# Solve for Good

# How to Publish Your Organization's Project

In this step-by-step tutorial, you will learn how to register your organization on the Solve for Good platform, create a profile and tasks for your project, and accept and review work from volunteers.

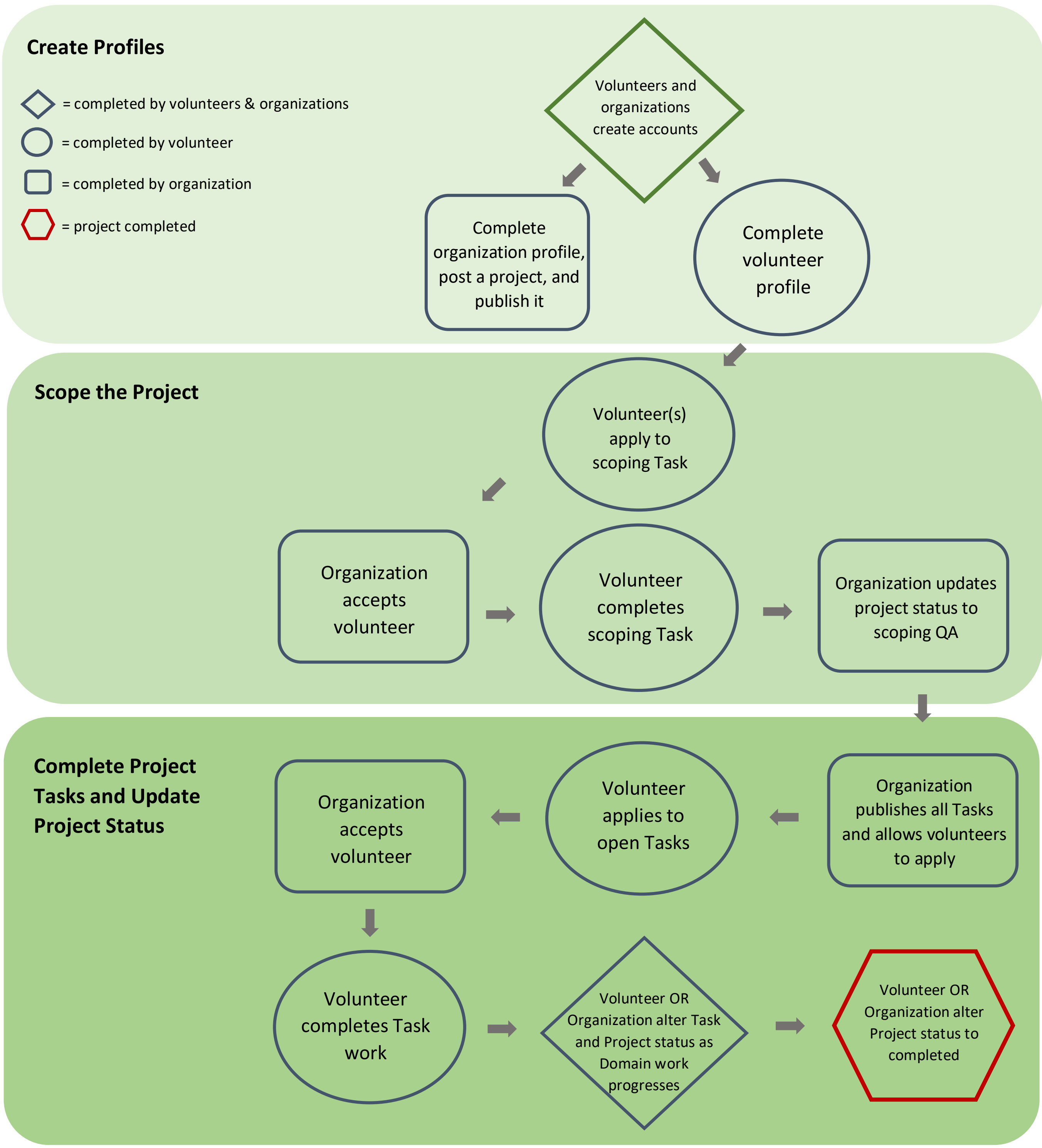
*Solve for Good is an online platform for social good organizations to post projects they need help with, for volunteers to help scope those projects into well-defined problems, and to help solve those problems. To start working on projects, you must create an organization account, complete an organization profile, and allow for volunteers to apply and work on your project.*

## Table of Contents

*Understanding the Solve for Good Project Process*

The diagram below depicts a simplified version of the project process for projects placed on the Solve for Good platform. Organizations and volunteers work together to complete their projects, with opportunity for collaboration and quality assurance.

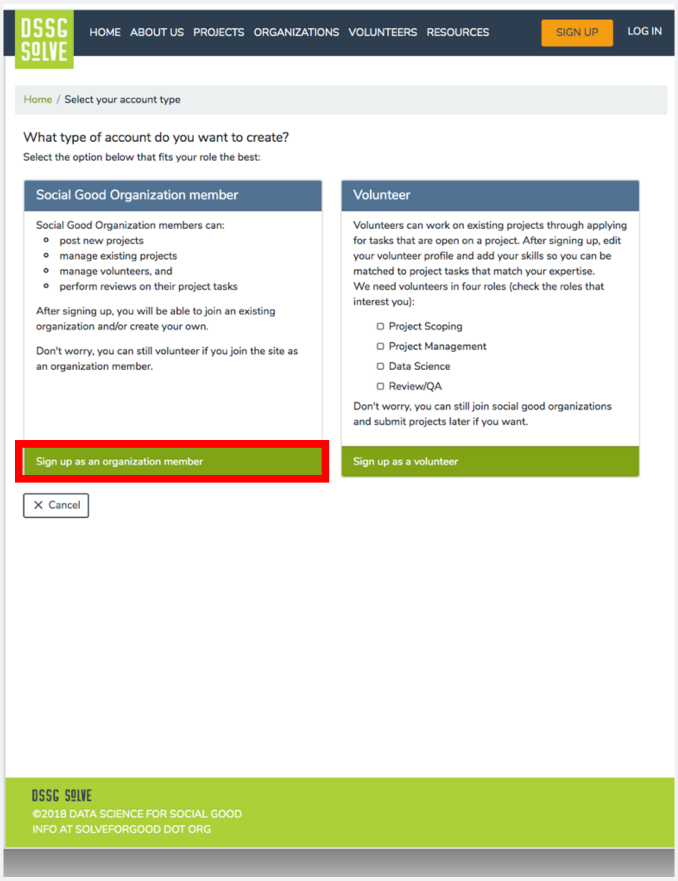
**Importantly, Tasks are the main unit of work for a project. This tutorial will go in depth about how to apply to a project's Task and the purpose behind each step.**



