
  3. Click **Upload**
  4. A URL of the image will appear under the *Manage Files* section. Copy this URL
  5. Click into the **Abstract/Description** textbox so that the text cursor is located where the image should appear
  6. On the text editor menu for this textbox, click the image icon
  7. Paste the copied URL of the uploaded image into the **URL** textbox
  8. Click **OK**
4. Under the *Details* section, provide any additional information in the relevant textboxes. These fields will differ depending on the type of Resource
  5. Click the **Next** button below to save a continue to the next step

### Step 2: Attach

1. Under *Attachments* a file or add a link can be added
2. To upload a file, click on the **Click or drop file** box
3. Select the file to attach and click **Open**
4. Alternately, drag and drop the file from the your computer into the **Click or drop file** box
5. When the file has successfully uploaded, it will show underneath *Attachments*
6. To add a link click the **Click to add link** button
7. Provide the URL of the link and click **OK**
8. To rename files or links, double click on the name that currently shows, provide a new name, and click **Save**
9. To change the access level of each attachment, click on the current access level highlighted in blue and with one click it will change between **Public** and **Registered** access
  1. **Public**= Anyone may view/download the resource
  2. **Registered**= Logged in users may view/download the resource
10. Click the Up/down arrows on the right side of the attachments to rearrange how they are ordered
11. Click the trash can icon on the right side to remove a file or link
12. Click **Next** to move to the next step when finished adding and organizing attachments

### Step 3: Authors

1. Optionally, under *Group Ownership* select a group from the **Group** drop down to associate the resource with a group

2. If a group is selected, the access level of the Resource can be changed by selecting the level from the **Access Level** drop down. This controls how much access non-group members have. The access levels are:
  - *Public* - Anyone may view/download the Resource. Public is the only access level that can be used if a group is not assigned.
  - *Protected* - Abstract is visible to all, files accessible to group members only.
  - *Private* - Entire resource is only visible to group members.
3. Under *Authors*, type the names of all the authors that contributed to this Resource in the **Enter names..** textbox, separated by commas. If their name appear in the auto-completer drop-down, be sure to click on the name that shows so that it correctly associates with their HUB account
4. Click **Add** when finished listing out the authors
5. The authors will appear below the **Enter names** text box
6. Optionally, provide the author's organization in the **Organization** textbox directly below the author's name
7. Select the appropriate role (*Author* or *Submitter*) for each user from the Role drop down list (shows **Author** by default)
  1. **Author:** The individual who created or helped create the materials that went into the resource
  2. **Submitter:** The individual charged with creating the resource, but they did not have a hand in writing and developing the resource materials
8. Click **Save Changes** anytime changes are made to the Organization or Role of users. Otherwise, the changes will not be remembered
9. To change the order the authors are listed in, use the up/down arrows to push them up and down the list
10. Click the trash can icon to the right of an author's name to remove the author
11. Click **Next** below to move to the next step

### Step 4: Tags

1. In the **Assigned Tags** textbox, start typing a keyword, phrase, or category that can be applied to this Resource
2. An auto-completer list box will appear with a list of suggestions. If the word appears in the list or a word appears that is closely related to it, click on the term in the list
3. If no terms show in the list that close match the term provided, type the full word or phrase and then press **Enter** or type a comma to start typing another word
4. After adding tags, click **Next** to move to the next step

### Step 5: Review

1. Under *Authorization*, read the paragraph:

I certify that I am the owner of all submitted materials or am authorized by the owner to

grant license to its use and that I hereby grant example license to copy, distribute, display, and perform the materials here submitted and any derived or collected works based upon them in perpetuity. Example may make modifications to the submitted materials or build upon them as necessary or appropriate for their services.

- Check the box next to it to indicate agreement.

2. From the **Select License...** drop down, select the appropriate license. The license can be viewed in the box directly below

3. A preview of the Resource page can be viewed below

4. Click **Submit Contribution** when the Resource is ready to be published

5. A Resource cannot be removed from the HUB once it is published. A Resource can only be removed from the HUB by special request by submitting a Support ticket

## Editing a Resource

**Note:** You must be logged into the HUB to edit a Resource and only the author or submitter of the Resource has the ability to edit.

