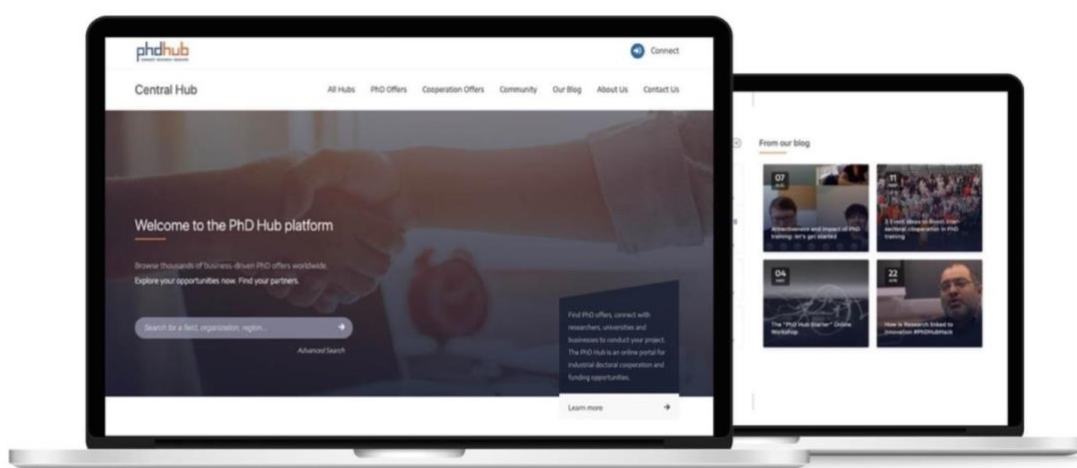


PhD Hub User Manual

Local hub coordinator | Features and usage



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Welcome to PhD Hub

31/08/2020 | Local hub coordinator

If you are the local hub coordinator for PhD Hub in your higher education institution, you are in the right place. When you are ready to get going with PhD Hub, start with [How to roll out PhD Hub](#).

PhD Hub architecture

PhD Hub has one central hub and local hubs satellites. Each local hub is managed independently by its local hub coordinator. The central hub regroups automatically the information from all local hubs and is the single point of entry for all users.

When you create your local hub, here is what gets created:

- A new local hub (satellite) with its URL: <https://phdhub.eu/local-hub-name>
- Basic menu items and pages: PhD Offers, Cooperation Offers, Community, Our Blog, About Us and Contact Us

Managing the local hub

As the local hub coordinator, you will manage your local hub through the Admin Panel.

Access it via Profile .

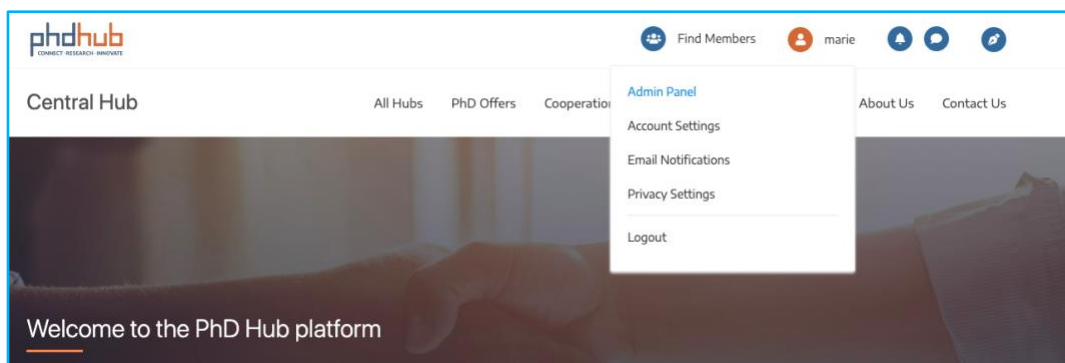


Figure 1 – Access to the Admin Panel

To learn more:

- [How to roll out PhD Hub](#).
- [Use PhD Hub admin roles to manage your local hub](#)
- [About user roles and capabilities](#)

PhD Hub known issues

See [PhD Hub Troubleshooting](#) and FAQs

How to roll out PhD Hub

31/08/2020 | Local hub coordinator

Start here

Whether you are a small or large higher education institution, the place to start for rolling out PhD Hub is [Get started](#). It walks you through a small-scale rollout, which may be all you need to start using PhD Hub in your faculty or doctoral school. If you intend to roll out at a larger scale, use Get started to pilot PhD Hub with a small group of early adopters so you can get acquainted and start planning the institution-wide deployment.

Recommended path to PhD Hub

We recommend rolling out PhD Hub in stages, as your institution is ready. You don't have to wait until you complete one step to move to the next. Some institutions may want to roll out the PhD Hub in all faculties, departments or doctoral schools at once, while others might prefer a phased approach. Here are, in order, our recommended steps:

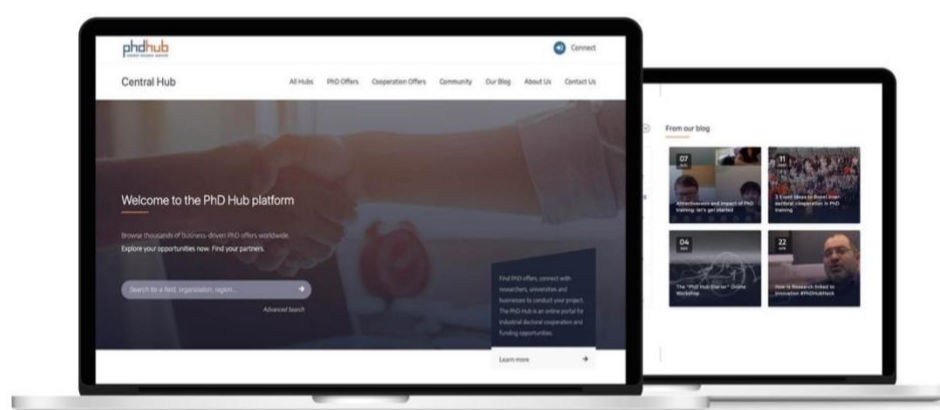
- Step 1: [Get started](#)
- Step 2: [PhD Offers, Cooperation Offers & Community](#)
- Step 3: [Collaborate with others on PhD Hub](#)

Get started with PhD Hub

31/08/2020 | Local hub coordinator

To get started quickly, we recommend you create an operational team, composed of a selected group of early adopters, who will help you manage your local hub and create basic content. By first rolling out the PhD Hub on a small scale, you will learn how to use PhD Hub and gain valuable insights to inform how you deploy PhD Hub in the whole institution.

PhD Hub allows you to easily connect all early-stage researchers, researchers and industry stakeholders together via a single portal. It allows you to gain traction on your PhD offers, making them visible to the whole PhD Hub community and talents worldwide. It simplifies your access to Research and Innovation opportunities across Europe and gives you new avenues for cooperation in the doctoral field.



Here is how to set up your operational team & basic content so your early adopters can start browsing, publishing, applying to PhD Offers and Cooperation offers and collaborating.

- Step 1: [Create your operational team & basic content](#)
- Step 2: [Onboard early adopters](#)
- Step 3: [Go-forward plan to scale up](#)

Next step

[Create your operational team & basic content](#)

Create your operational team & basic content

31/08/2020 | Local hub coordinator

Setting up your operational teams, giving your early adopters roles and tasks can build experience with PhD Hub and helps identify PhD Hub champions who can drive PhD Hub adoption across your institution.

Suggestion for your first operational team

Creating an operational team of people is not a mandatory step to start using the PhD Hub but it can considerably support a smooth start and secure success in deploying PhD Hub in the whole institution.


To get started, we recommend you constitute a team of selected early adopters and distribute roles as follows:

Role	What they can do
An admin staff	<ul style="list-style-type: none"> ➤ Support the local hub coordinator in creating basic content ➤ Invite & manage users ➤ Report bugs to local hub coordinator ➤ (Optional) Support companies in creating their profiles
A lead researcher	<ul style="list-style-type: none"> ➤ Publish PhD Offers ➤ Publish Cooperation Offers ➤ (Optional) Create its research team profile
A company rep	<ul style="list-style-type: none"> ➤ Publish Cooperation Offers ➤ Create/Update their company profile

[Add your operational team members](#) on PhD Hub using your admin role and get started.