*Sign up for Solve*

**Press the "sign up" button.**

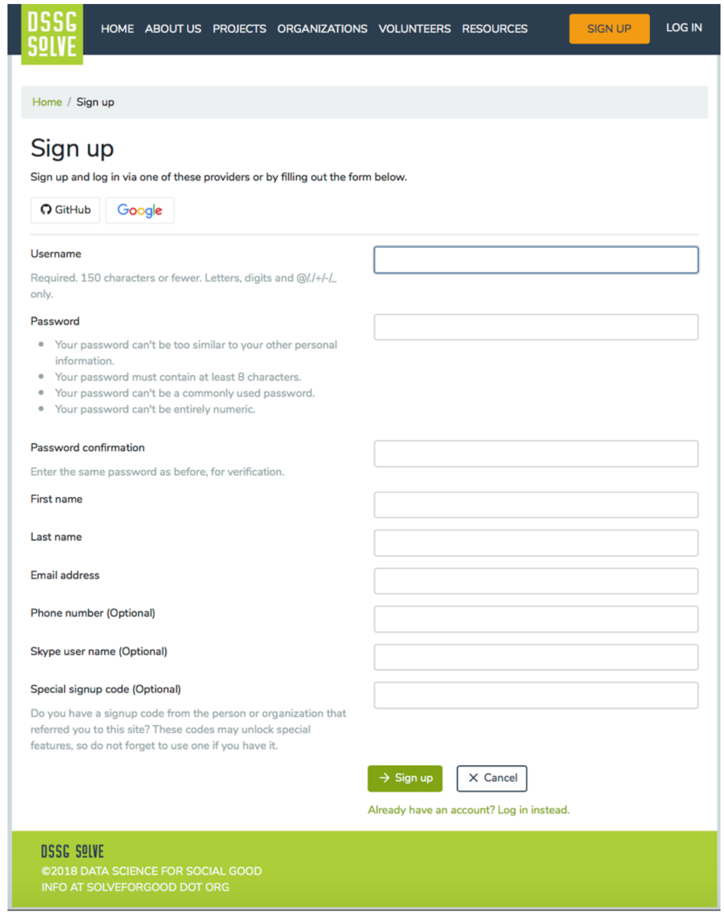
To sign up as an organization, press the **Post a project now** button the Solve for Good homepage **SIGN UP** button on the Solve for Good homepage (highlighted in red in the image on the right). You may also sign up using the other orange buttons.


*Select your account type*

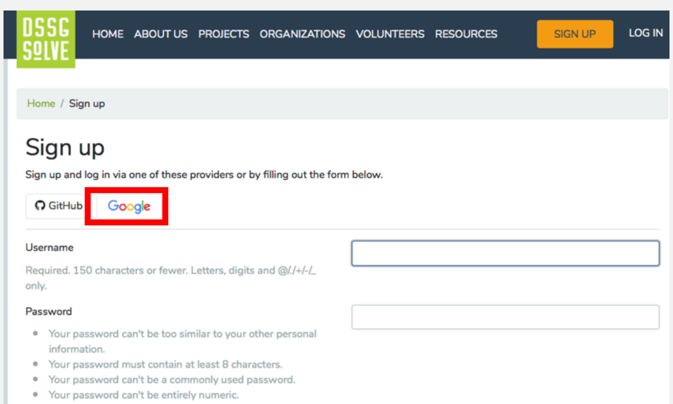
**To create an organization account, select "Sign up as an organization member" highlighted in red in the image on the right.**

**Note:** There are three ways you can create an account: manually, connecting a Google account, and connecting a Github account. By creating an account manually or using an existing Github account, you must verify your account via the corresponding email account. If you choose to create an account using an existing Google or Github account, you will not have to create a password. Please skip ahead to one of the three following the steps that pertains to your preferred method.




*Creating an account manually*

To manually create an account, fill out all the requested information on this page. You will receive a confirmation email asking you to verify your email. This will activate your account.




*Creating an account by connecting a Google account*

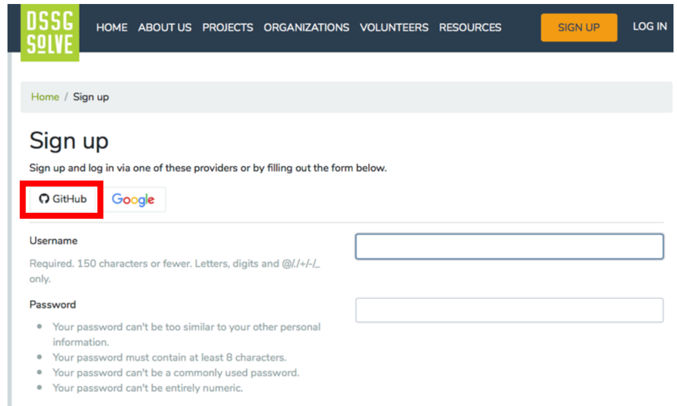
Select the "Google" icon on the sign-up page, highlighted in red on the image to the right. This will redirect you to Google where you must select a Google account.

After selecting the Google account, you will be redirected to the Solve homepage. A green banner at the top will notify you that your account was successfully created.

*Creating an account by connecting a Github account*

Select the “Github” icon on the sign-up page, highlighted in red on the image to the right. This will redirect you to Github, where you must authorize the sign-up request.

After authorizing your Github account, you will be redirected to the Solve homepage. A green banner at the top will notify you that your account was successfully created.



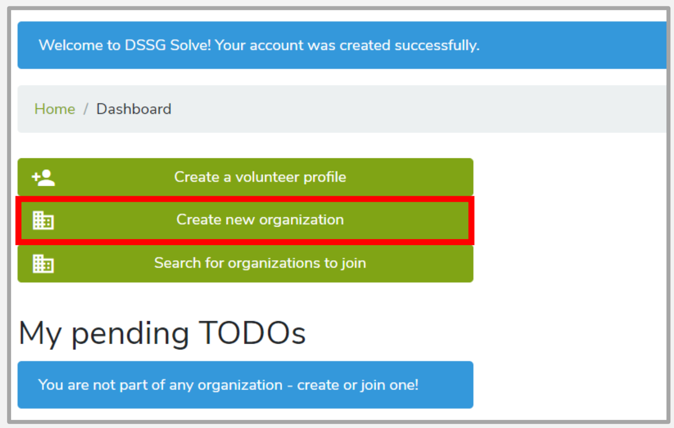

*Create an organization*

**Press the “Create new organization” button.**

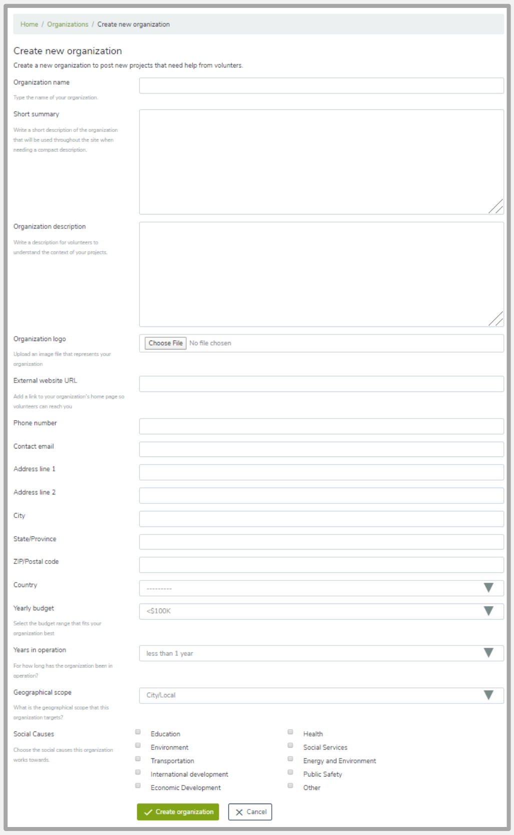
Next, you need to create a profile for your organization if one has not already been created by pressing the **Create new organization** button.

