

ClickUp Integration Proposal

Brief overview of ClickUp folder access permission

- To restrict folder access permission, the folder must be set to Private and managed by Folder Creator/Workspace Owner.
- A GitHub repo will be linked by space, not by folder. That means it is impossible to link different folders in one space to different GitHub repos. However, it is possible to link different spaces to different GitHub repos. One space can be connected to multiple GitHub repos. Free ClickUp workspace allows 5 spaces.
- One Slack workflow is allowed to connect to a static ClickUp folder (unable to use parameters for different folder paths).

ClickUp Integration Proposal

- Connect a ClickUp Space with all the GitHub repositories
Reason: *Explained by item 2 above. Considering all project folders hosted under one space, it is not possible to link each project folder to GitHub repos differently. Another option is to have different GitHub space for each project, but it is limited to 5 spaces for Free workspace. As a result, the best option is to connect a ClickUp space containing all project folders with all the GitHub repositories.*
- Create all project folders under the ClickUp Space and set them all to Private.
- Folder Creator invites researchers to access their corresponding project folder. Following these steps will restrict researchers from accessing other project folders.

1. Codebase Management

- In a project folder, create a list for codebase management, which will be used for hosting tasks related to code development. All invited researchers are allowed to update and edit the task list.
- Researchers can update the status of a ClickUp task when they link a commit, push a commit, or create a pull request. ClickUp automatically picks up new GitHub activity and associates it with tasks if they include a valid task ID in any part of the pull request title, pull request description, branch name, or commit message. Doing this way, researchers can directly update the ClickUp task status as code development progresses with task ID.

The task ID must be formatted using one of these options:

```
#{task_id}[status]
```

```
CU-{task_id}[status]
```

```
{custom_task_id}[status]
```

```
#{custom_task_id}[status]
```

To update a task status:

1. Add the ClickUp [task ID](#) in any part of the commit or pull request message.
2. Include the updated task status in square brackets.

For example: `#ud5b[ready]`

- Task status can be customized in ClickUp!

Edit Computer Vision Lizard statuses

Status type ⓘ

☐ Inherit from Space

☒ Use custom statuses

Status template

Custom

Not started ⓘ

⋮

☒ TO DO

...

+ Add status

Active ⓘ

⋮

☒ IN PROGRESS

...

+ Add status

Done ⓘ

⋮

+ Add status

Closed ⓘ


⋮


☒ COMPLETE




...


2. Slack Workflow for reporting incident/support request


- In the project folder, create a list for incident support list. One or two Higher Ed members should be allowed to access the project folder to support that project team.
- A custom Slack Support Workflow that is connected to the ClickUp support list will be created for each project team. This Workflow will allow researchers to submit support tickets as ClickUp tasks for Higher Ed members.

 **Test ClickUp Workflow** ×

Description
Test ClickUp Workflow
Creator
 Eve

Slack actions
 Collect info in a form
 Add an item to a list
 Send a message to a person

Third-party actions Manage Accounts
 ClickUp
Create a task in a folder

Workflow ID: Wf07SHLZ9NDA 

[Copy workflow link](#) Edit ▶ Start Workflow

REFERENCES

Vy Nguyen's research on Slack Workflow with ClickUp.

ClickUp article on GitHub Integration: <https://help.clickup.com/hc/en-us/articles/6305771568791-GitHub-integration>

ClickUp Article on Shared spaces, folders, lists and tasks: <https://help.clickup.com/hc/en-us/articles/6309266954263-Share-Spaces-Folders-Lists-and-tasks>