Get started with

PhD Hub

A short guide for local hub coordinators.
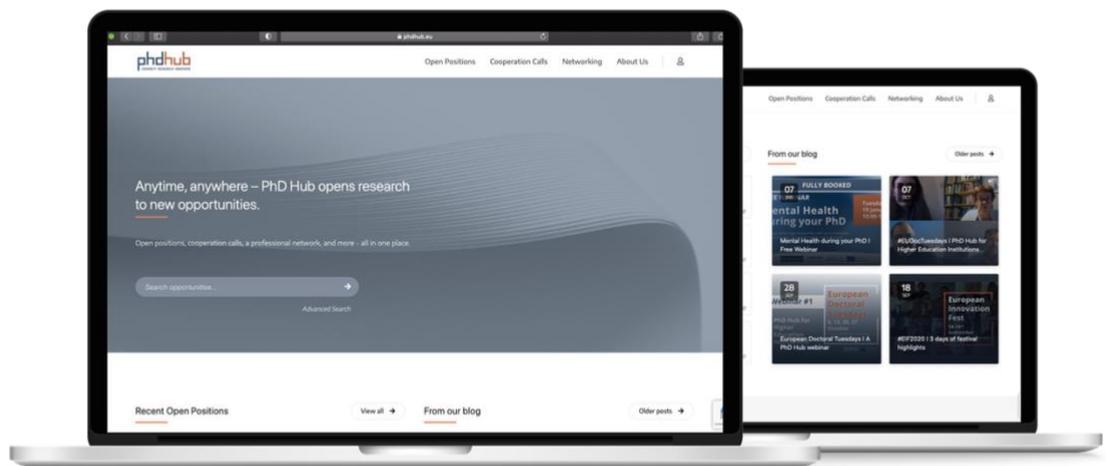
Table of Contents

Welcome to PhD Hub

01/02/2021 I 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.

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: Open Positions, Cooperation Calls, Networking and About Us
- Your local hub information and direct contact form will be added at https://phdhub.eu/local-hubs/.

Managing the local hub

As the local hub coordinator, you will manage your local hub through the **Admin Panel.** Access it via **Profile** .
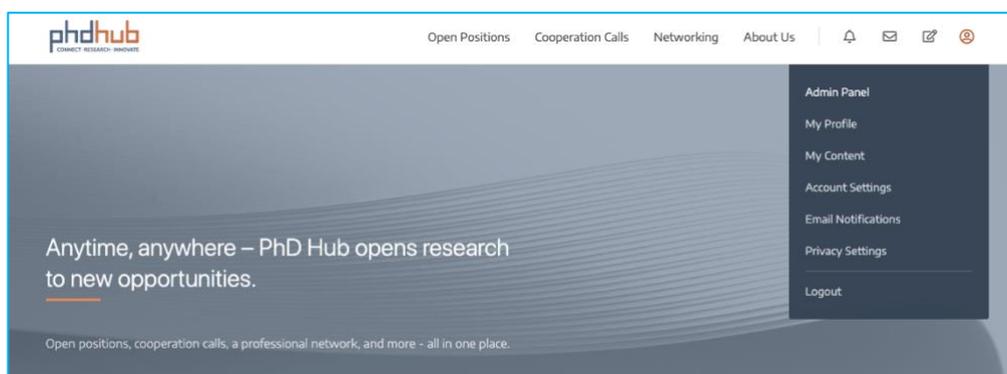

Figure 1 – Access to the Admin Panel

To learn more:

- How to roll out PhD Hub
- Use PhD Hub admin roles to manage your local hub
- About user roles and capabilities

How to roll out PhD Hub

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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.

Our helpdesk

As a local hub coordinator, and in the case, you need additional IT support, you have privileged access to our Helpdesk.

Please specify your local hub name and document with screenshots if possible, to allow for a smoother and quicker process of your IT support request.