Creating basic content

As local hub coordinator, the first type of content you should create is your institution's profile.

When logged in on PhD Hub, use (1) Quick content creation  and click (2) Create New Institution. You can now fill in the (3) basic information about your institution and click (4) Submit to publish it.

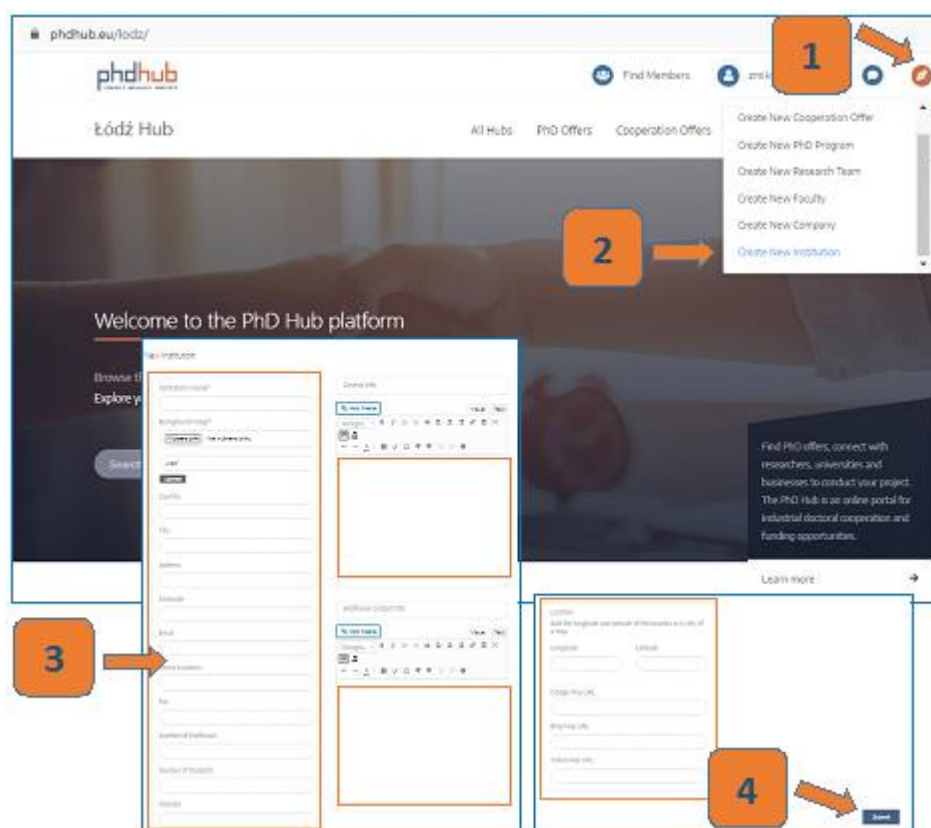


Figure 2 - Quick Content Creation Scheme

Repeat the above-mentioned steps to create both New Faculty and New PhD program.

Next step

[Onboard early adopters](#)

Onboard early adopters

31/08/2020 | Local hub coordinator

Invite users to your local hub

Send a welcome email to your colleagues, industry partners and early-stage researchers with basic information of your local hub and invite them to join PhD Hub. Be sure to include the following links to get them started quickly:

- PhD Hub User Manual
- [Registration link](#)
- Your local hub URL

For example, you may want to start your email this way:

Welcome to PhD Hub for <insert institution's name>. PhD Hub is an online portal for high impact business-driven research and innovation. It brings together people, PhD offers and research and innovation cooperation opportunities in one place.

We created our <insert city name> local hub, which you can access via this link <insert local hub URL>. You can already create your account and start taking advantage of the PhD Hub.

To join, click <https://phdhub.eu/register/>

We recommend you customise your email invitation when contacting different user groups (early-stage researchers, researchers and companies). Touch base with users to ensure they know how to register, [create content](#) and start [collaborating with each other on PhD Hub](#).

Validate new users as local hub members

By default, new registered users have limited capabilities on PhD Hub. They cannot create content, contribute to Community or access Cooperation Offers. Onboard early adopters and assign them a user role to give them more capabilities, see how to [edit a user role](#).

By assigning them a user role, you validate the users as local hub members. Once you have successfully done so, they can fully enjoy the benefits of and contribute to your local hub.

Tip: Students, early-stage researchers or any academic staff members of your institution who register with their institutional email address, are automatically validated as local hub members.

Drive initial adoption

It is important to encourage your early adopters to actively use PhD Hub to promote new collaboration experiences and develop PhD Hub champions. Keep in touch with them, ask for feedback and offer your support.

Next step

[Go-forward plan to scale up](#)

Go-forward plan to scale up

31/08/2020 | Local hub coordinator

Now that you have successfully set up your first operational team, created basic content and onboarded an initial group of users while driving usage, it is time to think about your go-forward plan in order to scale up and roll out PhD Hub in your whole institution.

Core deployment decisions

Ask yourself	Action
Who will be the main contact point for PhD Hub at institutional level?	To learn more about local hub coordinator see Use PhD Hub admin roles to manage your local hub
Who will be assigned the Admin staff role in the various departments, faculties, etc.?	To assign admin staff roles, see Add new users
Who should be assigned to each role?	To compare the capabilities of each role, see About user roles and capabilities
Do I need to create specific user roles? e.g. Technical staff	To create custom user roles, see Custom roles and capabilities
Should I work hand in hand with the Career Office and Doctoral Schools?	Talk with your Career Office and Doctoral Schools to see whether it would be interesting to collaborate on PhD Hub
What channels of communications should be used to drive adoption within the institution?	Talk with your communications department and/or Doctoral Schools leaders to seek the best way to drive adoption

Next step

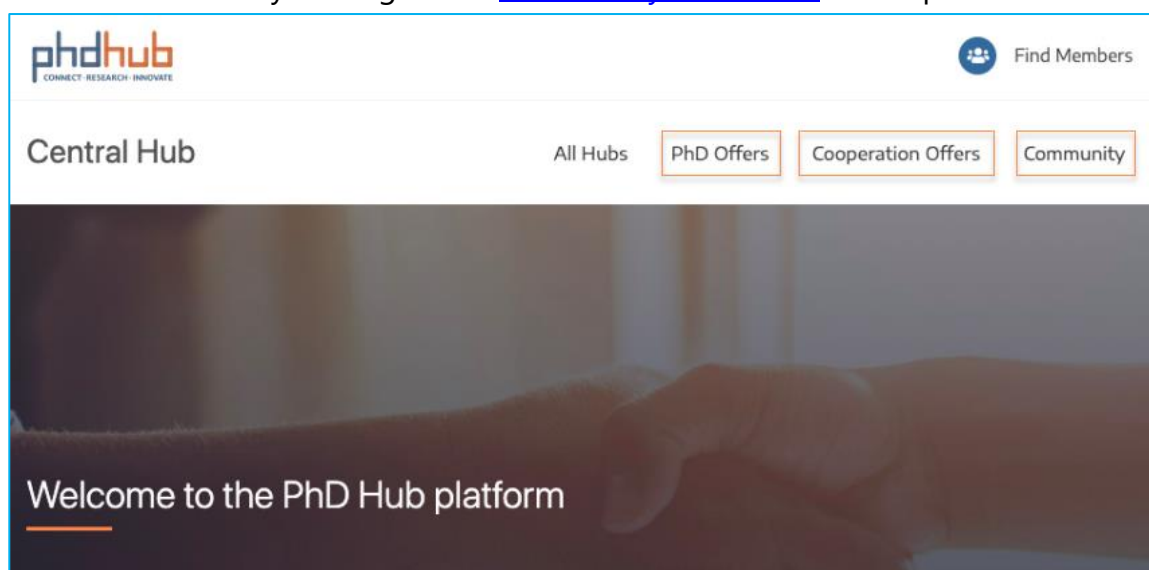
[PhD Offers, Cooperation Offers & Community](#)

PhD Offers, Cooperation Offers & Community

31/08/2020 | Features and usage

PhD Offers, Cooperation Offers and Community are the core features of PhD Hub. Here is a summative description of what is a PhD Offer, a Cooperation Offer and Community:

- A PhD Offer is a research opportunity with a funding framework for early-stage researchers and/or doctoral candidates and prospects. All PhD Offers are published by Academia and propose avenues of collaboration with the Industry. PhD Offers are accessible to all users.
- A Cooperation Offer is a call for interested parties to collaborate on a specific thematic or topic, usually, linking research work and innovation. It is a flexible means to look for partners and/or participants. Cooperation Offers can be issued by any members of a local hub. Only local hub users that have a user role can access this page.
- Community is a forum of discussions. It provides a friendly, collaborative and research-driven space for the PhD Hub Community. All local hub members can contribute freely as long as the [Community Guidelines](#) are respected.




