Project Dashboard Help

What is the Project Dashboard?

The Project Tracking Dashboard, PDASH, is used to track and manage project information, including project metadata, reports, publications, data products and data management plan status. This tool was funded by the National Climate Change and Wildlife Science Center.

How do I log in?

- Go to https://my.usgs.gov/pdash/ and click on Login.
  - **For DOI users:** enter your DOI Active Directory Username (full email address jdoe@usgs.gov) and AD Password
  - **For non-DOI users:** enter your email address and myUSGS password. To request a myUSGS account, send an email to sciencebase@usgs.gov and include first/last name and preferred email address.

What if Sciencebase password is expired?

- Your ScienceBase password expires every 90 days. Multiple email reminders are sent warning your password is going to expire. If your password is expired, you can go to https://www.sciencebase.gov/directory/forgottenPassword to reset your password. t

How do I search for projects?

- In the title bar, click on the **Project List**

To search for a term, use the general search box. The general search box does not support Lucene search syntax.

To browse for projects, use the provided search filters.

How do I navigate the project list page?

This is intended to be a summary of projects based on the search term or filters you selected.

The columns are sort-able

- Click on the **header** of a column to sort
- For more details click on the tabs to expand them
  - To close a tab, re-click on the **tab header**
  - click on the **X** to close all tabs

The tabs are color coded with the relevant columns

Due to limited screen space, when a tab is expanded, it will only display 3 items for each project (e.g. if the project has 7 publications, when you expand the pubs tab, it will only display the 3 most recent pubs).

- To view all items, click on the relevant button in the **Record Count column**

The Record Count indicates the total number of records the project has.

- Click on a button in the Record Count column to see all associated items

Upcoming Event indicates when the next scheduled notification will execute.

As a Principle Investigator, how do I...

upload a new report?

- From the **Project List**, click on the desired project to navigate to the project page
- Click on Reports to expand the Report list and click on the name of the desired report or click on **Add New Report**

- Click edit and complete or edit the fields in the Report form
    - For non-USGS PI's, disregard the FSP status field
    - To upload your report, click on **Choose File**, browse to the file, and click **Open**
    - Click **Create** to save

Note: Only one file can be uploaded to a Report record. Uploading a new file will overwrite the existing one.

When a file is uploaded, an email notification is sent to the Organization Managers.

add or edit a new publication?

- From the **Project List**, click on the desired project to navigate to the project page
- To add a new Publication, click on **Add New Pub**
- To edit an existing publication, click on Publications to expand the Publication list and click on the name of the desired publication to edit and click **Edit**

- Complete the fields in the Publication form
    - For non-USGS PI's, disregard the IPDS Number
    - Publication Date can be anticipated or use the actual publication date

When the Status of publication is set to **In Revision** or **In Preparation** an email notification is sent to the Community and Organization Managers.

When the Status is set to **Published** an email notification is sent to the Community and Organization Managers and Data Stewards.

add a new product?

- From the **Project List**, click on the desired project to navigate to the project page
- To add a new product, Click on **Add New Product**
- To edit an existing product, click on Products to expand the Product list and click on the name of the desired product to edit and click **Edit**

- Complete the form.
    - For non-USGS PI's, disregard the FSP status field.

Note: Use this form to add non-data products such as webinars, PDF, video. **For new data products, please add or update the data management plan in the DMP editor tool.**

update my DMP from the Project Dashboard?

The DMP cannot be updated in the Project Dashboard; this must be done via the **DMP Editor tool**.

- To navigate to the DMP Editor tool from the Project Dashboard
- Click on the **DMP Editor link** from the project page

Note: You must have edit permissions to edit the DMP.

If a project has a DMP, a link to the DMP Editor is also available on the Project List page.

As a Manager, how do I...

configure my organization settings?

- At the Home Page, click on **Organizations**
- From the **Organization List**, click on the name of the desired Organization

This is where you can add your managers, data stewards, see a summary of events, add new events, add bulk reports, send emails and configure the notification text and schedule.

Add an Organization Event

Organization Event is to used to send scheduled email notifications to managers, data stewards, and Principle Investigators to let them know a deadline or event is approaching.

