

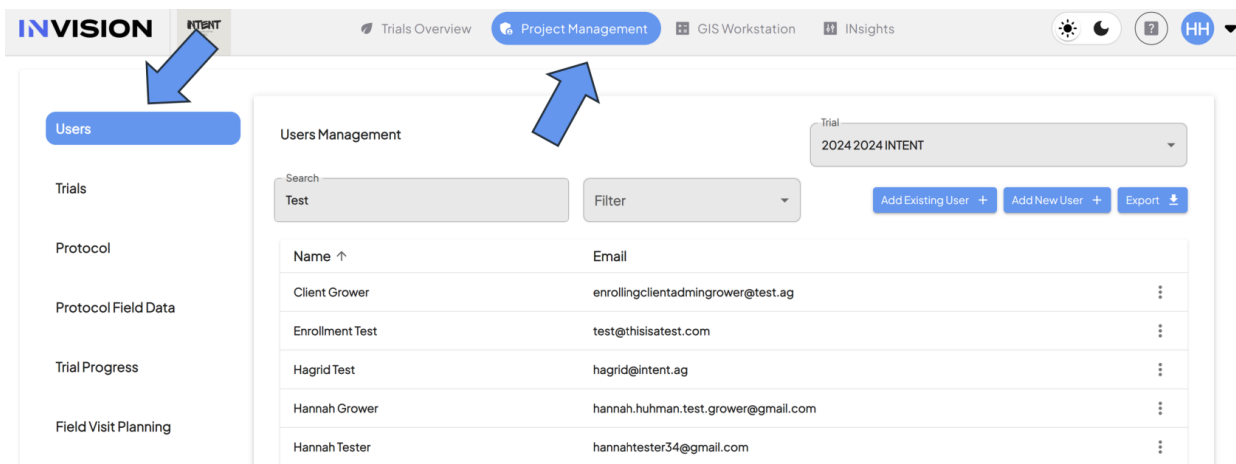
Understanding the Project Management Page

Guide to Understanding the Project Management Tab

The Project Management tab of the INVISION Platform is designed to give users access to all the tools they need to design and manage a trial. It's divided into several sections, outlined below.

Users

The Users section of Project Management is used to add users, edit user profiles, and to assign permissions.



The screenshot displays the INVISION Project Management interface. The top navigation bar includes 'Trials Overview', 'Project Management' (selected), 'GIS Workstation', and 'INsights'. The sidebar on the left has 'Users' highlighted. The main content area is titled 'Users Management' and shows a search bar with 'Test' entered, a filter dropdown, and buttons for 'Add Existing User', 'Add New User', and 'Export'. Below this is a table of users with columns for Name and Email.

Name ↑	Email
Client Grower	enrollingclientadmingrower@test.ag
Enrollment Test	test@thisisatest.com
Hagrid Test	hagrid@intent.ag
Hannah Grower	hannah.huhman.test.grower@gmail.com
Hannah Tester	hannahtester34@gmail.com

Components of the User Section

1. User Management

- **Function:** Displays a table containing users based on trial selection, search results, and/or specific filters that are applied.

2. Trial Selection

- **Function:** Use this dropdown menu to see users associated with a specific trial.

3. Search:

- **Function:** Search for users using first/last name or email address.

4. Filter:

- **Function:** Use this filter to find users that have been assigned specific roles.

5. Add Existing User:

- **Function:** Use this option to add users to a trial that you know are already in our system. For example, you would use this button to add a user from a previous trial to a new trial.

6. Add New Users:

- **Function:** Use this option to add completely new users to a trial.

7. Export:

- **Function:** Selecting this button will download a .csv file with all users, their contact information, and their role in our system.

8. User Profile:

- **Location:** Select the three dots to the right of the user's email to pull up a menu.

The screenshot displays the 'Users Management' section of the INVISION platform. It features a search bar with the text 'Hannah Tester' and a 'Filter' dropdown. Below the search bar is a table with columns 'Name' and 'Email', showing a single user entry: 'Hannah Tester' with email 'hannahtester34@gmail.com'. To the right of the table, there is a 'Rows per page: 10' dropdown and a menu with options: 'View Details', 'Assign Permissions', 'Edit User', and 'Delete User'. A blue arrow points to the menu icon next to the user's email.

- **Function:** This menu provides access to the following:
 - User Details
 - Assign Permissions
 - Edit User
 - Delete User

To see a list of all the available roles and how to assign them, check out our [Guide to Understanding Roles in the INVISION Platform](#).

Trials

A Trial is an experiment conducted on an agricultural field to test one or multiple products, such as fertilizer, fungicide, insecticide, etc.

Components of the Trials Section

- Trials Management**
 - Function:** Displays a table containing all trials created for your active client.
- Create Trial**
 - Function:** Selecting this button will allow you to start the process of creating a trial.
- Edit Trial**
 - Function:** Select the pencil on the far left in the table to edit that trial.

To learn more about Trial creation, check out our [Guide to Creating a New Trial](#).

Protocol

A protocol is a series of steps that need to be carried out to complete the Trial experiment. A protocol is specific to both a single trial and a single crop, but trials can have multiple protocols. Protocols can have both mandatory and optional steps.

Components of the Protocol Section

1. Protocol Management:

- **Function:** Displays a table containing all available protocols that have been created, based on the trial selection.

2. Trial Selection:

- **Function:** Use this dropdown menu to see protocols associated with a specific trial.

3. Create Protocol:

- **Function:** Selecting this button will allow you to start the protocol creation process.