Next step

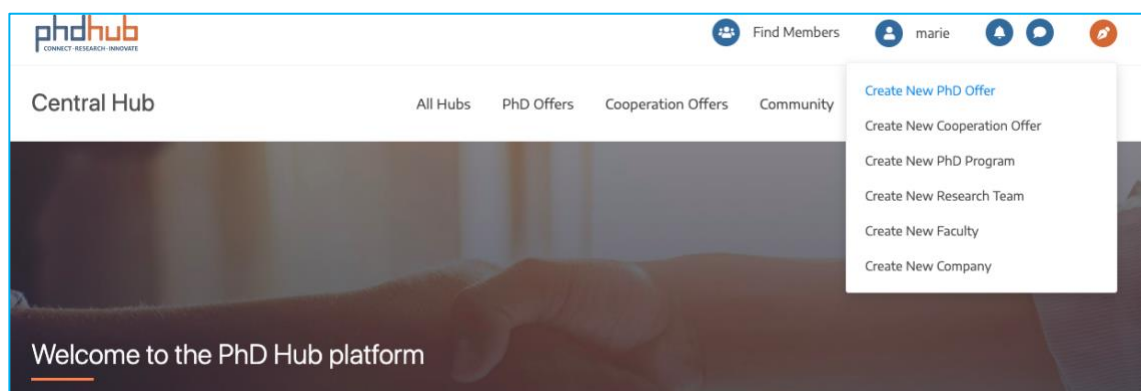
[Publish PhD Offers and Cooperation Offers](#)

Publish PhD Offers and Cooperation Offers

31/08/2020 | Features and usage


Quick way to publish Offers



The easy way to get a PhD Offer or Cooperation Offer up and running is to use Quick content creation .




(1) Select Create New PhD Offer or Create New Cooperation Offer, and (2) fill in the form with information. Make sure to select the most relevant Fields of Science under Basic Details to make it easily findable by interested users. It is also important to inform a Starting date and Deadline to Apply under More info. When all required fields are completed, you can (3) hit the Submit button and your Offer will be published immediately.

Publish, edit and delete Offers

If you don't want to publish immediately your Offers or simply want to preview before publishing, it is best to go through the Admin Panel  and create a New PhD Offer or New Cooperation Offer from there.

Navigate to PhD Offers  or Cooperation Offers  from the left-side menu and click (2) Add New. Fill in (3) information about your Offer and make sure to inform the Publish tab on the right-side menu:

- Save Draft to save without publishing
- Preview to preview the Offer on PhD Hub
- Publish immediately  gives you the option to schedule your Offer publication. Once set to a specific date and time, it will automatically be published on the

given date. If you don't change this, by default, your Offer will be published immediately when hitting the (4) Publish button

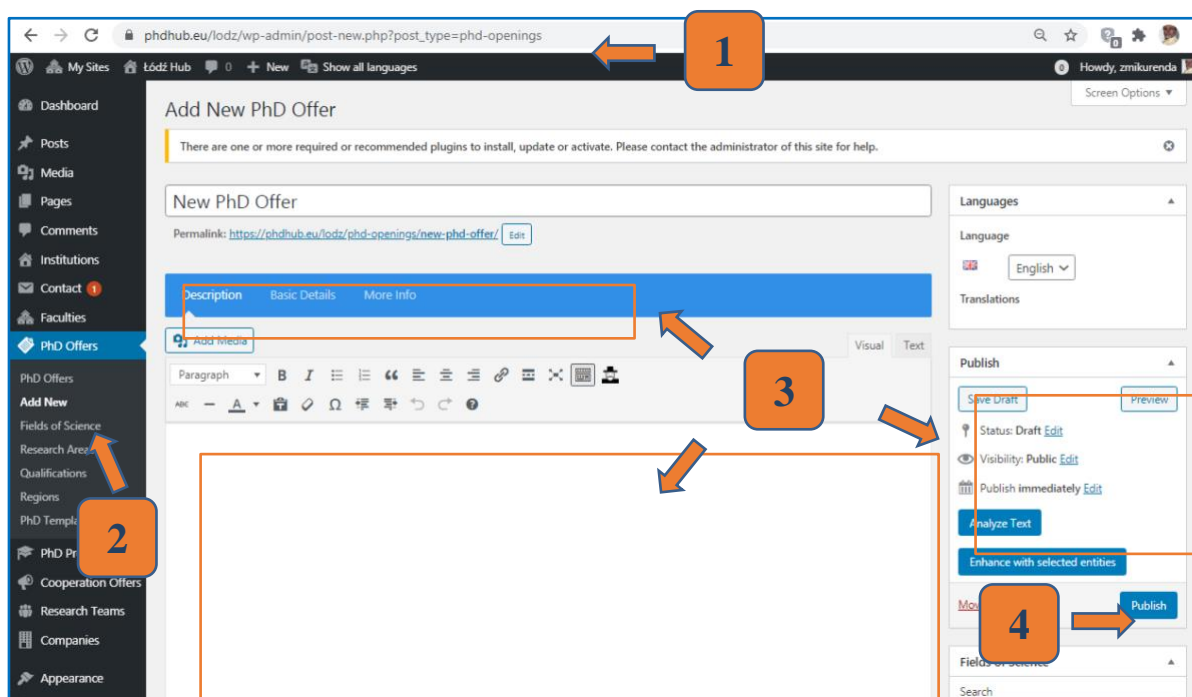




Figure 3 - Scheme for creating a New PhD Offer.

To edit Offers, (1) navigate to PhD Offers  or Cooperation Offers  from the left-side menu and (2) click PhD Offers or Cooperation Offers. Here you will find the list of draft and published Offers. Find the Offer you want to edit and (3) click on its title. Make your edits and click Update to save the changes. Your Offer will be immediately updated.

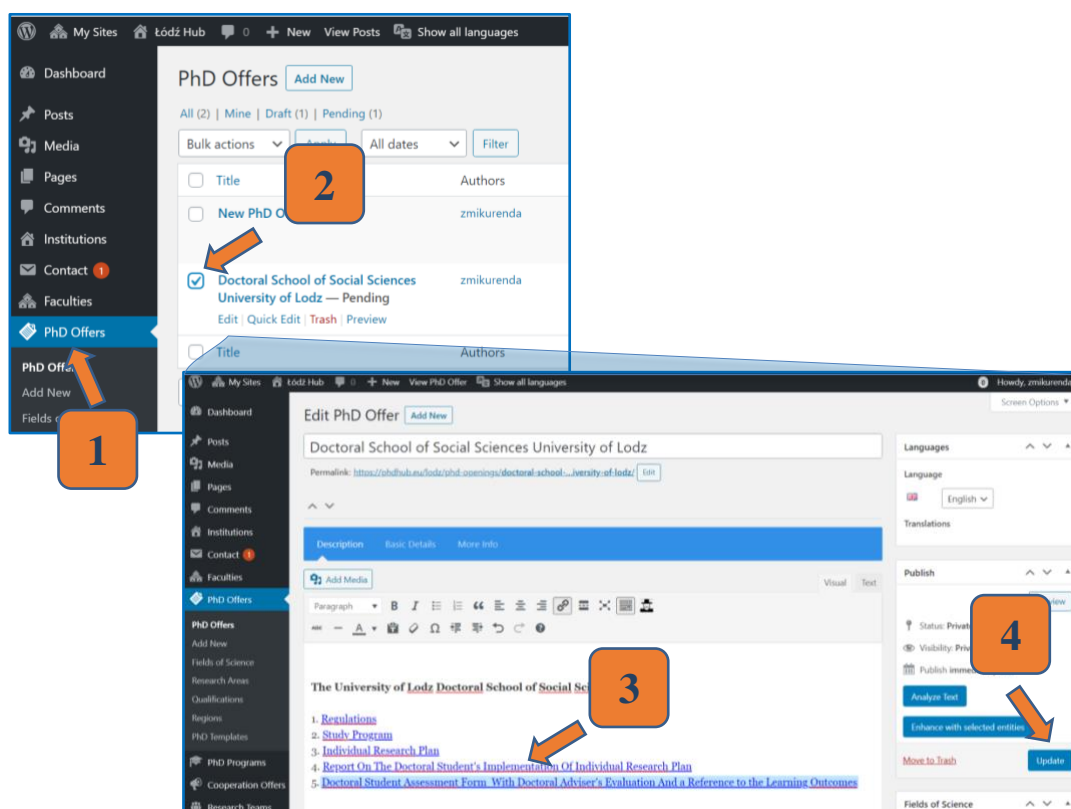




Figure 4 - Scheme to editing PhD Offer.

