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Tutorials

PROJECTS: OVERVIEW

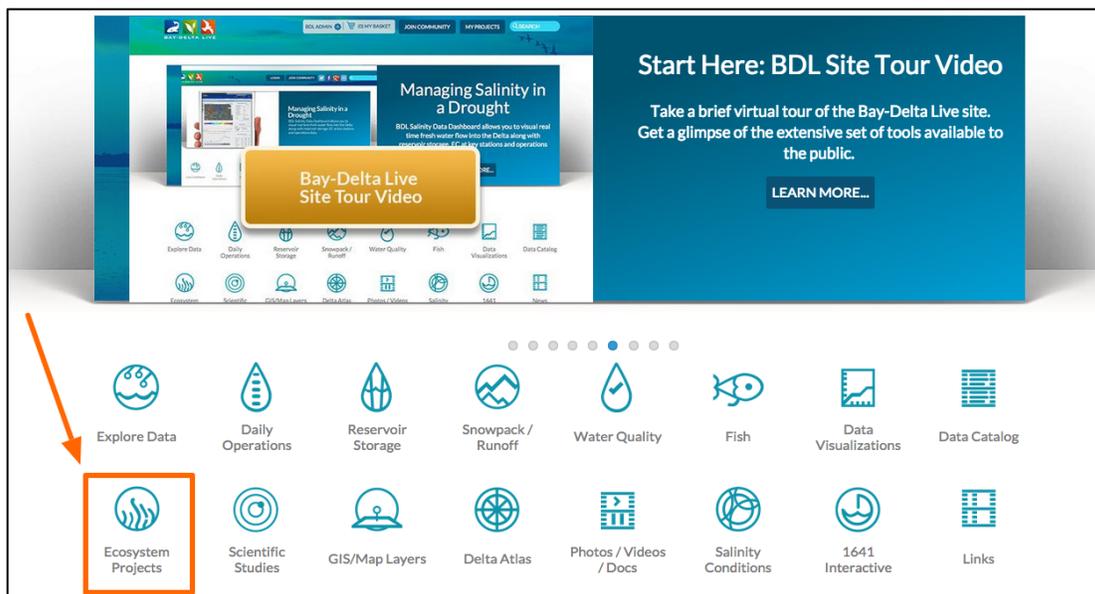
This tutorial includes all the aspects of creating and editing a Project page. If you'd like to get to a specific tutorial, you can click on the links below.

In this tutorial, you will learn how to:

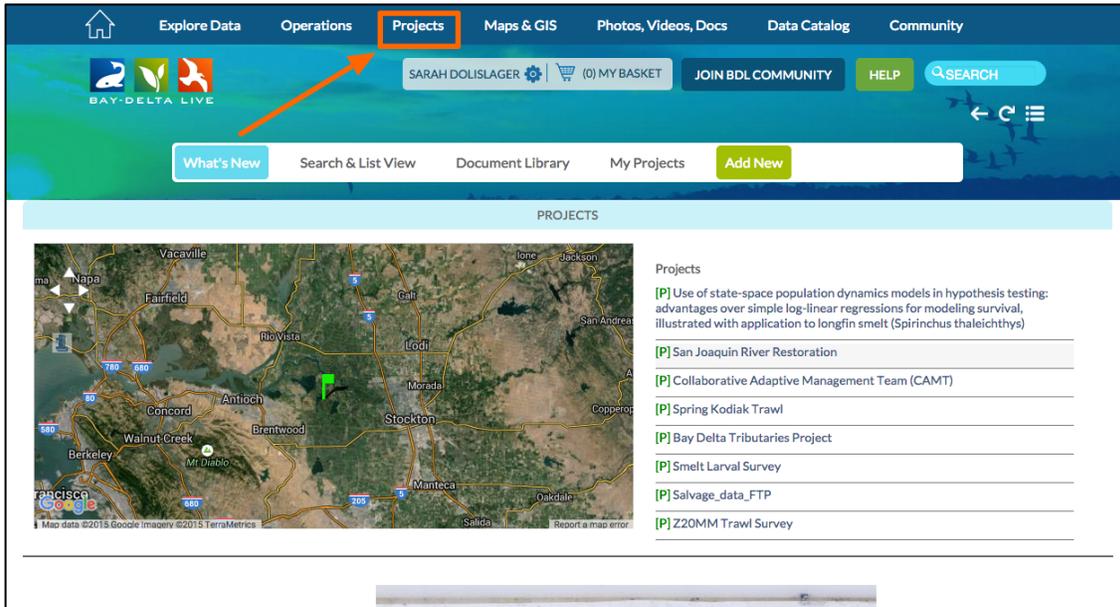
- Find and browse existing projects
- Add a new project
- Edit the project “article” page
- Add documents, images, and videos to your project
- Edit the project information
- Share your project

FIND AND BROWSE EXISTING PROJECTS

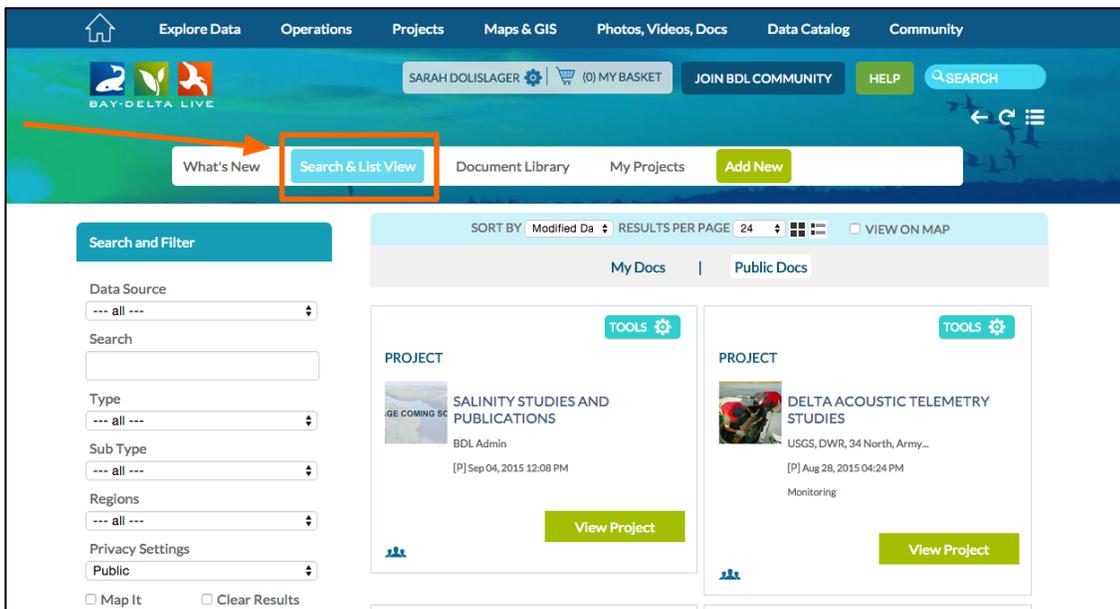
To browse existing projects, click on the, “ecosystem projects” on the homepage.



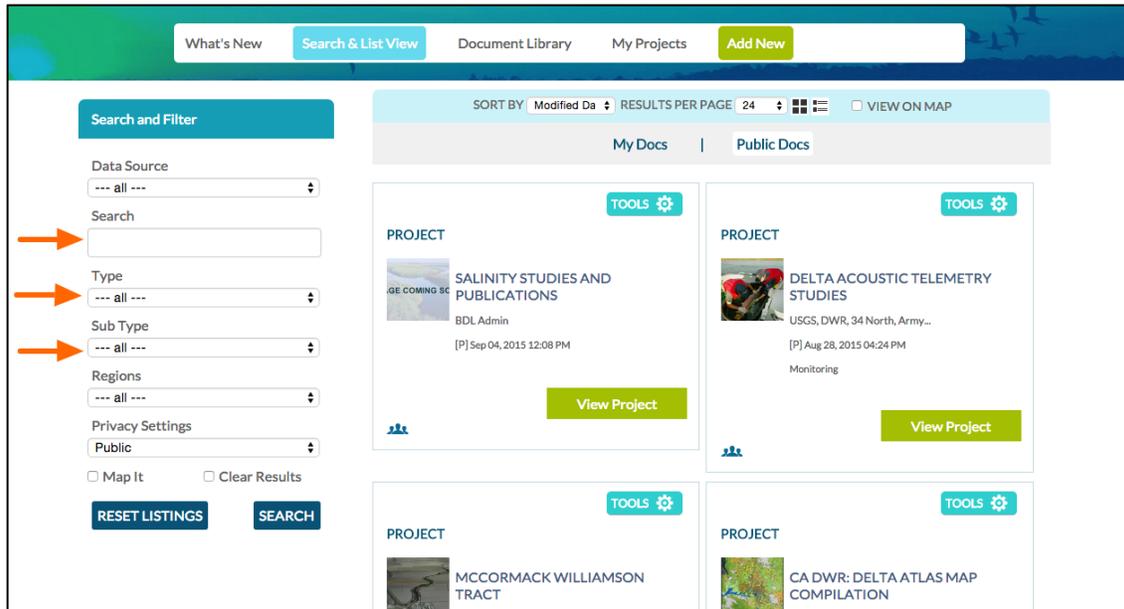
You can also get to this page from any other page by clicking, “Projects” on the bar at the very top of the screen.



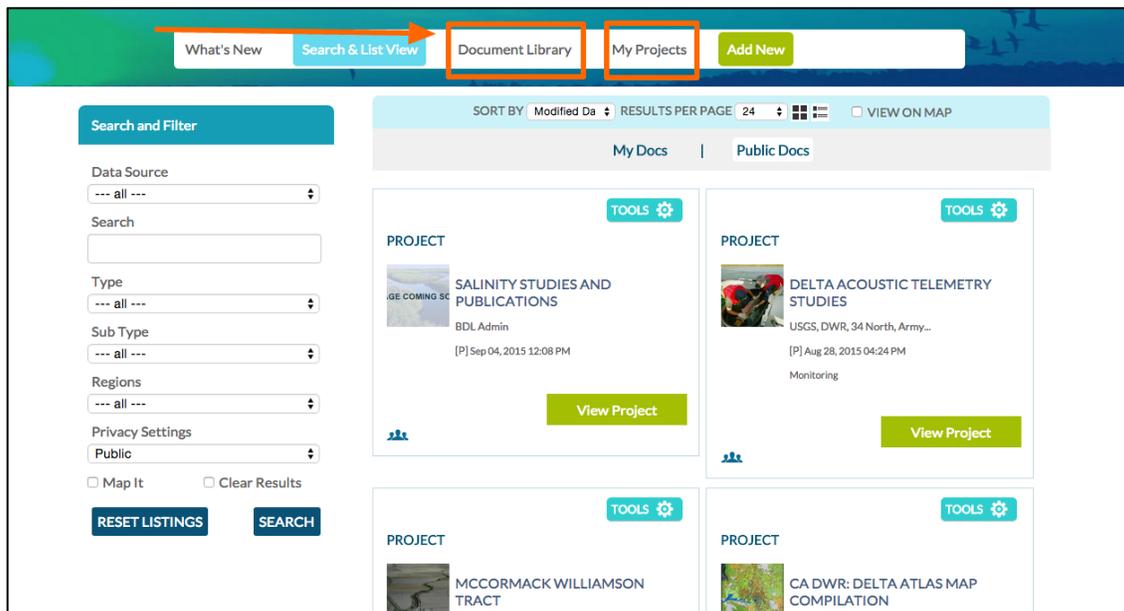
If you are looking for a specific project, you can go to the, “Search & List View” in the sub-navigation.



From here, you have various options such as data source, type, and specific region.