The information on your organization profile is viewable by volunteers and other organizations via the “Organizations” tab at the top of the page.

If your organization already exists, you can find your organization by pressing the **Search for organizations to join** button.




**Note:** This view is known as your **Dashboard**. Here you can create organization or volunteer profiles, search for organizations, view any pending **TODOs** or **Tasks** you have on your account, and view project notifications. **TODOs** and **notifications** will be explained in detail later in this document. The **Dashboard** is accessible at any time by clicking the **Dashboard** button on the upper right-hand side of the page as part of the toolbar.




## *Fill out organization info*

**Complete the applicable sections and press the "Create organization" button.**

Fill out all the relevant information about your organization. Note that this information should only be about the organization – the project will be created at a later step.

When you are finished, click **Create organization.**

**Note:** This information can be edited again at a later date, even after creating your organization,

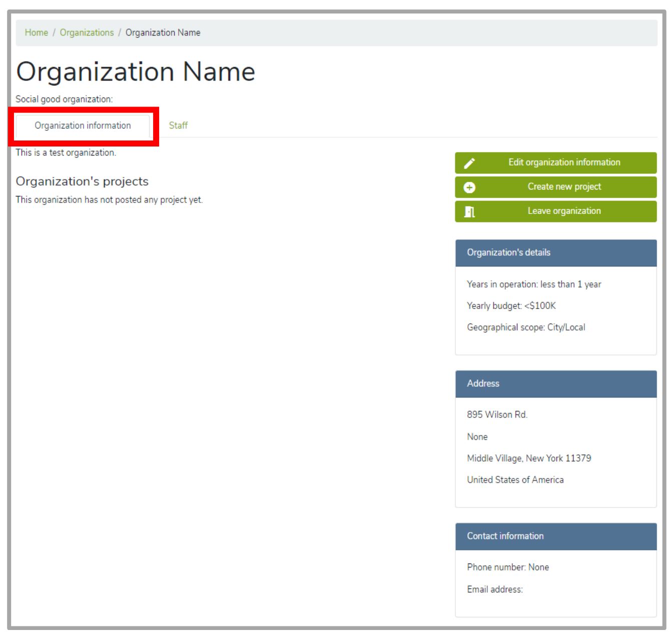
## *The organization view*

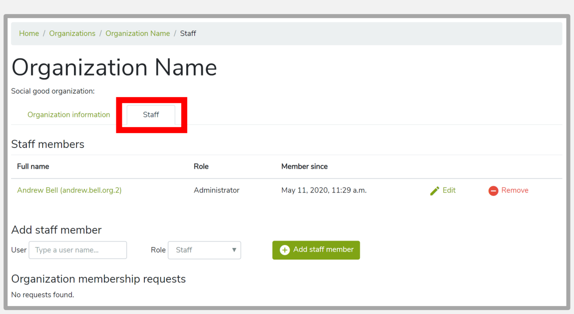
**To see your organization's details, click on the "Organization information" tab.**

After you have created your organization, you will be presented with your organization's public Solve profile.

At any time, you (and any future organization members with the role **Administrator**) can edit the organization information by pressing the **Edit organization information** button on the right side of the page.

**Note:** You can get to this view any time by navigating to **Organizations** on the navigation bar at the top of the page and then selecting your organization from the list




## *Select your organization's staff*

**To see your organization's staff, click on the "Staff "tab.**

You can view your organization's staff by clicking on the **Staff** tab towards the top of the page.

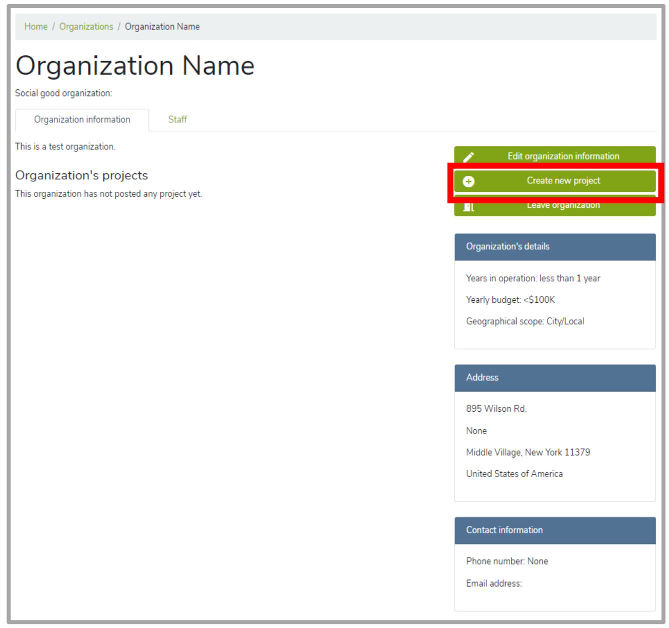
In this view, you can add or remove staff members from your organization by typing the username of other Solve members.  Staff can be added with either the **Administrator** or **Staff** role.  **Administrators** will be able to edit your organization information.

**Note:**  To invite Solve members to be a staff member of your organization, they must already have a Solve account.

## *Create a new project*

**Press the "Create new project" button on the right-hand side of the page.**

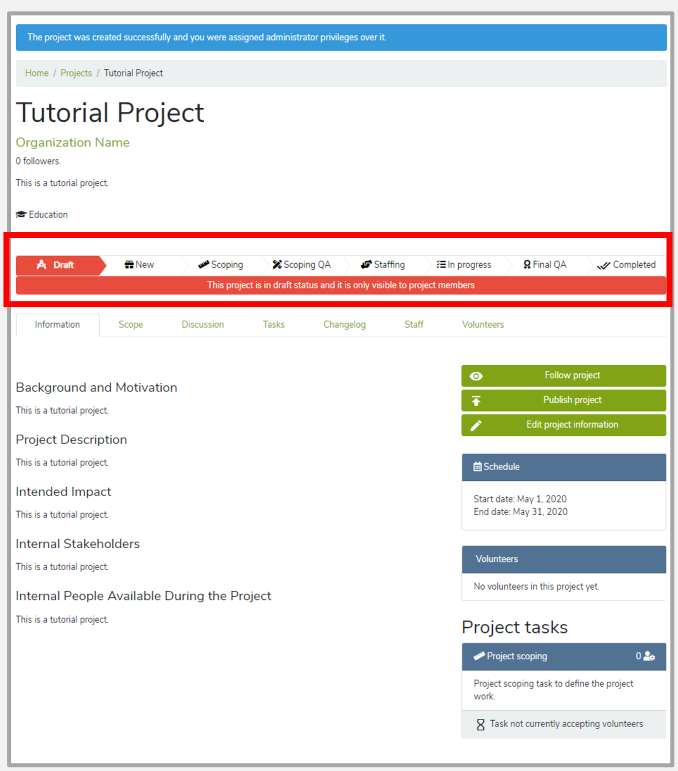
To create a project, return to the organization information tab and select **Create a new project**.