To delete Offers, (1) navigate to PhD Offers  or Cooperation Offers  and (2) click PhD Offers or Cooperation Offers. Simply (3) click **Trash**.

All trashed Offers can be restored (trashed content can be restored within 30 days!). Access them via Trash at the top of the page and choose **Restore**.

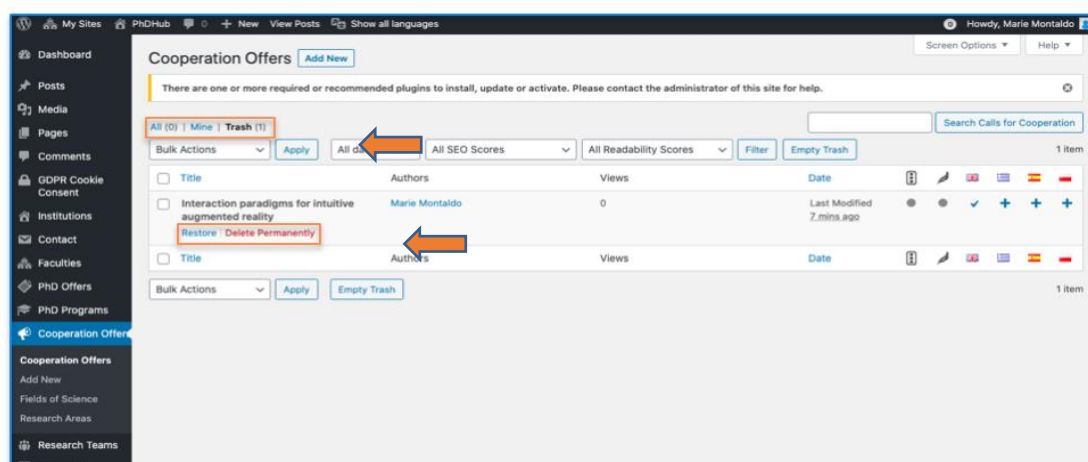


Figure 5 – Restore trashed Offers

Next step

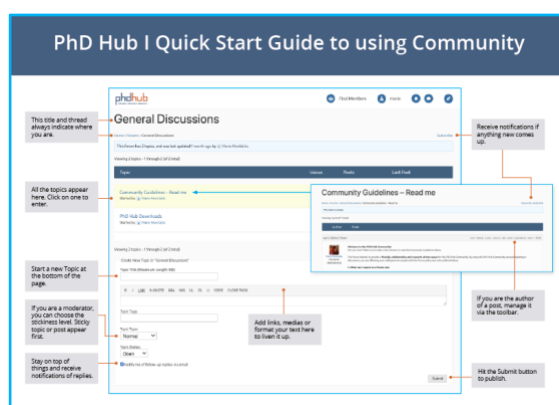
[Quick start to Community](#)

Quick start to Community

31/08/2020 | Features and usage

Community connects people across all local hubs. Drive PhD Hub-wide initiatives and build communities around common topics of interest, research areas or fields of science. Crowdsource ideas to foster open discussions with early-stage researchers, researchers and businesses across Europe or simply chit chat with your peers and colleagues.

The Quick Start Guide to using Community provides a view into the architecture and Community basics.



[PDF](#) | [PNG](#)

Next step

[Create content on Community](#)

Create content on Community

31/08/2020 | Features and usage

Community is a place of free expression and speech. There are only a few rules to follow to ensure everyone feel welcome, safe and comfortable sharing their views. Make sure to have a glance at the [Community Guidelines](#) before creating content.

You came across some interesting content and want to be notified about new additions to a forum or topic? [Subscribe](#) to it at the top right of the page. If you want to save it for later, mark it as [Favourite](#). Find all your bookmarks under your [user profile](#)'s Forum category.

Start new topics and reply

Entering the discussion on Community is easy, you can either create a new topic or reply under a topic. All you need to do is, (1) enter the most relevant forum or topic (e.g. General Discussions) and (2) write your topic or reply via the form at the end of the page. (3) Hit Submit to publish.

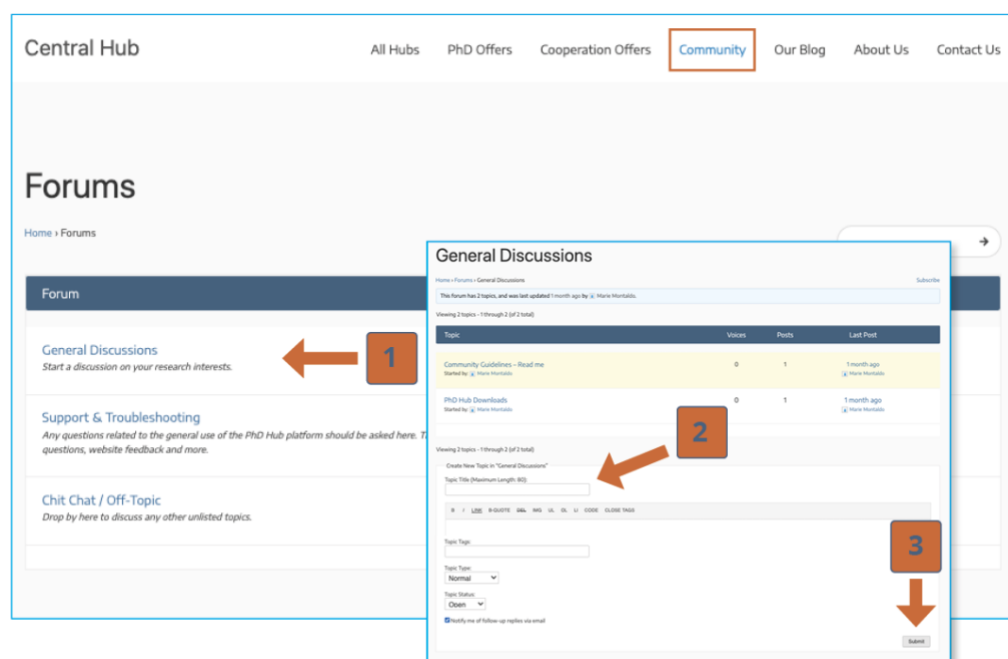


Figure 6 – Create a new topic

If you would like to be part of the moderation team of Community, contact us at contact@phdhub.eu.

Collaborate with others on PhD Hub

31/08/2020 | Features and usage

PhD Hub is built to enable international, intersectoral, interdisciplinary collaboration. With PhD Hub, connecting with your peers and research and innovation actors as well as replying to interesting research opportunities is made easy.

To learn more:

- [About User Profiles](#)
- [Invite colleagues and friends to PhD Hub](#)

Express Interest in PhD and Cooperation Offers

As a user, you can Express Interest in PhD Offers and Cooperation Offers and start collaborating with other PhD Hub members.

Go to PhD Offers or Cooperation Offers and click on the offers that interest you. (1) Find the Express Interest button at the top right, (2) enter your contact details and add a custom message to boost your chance of being selected. (3) Hit Send Message whenever you're ready to send it out.

In the rare cases the Express Interest button is not visible, look for the external link to apply in the description of the offer.

