**RStudio Cloud Tips and Tricks**

**Quick Snapshot:**

* Full online guide for trouble shooting: <https://rstudio.cloud/learn/guide>
* Recommended Roles:
  + **When building out materials in Cloud**, set instructors/TAs to *Admin or Moderator*. These roles can change project specifications.
  + **The day before the training begins**, set instructors/TAs to *Contributor* and leave only one person as *Admin/Moderator*. This is because only one Admin/Moderator can be logged into the main space at a time (your R session will be disconnected if you are logged in as Admin/Moderator and another Admin/Moderator logs in)
  + **For attendees:** Once projects/assignments are finalized, under the Members tab, create a Sharing Link and set Initial Role to *Contributor* and turn off all permissions in the section below (uncheck all of the following: Contributors can see members list; can make projects visible to all members; can change resources; viewers can see members)
* Convert Projects to *Assignments* so attendees can start/stop/continue on their own project copy. Important note: Changes made to the original project do not propagate to copies already created.

**Setting up the Instructor Account**

You only need one paid, instructor account for your training. Once you identify the lead person to activate the account and it is setup, the lead can then add collaborators with full administrative privileges to contribute and build out material. The lead person will need to 1) connect with RStudio and with SHARP Admin to get billing details 2) invite team members 3) provide invoices to SHARP admin on a monthly basis and 4) downgrade the account post-training to stop monthly charges.Steps for setting up the Instructor Account:

* **Step 1:** Lead person to set up a basic cloud account using your CU/institutional email address (<https://rstudio.cloud/>; top right click ‘sign up’)

*Complete Steps 2-3 if the basic cloud account does not support your needs for your training.*

* **Step 2:** Once basic account is set up, lead person submit request for instructor account using your CU/institutional email address (<https://rstudio.cloud/plans/instructor>; purple ‘sign up’ button)
* **Step 3:** RStudio Cloud will review the request and email you once approved. In that email they send you, there will be a link to the discounted plan. Coordinate a call with Nader Elmehdawi (ne2336@cumc.columbia.edu) when you’re ready to sign up and he can provide the credit card details to you over the phone for you to input. If there is a way to add Nader’s email address to the billing details, please do so he can get the monthly invoices. Once that’s done, the Instructor account is now active!

**Adding Co-Instructors and TAs to the Instructor Account**

Once the Instructor account is active, you can now create a shared space for the training and invite co-instructors and TAs: [see Steps 2 and 3 here](https://rstudio.cloud/learn/guide#course-spaces). Recommended Roles:

* **When building out materials in Cloud**, set instructors/TAs to *Admin or Moderator*. These roles can change project specifications.
* **The day before the training begins**, set instructors/TAs to *Contributor* and leave only one person as *Admin/Moderator*. This is because only one Admin/Moderator can access the project at a time (your R session will be disconnected if you are logged in as Admin/Moderator and another Admin/Moderator logs in). [Refer to more details here](https://rstudio.cloud/learn/guide#project-access).
* **For attendees:** Once projects/assignments are finalized, under the Members tab, create a Sharing Link and set Initial Role to *Contributor* and turn off all permissions in the section below (uncheck all of the following: Contributors can see members list; can make projects visible to all members; can change resources; viewers can see members)

**Creating a Shareable Project for Attendees**

Once the project is finalized, turn it into an Assignment so that attendee Contributors will make a copy of the project during the training and will not influence the master project: [see Step 4 here.](https://rstudio.cloud/learn/guide#teach-assignments)

* **Important Note:** Changes made to the original project do not propagate to copies already created. So if youchange the allocated resources (e.g., increase RAM) after your TA (or the attendees) has already made a copy of the original project, they will not be able to see those changes. Simple solution would be for the TA (or attendees) to sign out/log back in, or delete their copy and create a new one.

**Sharing the Assignment with Attendees**

Once projects/assignments are finalized, under the Members tab, create a Sharing Link and set Initial Role to *Contributor* and turn off all permissions in the section below (uncheck all of the following: Contributors can see members list; can make projects visible to all members; can change resources; viewers can see members). **Coordinate with SHARP Admin how/when the link will be shared, as once attendees use the link, billing and usage hours will apply.** It is recommended that the link is shared day-of with attendees by SHARP Admin, at the break before the lab session is to take place for attendees to open the assignment. SHARP Admin can share this link with all attendees when prompted and include on Canvas page at ideal timing.

**Downloading Code/Files Locally**

Attendees will likely ask during the training how they can save the lab locally. To download files from RStudio Server, you should take the following steps:

1. Double click on the boot camp project to open the directory
2. Once you are in the Project directory, open the **Files** panel.
3. Select the file(s) and/or folder(s) you want to download.
4. Click **More,** then **Export** on the dropdown menu.
5. You'll then be prompted with a default file name for the download. Either accept the default or specify a custom name then press download. Note that if you select multiple files or folders for download then RStudio compresses all of the files into a single zip archive for downloading.

**Closing out Instructor Account Post-training**

Once the training ends, downgrade the instructor account to your free, basic account to remove attendee access and stop accrual of usage hours and extra billing. Your projects will stay available in your account. There may be some limitations if specs needed are outside the free account constraints, but once upgraded again for the next training full access will be restored. Once downgraded, you’ll receive a final invoice by email that aligns with the billing cycle for you to forward to SHARP Admin Nader Elmehdawi (ne2336@cumc.columbia.edu).