SciNote: Organization and Team Management

Introduction

As a SciNote member, you can belong to one Organization and multiple Teams.

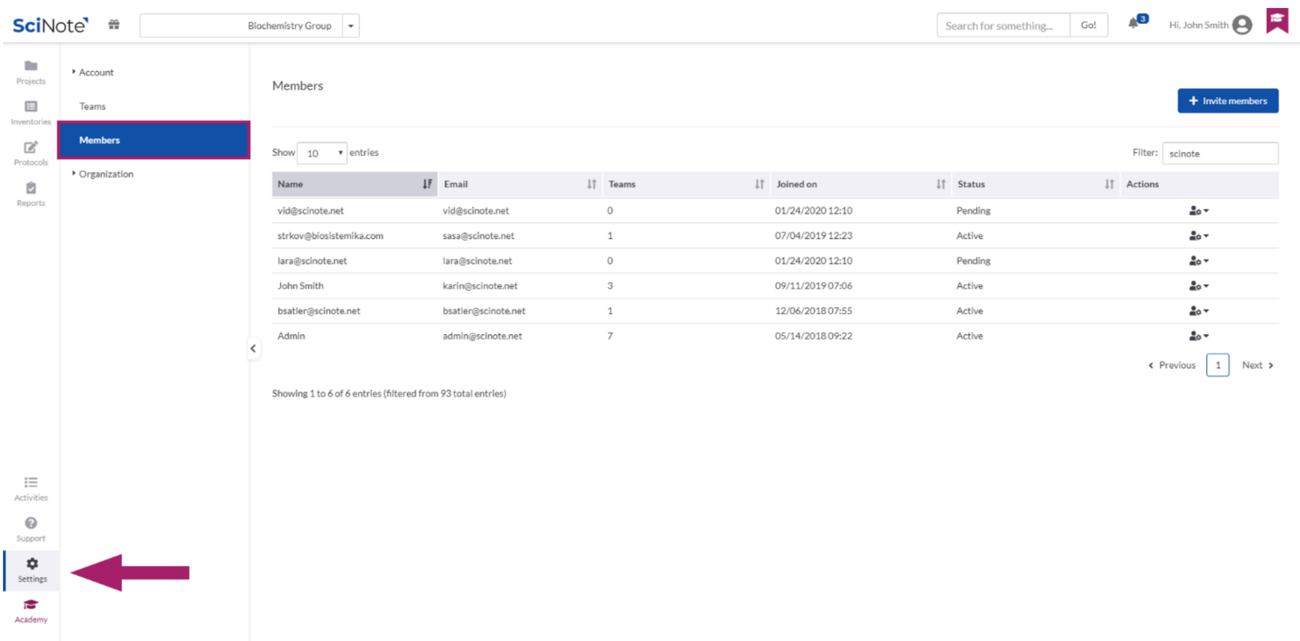
The **Organization** represents your entire workforce and is the first level of so-called user membership. Within the Organization, different **Teams** can be established that pose as different departments or groups of people who share the same repositories (e.g. samples, protocols, reagents, lab equipment, etc.) and work on the same projects.

In addition, different user roles and permissions can be assigned to each member on the Team level and Project level.

This document provides instructions on how to invite people to the Organization and Team, how to add people to the Project, and how to manage user roles.

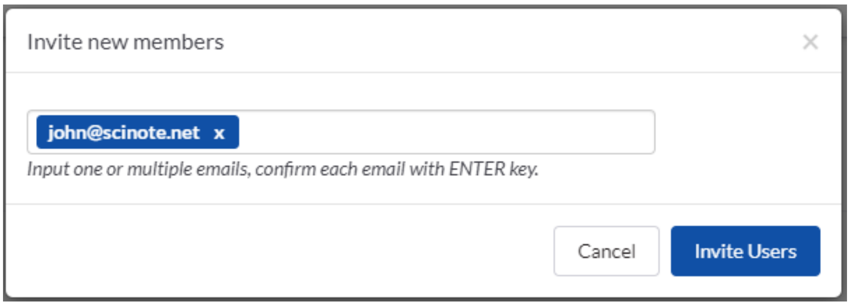
Organization

Organization Administrators can see all members of the Organization. Members are visible under the *Members* tab, where all users are displayed in an alphabetic order. Here is where the Organization administrators can invite people to the Organization, set a role of Organization administrator to another member or reset their password.