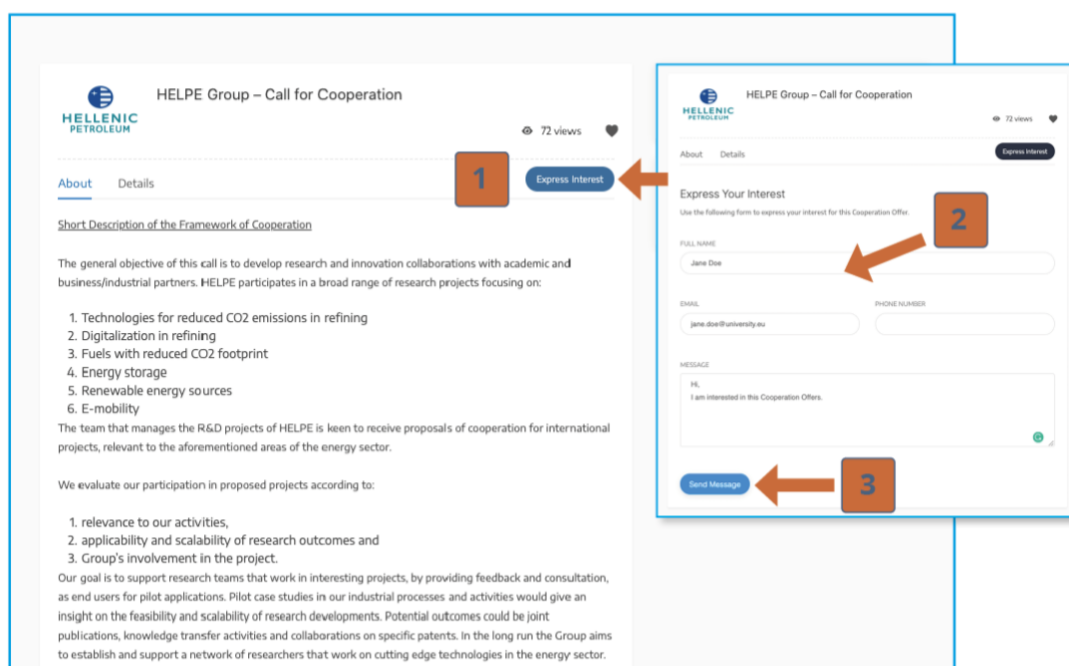
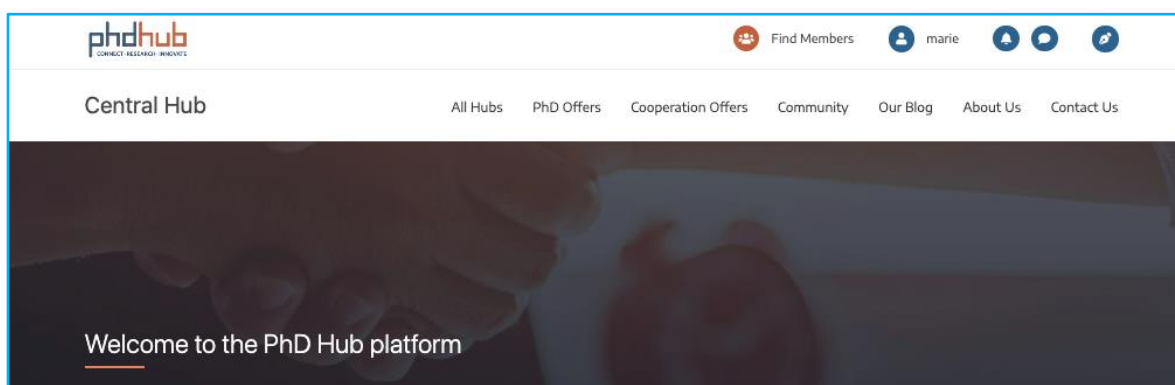


Figure 7 – Express Interest in Offers

Find members & connect with users

Find PhD Hub members, connect with them and start exchanging and collaborating on what is relevant for you. You can expand your research network in a few clicks by using

Find Members  when logged in.



For more information about how to use Find Members, check the Quick Start Guide to your network.



[PDF](#) | [PNG](#)

Start chatting with users

There are different ways to start chatting with your friends and the other users on PhD Hub. Use the Public Message or Private Message to reach out to people you know, you want to collaborate or exchange with. Both options are available to you via their profile page.

A Public Message appears under both users' [Activity](#) and is visible to all PhD Hub users. A Private Message is visible only to the user you send this message to.

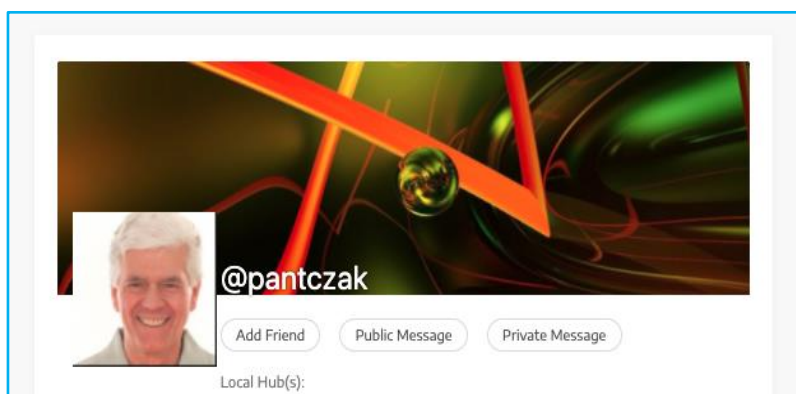


Figure 8 – Send public and private messages


If you would like to engage in deeper public discussions, start exchanging on [Community](#).

Use PhD Hub admin roles to manage your local hub

31/08/2020 | Local hub coordinator

As local hub coordinator, you are the “super admin”. While there can only be one single local hub coordinator, you can create admin staff accounts which have the same capabilities as a local hub coordinator.

Admin staff accounts become handy if your institution prefers a decentralised management approach. Admin staff can also give you a hand if you only need some extra support in managing your local hub.


Local hub coordinator and admin staff can manage users and manage content. This always happen via the Admin Panel which is accessible via Profile  when logged in.

Learn more:

- [User roles, capabilities and custom settings](#)
- [Publish PhD Offers and Cooperation Offers](#)

Add new users

You can add new and existing users as members of your local hub. By doing this, you give users the full benefits of your local hub, according to their [user role](#).

To add a new or existing user as member of your local hub, go to (1) Users  and click (2) Add New. By default, on this page, you are offered to Add Existing User. Scroll down the page to Add New User.

You can now (3) fill in the required fields and (4) assign them a role. Once you are done, make sure to (5) click the Add New User button to validate the form.

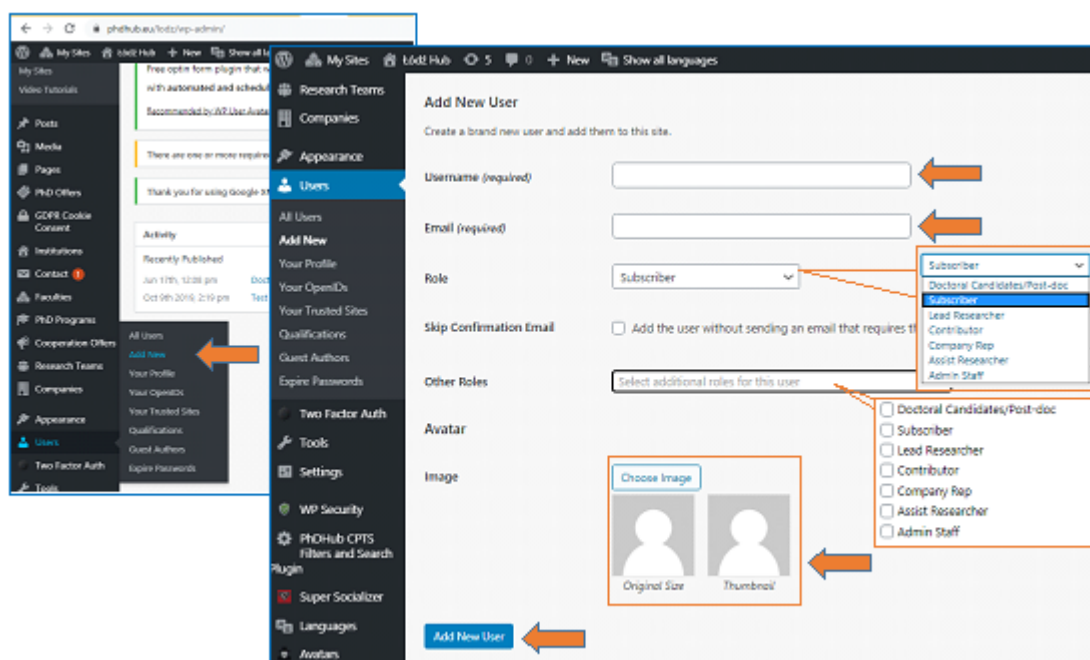



Figure 9 - Add New User

Edit user role, change password & delete users

As local hub coordinator or admin staff, you can edit or delete a user account in your local hub. The most common actions are to edit their roles or reset their password.