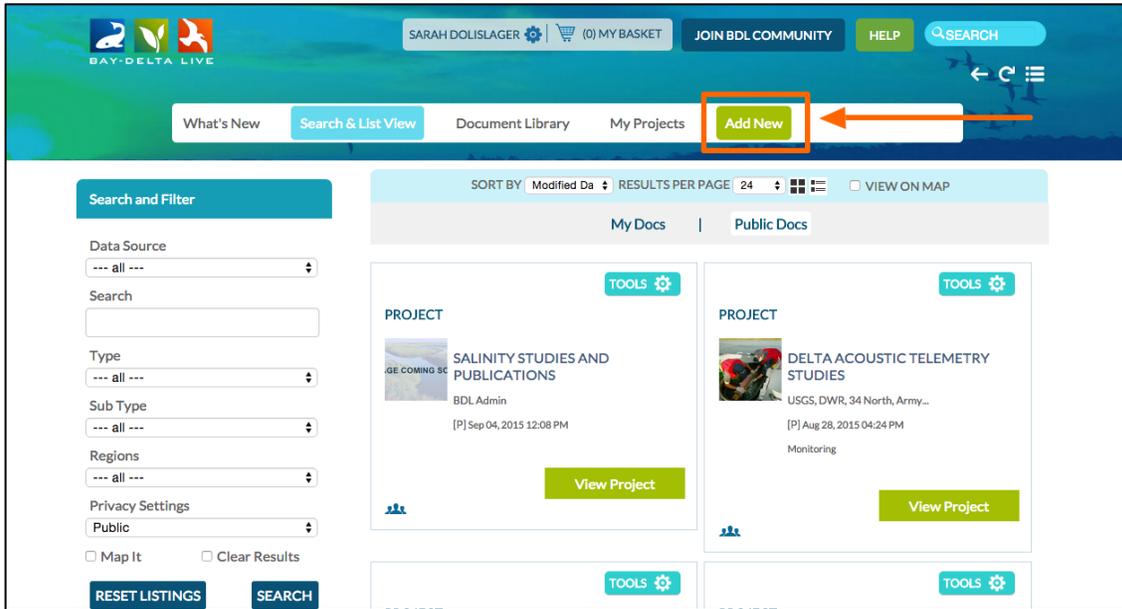


You can also access your projects and the documents library in the sub-navigation.

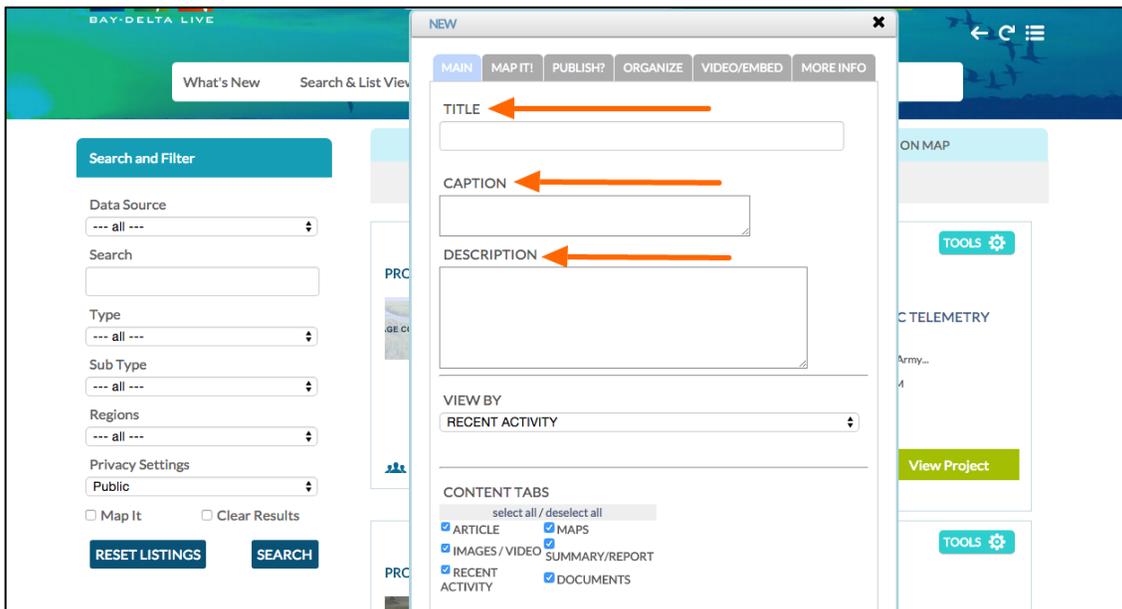


ADD A NEW PROJECT

To add a new project, click, “Add New” in the sub-navigation.



A new form will appear that you can fill out with information such as the Title and Description.

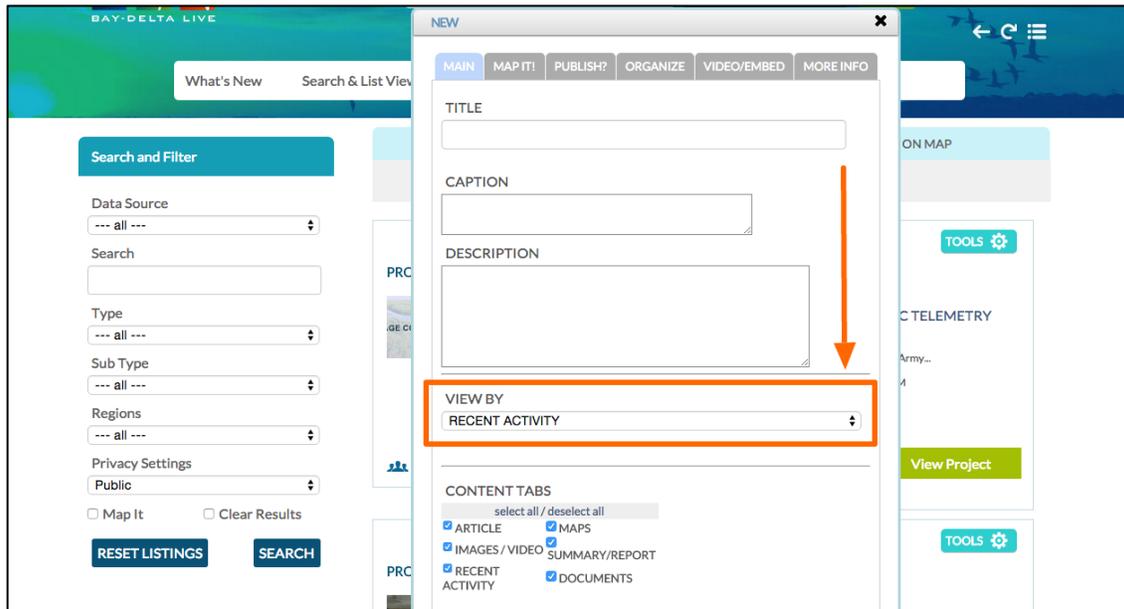


The “View By” drop-down menu decides what page people will first see when they open up your project.

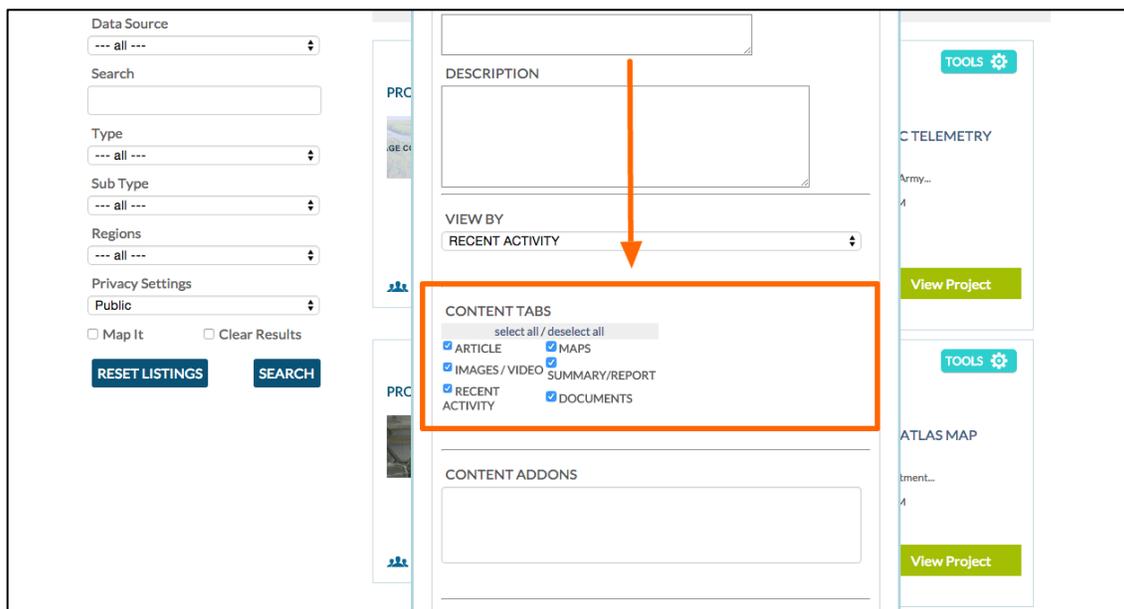
Essentially, this menu decides what your project homepage is.

A good option is, “Article” because this page is customizable. You can create an engaging information page or “data story” to summarize your project.

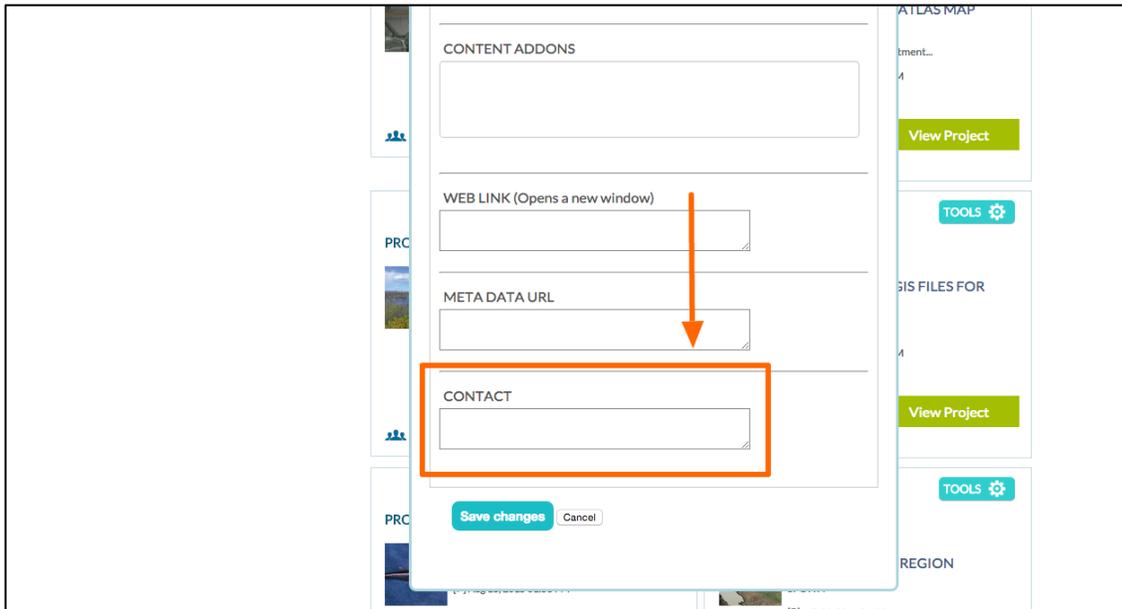
I will show you how to do that in the next section of this tutorial.



The “content tabs” are the different page options of a project page. If you are not sure which tabs you want to include, leave them checked and you can come back and edit this section later.



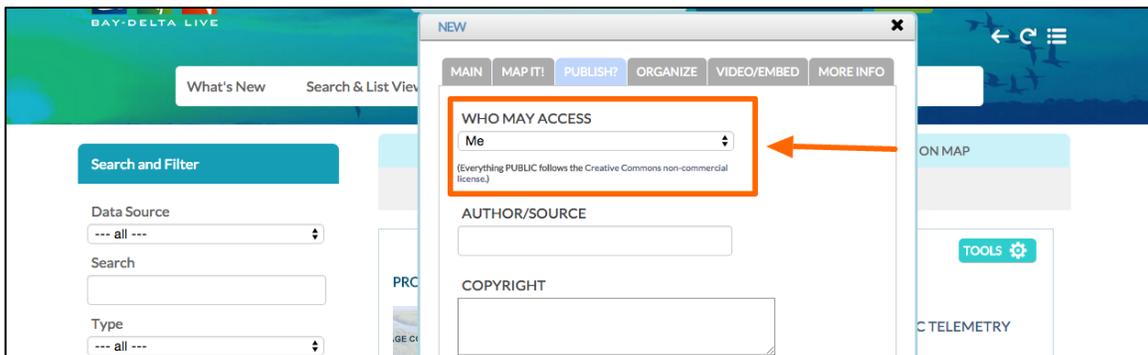
Next, enter any contacts of the project in the designated slot.