4. Protocol Steps:

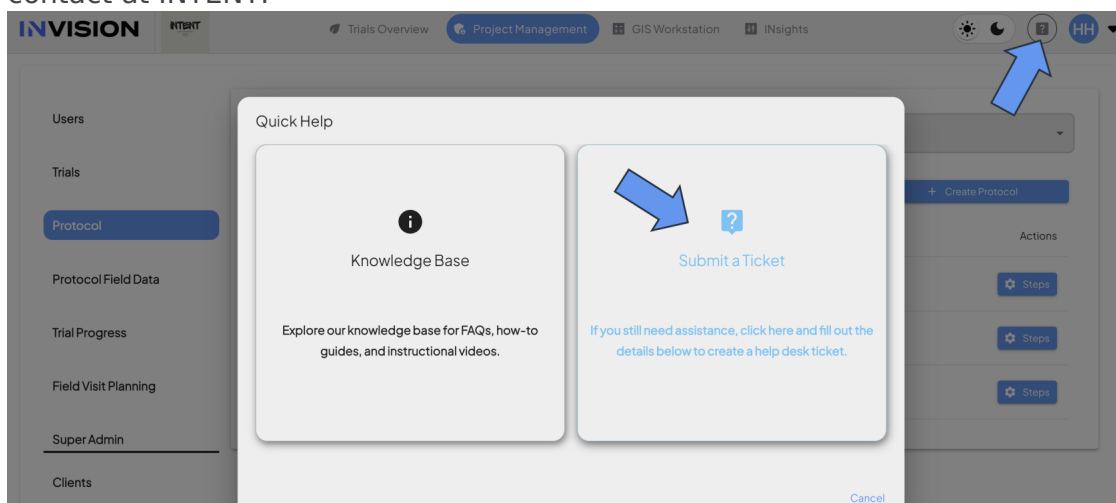
- **Function:**

5. Edit Protocol:

- **Function:** Select the pencil icon on the far left of the table to edit that protocol.

6. Delete Protocol:

- **Function:** Select the trash can icon on the left side of the table to delete that protocol.
 - Protocols cannot be deleted once data is associated to it. If you need assistance, submit a help desk request, or connect with your point of contact at INTENT.



To learn more about Protocol creation, check out our [Guide To Creating a Trial Protocol](#).

Protocol Field Data

Setting up protocol field data is a way to set up questions for a field visit, or collect extra information you need from growers about any of the protocol steps you've set up. For example, if you have a set of questions your grower needs to fill out in relation to the planting step, you can set that up in the Protocol Field Data section of Project Management.

The screenshot shows the INVISION Project Management interface. The top navigation bar includes 'Trials Overview', 'Project Management' (highlighted), 'GIS Workstation', and 'Insights'. The left sidebar lists 'Users', 'Trials', 'Protocol', 'Protocol Field Data' (highlighted), 'Trial Progress', and 'Field Visit Planning'. The main content area is titled 'Protocol Field Data' and features a 'Trial' dropdown menu set to '2023 INTENT Trial' and a 'Select Protocol' dropdown menu set to 'Smoke'. Below these are four expandable sections: 'Planting', 'Applicaiton', 'Field Visit #1', and 'Harvest', each with a dropdown arrow.

Components of the Protocol Field Data Section

- 1. Protocol Field Data Management:**
 - **Function:** Expandable sections for each protocol step created in the selected trial and protocol.
- 2. Trial Selection:**
 - **Function:** Use this dropdown menu to select the trial you want to add protocol field data for.
- 3. Protocol Selection:**
 - **Function:** Use this dropdown menu to see the protocols associated with a specific trial.
- 4. Protocol Steps:**
 - **Function:** Each step expands so that you can add questions for growers or edit question that have already been created.

To learn more about add protocol field data, check out our guide on [How To Add Field Data Questions to a Protocol Step](#).

Trial Progress

The Trial Progress section of Project Management is designed to be a tool for admins to closely keep track of the progress of all of their trials. It has a variety of of filters, as well as an option to export the data you want to see as a CSV file.

Components of the Trial Progress Section

- 1. Trial Progress Management:**
 - **Function:** Displays a table that provides all protocol steps and the dates they were completed, organized by growers.

- **Optional:** Some columns are editable, allowing admins to manually enter in specific dates.

2. **Trials Selection:**

- **Function:** Use this dropdown menu to filter the table to only display data associated with the selected trial.

3. **Optional Filters:**

- **Protocol:** Use this dropdown menu to filter the table to only display data associated with the selected protocol.
- **Grower:** Use this dropdown menu to filter the table to only display data associated with the selected grower.

4. **Years:**

- **Function:** Use this dropdown menu to filter the table to only display data associated with the selected year.

5. **Show Dropouts:**

- **Function:** Use this toggle to show or hide grower's that have been dropped out of their trial/protocol.

To learn more about the Trial Progress table, check out our guide on [How to View and Export Trial Progress](#).

Field Visit Planning

Field Visit Planning

Components of the Field Visit Planning Section

1. **Field Visit Management**
2. **Trials Selection:**
3. **Crop Selection:**
4. **Grower Selection:**
5. **Assignee Selection:**
6. **Optimal Start Date:**
7. **Optimal End Date:**
8. **Growth Stage Selection:**
9. **Years:**
10. **Show Dropouts**
11. **View Selection**

Components of Field Visit Planning

Revision #10

Created 19 February 2024 22:18:20

Updated 9 December 2024 15:05:57