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UvA/AUAS figshare manual

Projects

Do you have a question that isn't answered here? Please contact RDM Support via rdm-support@uva.nl

Introduction

You can use figshare to share files with others, whether they are within or outside UvA/AUAS. To do so, you use Projects. In this document you'll find everything you need to know about Projects in UvA/AUAS figshare.

Please note: in figshare, there's a distinction between 'item' and 'file'. An item is the record that contains the characteristics of the associated file(s). An item can contain just one file, but it can also contain more than one file, or none at all. A file is always connected to an item.

Private link

If you are planning on sharing only one item, you can keep things simple by – instead of using Projects – generating a private link to that item and sending that link to the people you need to share the item with. To do so, you create the item, attach the file(s) to the item, and click 'Generate private link' in the lower half of the upload/metadata screen of the item. You'll then be given a link that you can copy, for example to an email.

Please note: everyone who has the link can see and download the files that are associated with the item. The link expires automatically after one year. You can disable the link earlier by going back to the upload/metadata screen of the item and clicking the x on the upper right hand side of the link.

How to

Start a Project

1. Go to your My Data page and select the Projects tab,
2. click on the +Create a new project button,
3. complete the Title and Description fields as descriptively as possible, and
4. select the Project Type (*):
    a. if the Project is for individual use, select 'individual'.
       You will be able to invite other users to the Project. All items that are uploaded count against the individual storage quota of the uploader. If a user leaves the Project, his or her items are *removed* from the Project.
    b. if the Project is for group use, select 'group' and find the relevant group.
       You will be able to invite other users to the Project. All items that are uploaded count against the Project storage quota of the chosen group. If a user leaves the Project, his or her items *remain available* in the Project.

    Please note: the Project Type cannot be changed once it has been set. Should you need to change the Project Type, the only way to do so is by creating a new Project with the correct Project Type, and moving all content from the previous Project to the new one.

(*) *A note on Project Type*
If you are going to invite non-UvA/AUAS users or UvA/AUAS students to contribute to the Project, you should select 'group' if they will need to *upload* items to the Project. These users will have a regular figshare.com account with 20GB of storage space. If you don't select 'group', they will not be able to upload larger or more files to the Project than that 20GB allows. If these users only need to *view* the items you add to the Project and will not be uploading items to the Project themselves, you can select 'individual'.

Please note: by creating a Project, you automatically become that Project's manager and will not be able to leave the Project. The maximum number of Projects you can create is 100. Should you need to create more, please contact RDM Support and we can have this limit raised.
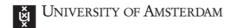
Add data to a Project

You can add data to a Project by adding an item to the Project. One item can contain one or more files. To add an item to a Project you either
a. (if the Project is still empty) click on +Add a new item in the Project screen, or
b. (if there are items in the Project already) click on +Add new content and select +Create a new item.

In both instances, the upload screen will open automatically, allowing you to
- drag and drop or browse for the file(s) you want to upload, and
- complete the metadata of the file(s).

Alternatively, you can drag a file to the Project screen, upon which the upload screen will open automatically and you can start completing the metadata while the upload is being completed.

If you have been invited to a Project, but are not able to add items to it, you will have been assigned a *viewer* role. If you need to upload items to the Project, you'll need to contact the person who invited you to the Project. Being the Project's manager, he or she is able to change your role to *collaborator*.

Please note: if you have been invited to a Project and are using a figshare.com account to upload items to a Project, please do *not* assign a category to the item *until* the item is in the Project (either uploaded to the Project directly or moved from your My Data to the Project). Otherwise, the difference in category list between figshare.com and UvA/AUAS figshare may cause your items to become inaccessible.

Move items from My Data to a Project

If you want to add an item from My Data to a Project, you can move the item. To do so, you
1. select the item in My Data,
2. click Action (just above the item list),
3. select the desired Project destination, and
4. click Submit.

In My Data, the item is now labelled with the name of the Project. This enables you to see which items you are sharing in which Project.

If you have been invited to a Project, but are not able to move items to it, you will have been assigned a *viewer* role. If you need to move items to the Project, you'll need to contact the person who invited you to the Project. Being the Project's manager, he or she is able to change your role to *collaborator*.

Please note: if you have been invited to a Project and are using a figshare.com account to upload items to a Project, please do *not* assign a category to the item *until* you have moved the item from your My Data to the Project. Otherwise, the difference in category list between figshare.com and UvA/AUAS figshare may cause your items to become inaccessible.