Go to (1) Users , find the user account you want to edit and (2) click on its username. From this page, you can change their Role under Name or change their password via Generate Password under Account Management. Scroll down the page to the bottom and (3) click Update User to save the changes.

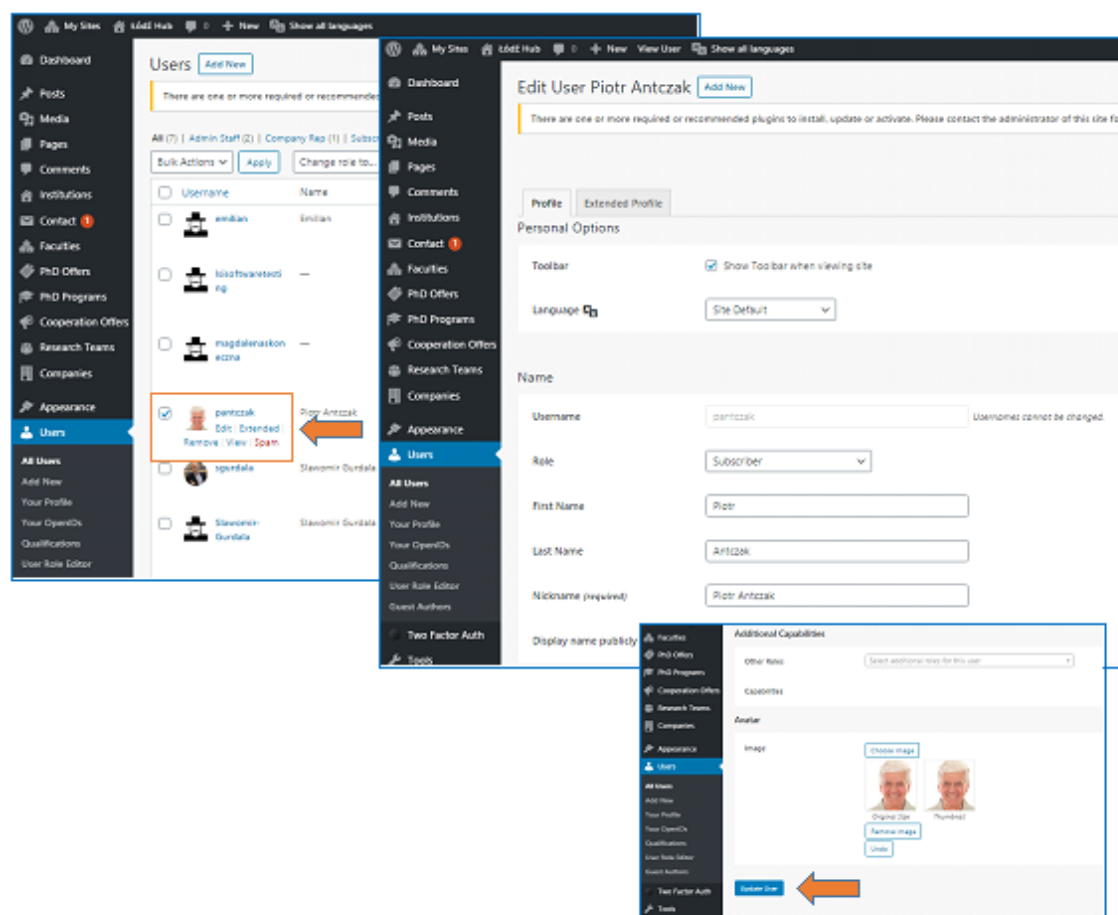



Figure 10 - Edit User Account

To delete a user from your local hub and thus, revoke their membership and related benefits, go to (1) Users , find the user account you want to delete and (2) click [Remove](#).

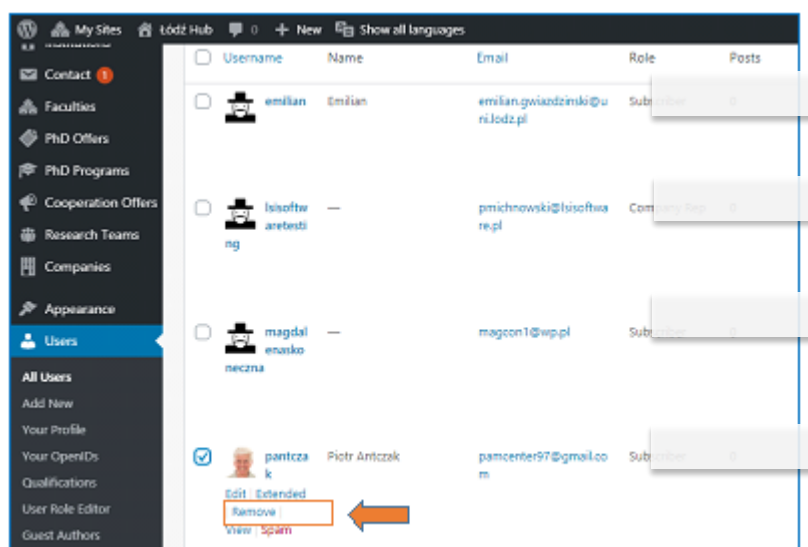


Figure 11 - Remove User Account

Co-Authorship

At some point, you may want to create content and give other users from your local Hub the possibility to co-own it, allowing them to edit it. For instance, this can be useful if you upload company profiles, via Import, and want to give ownership over the content to the company representatives or if you create your institution profile and want one of your colleagues to keep the page up to date.

When creating any new type of content (Institutions, Faculties, PhD Offers, PhD Programs, Cooperation Offers, Research Teams, Companies) via Add New or editing already created/imported content, find at the bottom of the page the Authors. Add the usernames of the co-authors to give them co-ownership.

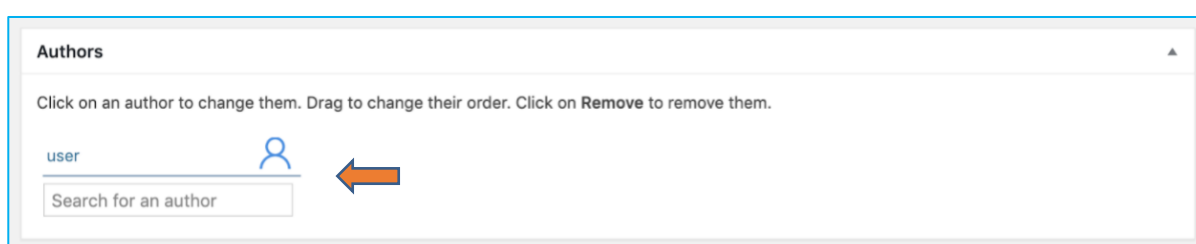



Figure 12 – Co-Authorship

Import content to your Hub

The Import tool allows you to import all types of content, namely Institutions, Faculties, PhD Offers, PhD Programs, Cooperation Offers, Research Teams, Companies. A feature that will reveal to be your best friend to gain time and populate your Hub in a few clicks.

As a local hub coordinator or admin staff, go to Tools , Import and click [Run Importer](#) and upload your .xml file.