Now, to invite colleagues to the Organization, click *Settings* in the left corner of the menu bar. Then open *Members* tab and click the blue *Invite members* button on the right.

A new window appears, where you type in one or multiple emails of people you want to invite. To add an email, press Enter on your keyboard, then click the *Invite Users* button.

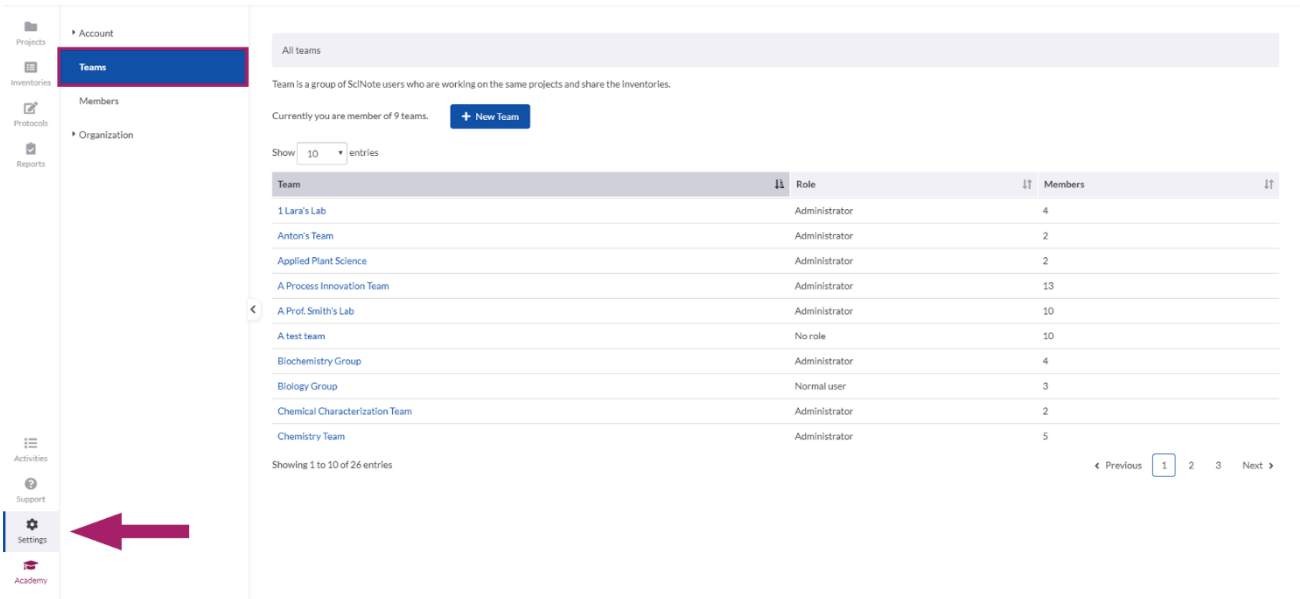


Once you are finished with adding people to the Organization and have specified another Organization administrator (this is completely optional), you can continue with inviting people to individual Teams.

Teams

Organization administrators can see ALL Teams within the Organization and have full access to manage individual Teams and its members.

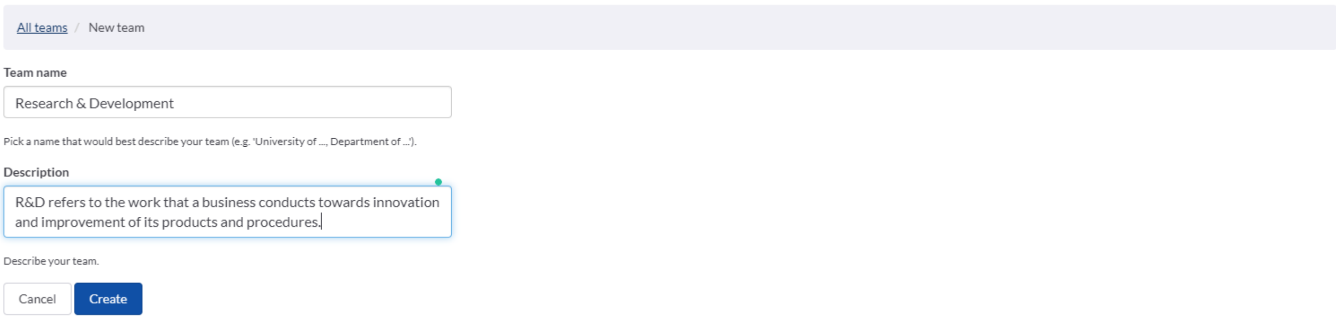
To see all the existing Teams within the Organization, click *Settings* in the bottom left corner of the menu bar. Then open the *Teams* tab as shown in the image below.



