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:

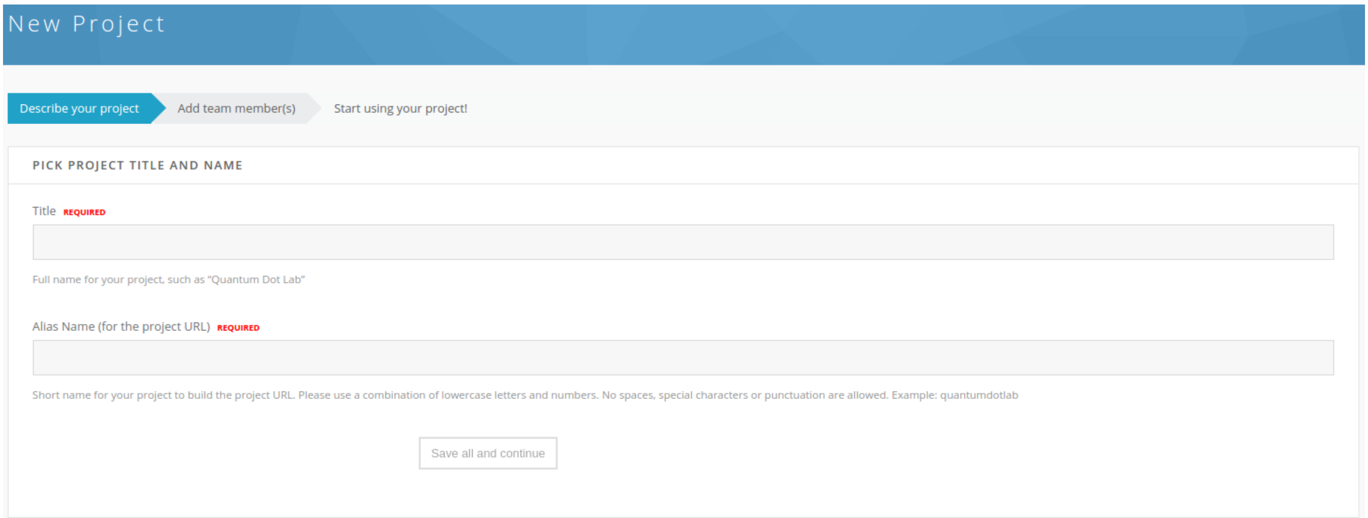
- a Git-based repository for data and apps with a built-in web browser;
- a Wiki area for project notes;
- To-do list management;
- a Facebook-like microblogging tool providing a stream of project updates from all team members, with the ability to comment on certain activities.

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 manager for this project, then it is likely that this is a project that was created within a Group. If this is the case then all membership must be controlled on the Group level

Adding Team Members

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

   ***Collaborator* can:**

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

   ***Manager* can:**

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

2. Start typing last name of the user you'd like to add in the **Individual** textbox, or the group name of the group you'd like to add in the **User Group** textbox
3. An autocomplete box will appear below these textboxes with suggested users or groups (depending on the textbox you use). Click on the suggestion that is associated with the user or group you want to add
4. Click **Add** to have the user or group added to the team

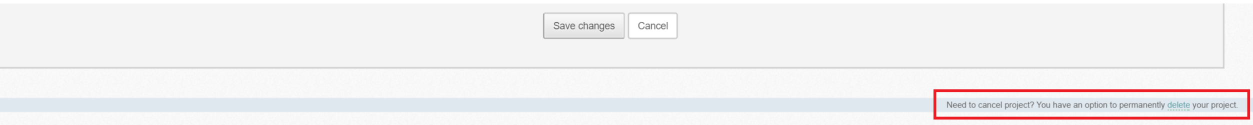
5. Repeat steps 1-4 above to add additional users or groups to the team

Removing Team Members

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

Deleting a Project

1. Login to your Hub
2. Navigate to **https://yourhub.org/projects**
3. Click on the Project you want to edit in the *My Projects* section
4. Hover over the **Project Manager** text in the upper right and click **Edit Project**. In the lower right below the *Edit Info* box there is the text "Need to cancel project?"

