How to Publish Your Organization’s Project to Solve for Good

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.

Step 1: Sign up for Solve

Press the “Post a project now” button.

To sign up as an organization, press the Post a project now button on the Solve for Good homepage (highlighted in red in the image on the right).

Step 2: Fill out your information

Fill out the requested information to sign up for Solve.

Note: You can connect to Solve using a Google or GitHub account by clicking on one of the respective buttons.
Step 3: Create an organization

Press the “Create new organization” button.

Once your account is created, you will be taken to a page with a blue notification at the top saying that your account was created successfully.

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

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.

Step 4: Fill out organization info

Complete the applicable forms 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 that all of this information can be edited again at a later date, even after creating your organization.
Step 5: 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.

Step 6: Select your organization’s staff

To see your org’s staff, click on the “Staff” tab.

You can view your organizations 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.

Step 7: 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.”

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.
Step 8: 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.

Once you have created a project, you will be able to see the full lifecycle of a Solve project:

- **Draft:** this view is only accessible for those Staff on the project.
- **New:** a project moves to this stage after a project has been published but before it has been open to volunteers.
- **Scoping:** in this stage, the project is scoped by members of Solve.
- **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 be recruited for the project Tasks. We will do a deep dive on Tasks later – they are a critical component of Solve projects.
- **In-progress:** after Tasks have been staffed, they will be in-progress until submitted.
- **Final QA:** the last and final QA of the 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.

Let’s look at all the tabs under the project page:
Step 8b: 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.

Step 8c: 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.

Step 8d: Task view

To see your project’s **Tasks** click on the “Task” 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.

**Tasks** have four stages:

- **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!

Because they 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**.
Step 8e: 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.

Step 8f: 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.

Step 8g: 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.

Step 9: Publish your project

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

By publishing your project, it will become visible to 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.
Step 10a: Recruit 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 recruiting Project scoping volunteers will be used to recruit volunteers for data science, project management and quality assurance tasks.

Step 10b: 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.
Step 10c: Accept (or reject) the volunteer

Press accept or reject volunteer application.

Here you will see the volunteer’s application, and you can add comments that will be seen by the volunteer, and note’s that will 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.

Step 10d: 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.

Step 10e: 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 e-mail. 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.
Step 10f: Accept (or reject) the volunteer’s work

Press accept or reject task 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.

Step 10g: Project view

Once the project scoping task is complete, it will receive two green checkmarks 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 found in Steps 10a-F is the same for all Tasks.
Step 11a: Creating a new task

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.

Step 11b: 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.
Step 11c: 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.

Step 11d: 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.

Repeat Steps 11a-d until all the project Tasks are created.

Step 12: Begin staffing the project

Wait for volunteers to apply to open Tasks, then return to steps 10b-f.

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 Steps 10b-f 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.
Step 13: 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 (steps 10a-f).

Step 14: Final Quality Assurance

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

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