Team(s) can only be created by Organization administrators. However, Organization administrators can add additional Team administrators, who are then able to fully manage the entire Team they have been added to.

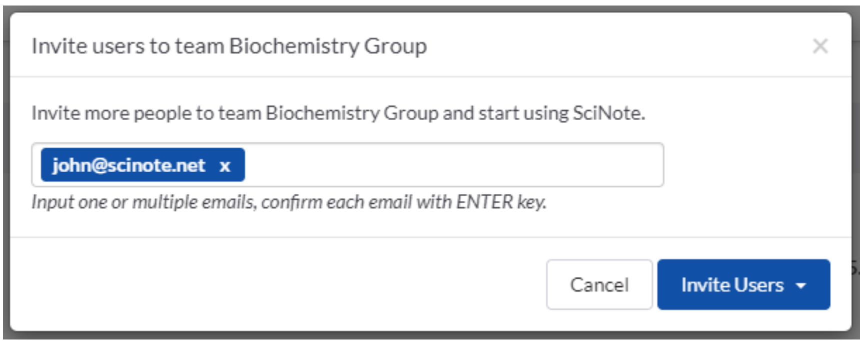
Team administrators can invite people to the Team, assign them different user roles on the Team level and remove them from the Team. It is also important to note that Teams cannot be deleted, because that would mean deleting all the data (projects, experiments, samples, protocols, results, etc.).

To create a new Team, click on *Settings*, open *Teams* tab and then click the *New team* button. After that, type in the *Team name* and *Description*, then click the blue *Create* button.



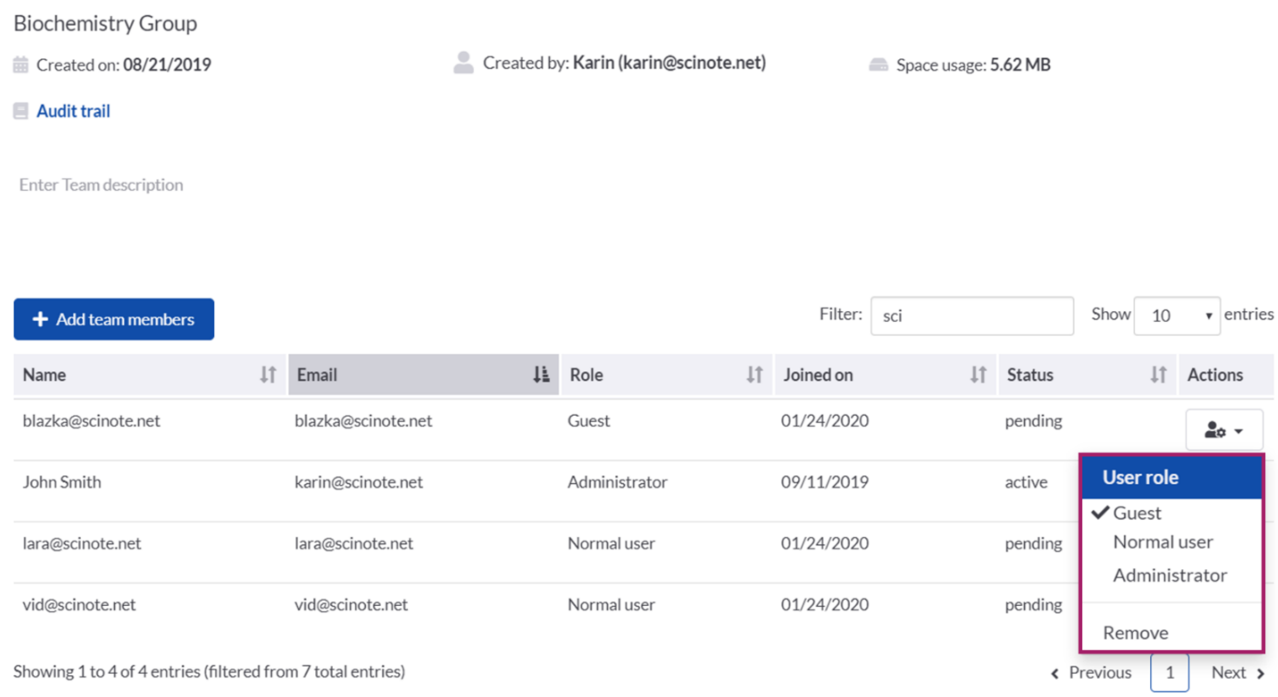
To invite your colleagues to the Team, open the Team by clicking on its name, then click the blue *Add team members* button on the left.