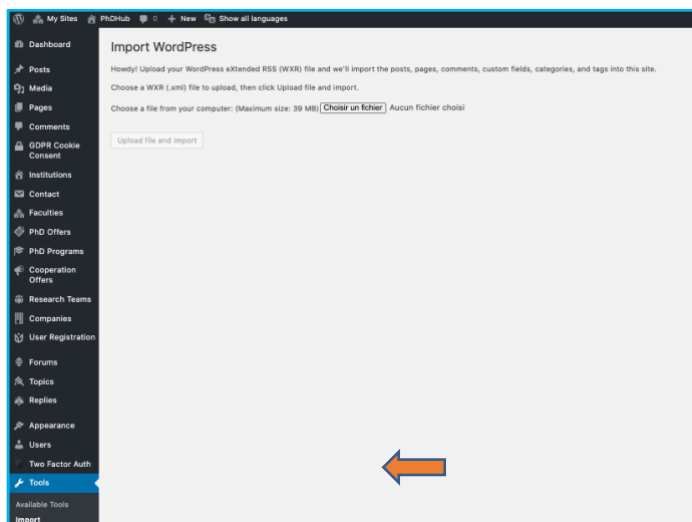


Figure 13 – Import content

For more information about how to use Import, check the Import Content note which gives you detailed instructions and ready-to-use templates for all content types.



[PDF](#) | [.xml Template Package](#)

About user roles and capabilities

31/08/2020 | Local hub coordinator

There are 6 default user roles on PhD Hub. You should assign all your local hub users a role which grants them capabilities. Here's the list of all default user roles and what they can do:

Role	Can do these tasks
Admin Staff	Read ¹ CRUD ² Institutions, Faculties, PhD Offers, PhD Programs, Cooperation Offers, Research Teams, Companies CRUD Posts, Pages, Users Upload files Edit Theme
Assist Researcher	Read CRUD Cooperation Offers Upload files
Company Rep	Read CRUD Cooperation Offers CRUD Company (limited to those created by the user) Upload files
Doctoral candidates/Post-doc	Read CRUD Cooperation Offers (limited to those created by the user)
Lead Researcher	Read CRUD PhD Offers, Cooperation Offers, Research Teams Upload files
Subscriber ³	Read

¹ Read all available content on PhD Hub

² CRUD: Create, Read, Update, Delete

³ A subscriber is a registered user, member of a local Hub without any given capabilities

Custom roles and capabilities

Most higher education institutions find that the default settings work for them, but if you have specific needs, PhD Hub has been designed to be flexible. You can change any of the default settings for user roles and capabilities or create new ones, based on your institution's requirements.

To edit the capabilities of an existing user role, go to Users and click (1) User Role Editor. Under Select role and change capabilities, (2) select the role you want to edit. (3) Tick or untick capabilities based on your needs and (4) hit the Update button.

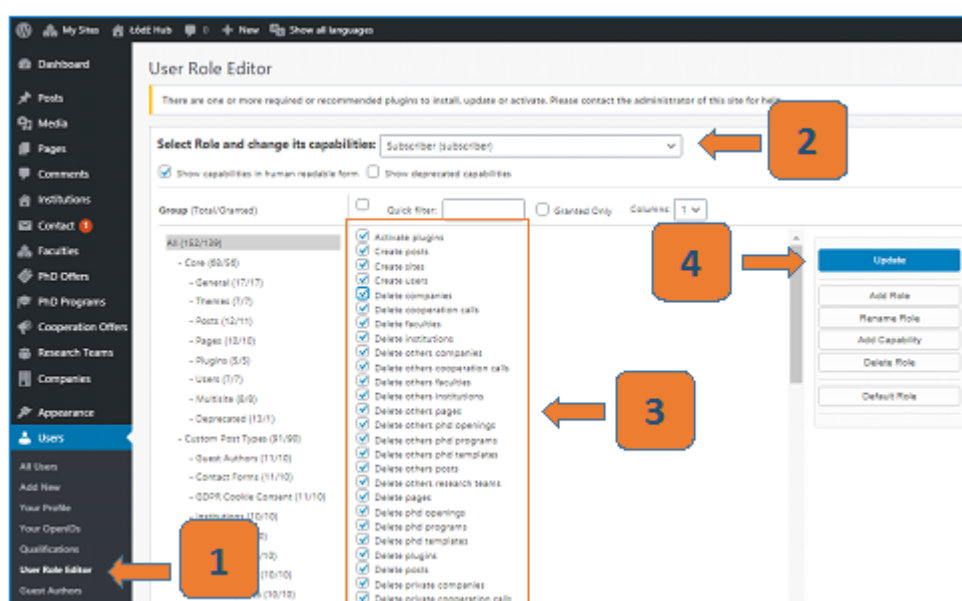


Figure 14- Edit user role

To create a new user role from scratches, go to Users and click (1) User Role Editor, then click (2) Add Role. You will be asked to name your user role (3). To make it easier, we recommend you use the same name for both Role name (ID) and Display Role Name. All you need to do now is to tick capabilities based on your needs and (4) click the Update button.

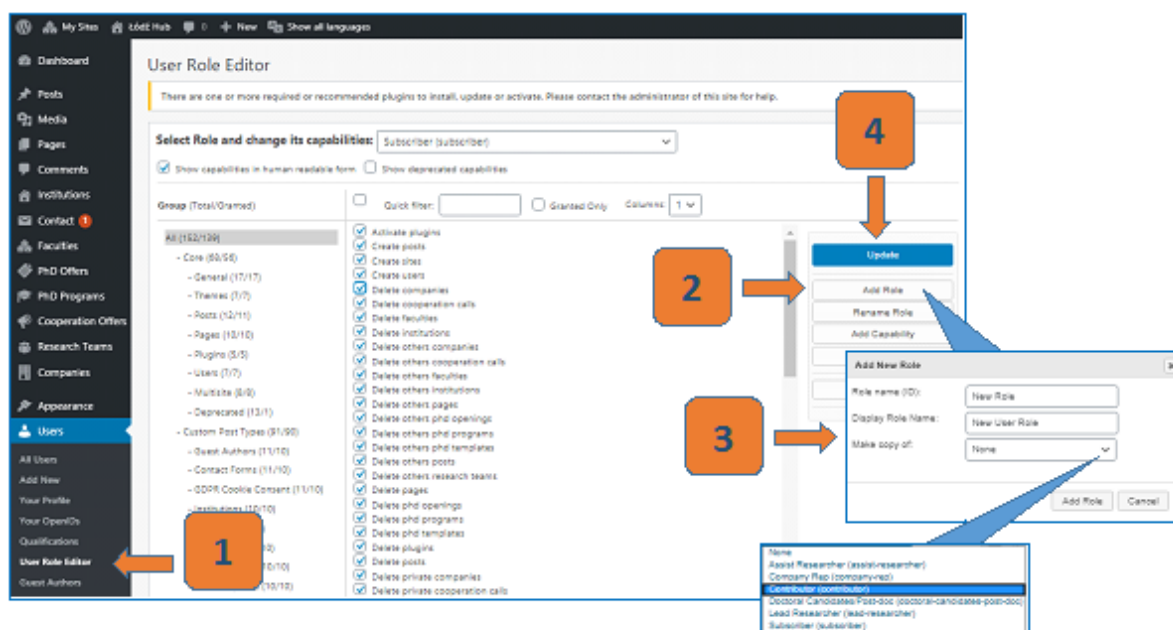



Figure 15 - Create New User roles

About User Profiles

31/08/2020 | Features and usage

Your profile is what people see when they [search for you](#) on PhD Hub. It is good practice to complete yours with accurate information to make it as easy as possible for users to find you and connect.

To go to your profile, click on your username . Your profile is organised in 7 categories: Activity, My Profile, My Network, Offers, Forums, Invite and Settings.

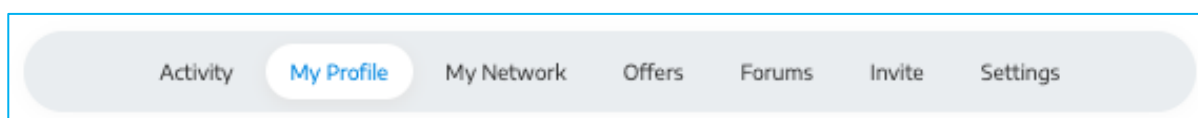


Figure 16 – User profile categories

If you are new to PhD Hub, you can follow these recommended steps to learn all about your user profile:

- Step 1: [Complete and edit your profile](#)
- Step 2: [Change your settings and preferences](#)

Next step

[Invite colleagues and friends to PhD Hub](#)

Complete and edit your profile

31/08/2020 | Features and usage

About your profile

In the (1) My profile category, you can view your user profile as other people will see it via the View section. Click (2) Edit to complete your profile and/or edit it.