Do your best to fill out all the fields but note that you will be able to edit these again later, even after creating the project. If you are uncertain about details of the project, such as the **volunteer agreement, analysis needed, and validation methodology**, feel free to use placeholders like, "Will be decided during project scoping."

You may create as many projects as you need and may also have multiple projects running at the same time.

**Note:** For required fields that you may not have at the outset of a project, like a **GitHub page**, you can enter a generic url like "www.github.com" or the URL for your organizations website. This also applies to fields like **project home page, documentation home, and project reports home.**




## *Project overview*

This page provides a Project overview.

After creating the project, you will be directed to the project page. Here you will see information about the **status of the project, the project scope, relevant discussion, tasks, the changelog, staff, and volunteers**.

The main component of this page is the full lifecycle of a Solve project (highlighted in red), which shows you the lifecycle step that the project is currently on. The lifecycle steps are:

- **Draft:** this view is only accessible for those **Staff** on the project.
- **New:** a project has been published by the organization administrator. It is during this phase, the first volunteer (a scoping volunteer) may apply.
- **Scoping**: in this stage, the project is being scoped
- **Scoping QA**: because Solve is volunteer-run, it is important that there are mechanisms for quality

assurance. By default, each component of work on a project is subject to QA review, starting with project scoping QA.

- **Staffing:** in this stage, volunteers will apply for the project Tasks as defined during the scoping process.
- **In-progress:** after Tasks have been staffed, they will be in-progress until submitted.
- **Final QA:** the last and final QA of this project. This is the last chance to make final changes, contributions, and corrections to the project work.
- **Completed:** the project is done!

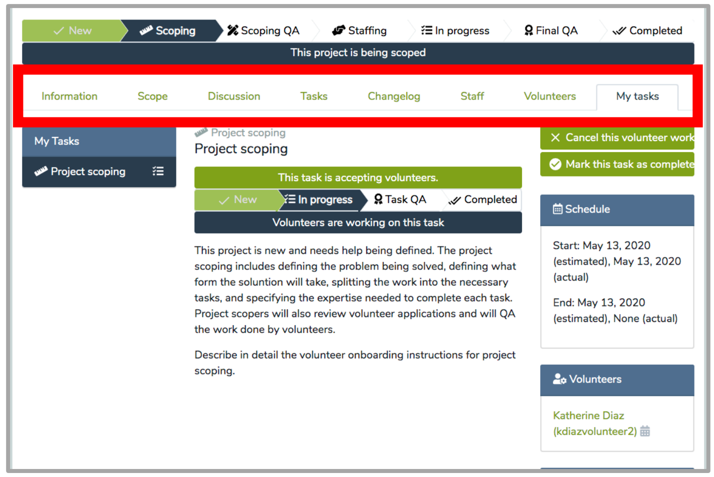
**Note:** Even though you have created a project, it won't be visible until you have **published** the project. A lot of Solve features work this way (first create a **draft**, then **publish**) to give you the opportunity to review your work before making it public. Note that even after publishing, you can still edit all relevant information.

Below the project lifecycle are tabs that will lead you to additional pages. Let's look at all the tabs under the project page:

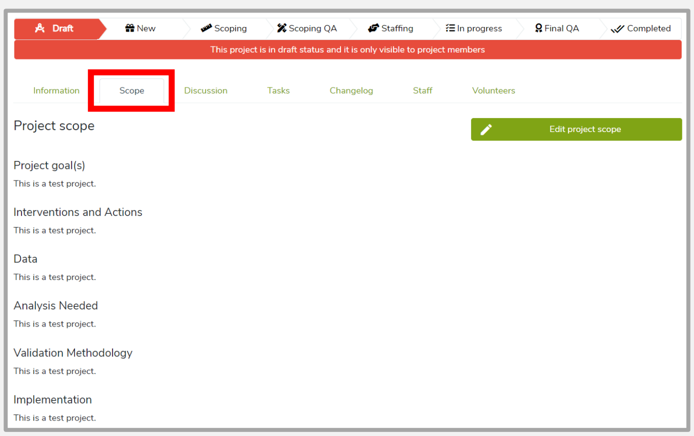
## Project toolbar

The project toolbar has eight tabs:

- Information: basic information about the project and its goals
- Scope: contains project details and metrics for completion
- Discussion: allows for volunteers to start discussion threads
- Tasks: lists the project tasks and progress
- Changelog: details project edits
- Staff: lists organization staff
- Volunteers: lists volunteers
- My tasks: lists the tasks that you applied for and were accepted to work on




Let's explore each tab of the project toolbar.




### *Scope view*

**To see your project's scope, click on the "Scope" tab.**

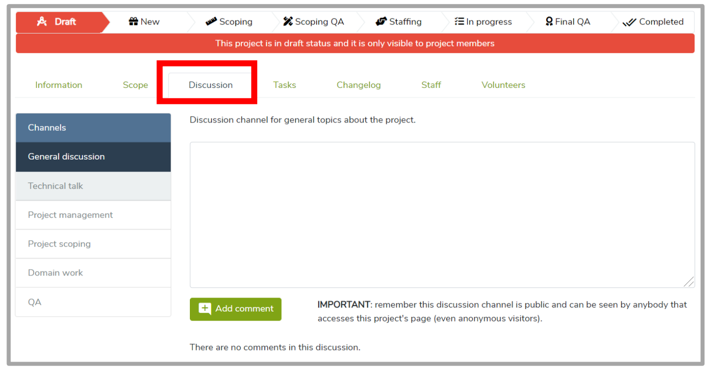
Under the **Scope** tab, you can see information about the scope of the project. Again, you can edit this information at any time.

The project scope provides volunteers with information about the project, such as its goals, data analysis needed, and how it will be implemented once the project is completed.

### *Discussion view*

**To see your project's discussion click on the "Discussion" tab.**

Under the **Discussion** tab, comments can be posted about various aspects of the project. The channels listed here all exist by default – additional channels will be created every time a new **Task** is created for the project.

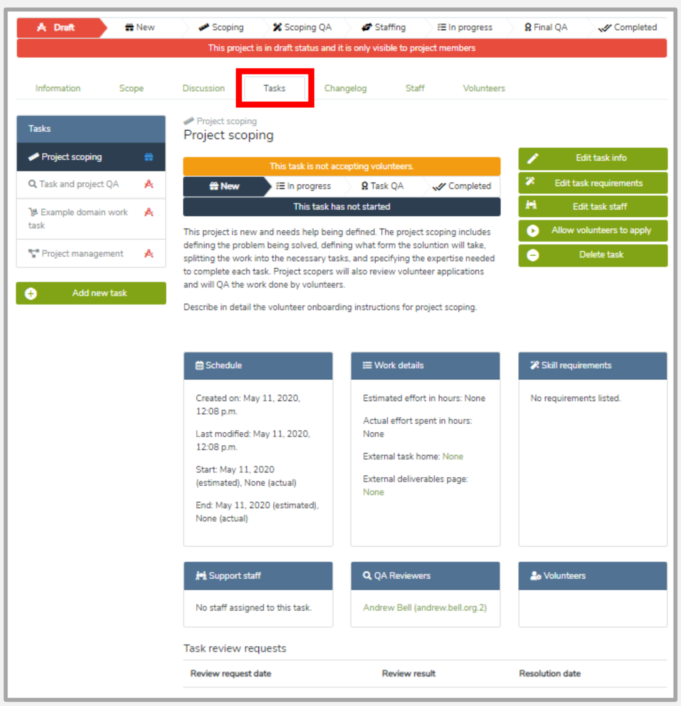



### *Tasks view*

**To see your project's Tasks click on the "Tasks" tab.**

The project **Task** view is the most substantial, and one of the most important. **Tasks** are the main mechanism of completing work on Solve.