Get started with PhD Hub

01/02/2021 I 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 Open Positions, 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.
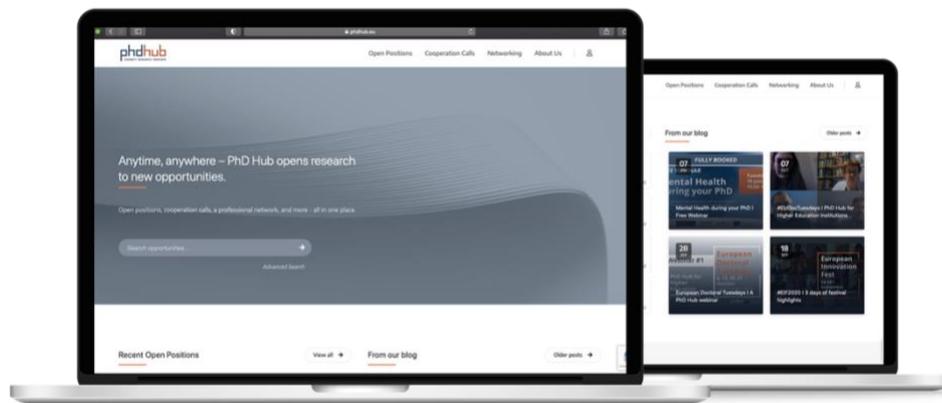
Here is how to set up your operational team & basic content so your early adopters can start browsing, publishing, applying to Open Positions and Cooperation Calls and collaborating.

- Step 1: Create your operational team & basic content
- Step 2: Onboard early adopters

Next step

Create your operational team & basic content

Create your operational team & basic content

01/02/2021 I 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 administrator	• Support the local hub coordinator in creating basic content • Invite users and manager user roles • Report bugs to local hub coordinator • Publish Open Positions and Cooperation Calls
An academic staff	• Publish Open Positions and Cooperation Calls • Create Faculties profiles • Create its Research Team profile
A company rep	• Publish Cooperation Calls • 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) **>>Institution.** You can now fill in the (3) basic information about your institution and click (4) **Submit** to publish it.
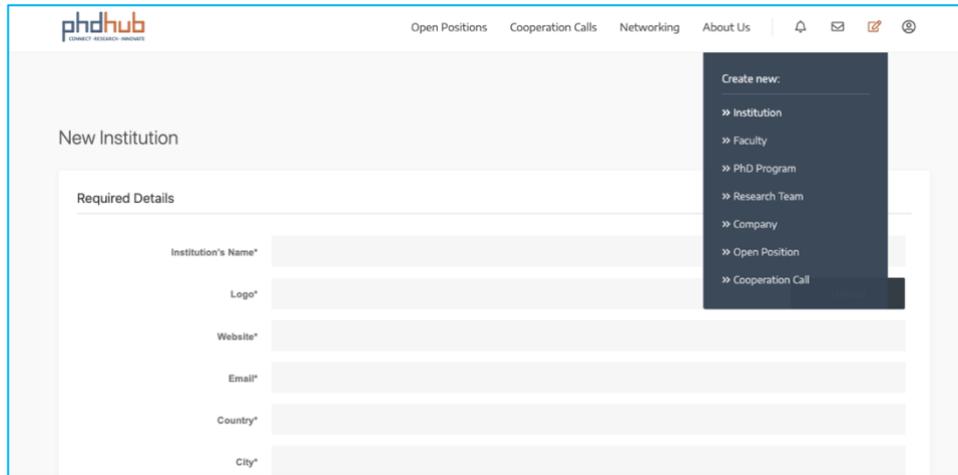
Figure 2 - Quick Content Creation Scheme

Repeat the above-mentioned steps to create both **>>Faculty** and **>>PhD Program.**

Next step

[Onboard early adopters](#)

Onboard early adopters

31/08/2020 I 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:

- A quick link to the [FAQs](#)
- [Registration link](#)

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

Dear *<PhD candidates and colleagues>*,

Recently, we have joined the [European PhD Hub](#), a platform opening Research to new opportunities. We are pleased to invite you to create your free account on our *<insert city name>* Hub.

PhD Hub is an online portal for high impact business-driven research and innovation. It brings together people, Open Positions and research and innovation cooperation opportunities - all in one place.

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

Should you have any questions, please feel free to contact the local hub coordinator *<insert name, surname and email address>* and have a look at the [FAQs](#).