Edit an item in a Project

At some point you may want to edit an item, for example by adding files to or removing files from the item, editing the metadata or making the item public. To do so, click the gear icon to the right of the item and click Edit item.

Please note: you can only edit your own items. You can't edit items others have uploaded to the Project.

- To add files to an item
  - drag and drop the file(s) you want to add to the screen, and
  - click Save changes.
- To change the order of the files within an item
  - click Manage (top of the screen),
  - hover over the name of the file you would like to move,
  - click the = that appears on the right hand side of the file name,
  - drag the file up- or downwards,
  - click Done editing (bottom of the screen), and

- o click Save changes.
- To remove a file from an item
  - o click Manage (top of the screen),
  - o hover over the name of the file you would like to remove,
  - o click the x that appears on the right hand side of the file name,
  - o click Done editing (bottom of the screen), and
  - o click Save changes.
- To publish an item:
  - o make sure you have completed all mandatory fields, marked with a green dot,
  - o select Publish (bottom of the screen), and
  - o click Save changes.

Please note: the other Project members are not notified of any changes you have made to your items. You can let them know by adding a comment to the item.

Remove items from a Project
To remove an item from a Project, click the gear icon on the right hand side of the item and select either
a. remove item from Project (the item will remain available in your My data tab) or
b. delete item (to delete the item from figshare altogether).

Move items from a Project to My Data
If you would like to move an item from a Project to My Data, you can do so by clicking the gear icon on the right hand side of the item and selecting Remove item from Project. You will be asked to confirm that you want to move the item to My Data. As soon as you do so, the item will be removed from the Project and will appear in My Data.

Please note: you can only move items to My Data that you have uploaded to the Project yourself. You cannot move items that others have uploaded to the Project to your My Data.

Add notes to a Project
To add a note to a Project you either
a. (if the Project is still empty) click on +Add a note in the Project screen, or
b. (if there are items in the Project already) click on +Add new content and select +Add note.
Type the text of your note and save the note by clicking Add note.

If you have been invited to a Project, but are not able to add a note to the Project, you will have been assigned a *viewer* role. As a viewer, you are only able to add comments to items and notes. If you would like to be able to add notes to the Project, you'll need to contact the person who invited you to the Project. Being the Project's manager, he or she is able to change your role to *collaborator*.

Edit or delete notes
If you would like to edit or delete a note you have posted to the Project, click the small gear icon to the right of your note and select either Edit note or Delete.

Please note: you can only edit or delete your own notes. You cannot edit or delete notes that others have added to the Project.

Add comments to a Project

To comment on an item or a note you click the dark balloon to the right of the item or note you would like to comment on. Type the text of your comment and save the comment by clicking Comment.

Edit or remove comments

If you would like to edit or remove a comment you have made, hover your mouse over the right hand side of the comment. Links will appear that allow you to either edit or remove the comment.

Increase a Project's storage space

At the top of the Project screen you can see how much storage space is available for the Project. To request more storage space
1. hover over the storage space bar,
2. click Request more?
3. type in a number and indicate whether that should be read as MB, GB or TB,
4. give your reason(s) for needing more space, and
5. click Submit.

Your request will be processed by the data steward of your faculty or research institute. Please allow for some time for your request to be processed, especially if you are submitting the request outside office hours.

Please note: you are only able to request more storage space for Projects you have created yourself. If you have been invited to a Project, need to add items to it and fear the available space will not suffice, you should contact the person who invited you to the Project. Being the Project's manager, he or she is able to put in a storage request.

Invite other users to the Project

To invite others to your Project
1. on the right hand side of the Project screen search for existing users of UvA/AUAS figshare and figshare.com, or add users not currently on figshare via the invite new users link,
2. assign a role to each user you invite,
3. click Add member (right hand side of the screen), and
4. click Save changes (bottom of the screen).
   Please note: just clicking Add members is not enough, your invites will only be sent if you also click Save changes.

To all users you invite, you assign either of two roles:
- a *viewer* is able to
  - view and download all items that are added to the Project, and
  - comment on all items and notes in the Project.
- a *collaborator* is able to
  - view and download all items that are added to the Project,
  - add and move items to the Project,
  - add notes to the Project, and
  - comment on all items and notes in the Project.