A list of tasks can be seen on the left side of the page under the **Tasks** toolbar. You can select any **Task** to see its details, and you can add a new **Task** at any time.




By default, each project has four **Tasks: Project Scoping, Task and project QA, Example domain work task, and Project Management** – notice that each of these **Tasks** have a different icon, representing the four types of **Tasks.** These types are **project scoping, quality assurance, data science, and project management,** respectively.

**Tasks** have four stages, found on the middle section of the page:

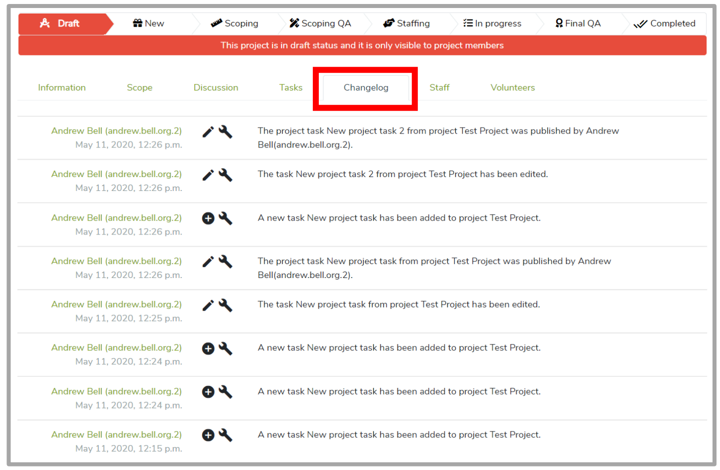
- **Draft:** a **Task** is created but not published
- **New**: a **Task** is in this stage when it is created, published, and waiting to be staffed.
- **In progress**: the **Task** is currently being worked on.
- **Task QA**: the **Task** is being reviewed by a staff member or volunteer.
- **Completed**: the **Task** is complete!

If any of the four auto-created tasks does not fit your project, you can create new tasks by selecting the green "Add new task" button.

The bottom of the page lists additional information about the task such as its schedule, details, skill requirements, volunteers, reviewers, and staff.

Because Tasks are so important, we will do a deep dive on creating and publishing a task later.

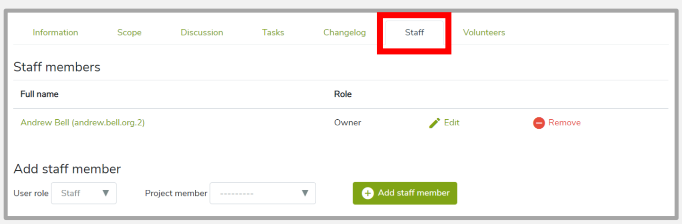
**Note:** Rather than volunteers being matched to entire projects, they are matched to **Tasks**.




*Changelog view*

**To see your project's changelog click on the "Changelog" tab.**

The project **Changelog** shows all the actions that have been taken for the project.




*Staff view*

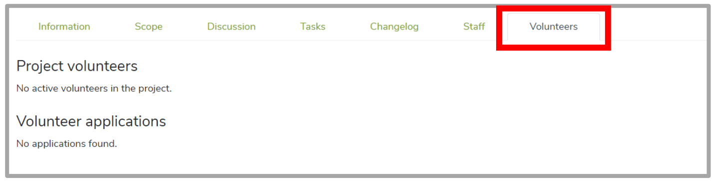
**To see your project's staff click on the "Staff" tab.**

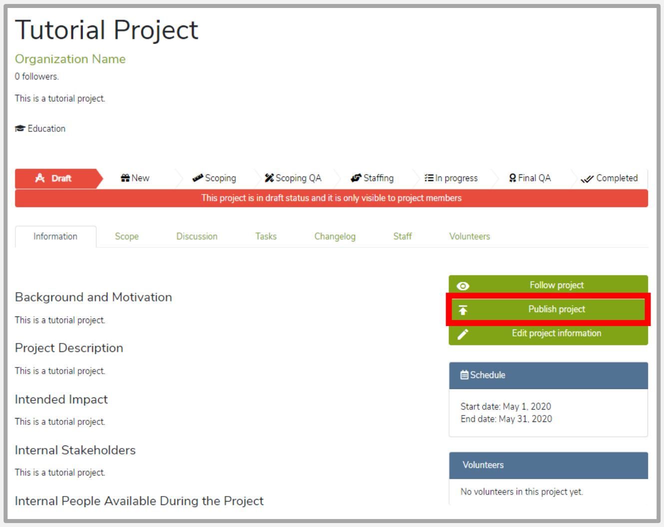
Under the **Staff** tab, you can add or remove Staff to a project.

## *Volunteer view*

**To see your project's volunteers click on the "Volunteers" tab.**

Last but not least, under the **Volunteers** tab you can view all the volunteers for the project.




## *Publish your project*

**Press the publish project button on the right-hand side of the page.**

By publishing your project, it will become visible on the Solve platform. As long as your project remains in **Draft** view, only members from your organization will be able to view it.

Note that once the project is published you can still edit project information.

To publish project, press the **Publish project** button. This will move your project from the **Draft** phase to **New** phase.

*Staffing volunteers for project scoping*

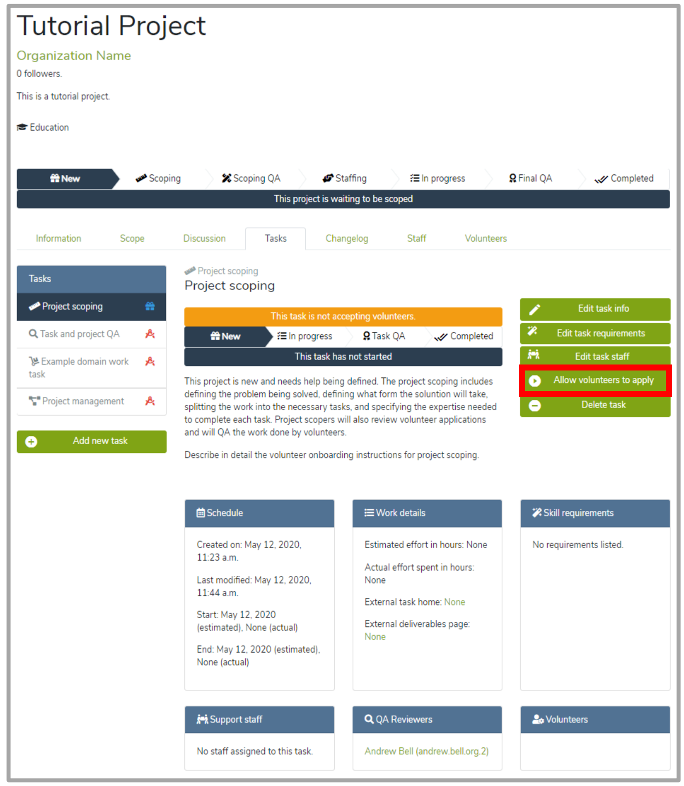
**Press the allow volunteers to apply button.**

As mentioned earlier, each project begins in **Draft** stage, and must move to **New** and then **Scoping.** Once project scoping is completed, we can start creating new data science **Tasks** for our volunteers. The purpose of project scoping is to help fill out any remaining project information and thoroughly establish the scope of the project.