We are looking forward to welcoming you,

<Signature>
The *<insert city name>* Hub team

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.

Verify new users as local hub members

By default, and **only if users don't create an account with valid academic credentials**, new registered users have **limited capabilities** on PhD Hub. They cannot create content and access **Networking**. 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 verify 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** verified. No further step is required from your side.

To learn more:

- FAQs on Getting Started and Account Help

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.

Use PhD Hub admin roles to manage your local hub

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

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

Local hub coordinator and administrator 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](#)

Add new users

You can add new and existing users as member 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 you **Admin Panel**, (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.
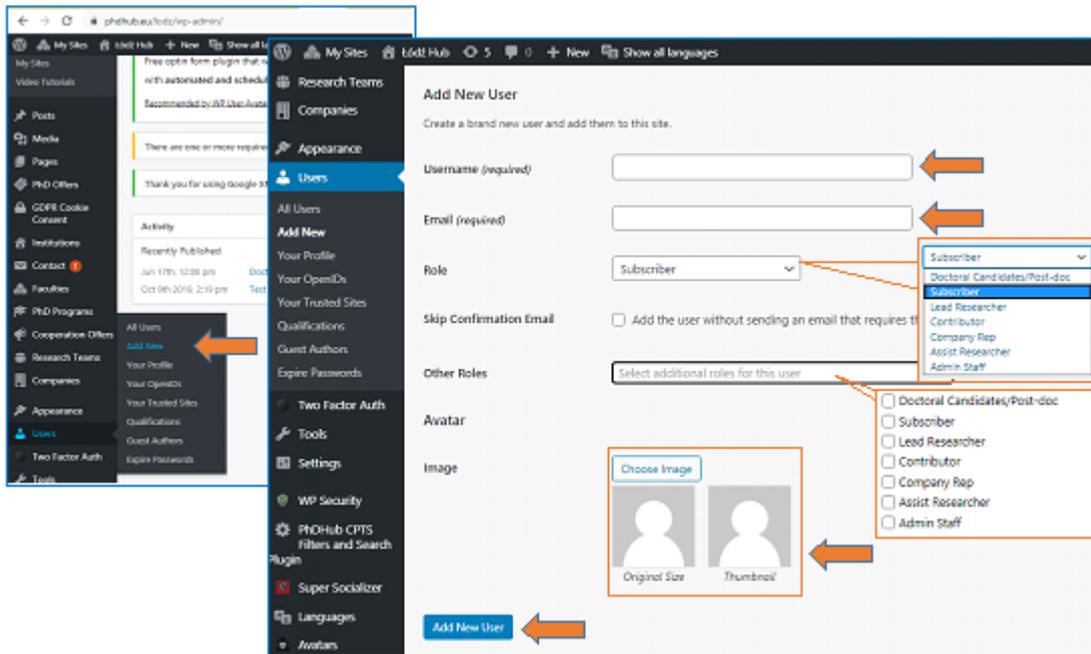
Figure 3 - Add New User