1. Navigate to the Resource page of the Resource to edit
2. Click on the title of the section to edit (e.g. *Compose, Attach, Authors, Tags*)
3. Click **Next** below when changes are made so they are saved
4. Click to the **Review** section and click **Save** when finished

# Tools

## Overview

Have a simulation/modeling tool that you want to deploy for others to use? The Hub makes it easy. You don't have to build the tool for multiple platforms. You don't have to distribute binaries or tar balls. Just get your tool installed and running within the Hub environment, and others can access your tool via the Web.

## Existing Graphical User Interface that runs under Linux/X11

If you already have a tool with a graphical user interface built with Java, Qt, MATLAB, or anything else that runs under Linux/X11, you can probably deploy it as-is within this Hub in a matter of hours. There are a few caveats:

- **If your tool relies on a graphics card for acceleration, the graphics performance will be slow.** Tools running within the virtual machines of this Hub use software rendering for all graphics. It will probably work, but graphics may be clunky.
- **If your tool needs to pull data from external sites (other web sites and databases), you will have to let the Hub team know.** All such connections are blocked by default, in order to safeguard against malicious tools. Once your tool has been approved and white-listed, it will have controlled access to external sites.
- **Your tool will be running in a remote server environment with its own file system.** The usual *File > Open...* operation will look for files on the server--not on the user's desktop. Users can upload files via sftp, WebDAV, and the hub's own importfile command. You might consider modifying your tool so that *File > Open...* launches importfile, so your users can upload files from their desktop on demand.

## Command-line interface that runs under Linux

If you don't have a graphical user interface for your tool, you can create one in short order by using our [Rappture Toolkit](#). Rappture integrates with a wide variety of programming languages, including C/C++, Fortran, Java, MATLAB, R, Python, Perl, Ruby, and Tcl/Tk. Check out these videos to get started:

- [Introducing the Rappture Toolkit](#)
- [What's Under the Hood?](#)

- [More Rappture Objects](#)
- [Advanced Visualization](#)

Can your tool take advantage of cluster resources or parallel execution? We have additional computing resources within the hub that you can tap into via the [submit](#) command. Write a wrapper program in your favorite language, and have it gather the input values, prepare input files, and [submit](#) your runs to our remote computing resources.

### Tools for Microsoft Windows or Macintosh Systems

Sorry, your options here are limited. All tools deployed on this Hub must run in a Linux/X11 environment. In some cases, tools written for Microsoft Windows will run under Linux via [Wine](#) emulation. If that works in your case, then you can deploy your tool after setting up the appropriate Wine configuration files. If not, then we won't be able to host your tool.

### Follow These Steps

- **Create a project area for your tool**

[Watch this video](#) to get a sense of the tool upload process, then [register your tool project](#). This lets us know that you're starting a new tool. We'll grant you access to our remote development environment, and we'll create a project area with a Subversion source code repository where you can store your code.

- **Upload your code and build/test in the workspace**

A [workspace](#) is a remote Linux desktop--a window into our remote development environment that you can access from any Web browser. [Watch this video](#) to learn how to use workspaces, then go to the [workspace page](#) and click *Launch Tool*. You can use sftp, WebDAV, or importfile to upload your code into the workspace. After that, you can build and test your code as you would in any other Linux environment. Once your tool runs properly in the workspace, it is ready to deploy.

- **Check in your code and tell us you're ready for deployment**

The project area that you created in Step 1 comes with a Subversion source code repository. After having tested your code in the workspace, commit it to the Subversion repository. If you've never used Subversion before, you should [watch this tutorial](#). Once your code is checked in, you can click a link in your project that says *My code is committed*, as described in [this video](#). We'll install your code and get it ready for final testing. Click another link to say that you approve the tool, we'll make it available for others to use.

- **Keep an eye on your tool**

Each published tool has its own page listing the name of the tool, the authors, and a brief description. This page also shows the number of people who have accessed the tools, along with any questions they have posted, and ideas for improvement. Keep an eye on this page and watch your tool's popularity grow. Help answer the questions, use the feedback to make improvements, and publish improved versions of your tool. The more you support your tool, the more your user base will grow.

