

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

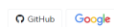
Press the “Post a project now” button.

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



Sign up

Sign up and log in via one of these providers or by filling out the form below.



Username
Required: 150 characters or fewer. Letters, digits and @/./_/- only.

Password
• Your password can't be too similar to your other personal information.
• Your password must contain at least 8 characters.
• Your password can't be a commonly used password.
• Your password can't be entirely numeric.

Password confirmation
Enter the same password as before, for verification.

First name

Last name

Email address

Phone number (Optional)

Skype user name (Optional)

Special signup code (Optional)
Do you have a signup code from the person or organization that referred you to this site? These codes may unlock special features, so do not forget to use one if you have it.

[→ Sign up](#) [X Cancel](#)

Already have an account? [Log in instead.](#)

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.

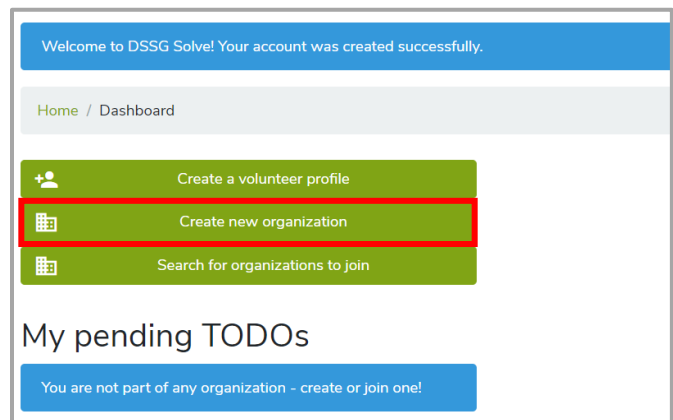
Step 3: Create an organization

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.

A screenshot of the "Create new organization" form. The form is titled "Create new organization" and has a subtitle "Create a new organization to post new projects that need help from volunteers." It contains several input fields: "Organization name", "Short summary", "Organization description", "Organization logo" (with a "Choose File" button), "External website URL", "Phone number", "Contact email", "Address line 1", "Address line 2", "City", "State/Province", "ZIP/Postal code", "Country" (a dropdown menu), "Yearly budget" (a dropdown menu with "<\$100K" selected), "Years in operation" (a dropdown menu with "less than 1 year" selected), and "Geographical scope" (a dropdown menu with "City/local" selected). At the bottom, there is a section for "Social Causes" with a grid of checkboxes for various categories: Education, Environment, Transportation, International development, Economic Development, Health, Social Services, Energy and Environment, Public Safety, and Other. The "Education" checkbox is checked. At the bottom right of the form are two buttons: "✓ Create organization" and "X Cancel".

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.