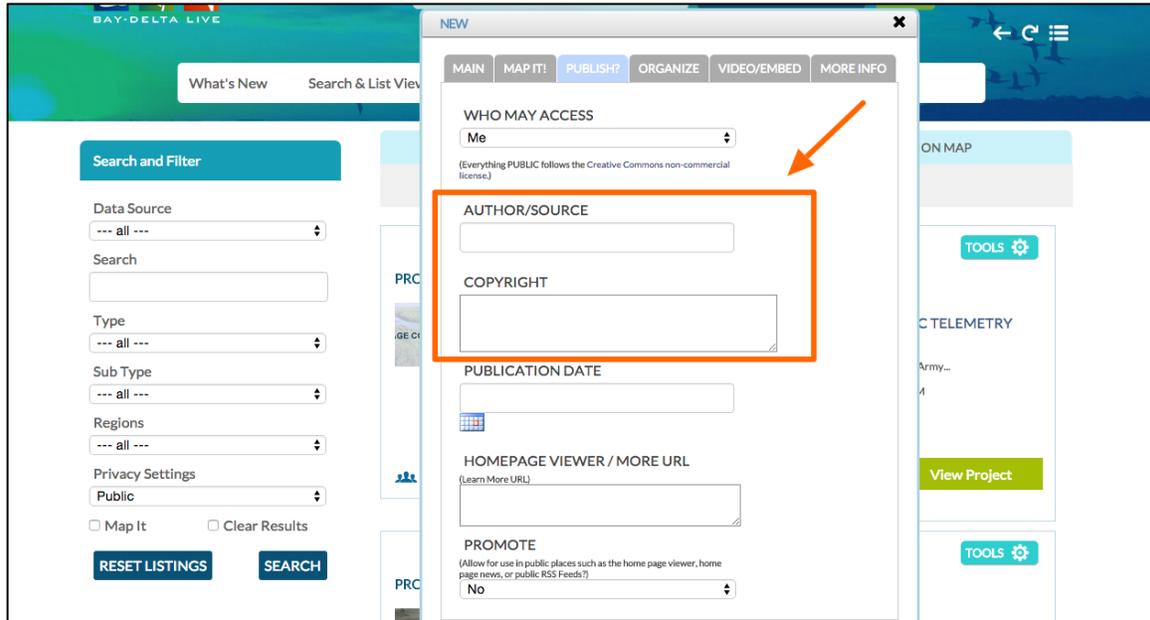
Then go to the “Publish?” tab.



Under the “Who May Access” drop-down menu, there are two options: “Me” and “Public/Everyone.”
If you want to keep the project private until you are done editing, then select, “Me.”

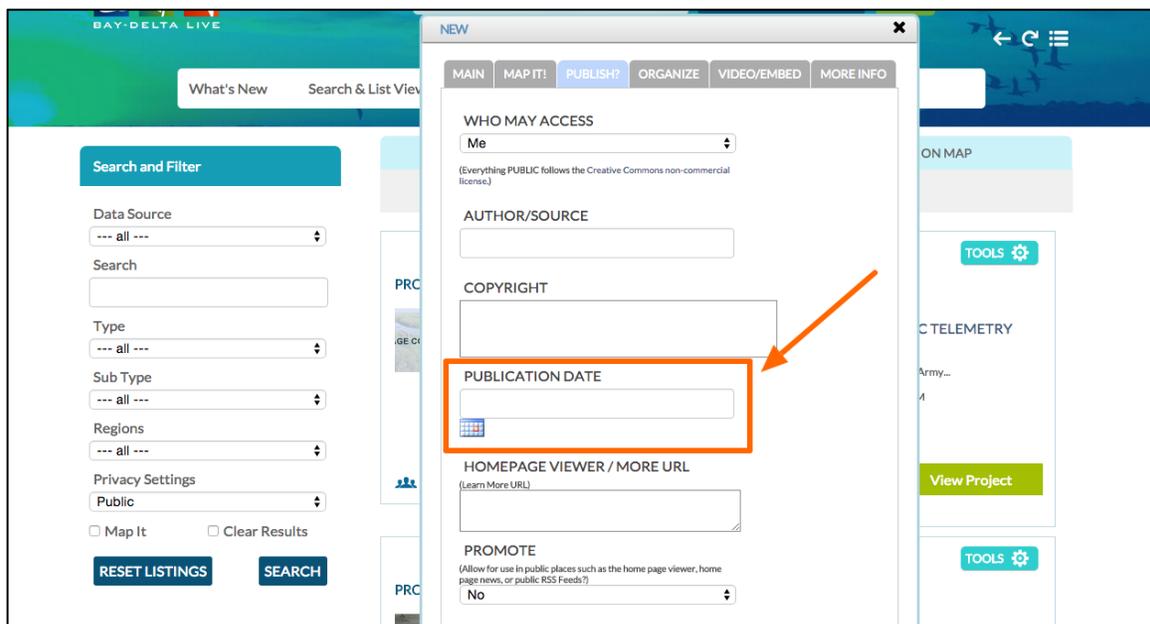


Next, fill out Author/Source accordingly, along with any necessary copyrights.



The screenshot shows the 'NEW' project creation interface. The 'PUBLISH?' tab is active. The 'WHO MAY ACCESS' dropdown is set to 'Me'. The 'AUTHOR/SOURCE' and 'COPYRIGHT' text input fields are highlighted with an orange box. An orange arrow points to the 'Me' dropdown menu. Other visible fields include 'PUBLICATION DATE', 'HOMEPAGE VIEWER / MORE URL', and 'PROMOTE'.

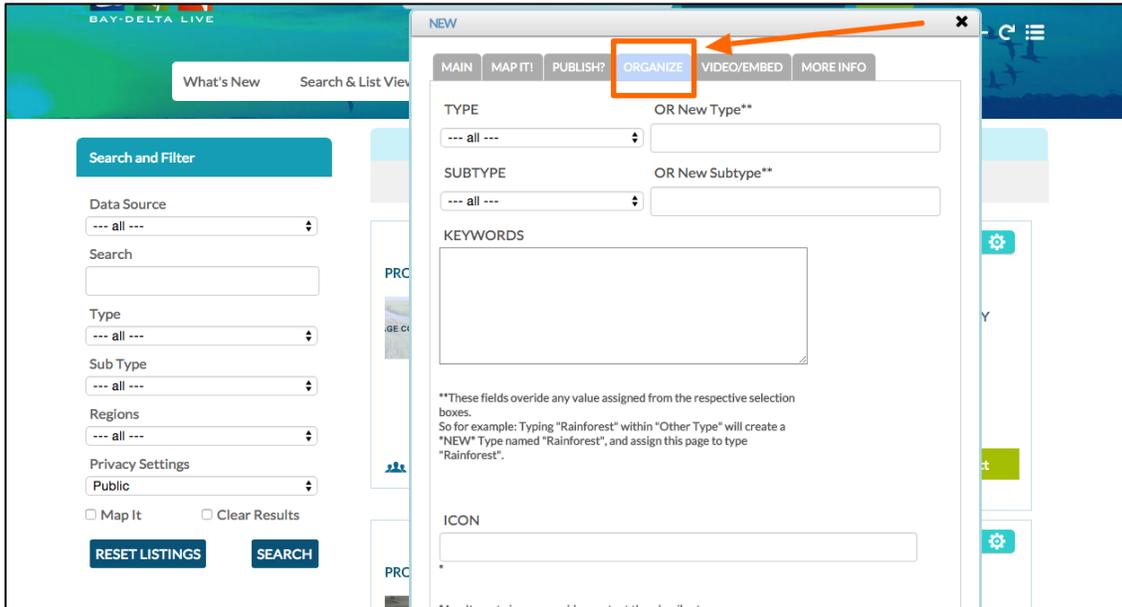
To select a publication date, click on the calendar icon and choose a date.



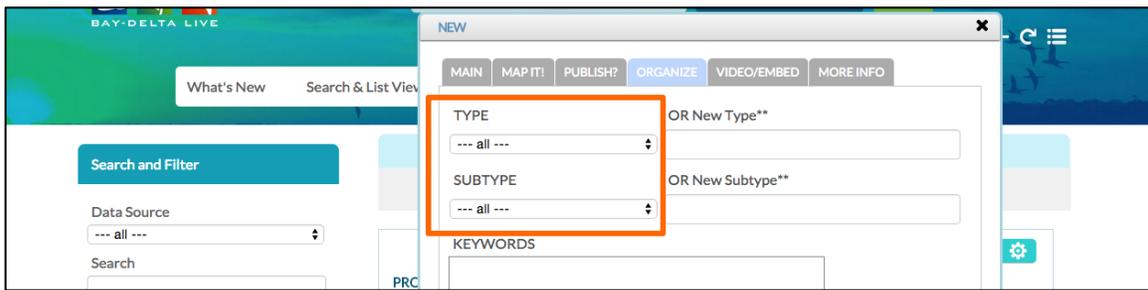
The screenshot shows the same 'NEW' project creation interface. The 'PUBLICATION DATE' field, which includes a calendar icon, is highlighted with an orange box. An orange arrow points to the calendar icon. The 'AUTHOR/SOURCE' and 'COPYRIGHT' fields are no longer highlighted.

You can choose how and where to promote your project under this tab, but if you chose to keep it private, you can come back to edit this section when you make it public.

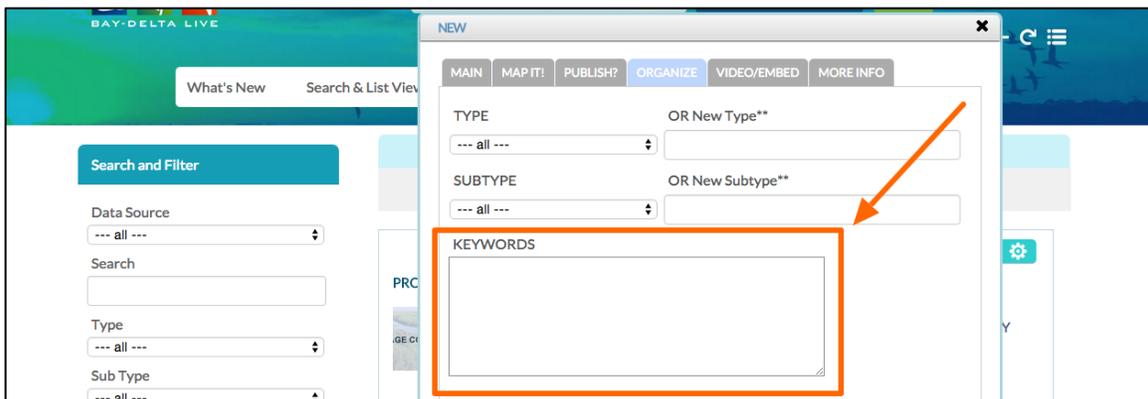
Then go to the “Organize” tab.



This is where you can specify a type and subtype, so that when people use the search function, they can find your project.



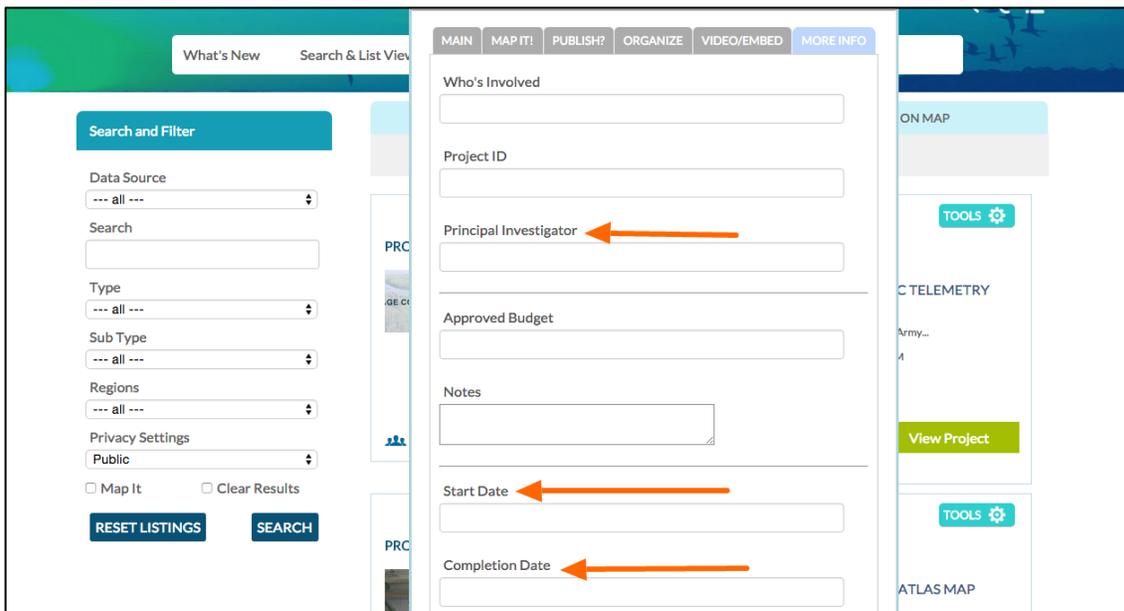
You can also make a list of keywords for the same purpose. Be sure to separate each keyword or phrase by using a comma.