- To add a new **Organization Event** click **+Add New Event**
- Fill in all required fields (indicated by the *) along with any aditional information you wish to include in the event
- Enter the **Date** of the event
- Configure the **Reminder** schedule
  - For example, if the **Date** of the event is for 2018-01-23 and the reminder schedule is configured for 1 week, the email notification will be sent one week prior to the **Date** and then another email will go out on the day of the event.
- To add files to the notification by clicking the **Browse** button and navigating to the file you wish to add
- Be sure to select the individuals and groups that you would like to include in the event
- Click **Create** to add the event

Add Bulk Reports

An organization can configure what reports they wish to collect from their projects by using the **+Add Bulk Report.** Managers can configure what type of report, when it is due (for quarterly report only), and which project they wish to collect the report from.

- To add bulk reports click **+Add Bulk Report**
- Select the **Report Type** (Quarterly, Final, Annual)
  - Note: For Quarterly reports, users will need to select the due date. For Annual and Final Reports the due dates are auto-calculated based on the project start date and end date. The formula to calculate annual report due date is project start date + 12 months - 60 days. The formula to calculate the final report due date is project end date + 90 days.
- Select the projects you wish to collect the reports from by using the filters, selecting all the projects, or manually selecting the projects
- Click **Add Bulk Reports** to complete the action

Add Notifications

Default notifications are reminder email messages automatically sent to alert the recipients of upcoming or overdue deadlines. Managers can configure the Reminder Schedule (when the notification is sent), which PDASH users receive the notifications (Community Managers, Organization Managers, Data Stewards and/or Principal Investigators), and text of the notification.

- To add a notification, from the Organization page, click **Edit**
- Click on the notification you wish to configure. Default notification types include:
  - **Project End Date:** This notification is to sent alert recipients that a project end date is approaching
  - **Report Due Date:** This notification alerts recipients that a report due date is approaching. This notification will execute if a report type (Quarterly, Annual, or Final) is not selected when adding a generic report to a project. It will also default to execute for all report types if default notifications are not configured for the Quarterly, Annual, and Final reports.
  - **Quarterly Report Due Date:** This notification alerts recipients that a quarterly report due date is approaching or overdue
  - **Annual Report Due Date:** This notification alerts recipients that an annual report due date is approaching or overdue
    - The annual report due date is automatically calculated
    - The formula to calculate the annual report due date is project start date + 12 months - 60 days
  - **Final Report Due Date:** This notification alerts recipients that a final report due date is approaching or overdue
    - The final report due date is automatically calculated
    - The formula to calculate the final report due date is project end date + 90 days
  - **Product Due Date:** This notification alerts recipients that the product due date is approaching or overdue.
  - **DMP Due Date:** This notification alerts recipients that the deadline to submit a completed Data Management Plan is approaching or overdue
- Select the **Reminder Schedule:**
  - Enter comma-separated list of durations, such as "4h, 3days, 2weeks, -1month (negative quantities denote overdue reiminders)
  - The notification will be emailed based on the due date and the reminder schedule
    - For example, if the manager sets the **Project End Date** reminder schedule to 2weeks, the email notification will be send 2 weeks prior to the project end date and another message will be sent out on the actual end date of the project.
- Select the Recipients you wish the notification to go to.
- Enter the Email Subject
- Enter the Text of the email. Refer to the list of available variables that may be used to customize the message
- Click on **Chooses Files**, if you wish to add attachments to the notification
- Once you are done editing, click on **Update** to save your changes

Syncronize with ScienceBase

Click on **Refresh Projects** will reconnect with ScienceBase and update Project Dashboard with any new information from ScienceBase.

Send Emails

As a manager, you are often tasked to send an email out to PIs that were funded in a certain year, to projects that are "In Progress" or to closed projects. This can easily be done using Project Dashboard. The ability to send emails is available in multiple places throughout the tool. The best place to send a largely distributed email message is from the **Organization Page** or the **Project List page**.

