

# Create collaborative spaces using "projects"



## Definition

"Projects" are **collaborative spaces** used for **ongoing work**.



Projects are the best solution when:

- multiple people need to be able to **independently** upload datasets and create metadata for items which are related to each other
- *and* if they also need to have access to colleagues' data for **review** and comment before publishing.

You can give people outside the Institution access to review and contribute data by inviting them to your project - all they will need is a (standard, free) figshare account.

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## "Individual" vs. "Group" Projects

There are two types of projects, differentiated by how storage is allocated - "individual (storage)" and "group (storage)" projects.



## How to choose

If most of the people in your project are permanent Smithsonian staff, or the collaboration is is a "one off" you probably want to create an "Individual" project.

If the project is large, long-term, and/or involves many collaborators from outside the Institution, but *we are responsible for the long-term management of the data* you should create a "Group" project.

Individual Projects	Group Projects
Everyone uses their own quota and account storage.	Storage is allocated from the project owner's group's (unit's) quota, i.e., whatever group/subgroup the project owner belongs to determines the total storage quota allocation.  This group allocation must be shared among all group projects that fall under that unit/group*.
People have full control of their items, even if they leave the project, i.e., they can remove their item from the project space.	All work remains within the project (institutional storage) space if people leave.  Project owners can transfer control of any item on the project to themselves by removing the original uploader from the project member's list.
Items are created using the metadata schema of the submitter.	Contributors must adopt the metadata schema of the project owner, including custom fields.
Items also appear in the subgroup of the uploader.	Items appear only under the subgroup that the project owner is a member of, regardless of submitter's affiliation.
Items published by users from outside the organization don't have to go through review (if review is turned on for the group).*	Items published by users from outside the organization have to go through review (if review is turned on for the group).**

\*note: if a project is created, a certain amount of storage - usually 10GB - is set aside from the overall unit allocation *even if the project has no or even one or two small files in it*

\*\*currently review is NOT turned on for any SI group

## Create a new project

1. Go to the **Projects** tab and click on the **+Create a new project** button.
  - a. Complete the metadata fields as descriptively as possible.

- b. Under **Allocate storage** choose either group or individual storage as needed (based on the criteria above).

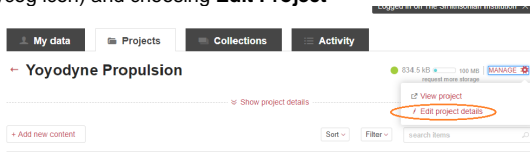
## Add Members

### While creating the project

1. Add people to the project by searching on the right hand side under **Members**. Add users not currently on Figshare by clicking on the **invite new users** link.
  - a. Members can either be **collaborators** or **viewers**.
    - i. **Viewers** can view, download and comment on datasets
    - ii. **Collaborators** can view, download, and comment *and* upload items to the project

### After the project has been created

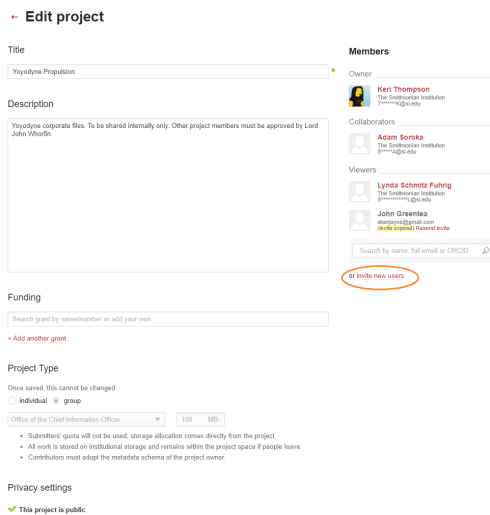
1. You can add additional members by clicking on the **Manage** link (in the right, near the wheel /cog icon) and choosing **Edit Project**



2. If new members have a figshare account, you can search for them by email address, name, or ORCID.

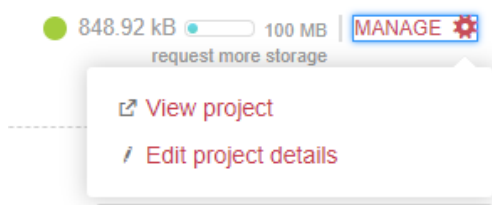
⚠ Note that many users have similar names, and it is difficult in this interface to differentiate among them. Adding members by using their ORCID or email are the safest options.

3. If new members do *not* have a figshare account, you can send them an invitation using the email link



## Remove members


1. Go to the cog next to Manage project and choose Edit project details




2. Click on the cog next to the 'retiring' member and choose Remove member (don't forget to click "save")

## Members



Owner

 **Keri Thompson**  
The Smithsonian Institution  
T\*\*\*\*\*K@si.edu

Collaborators

 **Adam Soroka**  
The Smithsonian Institution  
S\*\*\*\*\*A@si.edu

Viewers

   Remove member

3. if your project is a group project, you, the project owner, will now be able to edit items uploaded by the 'retired' member

## Privacy and pre-publication review


Projects can be a mix of both published (public) and unpublished (private) datasets. Anyone that is a member of a project - both viewers and collaborators - can view and download private datasets.



### Private Projects


If a project is not published, it will only be visible to the project members on their "projects" tab. It will not have a landing page.



## Adding/moving your data to a project

 this assumes that you are the owner of or a collaborator on the project

1. New dataset:

Select **Add a new item**, which takes you to the metadata form. Once you've saved the item, it will appear in the home page of the project. As a collaborator, you can comment on individual items within the project or on the project as a whole.

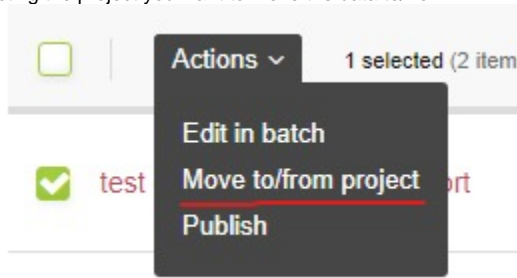
 Show project details

 <b>Add a new item</b> After the item is created you would be able to upload files or save it as metadata record only	 <b>Add a note</b> Post an update or a generic comment about the project
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2. Existing dataset:

You can also move your existing data to a project by clicking the checkbox to the left of the item you want to move in **My data**, clicking on **Actions**, selecting **Move to/from project**, and

selecting the project you want to move the data to/from.



⚠ To make the project public, you must first make *at least one item public* within the project.

## Related articles

- [Create collaborative spaces using "projects"](#)
- [Group or structure sets of files](#)