# Wiki Pages

## Overview

Wiki Pages are meant to be user-created community editable pages covering a specific topic or topics. Wiki pages allow users to share their knowledge of a subject and related areas in a simplified mark-up with a complete history of page changes.

## Creating New Wiki Pages

1. Navigate to **<https://yourhub.org/wiki>** and log into the Hub as a registered users
2. On the Wiki home page, click on **Create a New Article**
3. Fill in the required fields
4. If you need more help with wiki formatting, click on the link at the bottom of the Page text box
5. Click **Preview** if you'd like to see how your page looks like before submitting it.  
Click **Submit** when ready. The wiki page is now created
6. To create a new wiki page within a group:
  - a. Go to the **Wiki** tab inside a group
  - b. Click on the **New Page** button
  - c. Fill in the required fields
  - d. Click **Preview** if you'd like to see how your page looks like before submitting it
7. Click the **Save** button when ready

### Embedding an Image or File on Wiki Pages

Note: In order to embed an image or file on the wiki page, you must first upload the image or file.

To embed an uploaded image/file:

1. Go to the **Edit** section of the wiki page you would like to edit
2. On the Page text box, place your cursor where you want the image or file to be. If you are uploading an image, click the Embedded Image button on the toolbar. If you are uploading a file, click on the **Embedded File** button
3. Replace the highlighted text with the full name of the uploaded item you want to embed
  - a. For image: **[[Image(examplepicture.jpg)]]**
  - b. For file: **[[File(examplefile.pdf)]]**
4. Scroll down to the bottom of the page and click **Submit**
5. The item you chose to embed will now appear in the area where you placed it on the wiki. If you embedded a file, it will show up as a link that users can download

### Uploading an Image or File to Wiki Pages

In order to embed an image or file on the wiki page, you must first upload the image or file in the wiki. To upload an image or file, follow these steps:

1. Navigate to <https://yourhub.org/wiki> and navigate to the Edit section of the wiki page you would like to edit
2. Upload a file to the page by locating the file on your computer then click the **Choose File** or **Upload a File** button
3. Locate the image or file you would like to upload and click **Open**
4. Click **Upload**
5. Your file is now uploaded in the wiki and you can now embed it in the wiki's Page text box so others can view or download it

### Making a List of Available Wiki Pages

When a new wiki page is created, there is really no way to access the newly created wiki unless you know the URL of it (see Creating a Wiki Page tutorial to figure out the URL of your wiki page). *A wiki macro (or custom function to insert dynamic content in a page) can be added to a page to display a list of existing wiki pages within a given wiki.*

To add a wiki macro that generates a list of all wiki pages:

1. Navigate to **https://yourhub.org/wiki** and navigate to the **Edit** section of the wiki page you would like to edit
2. Type in this wiki macro **[[TitleIndex]]** where you want the list to appear in the wiki page
3. Click the **Submit** button
4. You will then see a bulleted list of all available pages where you added the macro

**Note:** This macro allows you to provide a list of all wiki pages in that group. If you would like to view an alphabetical list, click on all pages at the top of the wiki page.

### Deleting a Wiki Page

1. Navigate to **https://yourhub.org/wiki**
2. Log in to the Hub and locate the Wiki page that is to be deleted
3. Once the Wiki has been located, open the Wiki to preview
4. On the right hand side, locate the **Delete** button and click it
5. Confirm the deletion and then the Wiki will be permanently deleted from the Hub

### Editing Content on Wiki Pages

1. Navigate to **https://yourhub.org/wiki**
2. Open the wiki page you would like to edit
3. Go to the **Edit** section of the wiki page
4. **Edit** the page
5. When you're done with all your changes, scroll down the bottom of the page and click **Preview** if you'd like to see how your page looks like before submitting it. Click **Submit** when ready
6. The wiki page is now updated

### **What is the purpose of identifying a "Parent" for a new wiki page?**

By making an article have a parent page just builds the URL path. For example, if you have a main page and you wanted to have several articles that explain parts of the main page children of the main page, then the other pages' URL would be: `yourhub.org/groups/groupname/wiki/mainpage/childpage`.