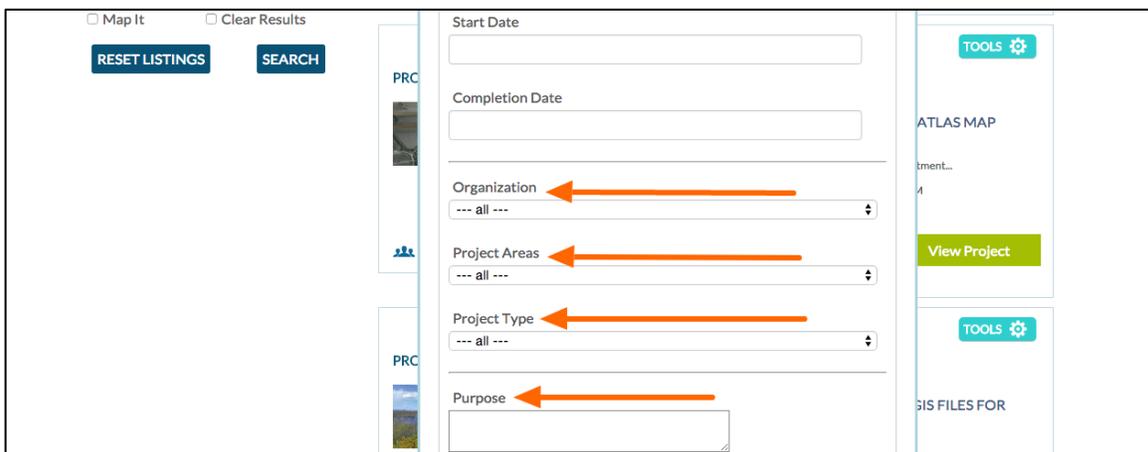
Then go to the “More Info” tab.



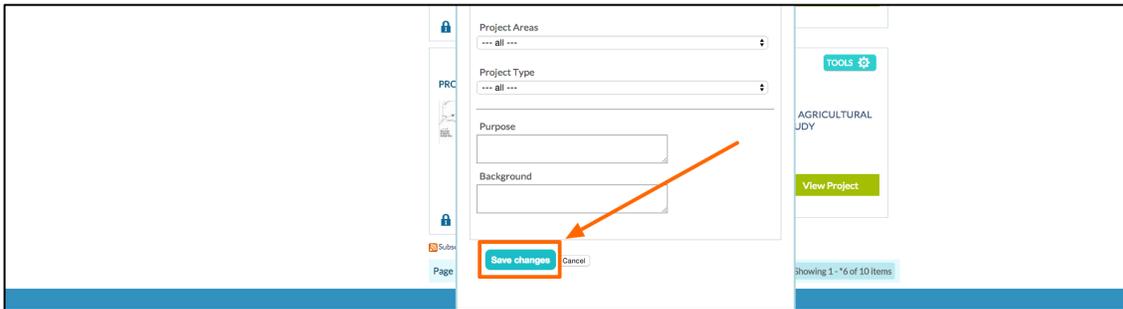
You can enter detailed information here such as who is involved, the principal investigator, and a start and completion date.



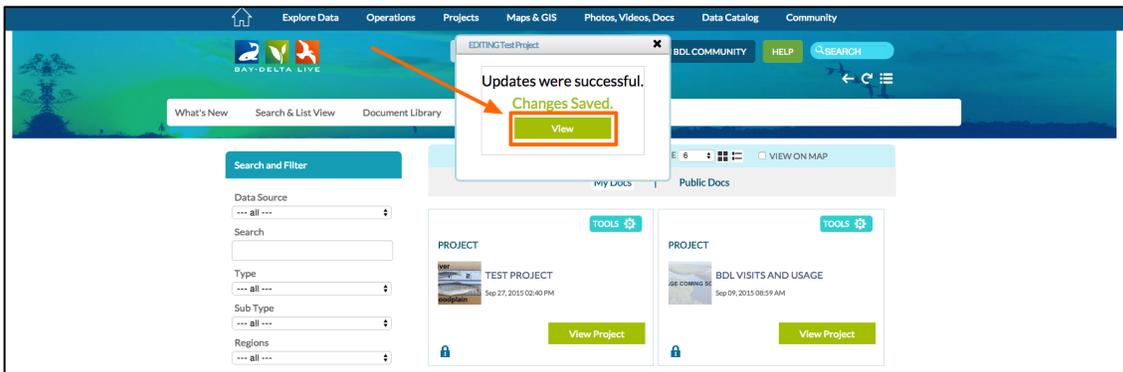
If your organization is in the “Organization” drop-down menu, select it. You can select a region or project type under the drop-down menu and fill out the purpose and background sections if you wish.



Remember, all of this can be edited later.
When you are done, click, “save changes.”



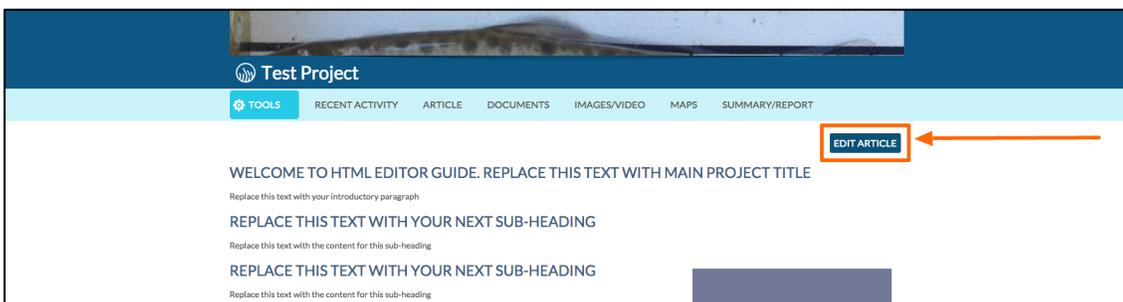
A box will appear after you save your changes with an option to view your new project.
Click, “view.”



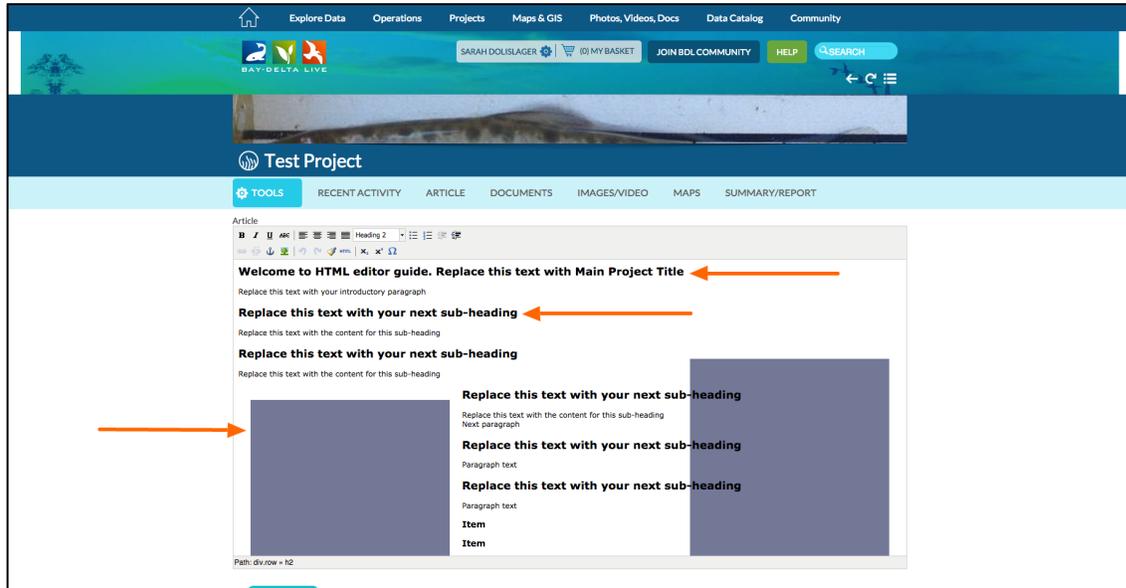
Since you chose “Article” from the “View By” drop-down menu, it opens up to that page.

EDIT THE PROJECT “ARTICLE” PAGE

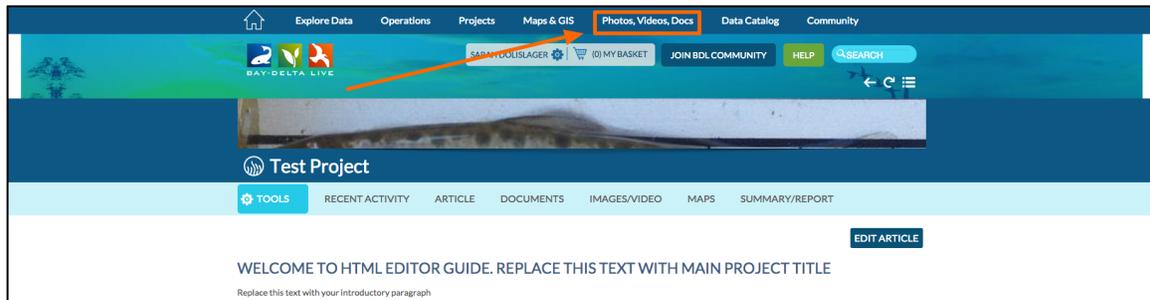
You can edit the content on this page by clicking the, “Edit Article” button.



You can use the HTML editor guide to create your page. There are headings, text, and photo examples in place to guide you.

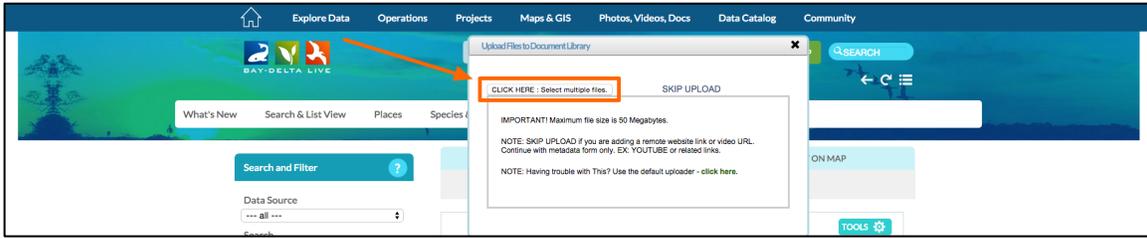


To add photos to this page, you need the Image URL.
To get this, find the photo you would like to add in the Photos/Videos/Docs library.
Click on, "Photos/Videos/Docs" at the top of the page.

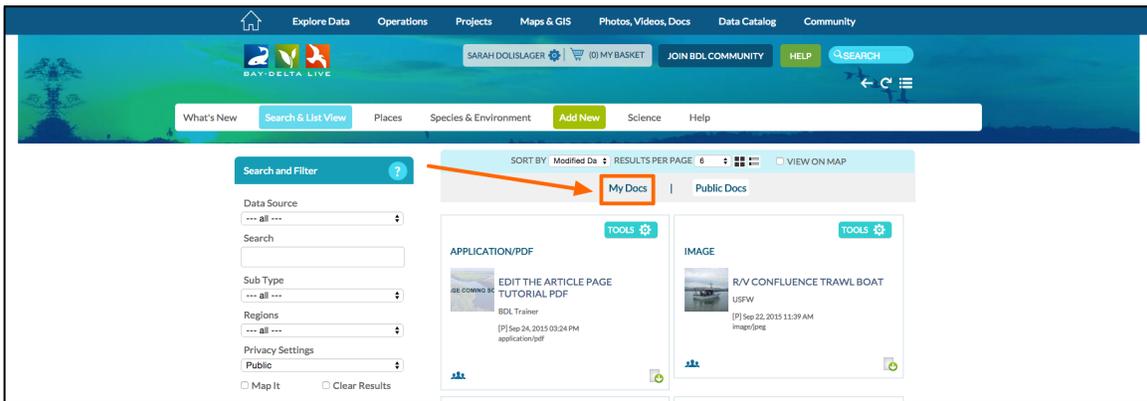


If the photo you want to add to the article page is not uploaded into your library, click "Add New" and then click on, "Click Here: Add Multiple Items" to browse your computer.