A new window appears, where you type in one or multiple emails of people you want to invite. To add an email, press enter on your keyboard, then click the *Invite Users* button and assign them a role.



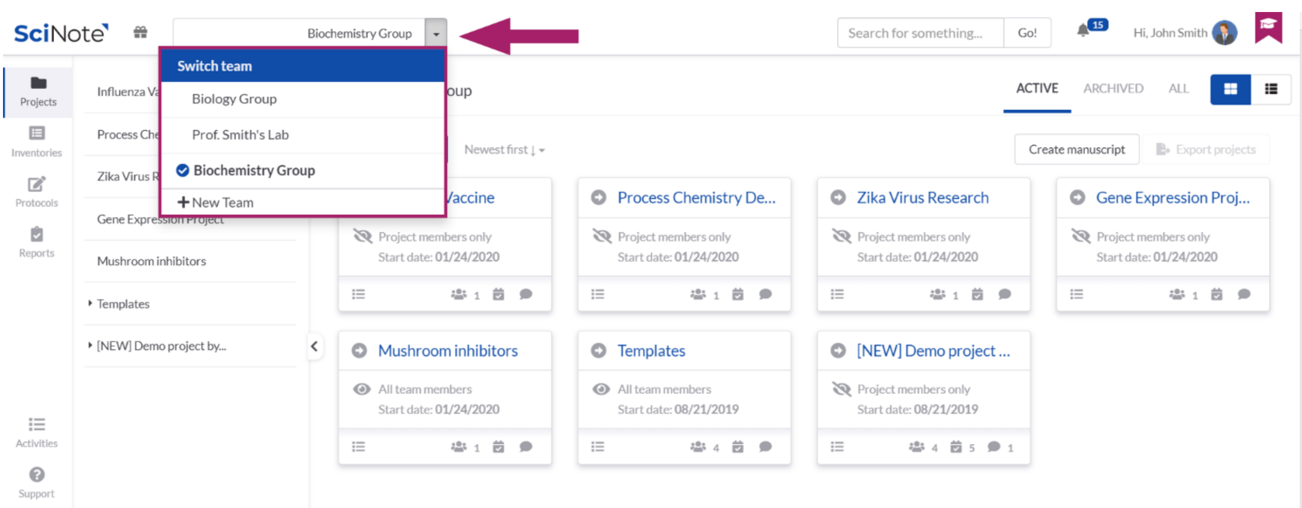
At the Team level there are three user roles: Administrator, Normal user and Guest. Administrators have the full authority when it comes to managing the Team members and the projects. The Normal user can create, edit, and archive things within the Team. And the last one is the Guest, who can only view.

As a Team administrator you can easily change the role of Team members or remove them from the Team entirely by clicking on the cog wheel under the *Actions* column.



Back on the main dashboard you see the projects of a certain Team. You are able to switch between different Team's dashboards that you are a part of.

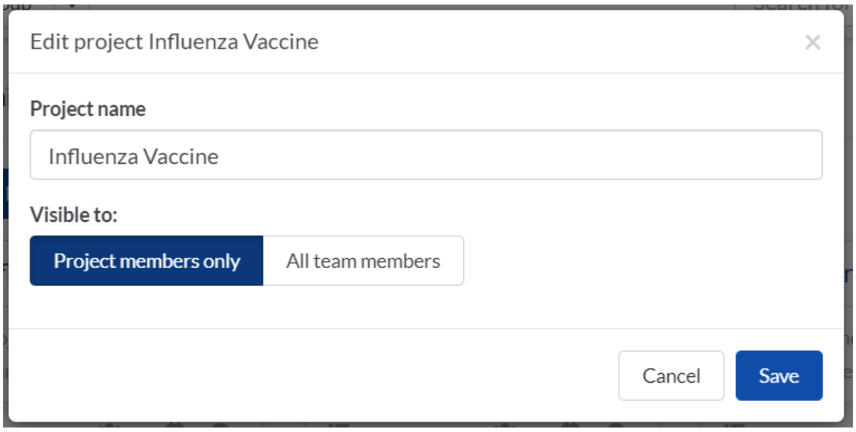
To change the dashboard from one Team to another, click on the *Team switch* button in the left upper corner. Once you switch the Team's dashboard, other Team's projects will be displayed.