To begin project scoping, navigate to the project **Tasks** tab and make sure the **Project scoping task** is selected in the toolbar on the left-hand side.

Next, press the button **Allow volunteers to apply** to open the **Task** for project scoping volunteers.

**Note:** The same process for recuriting **Project scoping volunteers** will be used to recruit volunteers for **data science, project management and quality assurance tasks.**





*Monitor your notifications*

**Check notifications by clicking Dashboard at the top right-hand side of the page in the navigation bar.**

By clicking on **Dashboard** in the navigation bar on the top of the page, you can view the notifications for your account.

When a **Volunteer** applies to your project, a notification will appear here. Additionally, you should receive an e-mail notification.

To see the volunteers that have applied to your project **Tasks**, click the notification.

### *Accept (or reject) a volunteer*

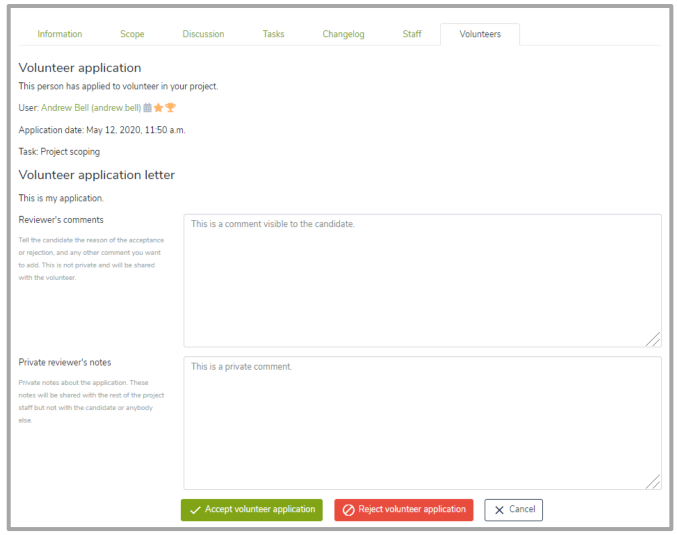
**Press accept or reject volunteer applications.**

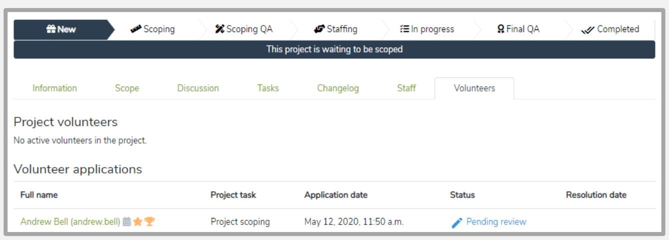
Here you will see the volunteer's application, and you can add comments that will be seen by the volunteer, and notes that will be kept internally.

To accept (or reject) the volunteer, press the respective button at the bottom of the page.

At this time, a task is moved to **In Progress** status.

Furthermore, because the Project Scoping task has begun, the overall project will move from the **New** phase into the **Scoping** phase.




### *Volunteer view*

Once a volunteer has been accepted to the project, they will appear in the **Volunteer** view.

You can change the status of volunteers at any time, and even assign them to different **Tasks** if need be.

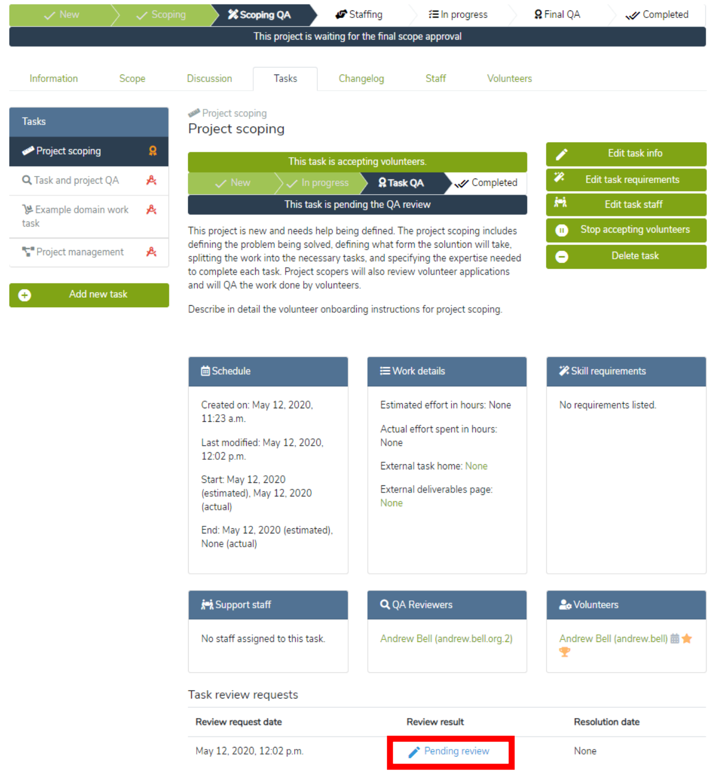
**Note:** You can access this view at any time by going to the **Volunteers** tab under the project page.

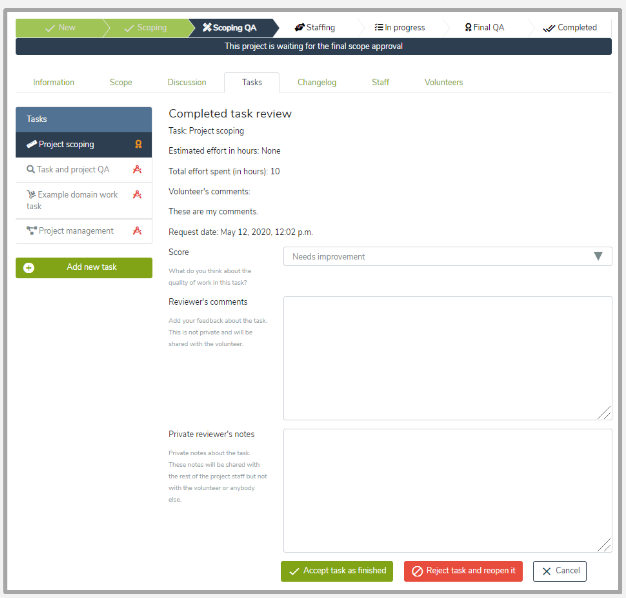
## *Review the volunteer's work*

**Click on "pending review" at the bottom of the page.**

After a volunteer has submitted their work for a **Task**, you will receive a notification in your **Dashboard** and by email. Furthermore, the **Task** will move from **In progress** to **Task QA**.

To review the work done on a **Task**, select **Pending review** on the bottom of the page.