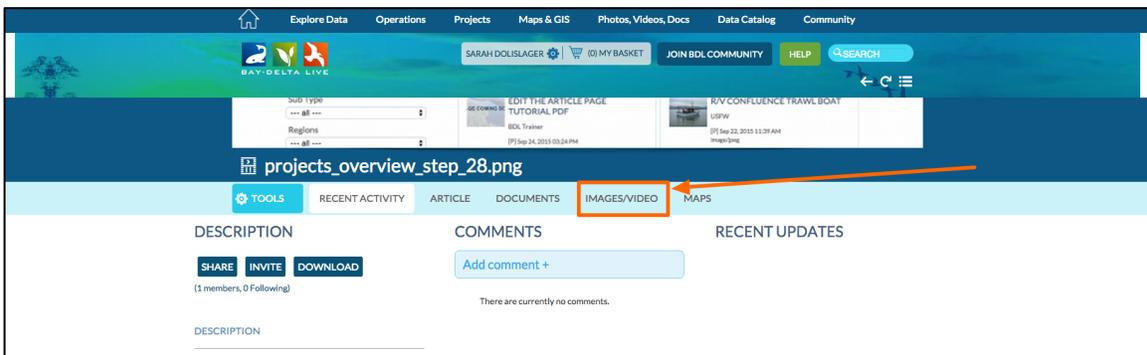




Once you have chosen the photo from your computer and it is finished uploading, you will find the photo by clicking, “My Docs.”



Click on the image. If it goes to the “Recent Activity” page when you click on it, click on the “images/video” option in the sub-navigation.



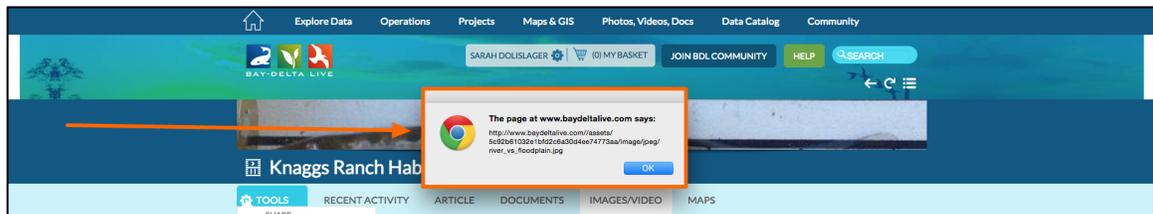
The following steps can be followed for the image you just uploaded or any images already in the document library.

Hover over the TOOLS menu in the left-hand corner.

Then, click on “Image URL.”



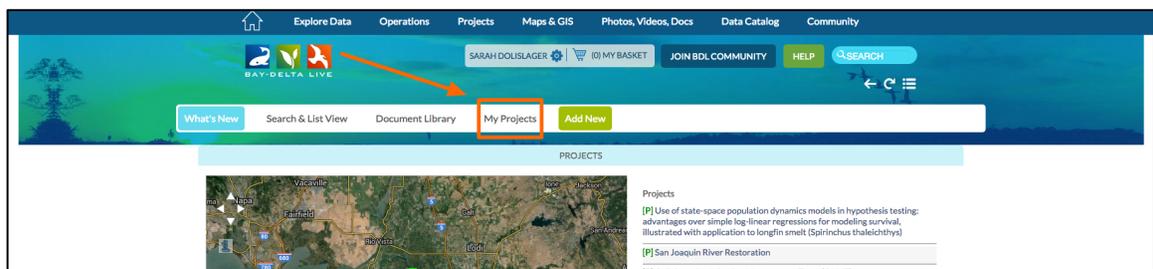
A box will appear containing the URL.
Highlight the URL and right-click.
Choose, “copy.”



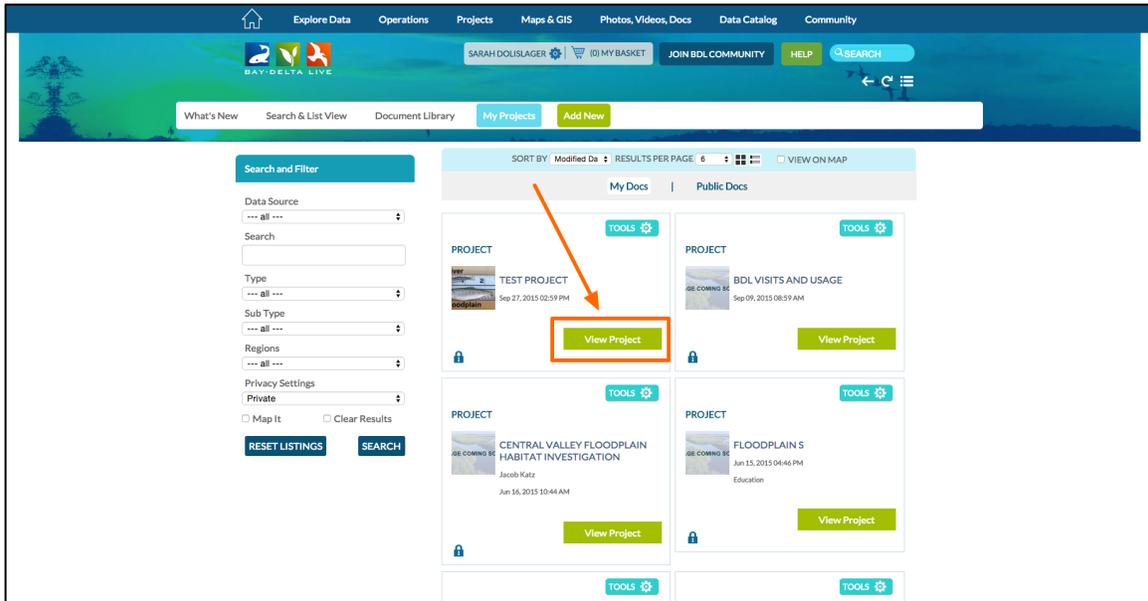
Now, go back to your project by clicking, “Projects” at the top of the screen.



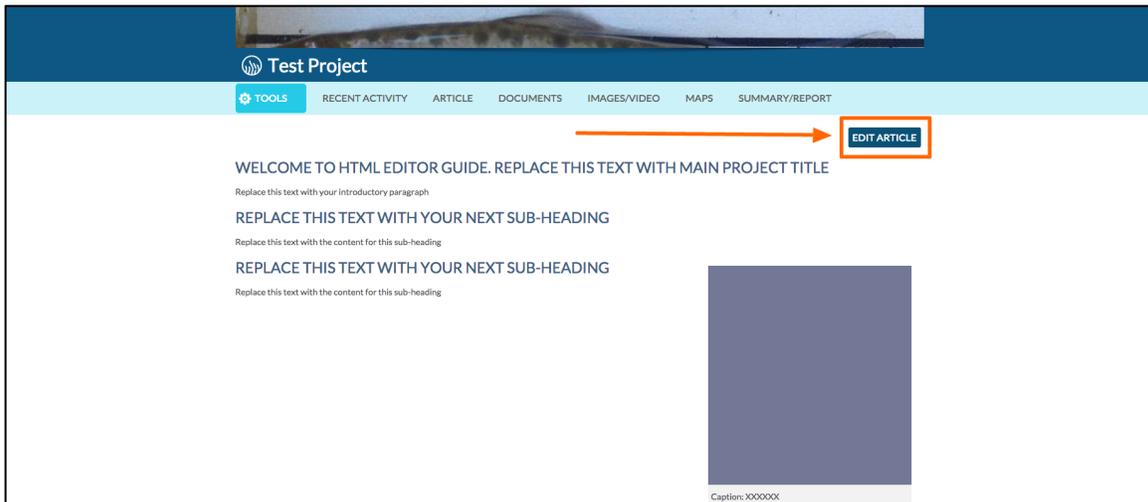
Click on, “My Projects” in the sub-navigation.



Then, click on the, “View Project” button.



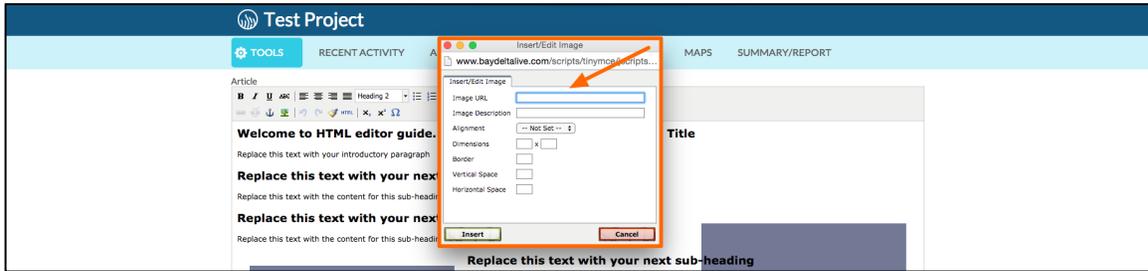
Click, “Edit Article.”



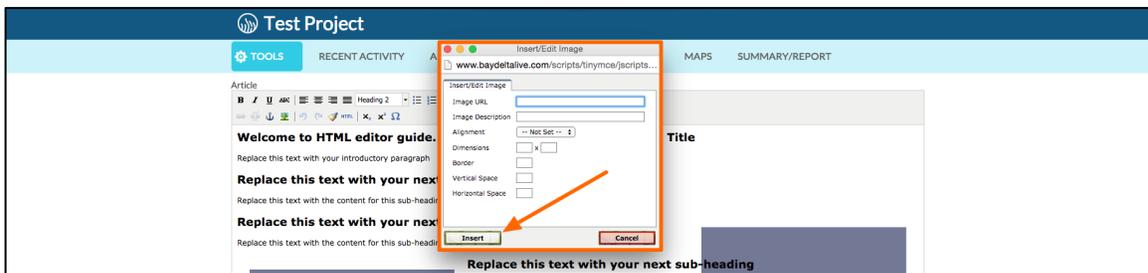
To insert the image into the article page, click on the “Insert/Edit Image” icon on the toolbar. It’s the one that has the picture of a tree.



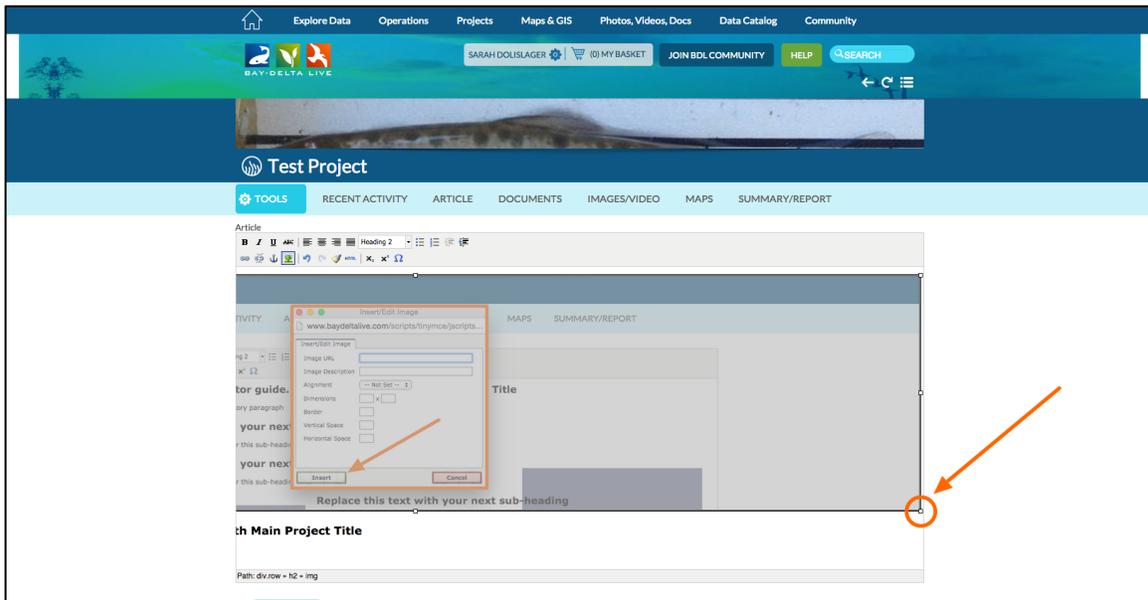
Paste the image address you copied in the, “Image URL” line.
You can choose an alignment for the image by clicking on that drop-down menu.