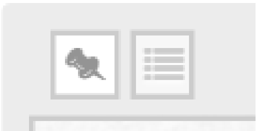


    - You have an option to permanently *delete* your project
5. Click on the word **delete** in that phrase
6. Click **Yes, Delete** to verify that you intend to permanently remove the project
7. The Project will now no longer exist

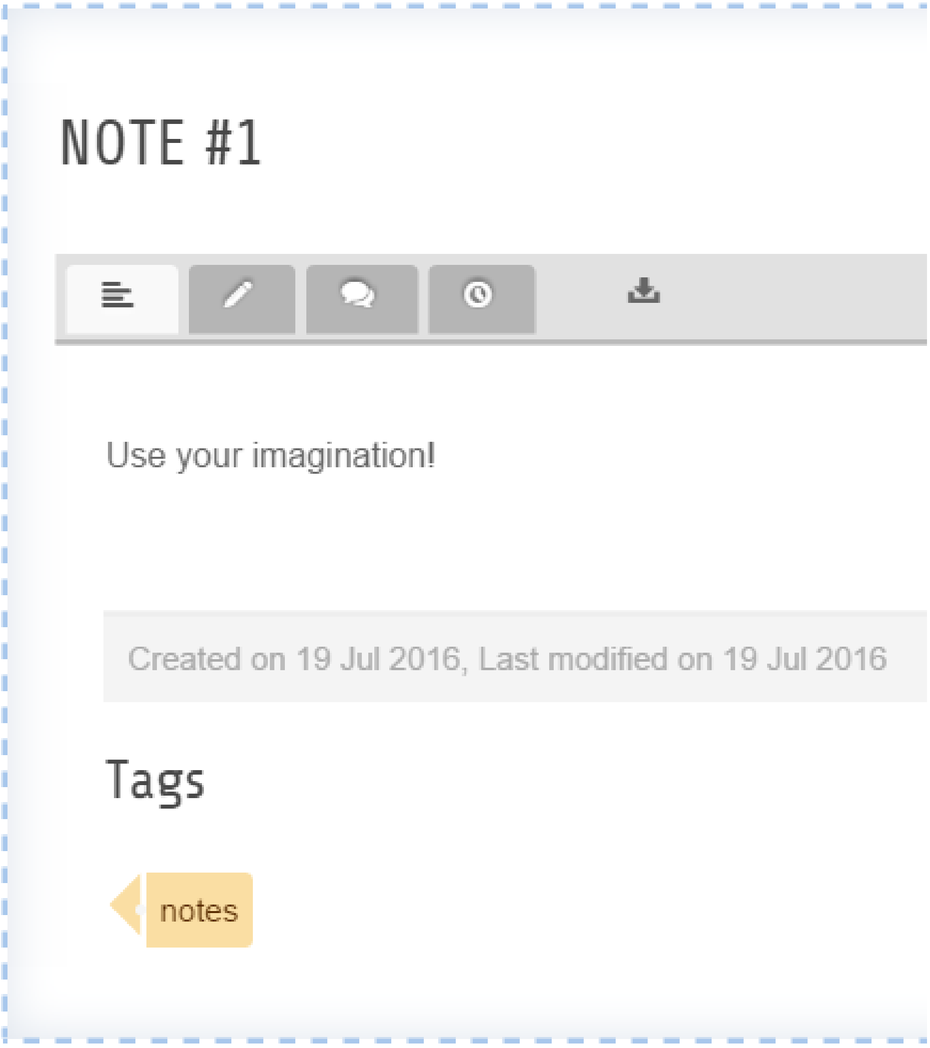
Changing the Layout of the "To-Do"

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.