Please note: you are only able to invite users to Projects you have created yourself. You are not able to invite other users to a Project you have been invited to.

Please note: the maximum number of users in one Project is 100, regardless of the role you assign to them. Should you need to add more, please contact RDM Support and we can have this limit raised.

Change a user's role in the Project

To change the role of a user in the Project from viewer to collaborator or vice versa
1. click the gear icon in the upper right corner of the Project screen,
2. select Edit project details,
3. hover over the name of the user whose role you want to change and click the gear icon that appears next to it,
4. change the user's role, and
5. click Save changes (bottom of the screen).

Please note: you are only able to change the role of users in Projects you have created yourself.

Find out who the Project's manager is

If you have been invited to a Project, need to contact the Project's manager, but don't remember who that is,
1. go to your Projects tab,
2. open the Project screen by clicking on the title of the Project, and
3. click Show project details at the top of the Project screen.
The Project's manager is the person who created the Project.

Find out who the other users in a Project are

If you have been invited to a Project and would like to know who the other users in the Project are
1. go to your Projects tab,
2. open the Project screen by clicking on the title of the Project, and
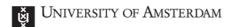3. click Show project details at the top of the Project screen.

Remove other users from the Project

To remove one or more users from the Project
1. click the gear icon in the upper right corner of the Project screen,
2. select Edit project details,
3. hover over the name of the user you want to remove and click the gear icon that appears next to it,
4. select Remove member, and
5. click Save changes (bottom of the screen).

Please note: you are only able to remove other users from Projects you have created yourself. Should you find it necessary that a user is removed from a Project you also have been invited to, you should contact the person who invited you. Being the Project's manager, he or she is able to remove users from the Project.

Please note: if you leave a Project, the items you have uploaded to the Project will remain available in the Project if the Project Type has been set to 'group'. If you'd like to know if this is the case, you should contact the person who invited you. Being the Project's manager, he or she has set the Project Type. Alternatively, if you would want to make sure your items will no longer be available, you should remove them from the Project before you leave the Project.

Edit the Project information

To edit the Project title or description, click the gear icon in the upper right corner of the Project screen and select Edit project details.

Please note: you are only able to edit the information of Projects you have created yourself. If you have been invited to a Project and think the Project information is inaccurate or incomplete, you should contact the person who invited you. Being the Project's manager, he or she is able to edit the Project information.

Publish a Project

If at any point you'd like to share the Project and its contents with the world, you can make the Project public. In order to do so, at least one item within the Project needs to be public already.

1. Click the gear icon in the upper right corner of the Project screen,
2. select Publish project,
3. confirm that you want to publish the project by clicking Yes, publish, and
4. click Save changes (bottom of the screen).

A Project that has been made public is marked with a green dot in your Projects tab.

Please note: only the public items in the Project will be visible for website visitors. Items in the Project that haven't been published will not become public until you publish them individually. Website visitors will also be able to see who the Project members are. Notes and comments in the Project are not visible to them.

Please note: you are only able to publish Projects and items you have created yourself. If another user has uploaded an item to a Project that you have created, that item can only be made public by that user.

Please note: only the published items within the Project will each have their own DOI, the published Project will not get its own DOI. If you would like the group of items to have a DOI, you should create and publish a Collection (via the Collections tab). Collections do get a DOI.

Leave a Project

You are only able to leave Projects you have been invited to by others, you can't leave Projects you have created yourself. If a Project you have created is no longer needed, you can delete the project. If you would like to leave a Project

1. go to your Projects tab,
2. open the Project you want to leave by clicking on the title of the Project,
3. click Show project details at the top of the Project screen, and
4. click Leave project.

Please note: you will not be able to undo this action. Should you need renewed access to the Project, the Project's manager will need to invite you again.

If you leave a Project, the items you have uploaded to the Project will disappear if the Project Type has been set to 'individual'. If the Project Type has been set to 'group' the items will remain available in the Project. The ability to edit and delete these items will transfer from you to the Project's Manager. If you would want to make sure your items will no longer be available, you should remove them from the Project before you leave it.

You can check the Project Type by using the filter on your Projects tab. If the Project remains visible after you check 'allocated to group' in the filter drop down, the Project Type has been set to 'group'.

Delete a Project

To remove a Project, click the gear icon in the upper right corner of the Project screen and select Delete project. The items you have uploaded to the Project yourself will still be in My Data, but the label with the Project name has been removed.