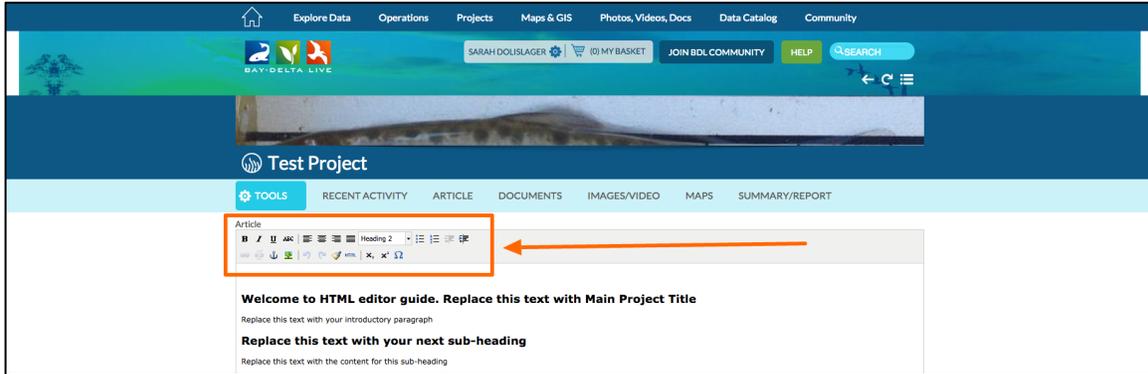
Then click, “insert.”



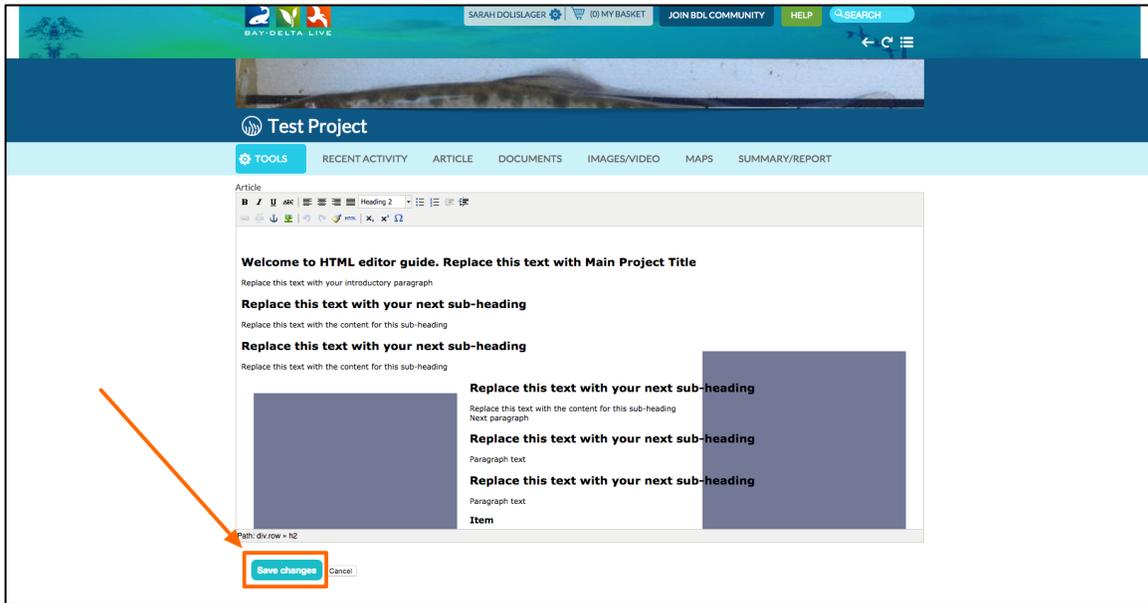
Now, you can see that the image is too large for the rest of your template. You can re-size the image by hovering over the corner until an arrow appears and then move your cursor towards the center of the image to make it smaller.



Then go back and edit the image information by selecting the image and then clicking on the, "Insert/Edit" icon in the toolbar menu.
The same box will appear and you can make any changes you need.
The next part of editing the article page is to insert any titles, subtitles, and text.
If you would like to edit the font, you can do so by using the options in the toolbar.

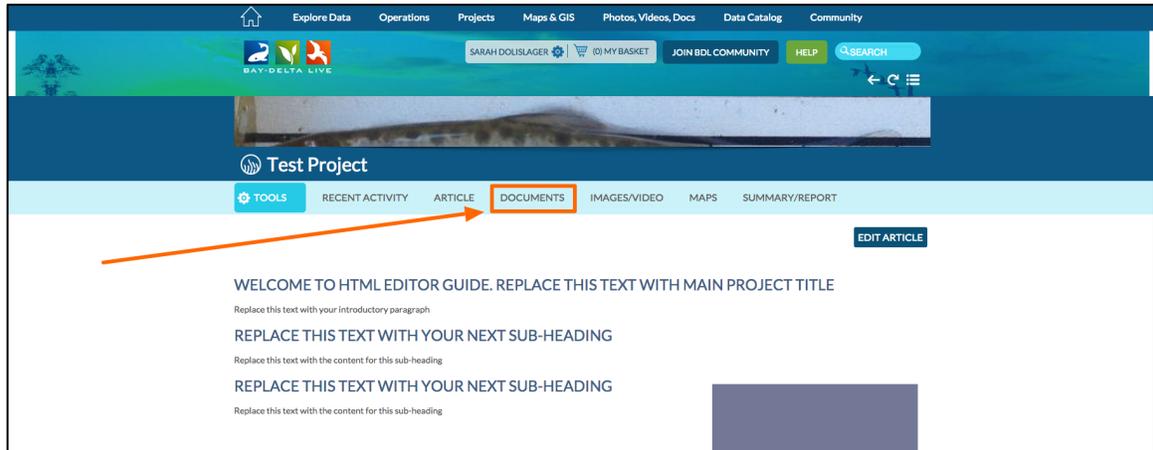


Once you are done editing the article page click, "Save changes."

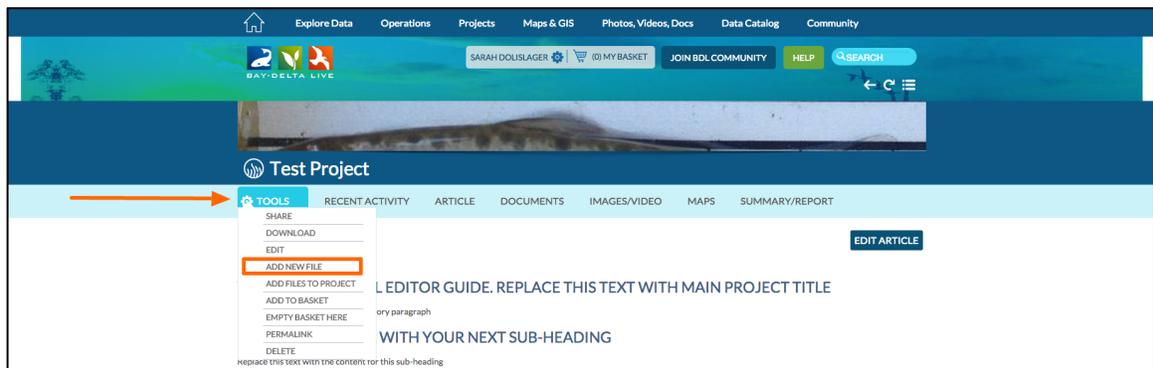


ADD DOCUMENTS, IMAGES, AND VIDEOS TO THE PROJECT PAGE

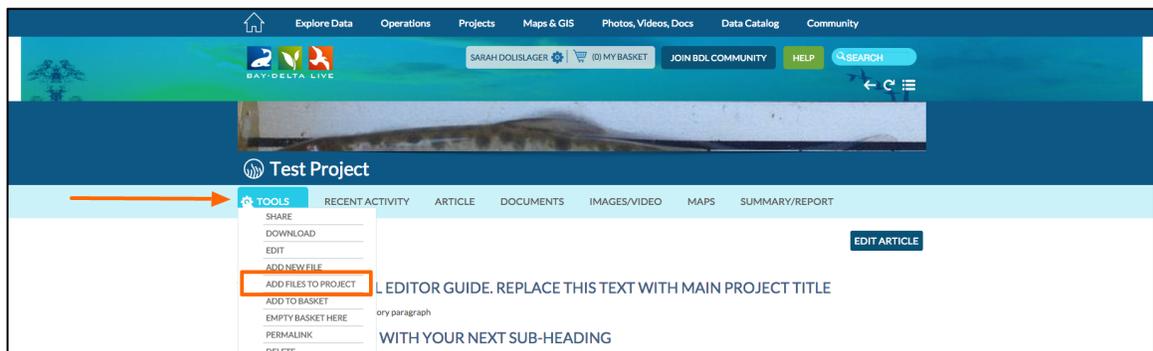
To add documents or images to your project page, click on, “documents” in the sub-navigation.



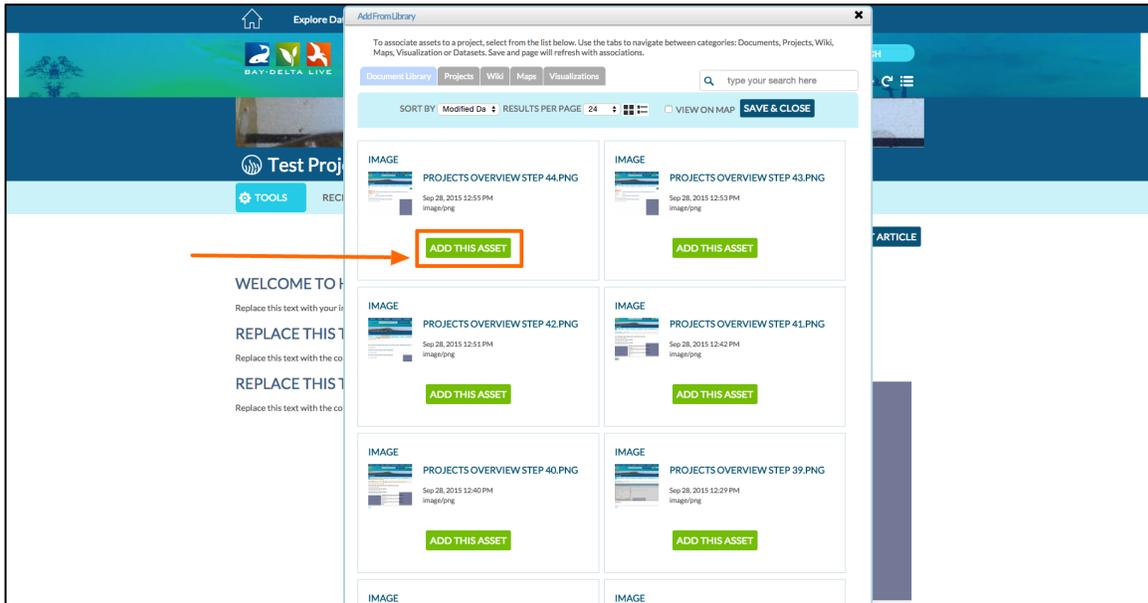
Hover over the TOOLS menu and choose, “Add New File.”



If you already have the photo or document uploaded to your library then choose, “Add Files to Project.”

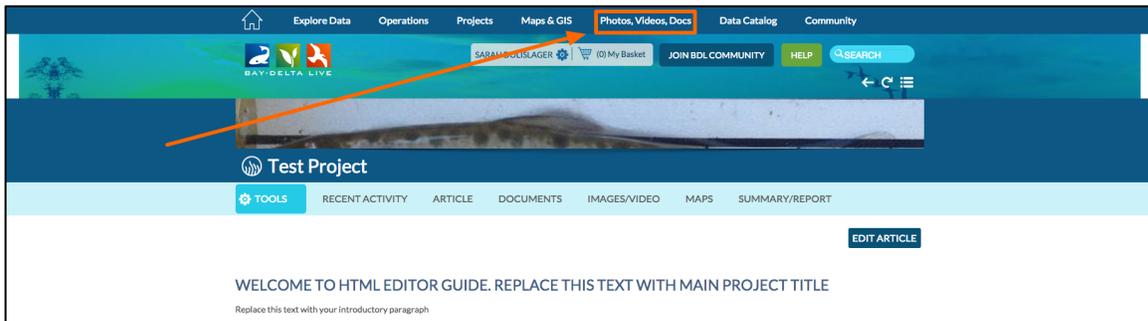


You can choose the photos or documents you'd like to add by clicking, "Add Asset."