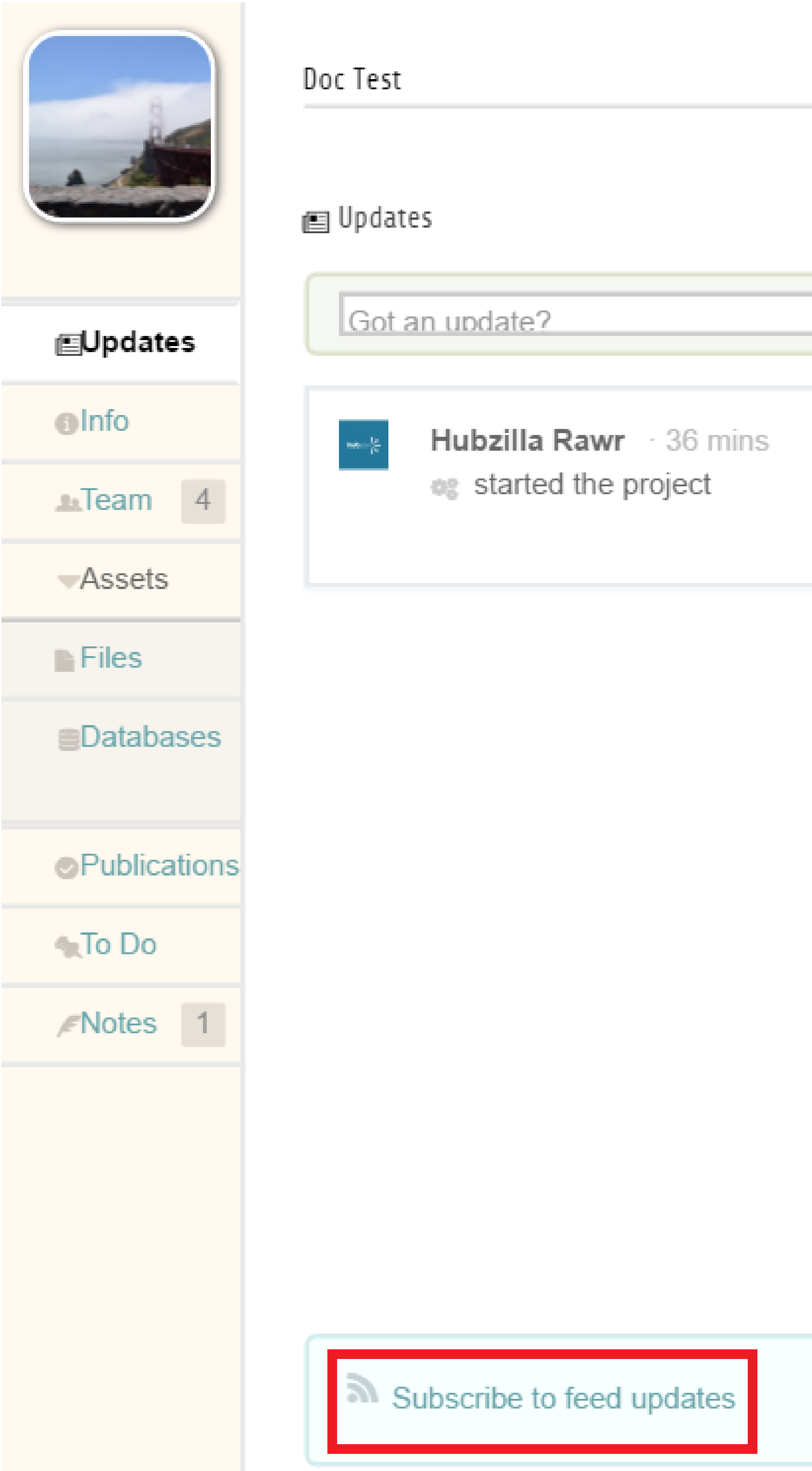
Sharing Project Notes



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, locale the **Feed Module** and click on *Subscribe to feed updates*

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

Projects: How do you connect Google Drive, Dropbox, or GitHub to a Project?