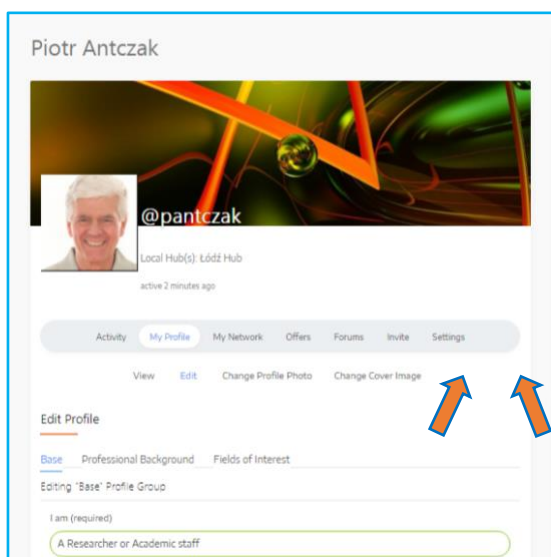


Figure 17 – User profile categories

There are 3 groups to the profile information:

- Base: basic information and contact details

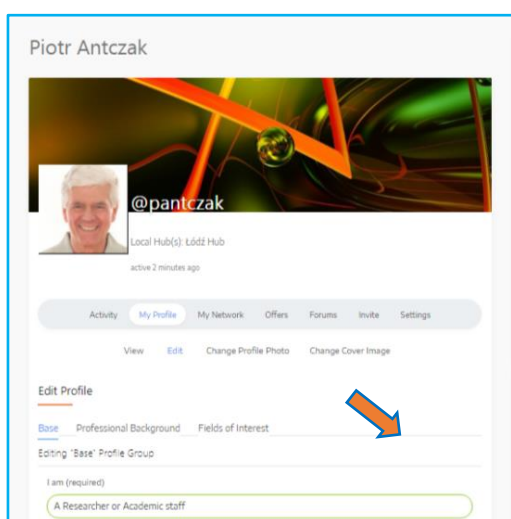


Figure 18 – User profile categories – Base

- Professional Background: make yourself shine by filling in further information such as your Specialisation and Bio.

The screenshot shows the 'Professional Background' section of a user profile for Piotr Antczak. The profile includes a cover image, a profile picture, and a bio. The 'Professional Background' section is highlighted with a blue box. It contains a 'Position (required)' field with the value 'PhD/Researcher', a 'Specialisation in (required)' field with the value 'Accounting and taxation', and a 'Bio' field. The 'Bio' field is currently empty and has a 'Visual' and 'Text' toggle. The 'Position' and 'Specialisation' fields have a note: 'This field may be seen by: Everyone'. The 'Bio' field has a note: 'This field may be seen by: Everyone'. The 'Professional Background' section is highlighted with a blue box. To the right of the screenshot, there are three orange arrows pointing left towards the 'Position', 'Specialisation', and 'Bio' fields respectively.

Figure 19 – User profile categories – Professional Background

- Fields of Interest: tell others in which fields of sciences you are interested in. It you findable by people looking for keywords such as "Agriculture".

The screenshot shows the 'Fields of Interest' section of a user profile for Piotr Antczak. The profile includes a cover image, a profile picture, and a bio. The 'Fields of Interest' section is highlighted with a blue box. It contains a 'Fields of Interest (required)' field with the value 'Agriculture'. The 'Fields of Interest' section is highlighted with a blue box. To the right of the screenshot, there are two orange arrows pointing left towards the 'Fields of Interest' field and the 'Save Changes' button respectively.

Figure 20 – User profile categories – Fields of Interest

Upload a profile picture

Make sure to upload a profile picture to stand out. Keep in mind that PhD Hub is a professional network, users expect to see your face, not a logo. It should be your likeness.




Figure 21 – User profile categories – Picture profile

Next step

[Change your settings and preferences](#)

Change your settings and preferences

31/08/2020 | Features and usage

Manage your account settings and your preferences via your user profile  under the Settings category.

Here is what you can do:

- General to update your email address and/or change your password
- Email to set your email notification preferences
- Profile Visibility to select who may see your profile's details
- Privacy Settings to select who can view your profile
- Group invites choose to restrict group invites to your friends only
- Export Data to receive a download link to your data via email
- Delete Account will erase your account and all the related data

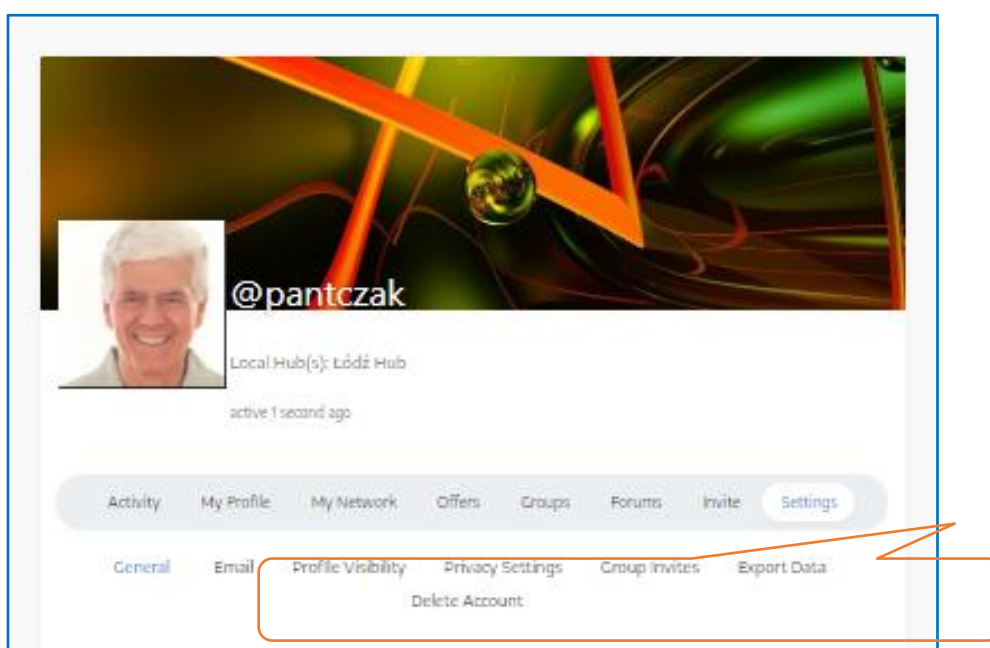


Figure 22 – Manage your account settings

Invite colleagues and friends to PhD Hub

31/08/2020 | Features and usage

Inviting users to PhD Hub is a way to easily grow your network and share good opportunities. As a user, you can invite up to 10 colleagues at a time via your user profile



Go to Invite category, (1) copy-paste the email addresses of your friends and colleagues and (2) add a custom message. (3) Hit Send Invites when they are ready to go.

The screenshot shows the 'Invite New Members' form on a user profile page. The user is '@pantczak' from 'Local Hub(s): Łódź Hub', active 3 minutes ago. The navigation bar includes Activity, My Profile, My Network, Offers, Groups, Forums, Invite, and Settings. Below the navigation bar are links for 'Invite New Members' and 'Sent Invites'. The 'Invite New Members' section contains the following steps:

- 1. Enter email addresses below, one per line.**
You can invite a maximum of 10 people at a time.
A text input field is provided for email addresses.
- 2. Subject: An invitation to join the PhDHub community.**
- 3. (optional) Customize the text of the invitation.**
The message will also contain a custom footer containing links to accept the invitation or opt out of further email invitations from this site.
A text input field contains a pre-filled invitation message: 'You have been invited by Piotr Antczak to join the PhDHub community. Visit Piotr Antczak's profile at https://phdhub.eu/members/pantczak/'.

At the bottom of the form is a 'Send Invites' button. Three numbered orange arrows point to the form: arrow 1 points to the email input field, arrow 2 points to the subject line, and arrow 3 points to the 'Send Invites' button.

Figure 23 – Invite users to PhD Hub

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