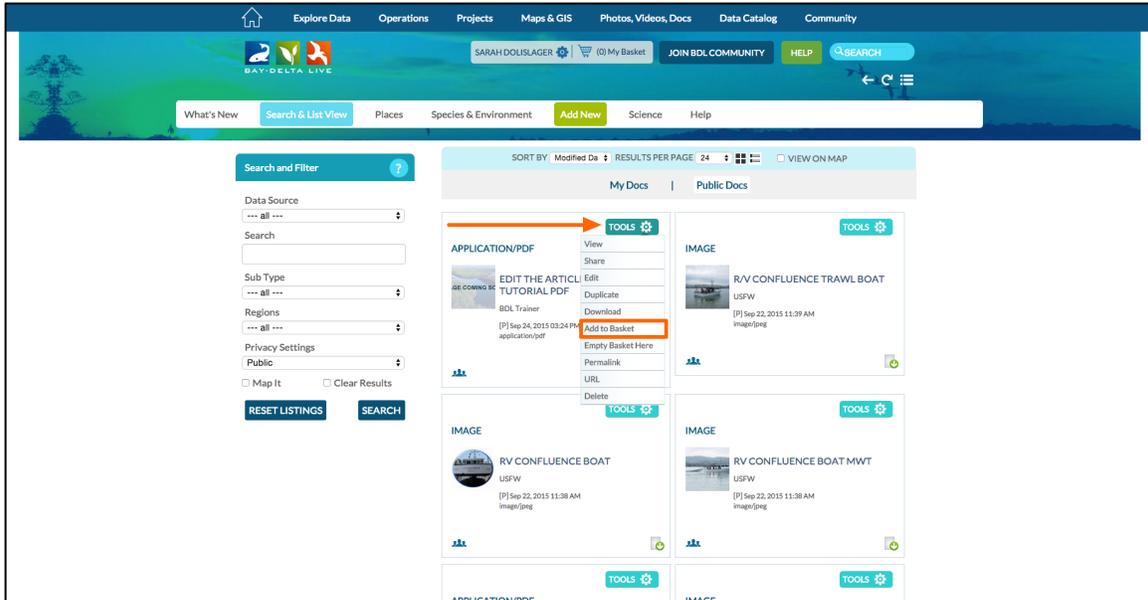


You can also add photos/videos/documents to your project by using the basket function.

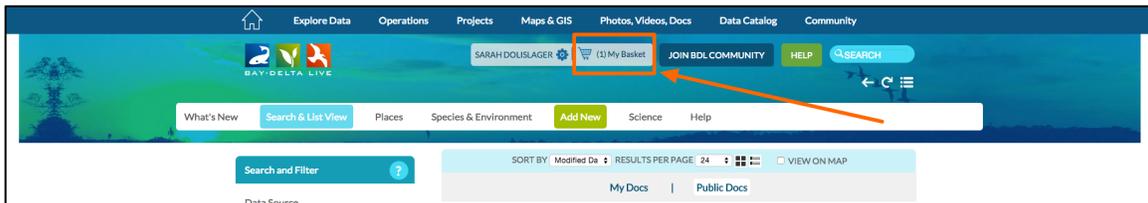
Go to the document library via the "Photos, Videos, Docs" link at the top of the page.



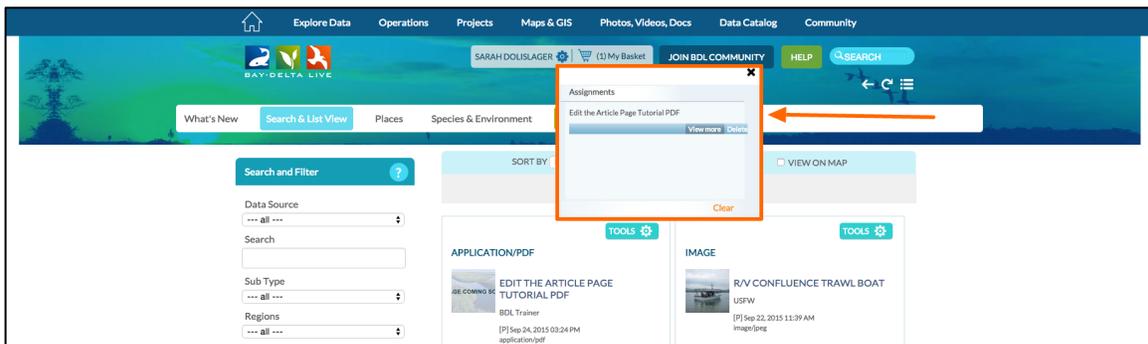
Hover over the TOOLS drop-down menu on the right corner of the image you want to add.
Choose, "Add to Basket."



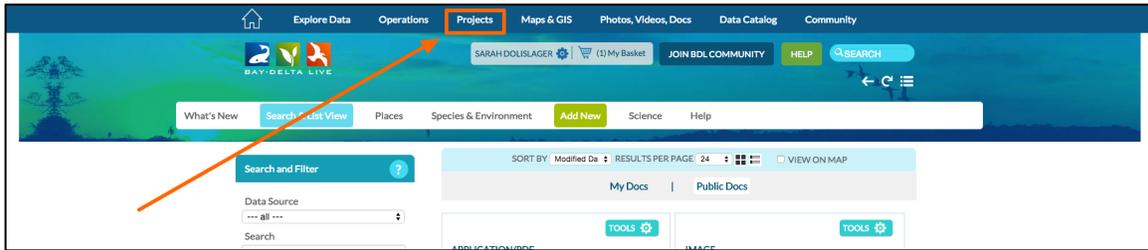
If you scroll up to the top of the page and look to the right of your name, you will notice that you now have one item in your basket.



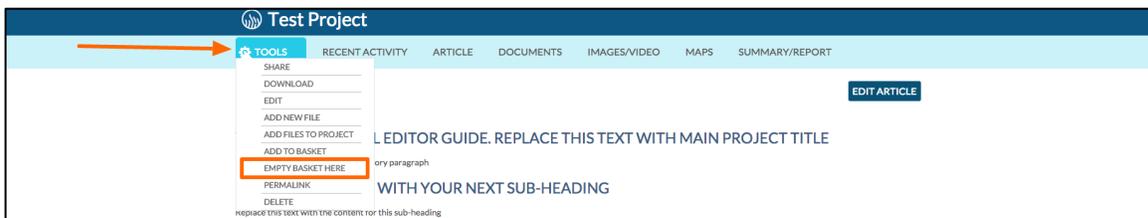
If you click on that link, a box will appear showing the items in your basket.



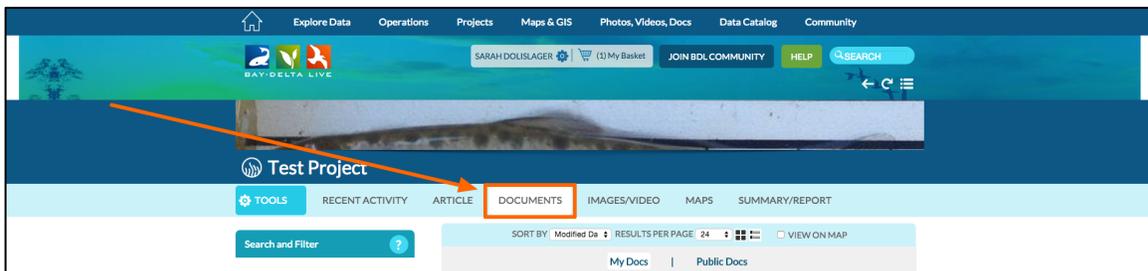
To add this item to your project, click on, “Projects.”



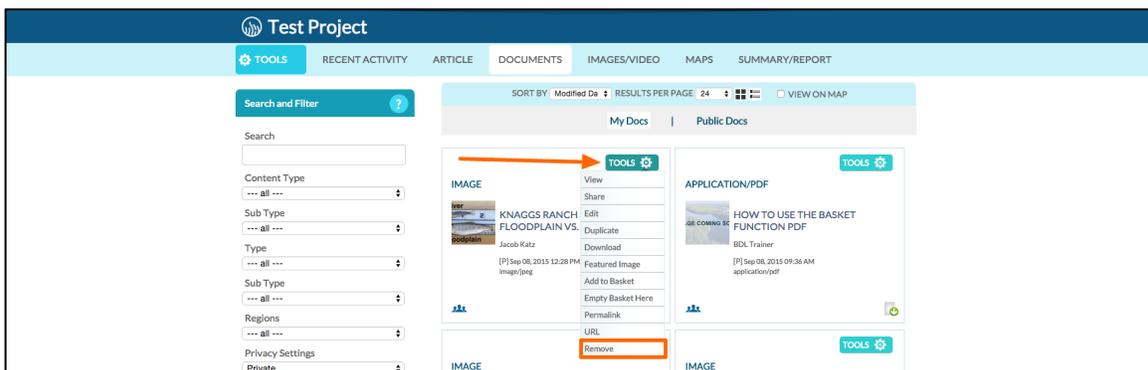
Find the one you are working on and then click the, “View Project” button to open it. Go to the TOOLS menu and choose, “Empty basket here.”



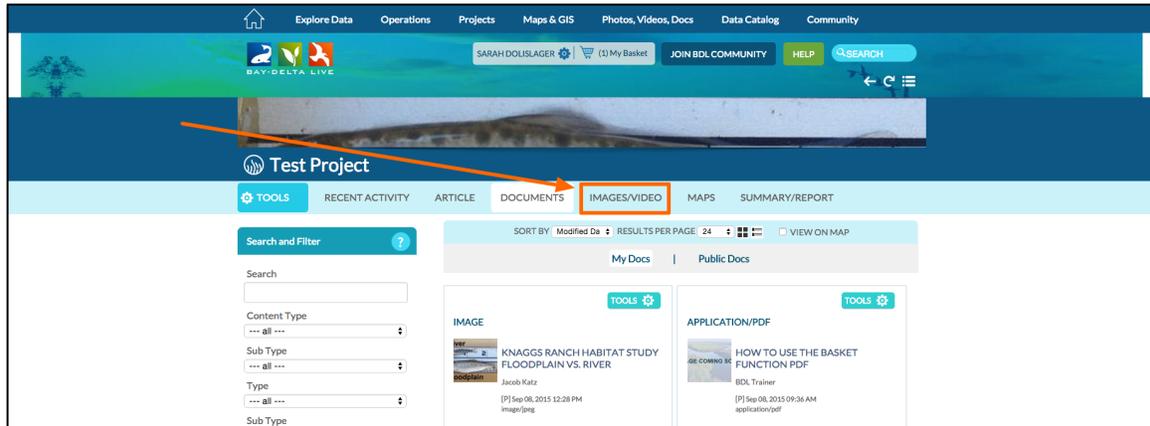
Click on, “Documents” in the sub-navigation and you should see the item you just dropped.