Note: You must be the creator or manager of the project in order to connect with a file connector.

1. Navigate to **https://yourhub.org/projects**
2. Access the project that you wish to add your the file connector of your choice
3. Inside of the project, click on **Files**
4. Select from the dropdown the file connector
5. Complete authentication into your Dropbox, GoogleDrive, or GitHub account
6. Return to the project, and you will have a connection with the files and folders in that

account

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 retuning 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

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

has been used by uploaded files

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:

1. 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/developer/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

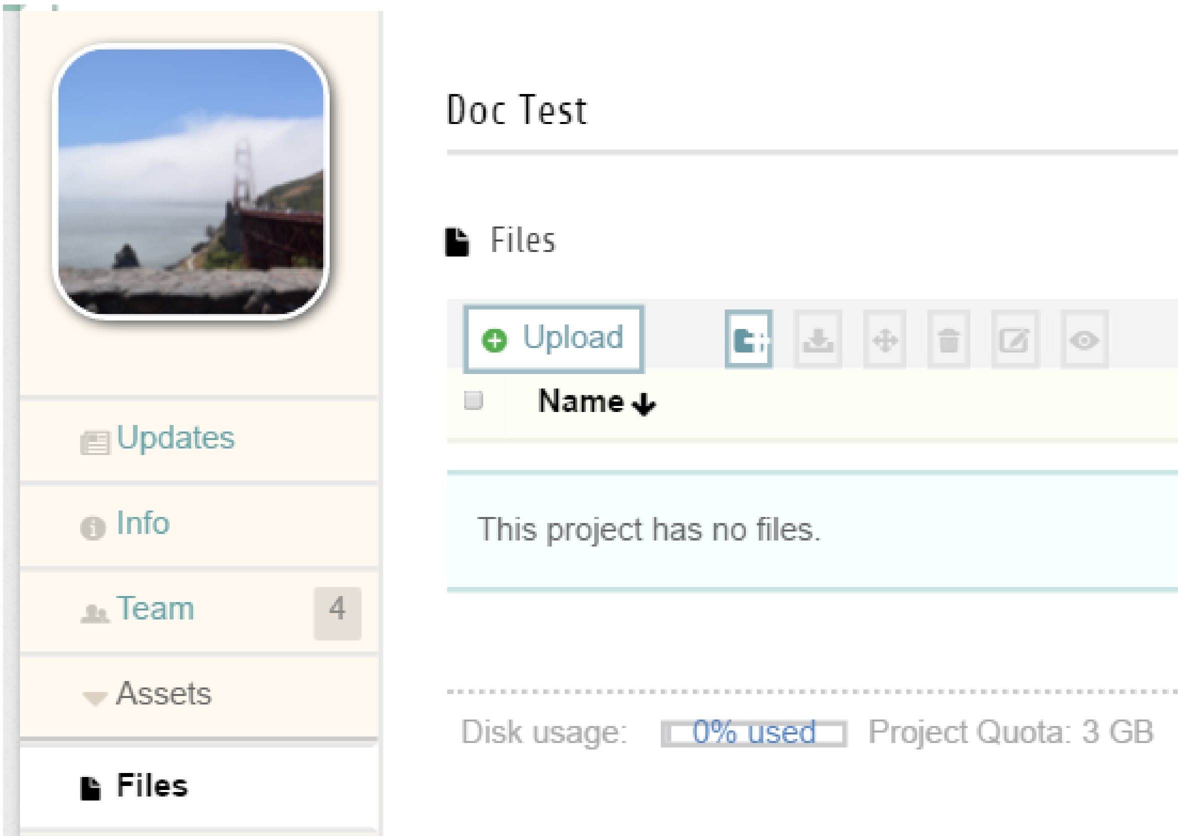
Creating a searchable hub database from a spreadsheet with data is made possible by DataStore Lite within Projects.
Note: You must be logged in on the hub and inside a project in order to use this feature.

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**