Now, these child pages do not automatically link to the parent, because wiki pages allow for flexibility. If you wanted children to be linked to their parent page, then you would need to manually add the children links to the parent page by adding the links in the content of the wiki page.

### **Wiki Search Results**

The wiki search uses MySQL's FULLTEXT. While it works fairly well with a lot of data, it tends to not return the best (or any) results when there's little data to work with. In other words, the more content there is in the wiki, the better the search results will probably be. It also has a number of stop words it will ignore due to the frequency found in normal text (e.g., "the").

# Search

## Hubzero's Search Engine: Solr

Solr is a highly configurable search engine with many different options that control its behavior. Solr's default configuration comes with a ton of helpful features which provide a high level of productivity out-of-the-box.

Solr is not implemented in all areas of the Hub, however it will be expanded throughout the upcoming releases. The foundation of the integration will allow for basic search functionalities. The following search plugins are currently available:

- Answers
- Citations
- Collections
- Content
- Courses
- Forum
- Groups
- Members (public profile and public fields)
- Projects
- Publications
- Resources
- Tools
- Wiki
- Knowledge Base

## Query Syntax

### Searching Fields:

Solr supports matching within a particular field. This means that one can specify a term to search for within a particular area of a document.

Available Search Fields:

- title - filters search down to title results
- author - filters search down to author results
- description - filters search down to full-text results
- path - filters search down to related path results
- DOI - filters search if the object has a DOI issued

### Partial Words:

The Hubzero implementation of Solr has not yet been tuned to understand complex phrases in the English language (or any other language for that matter). Therefore Solr sees the words “puppy” and “puppies” as two different concepts. Solr supports partial word matching through the use of the wildcard symbol, \*. To perform a search for both “puppies” and “puppy” the query will read “pupp\*”.

### Complex Queries:

Solr comes with a query parser which understands Boolean search terms. This means that the keywords “OR” and “AND” can be used. When “OR” is used, Solr returns inclusive results. When “AND” is used, Solr returns exclusive results. For example, the query “cats OR dogs OR puppies OR pupp” will return any results that contain the words cats, dogs, puppies, or the partial word ‘pupp’.

To demonstrate the use of the keyword “AND”, the consider the query of “cats AND dogs”. This means that Solr will only return the results that have both cats and dogs within the record. In this dataset, this was not a popular combination. More information about the Solr Query Syntax is available on their wiki: <https://wiki.apache.org/solr/SolrQuerySyntax>.

### Search Results

A search result listing contains a few portions:

1. Title - The title of the content Category - The plugin / facet of the data.
2. Date - The date (usually created date) associated with the record.
3. Author - Authors listed on the item.
4. Tags - Hubzero tags applied to the item.
5. Description - A snippet of all matching text in the record.
6. Path - The path to the original item.

### What is this "Feed" button?

Navigating to the **What's New** section of Resources or Knowledge Base, one can find a **Feed** button that spits out RSS feed. A user can take this feed and add it to their favorite page services or personal browser feed, depending on their use case. This way one can catch up on all the new resources and knowledge base articles that have been posted recently and stay on

## HUB USERS

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top of Hub activity.

# Simulation Usage Definitions

## Simulation Users

Number of Registered Users that ran one or more simulation runs.

A registered user is assigned and identified with a unique login identity on the system.

## Simulation Jobs

A unit of work to be processed, generally comprising an application program or group of related programs and data, linkages, and instructions to the operating system needed for running the program.

## Total CPU Time

CPU time measures the amount of time a single CPU spent running your code. If multiple cores are used during the same time frame the CPU time is multiplied by the number of cores.

CPU time does not include other time on the system such as waiting in the queue, file I/O, etc..

## Total Wall Time

Wall clock time (clock on the wall) is the actual elapsed time taken to perform a job from beginning to end. This is equivalent to timing your job with a stopwatch and the measured time to complete your task can be affected by anything else that the system (file I/O) happens to be doing at the time.

## Total Interaction Time

??

### **Users with > 10 mins of CPU Time**

Users who ran a simulation that used more than 10 mins of CPU Time.