- You can send emails from the Organization page by clicking the **Send Email** Button.
  - Fill in all required fields (indicated by the *) along with any additional information you wish to include in the email
  - Click **? see available variables** to see the different variables you may add to personalize individual emails
  - Select the email recipients or groups that the email should go to
  - To send attachments with the email, click on **Choose Files**

- Click **Send Email** and the message will immediately be sent to the recipients

Organization page field descriptions

- **ScienceBase ID:** This is the Identification number of the organization in ScienceBase
- **Community:** A required field; this is the name of the ScienceBase community your organization belongs to
- **Name:** The short name (abbreviation) for your organization; as a best practice, this should be the same name of your organization in ScienceBase
- **Full Name:** The long name for your organization
- **Managers:**
  - Community managers can edit community settings and their corresponding organization settings; they can also edit/view all projects of organizations that are in the community
  - To add a manager, begin entering the name in the manager field; if the name does not appear in the list, please send an email to sciencebase@usgs.gov to request access for the manager. Please include first/last name and email address.
  - To remove a manager, click on the **X** next to the name.
- **Data Stewards:** To add a data steward, begin entering the name; if the name does not appear in the list, please send an email to sciencebase@usgs.gov to request access for the data steward. Please include first/last name and email address.
  - To remove a data steward, click on the X next to the name.
- **Default Sender Email Address:** If this field is left empty, the default email address will be from project_dashboard@usgs.gov and recipients of the email will be unable to reply to the message. If a default sender email address is entered, recipients of the email will be able to reply to the message.
- **Default Notifications:** Default notifications are reminder email messages automatically sent to alert the recipients of upcoming or overdue deadlines. Managers can configure the Reminder Schedule (when the notification is sent), which PDASH users receive the notifications (Community Managers, Organization Managers, Data Stewards and/or Principal Investigators), and text of the notification. Default notification types include:
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    - The final report due date is automatically calculated
    - The formula to calculate the final report due date is project end date + 90 days
  - **Product Due Date:** This notification alerts recipients that the product due date is approaching or overdue.
  - **DMP Due Date:** This notification alerts recipients that the deadline to submit a completed Data Management Plan is approaching or overdue

add a new project or edit an existing project?

- To add a new project, navigate to the project list and click on **+ New Project** from the top navigation bar
- This will redirect you to the DEPTH (Data Entry for Project Tracking and Highlighting) application to add your project record
- When this is completed in DEPTH, return to the **Project List** in the Project Dashboard and click on **Refresh Projects** at the bottom to pull the new project into the dashboard

If you need to edit the metadata on an existing project, such as changing the project end date, this must be done in either DEPTH or ScienceBase. From the Project list, click on either ScienceBase or DEPTH link to be redirected to the desired tool for further editing.

Note: You must have write permissions to edit a project record.

The DEPTH or ScienceBase links are also accessible from the Project page.

send a report to ScienceBase?

To send a report to ScienceBase, navigate to the desired project report record and click on **Upload to ScienceBase**. This will send the report to the designated folder, which is typically the project working folder.

After the report has been sent to ScienceBase, the ScienceBase ID field will automatically be populated.

upload an attachment to a project record and send an attachment to ScienceBase?

On each project record, a manager can upload multiple attachments.

- Navigate to the the desired project record and select **+Add New Attachment**
- Select **Choose File**, browse to file and select **Open**
- Enter description (optional)
- Select **Create**
- Click on **Upload to ScienceBase**. This will send the attachment to the designated folder, which is typically the project working folder.

After the attachment has been sent to ScienceBase, the ScienceBase ID field will automatically be populated.

send a product to ScienceBase?

For non-data products, you can send the product to ScienceBase via the project dashboard.

- Navigate to the desired product and click on **Upload to ScienceBase**

This will create a record in the designated folder, which is typically the project working folder. It is likely that you will need to edit the record in ScienceBase to add additional metadata prior to making the item public.

Note: For data products, the Data Steward should upload them directly into ScienceBase.

As a Data Steward, how do I add notes for the DMP?

- From the Project Page, click on **See DMP** and select **Edit**.
- Enter text in the Notes field. ***Note: Adding Notes in the Project Dashboard does not update the notes in the DMP Editor.***