Projects

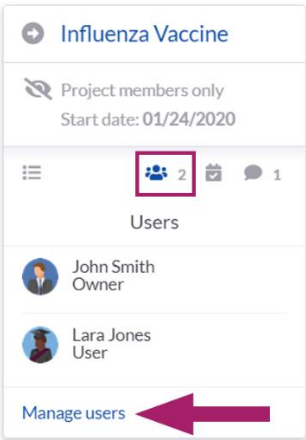
All Team members can work on shared projects which are set as **public** or they can create **private** projects that are visible only to the person who created a project or to a certain group of people. You can see that each project card has a name, a start date, and a function bar, where you can check the activity on a project, manage users, see the notifications, and write messages.

To create a project, click on the *New Project* button on the right of the main dashboard and type in the project name. Next, decide if you want to make the project visible to the entire team (*All team members*) or just to members of this particular project (*Project members only*). In any case, this has nothing to do with visibility outside of your Team.

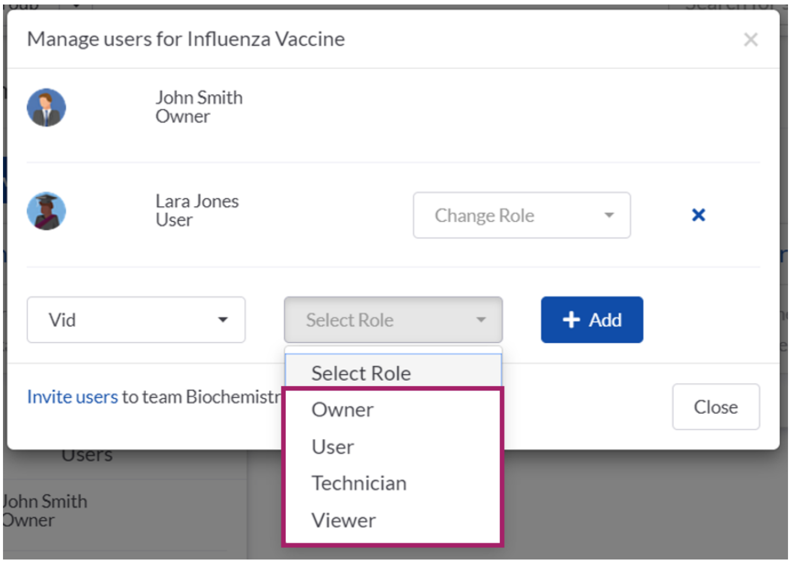


Furthermore, as the project Owner you still need to add people to the project and assign them a project role in order, they can access the project's data.

To invite your colleagues to the project, they have to be Team members first, so that you can manage their roles and permissions. First, select a project on your dashboard, click on the avatar icon and continue to *Manage users* link.



A window for managing users for this particular project appears. Click the first field to select a user from the drop-down list. Then assign that person a project role by selecting the role in the second field. When you select the role, click on the blue *Add* button.



The roles at the Project level are a bit different compared to those at the Team level.

First, we have the Owner, who has the full authority when it comes to managing the projects.

The second one is the User, who has very similar rights as the Owner, with the exception of not having the privileges to manage the projects and its users. Furthermore, the User cannot archive the data.

Next, we have the Technician, whose rights are a bit more limited in terms of managing the tasks and protocols. For example, they cannot create, edit or restore a task, nor they can create, edit or delete the protocol steps.

The last one is the Viewer whose permission is to view only.

If the person you want to invite is not an existing SciNote user, follow the link *Invite users* right below the first field. You are redirected to the management board of your Team, where you can continue with inviting people to the Team.