Edit user role, change password & delete users

As local hub coordinator or administrator, 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.
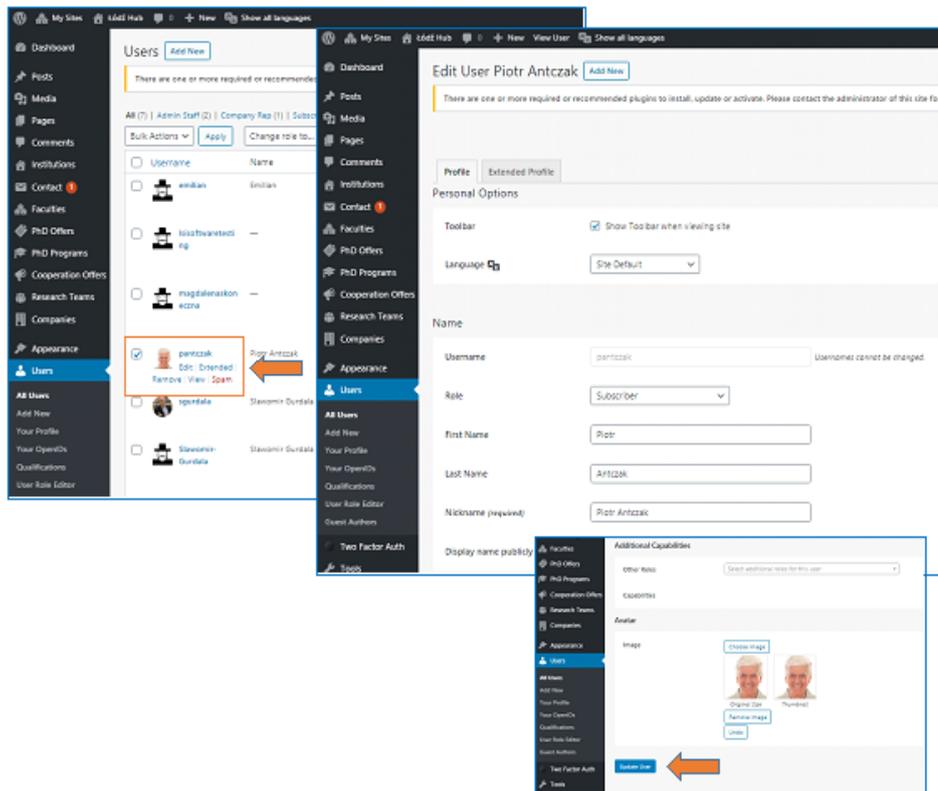
Figure 4 - Edit User Account

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.
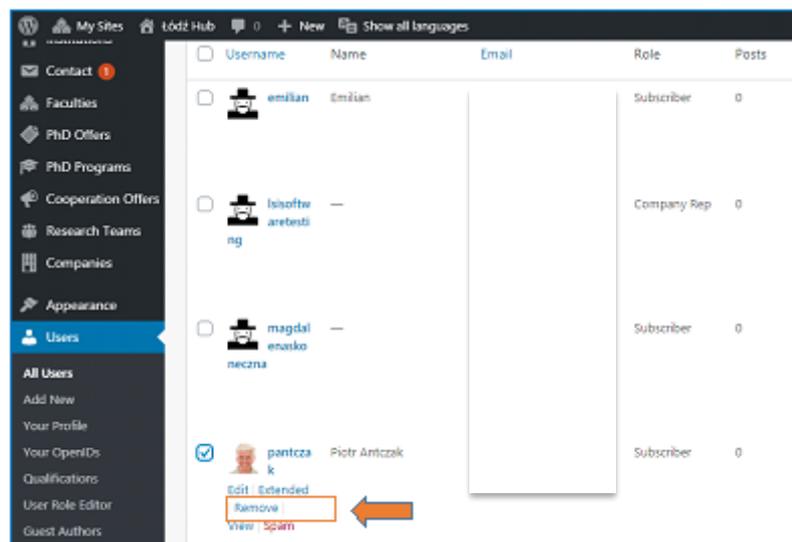

Figure 5 - Remove User Account

About user roles and capabilities

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There are 5 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
Administrator	Read[1] CRUD[2] Institutions, Faculties, Open Positions, PhD Programs, Cooperation Calls, Research Teams, Companies CRUD Posts, Pages, Users Upload files Edit Theme
Academic Staff	Read CRUD Institutions, Faculties, Open Positions, PhD Programs, Cooperation Calls, CRUD Research Teams (limited to those created by the user) Upload files
Non-academic partner	Read CRUD Cooperation Calls CRUD Company (limited to those created by the user) Upload files
Verified Users	Read CRUD Cooperation Calls (limited to those created by the user)
Non-verified Users[3]	Read

[1] Read all available content on PhD Hub
[2] CRUD: Create, Read, Update, Delete
[3] A subscriber is a registered user, who has not been verified by any local hub or who has not created his/her account using valid academic credentials.