### **Avg. Number of Simulation Jobs/User**

The average number of simulation jobs that the user executed in the selected time frame.

### **Avg. Time between First and Last Simulation**

??

### **Repeat Users with > 10 Simulation Jobs**

Number of users that have executed more than 10 simulation jobs.

### **Repeat Users with > 3 Months 9**

The number of simulation users that returned after a gap of 3 months.

# Storefront

## Overview

Storefront is an online store supported by the Hub. Storefront can be used to sell collections of products to Hub users. Different products can be sold to specific user groups or any registered user. Products are categorized by their type and can fit in various SKUs, stock keeping unit identification code.

## Logging in

1. Navigate to **<https://yourhub.org/storefront>** and login
2. A page entitled "Online Store Homepage" is displayed with a list of software collections.

## Adding Software to the Shopping Cart

1. From the "Online Store Homepage", **click** on the desired software collection.
2. Click on the desired software product.
3. Select a **Product Option** (Operation System).
4. Select a **Quantity**.
5. Click on **Add to Cart**.

6. The software product is now displayed in your cart.

### Checking Out / Completing Purchase

1. Once you are done collecting items to purchase, click on **Checkout**
2. Review the **License Agreement**
3. Click the **checkbox** to agree to the License Agreement.
  1. Note: You must accept to complete the checkout process
4. Click **Next**

5. **Review** the order
6. Click **Place Order**

7. Your order is now complete. Click on the **download link** to download the software product. You will also receive an email with the order details.

### **View Order History**

You can review your order history at anytime after you have successfully checked out. Click on **Your Orders** from the cart.

**Note:** You must be logged in to the Hub in order to view your order history.

## HUB USERS

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Your previously purchased orders will display and you may click on the download link to re-download an item if it was a software product or downloadable file.

# Tags

## Overview

Tags are like keywords or category labels. Tags help you find content, events, and members which have something in common or similar interests. Tags can be added to groups, your profile, resources, wiki pages, and events. When creating or editing content, your profile, groups, etc. you can add or remove tags as you wish. If a tag does not exist, simply typing it in a **Tags** form field will create it and make it available for everyone to use on the Hub. Once a tag has been created, Hub search engines will pull the contribution documents and resources linked to that tag whenever a user searches a word related to a tag.

## Creating a Tag

1. Navigate to **<https://yourhub.org/>**
2. Log in to the frontend of the Hub and access a section of the Hub where tags will be available
3. Begin to edit the new media type?
4. In the Tag text box, type in the phrase or word that the tag will be
5. Once the project is saved, the new tag will be created

# Usage

## Overview

Usage compiles user statistics from contributions on the Hub, such as tool usage or publishing usage.

To find the user Usage:

1. Navigate to **<https://yourhub.org/>**
2. Log in to the frontend of the Hub and navigate to the user dashboard
3. In the left sided tab list there will be **Usage**, proceed to that page
4. There, all of the personal usage that the user has consumed on the Hub has been recorded in tables

# Wishlist

## Overview

A user suggestion or request area that allows the user community to vote on ideas and Hub managers to approve wishes made by the community. Hub managers can categorize wishes with the following terminology:

- Active- open wishes where people can vote on the wish
- Accepted- the wish has been accepted and will be activated
- Rejected- the wish will be denied for now
- Granted- the wish is already available or will be in the next update
- Like- voting up the wish
- Dislike- voting down the wish

## How is the consensus of a wish calculated?

Under **My Opinion**, each user can choose the importance and effort that will go into creating the final product outlined in a wish. The consensus combines all votes received and averages them. The total number of votes can come from the total number of people in the group, the number of people in the group of wishlist owners, plus any users who have been given access to view the wishlist. Any of these individuals can cast a vote for your wish, but the consensus will only be calculated as a percentage of the few that voted **Yes** out of the whole who can vote.

## Creating a Wish

1. Log in to the frontend of the Hub and under the “Support” tab select the Wish List component.
2. On the Wish List dashboard and click on the “Add a Wish” button.
3. Check the box to post anonymously or leave the box unchecked to put your name on the wish.
4. In the first box describe in a short sentence the wish.
5. In the second text box give a more detailed explanation of the wish that you’re making.
6. Tag the wish to connect it to the Hub search engine.
7. Click “Submit” to save the wish.