## *Accept (or reject) the volunteer's work*

**Press accept or reject tasks as finished.**

Here you will have the ability to score, add comments for the volunteer, and add private reviewer's notes.

At this time, you can accept or reject the volunteer's work. If the work is accepted the Task will move to being Completed.

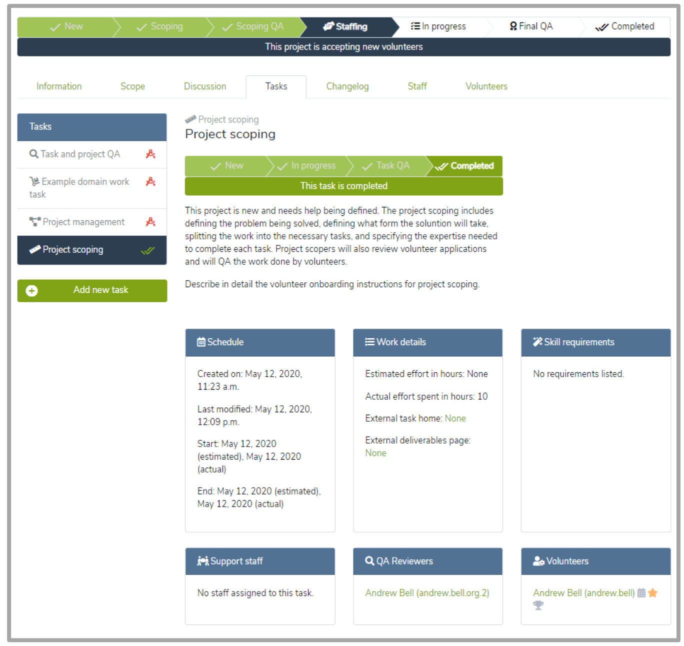
Notice that because a **Project Scoping Task** is being reviewed, the project status at the top of the page has moved to **Scoping QA**.

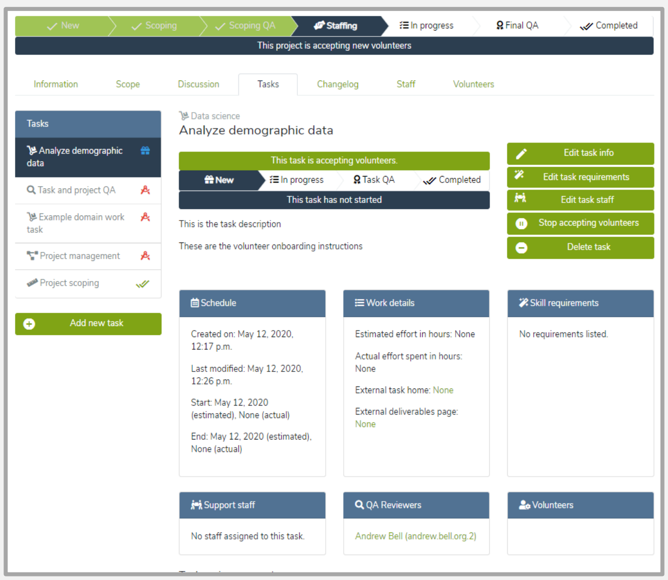
## *Project view*

Once the project scoping task is complete, it will receive two green check marks in the **Task** panel on the left-hand side of the page.

Furthermore, since scoping is complete, the project is ready for new **data science and project management** tasks.

It is important to note that the recruiting and revising process is the same for all **Tasks.**



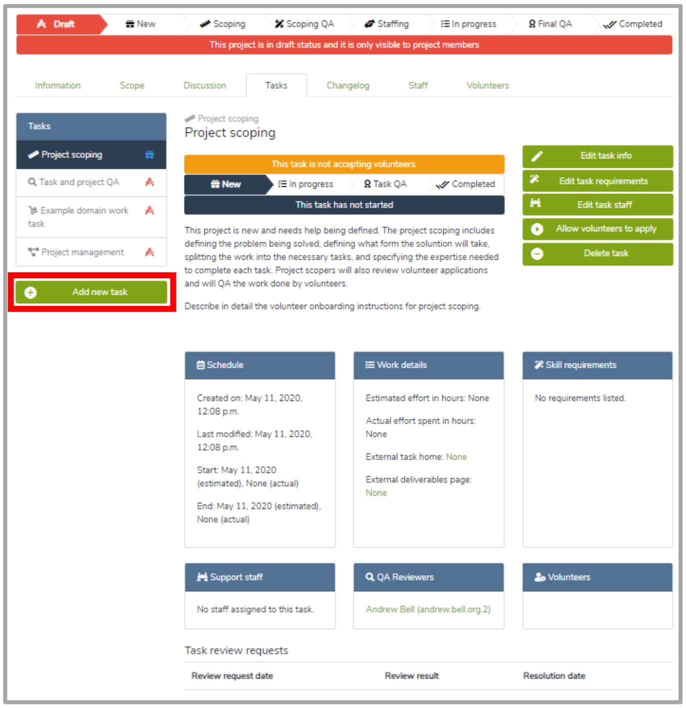

## *Continue staffing the project's open Tasks*

**Wait for volunteers to apply to open Tasks, then return to the steps outlining accepting and rejecting volunteers.**

Once all the project **Tasks** are created and open, you can begin **Staffing** the project by accepting all the volunteers. Generally, these will consist of data science and project management work.

For each open **Task**, return to the steps outlining how to accept volunteers and review their work for **Tasks.**

Volunteers can begin working as soon as they are accepted, but a project will remain in **Staffing** as long as there are still unstaffed **Tasks**. Once all projects are staffed, the project will move to **In Progress.**




**Note:** The following four steps detail creating new Tasks, which is *optional*. Continue to "Monitor and QA volunteer's work" if this step is not relevant to your project.

## *Creating New Tasks*

**Press the "Add a new task" button.**

By default, each project has four **Tasks: Project Scoping, Task and project QA, Example domain work task, and Project Management** – notice that each of these **Tasks** have a different icon, representing the four types of **Tasks.** These types are **project scoping, quality assurance, data science, and project management,** respectively.

You can delete or edit **Tasks** at any time using the buttons in the toolbar on the right side of the page.

To create a new task, select **Add new task**.