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 the **Admin Panel**, then **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.
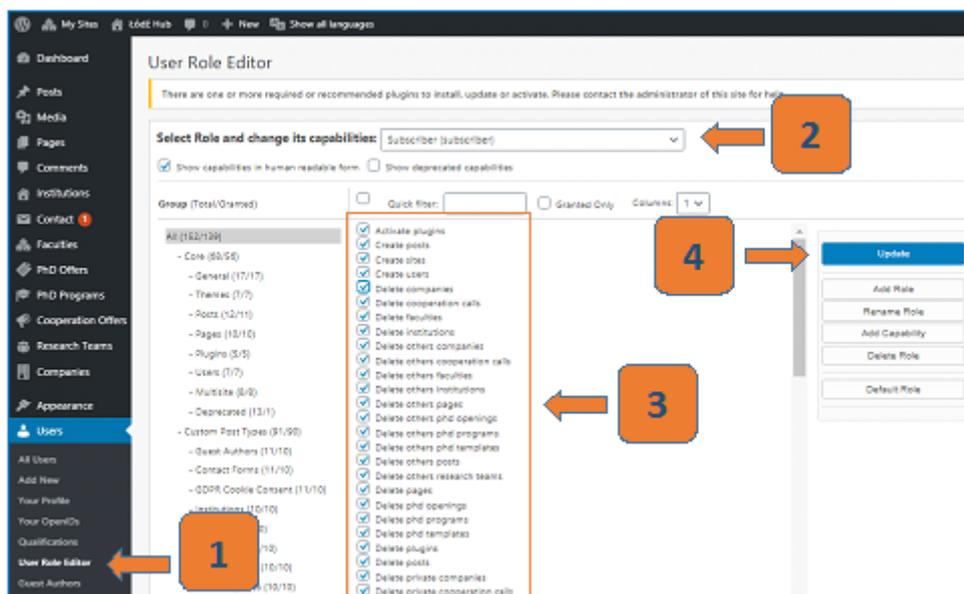

Figure 6 - Edit user role

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.
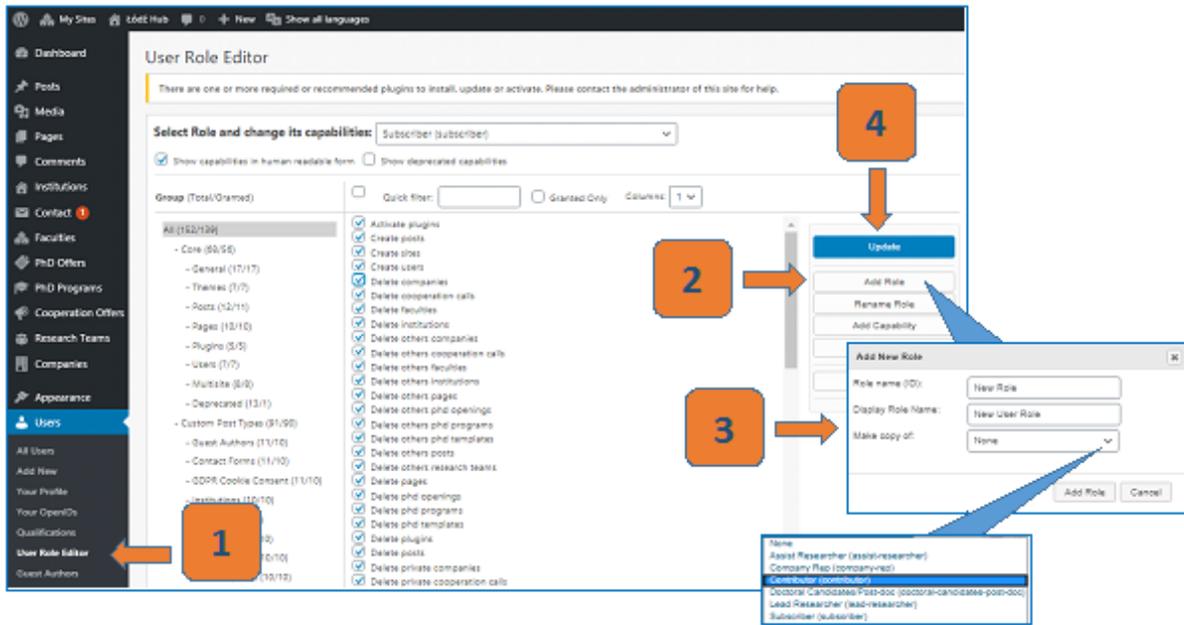
Figure 7 - Create New User roles