# Search

## User Manual

Solr is a highly configurable search engine with many different options that control its behavior. Solr's default configuration comes with a ton of helpful features which provide a high level of productivity out-of-the-box.

## Search Categories

At the time of writing, Solr is not implemented in all areas. However it will be expanded throughout the upcoming releases. The foundation of the integration will allow for basic search functionalities. The following search plugins are available at the time of this writing:

- Answers
- Citations
- Collections
- Content
- Courses
- Forum
- Groups (regular and super)
- Members (public profile and public fields)
- Projects
- Publications
- Resources & Tools
- Wiki
- Knowledge Base (kb)

[1] Dependant on Apache Tika installation. This is not a distribution package and must be packaged by a Hubzero package maintainer.

### Search Structure

The Hubzero CMS produces a variety of content. For instance you can create a group, a project, a collection, a blog post, a publication, a resource, a tool, a course, a wiki page, a content page, a group page, and so much more. In order to provide a way to search all of the different kinds of data in a consistent manner, a standard model has been developed. You can search a document by title, author, description (which combines all text), path (URL), tags, date, or DOI (if applicable).

If you enter a term “puppy”, it will search all fields by default. You can narrow down the search field as described in [Searching Fields](#).

### Searching Areas

Search is currently implemented in the site-wide search areas.

**There are plans to create an embeddable search module, providing access to the same search index anywhere in the hub. This development has not been completed yet.**

### **Search Result**

A search result listing contains a few portions:

1. **Title** - The title of the content
2. **Category** - The plugin / facet of the data.
3. **Date** - The date (usually created date) associated with the record.
4. **Author** - Authors listed on the item.
5. **Tags** - Hubzero tags applied to the item.
6. **Description** - A snippet of all matching text in the record.
7. **Path** - The path to the original item.

## Highlighting

A work-in-progress. Marking up information from another system proves to be a little challenging, especially when the data is not sanitized of HTML and other goodies before being indexed. This is implemented at the controller / view level, however it can be handled by Solr itself. There are some system-level CSS and styling issues to work out.

## Partial Words

The Hubzero implementation of Solr has not yet been tuned to understand complex phrases in the English language (or any other language for that matter). Therefore Solr sees the words “puppy” and “puppies” as two different concepts. Solr supports partial word matching through the use of the wildcard symbol, \*. To perform a search for both “puppies” and “puppy” the query will read “pupp\*”.

### **Searching Fields**

**Solr supports matching within a particular field. This means that a user can specify a term to search for within a particular area of a document.**

**Searching for title:life, for instance, would return a set of documents containing the word “life”.**

The following fields are available for filtering, please note the lower-case syntax.

### Available Search Fields:

1. **title** - filters search down to title results
2. **author** - filters search down to author results
3. **description** - filters search down to full-text results
4. **path** - filters search down to related path results
5. **doi** - filters search by DOI

\* If the object has a DOI issued.

## Complex Queries

Solr comes with a query parser which understands Boolean search terms. This means that the keywords “OR” and “AND” can be used. When “OR” is used, Solr returns inclusive results. When “AND” is used, Solr returns exclusive results.

For example, the query “cats OR dogs OR puppies OR pupp” will return any results that contain the words cats, dogs, puppies, or the partial word ‘pupp’.

To demonstrate the use of the keyword “AND”, the consider the query of “cats AND dogs”. This means that Solr will only return the results that have both cats and dogs within the record. In this dataset, this was not a popular combination.

**To demonstrate searching for many terms within a given field, consider the query (tags:hacking OR tags:development). This query is interpreted as searching all content which is tagged with either “hacking” or “development.**

**Let’s say you want to search for items tagged with “hacking” or “development” but not tagged with “blog”, the query (tags:hacking OR tags:development) AND NOT (tags:blog) will reduce the number of matching results.**

**More information about the Solr Query Syntax is available on their wiki:**  
<https://wiki.apache.org/solr/SolrQuerySyntax>.