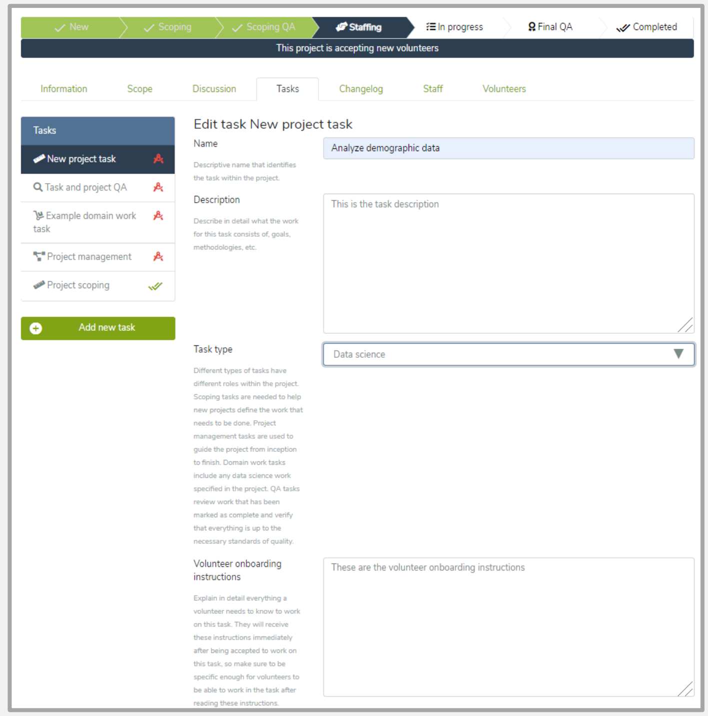
## *Fill out Task info*

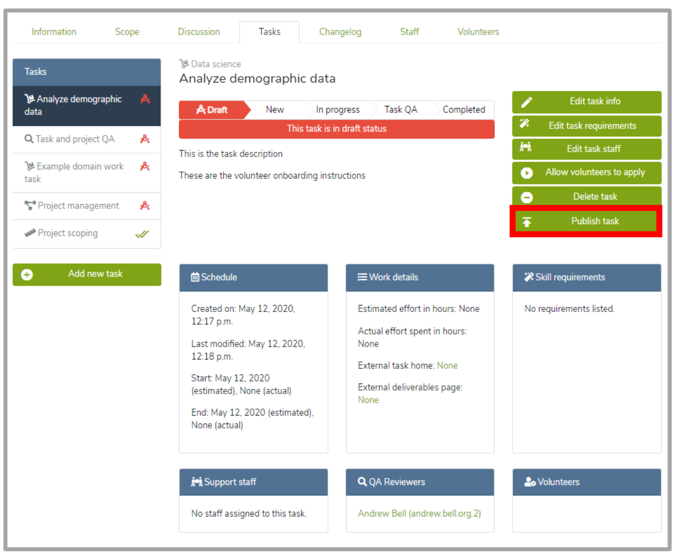
**Complete the Task forms and click "Save."**

Here you can edit all the content of a **Task** and select the Task type. Here we are creating a new **data science Task** called "Analyze demographic data." Note that each new **Task** appears in the list on the left side of the page.

To save the new **Task**, scroll down to the bottom of the page and select **Save.**

In practice, **Task** names should be as descriptive as possible – remember, volunteers connect to your projects through **Tasks**. Additionally, in practice, most projects will only have one **Task** for project scoping – the bulk of **Tasks** will be data science work, which in theory should have been decided during the Project Scoping phase.




## *Publish the task*

**Press on the "Publish task" button.**

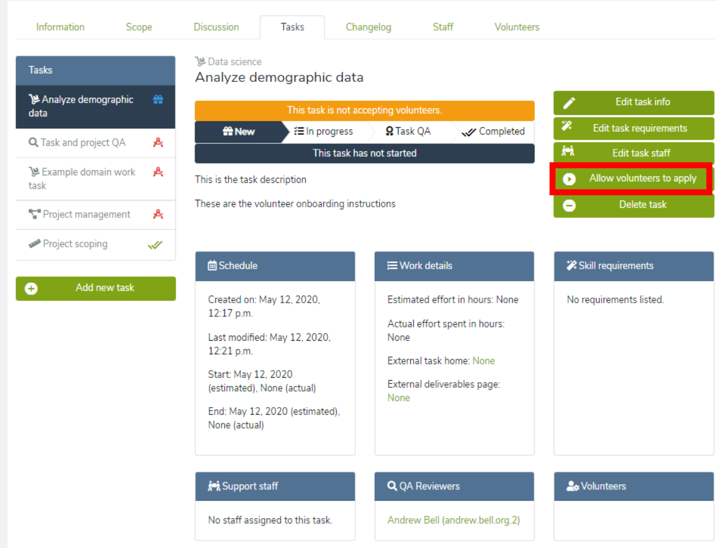
Like with creating a project, a new **Task** will be in **Draft** stage until it is published. To **publish a Task**, click **Publish task** on the right side of the page.

*Open the Task to volunteers*

**Press on the "Allow volunteers to apply" button.**

The last step for creating **Tasks** is to press the button **Allow volunteers to apply**. Once you have opened the **Task** to volunteers, it will be visible to them on the platform.

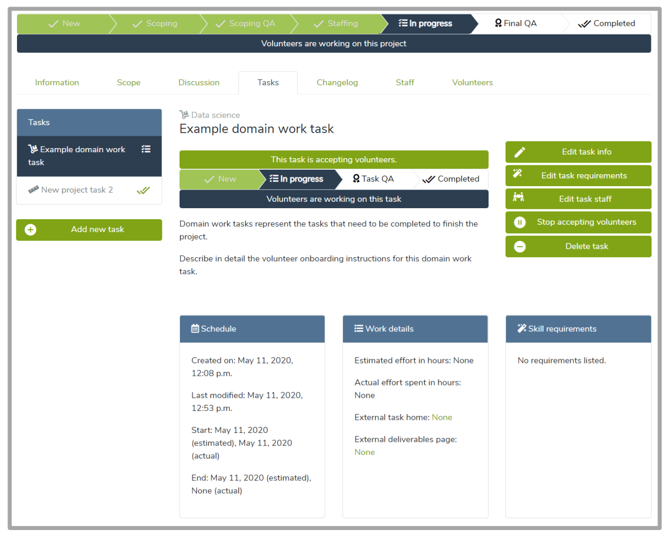
You may continue adding new tasks until all the project **Tasks** are created.

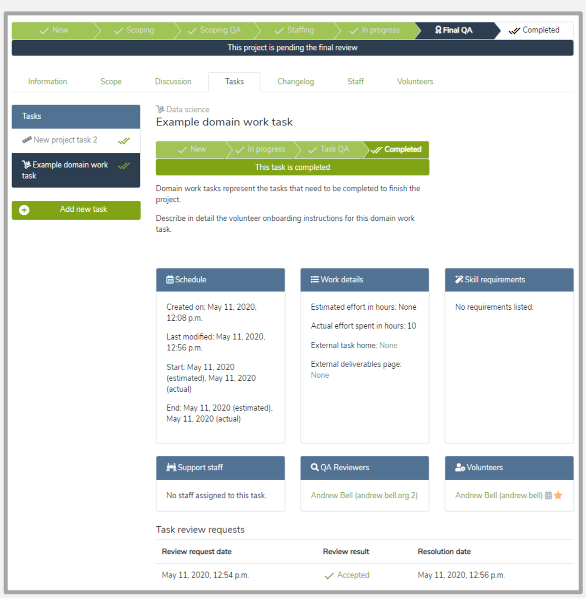



*Monitor and QA volunteer's work*

As volunteers submit work, you will receive notifications in the **Dashboard** and via e-mail.

Each piece of work will need to go through the review and **Quality Assurance** process previously observed: first the volunteer will submit the work, and second, a staff member from the organization will provide and either accept or reject the work.




*Final Quality Assurance*

Once all **Tasks** for a project have been completed, it will move to the **Final QA** stage. Here, you can review the work submitted by Volunteers and confirm that **Tasks** have been completed and completed correctly.

Once **Final QA** has been completed, a project will be moved from **Final QA** to **Completed!**