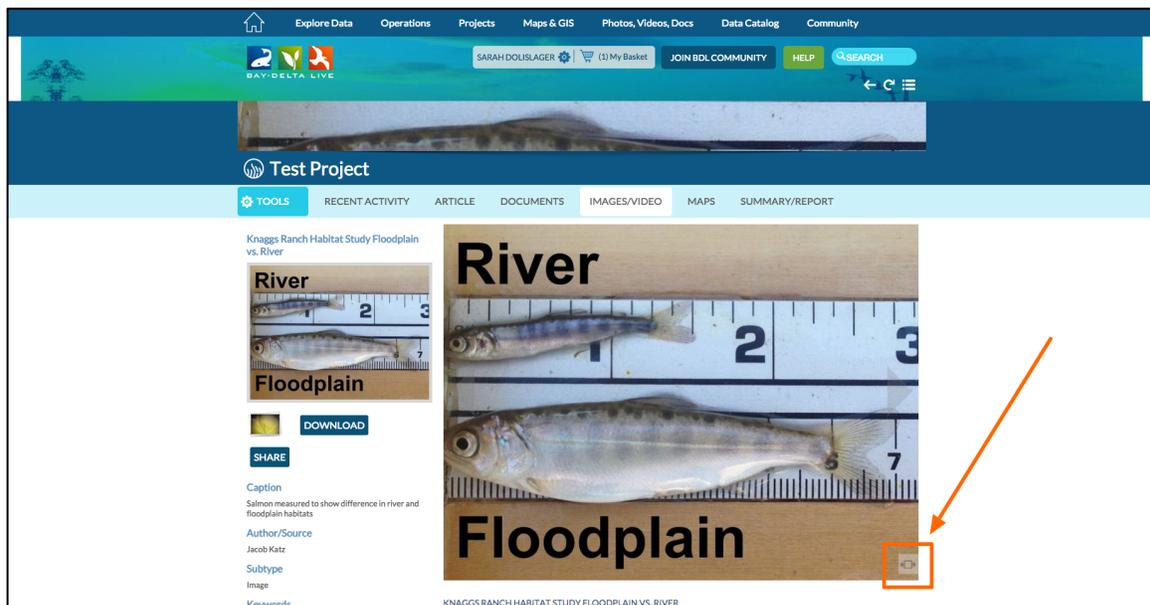
If you wish to delete an item from your project, hover over the TOOLS menu in the right-hand corner of each image or document. Choose, “Remove.”



You can also access the images by clicking, "Images/Video" in the sub-navigation.



Here they show up in slideshow form. To see the photo in full-size, click on the expand icon that appears in the bottom right corner of the image.

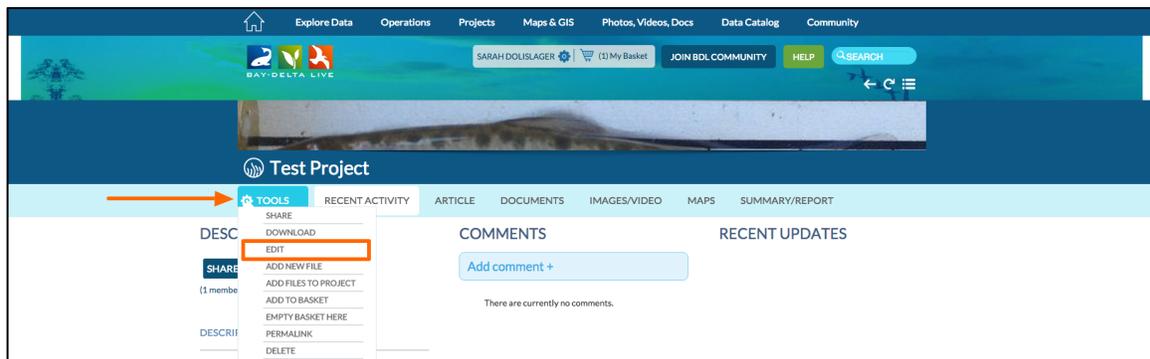


You can click through the slideshow by using the arrow buttons.

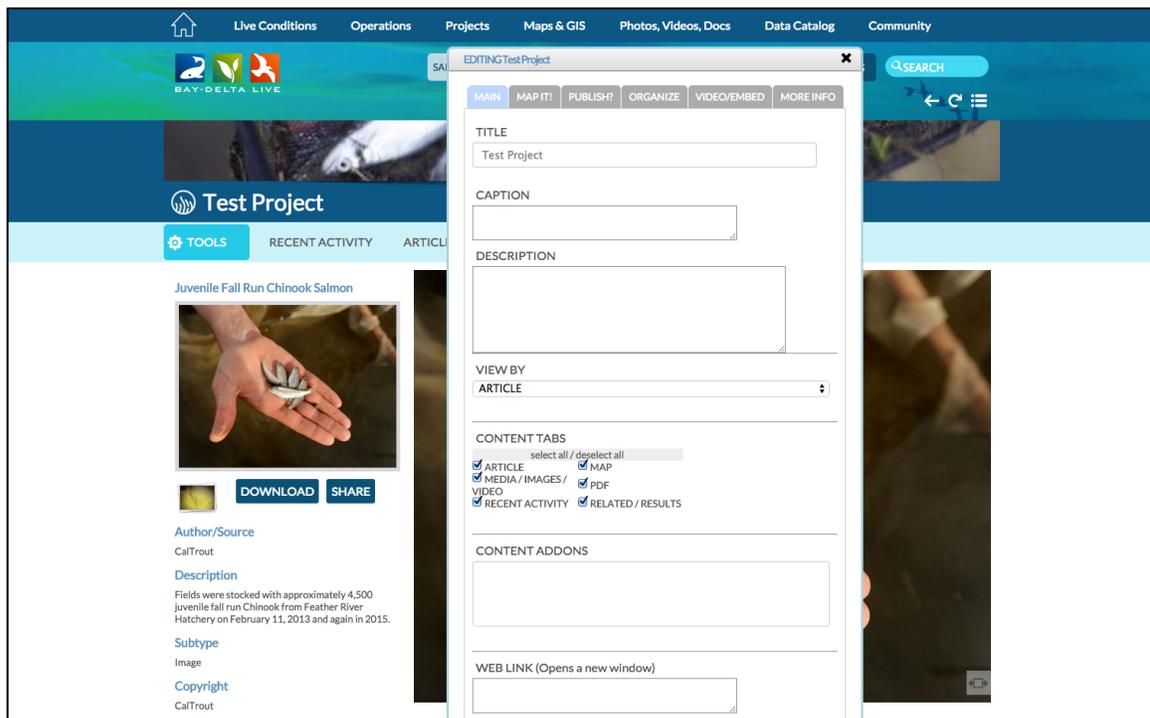
EDIT THE PROJECT INFORMATION

If you are finished putting in all the pieces to your project and you're ready to make it public, you can go back and edit the information.

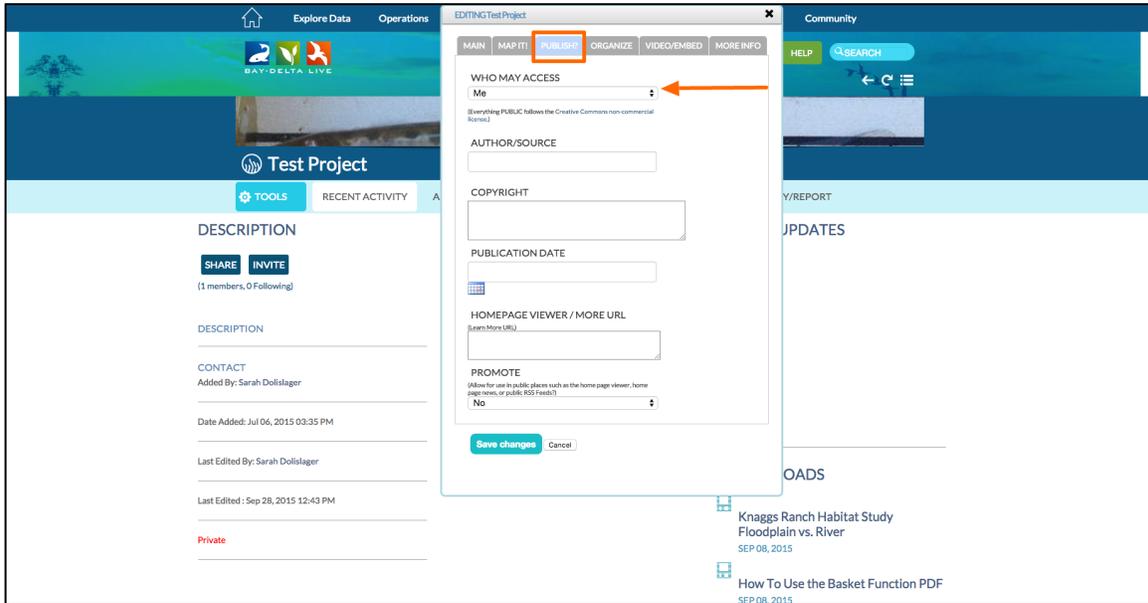
Go to the TOOLS menu and choose, "Edit."



This is the Editor, the form that you filled out when you first created the project.



To make the project public, go to the “Publish?” tab and select “Everyone” under the “Who May Access” drop-down menu.

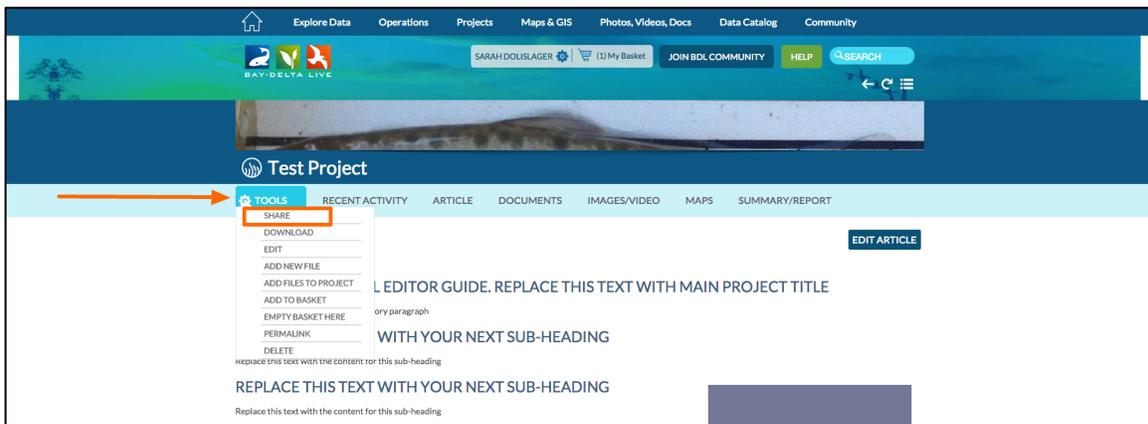


You can also edit the description or any project details in this form. Remember, you can always come back and edit this information.

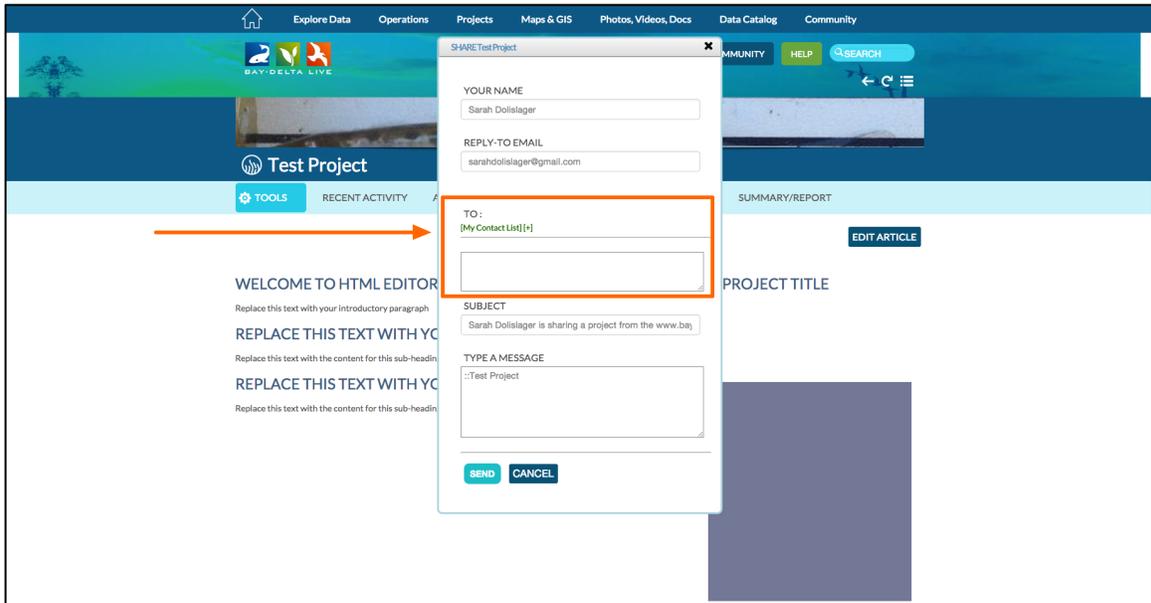
SHARE A PROJECT

If you'd like a colleague to review your project or you want to share your project with a group, you can do this through the TOOLS menu.

Hover over the TOOLS menu and choose, “share.”



You can use the built-in BDL contact list or enter email addresses.
This will send the link for them to review.



This concludes the “Projects: Overview” tutorial.
We hope this helps you to get started in creating projects and sharing information
on Bay-Delta Live.