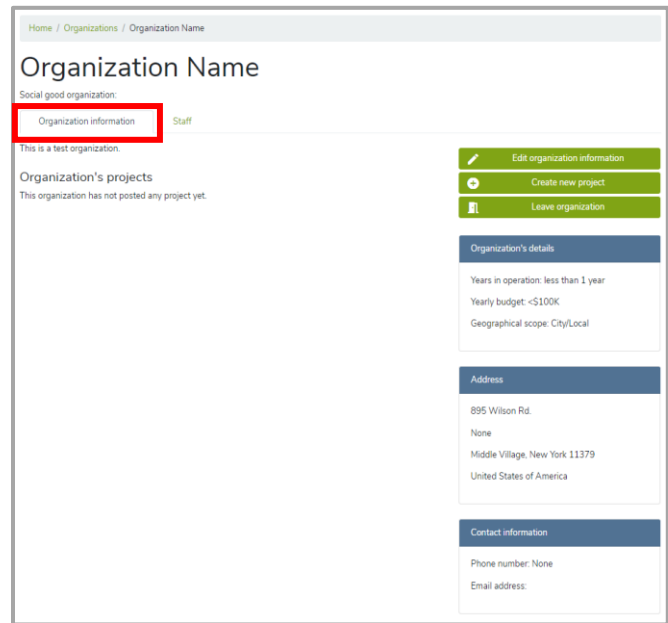
Step 5: The organization view

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

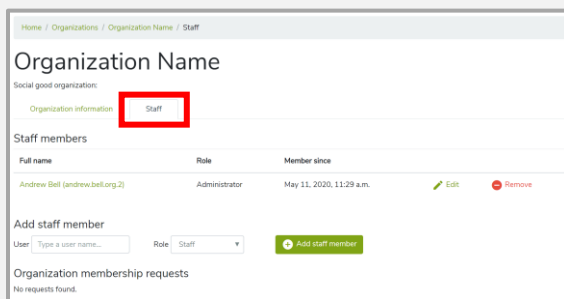


Step 6: Select your organization's staff

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.



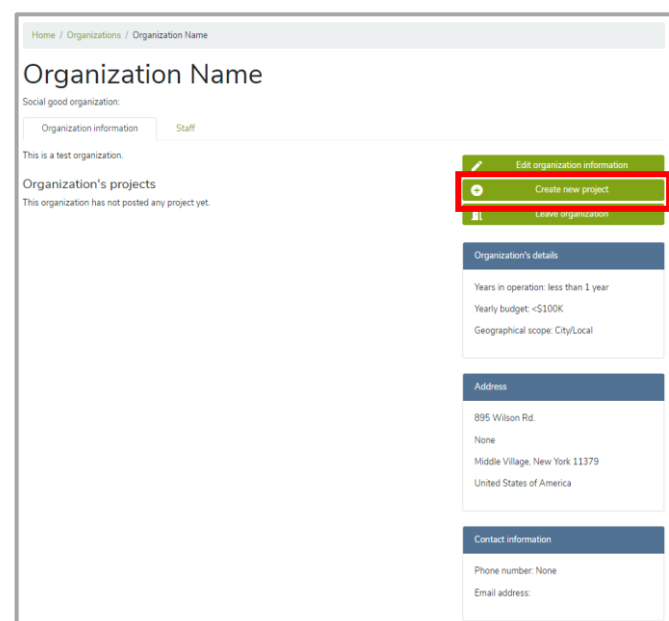
Step 7: Create a new project

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**.

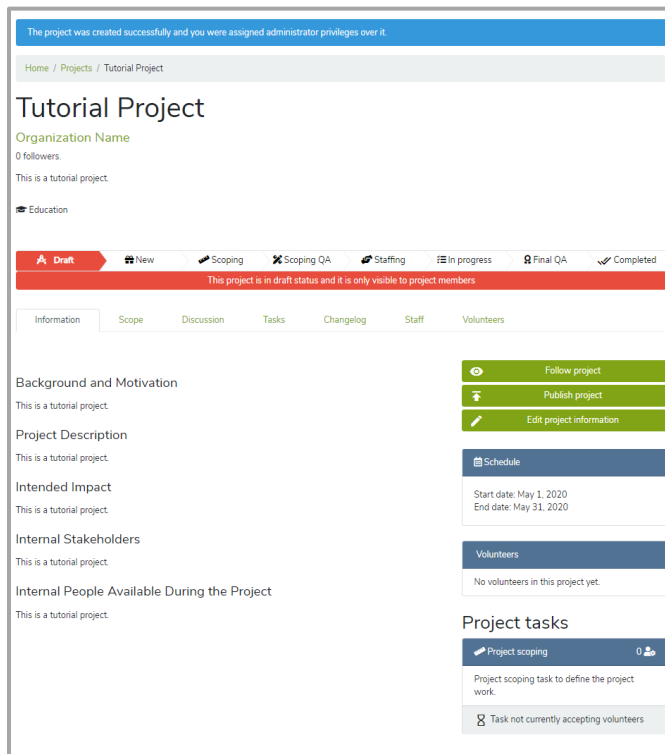


Step 8: Project overview

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.**

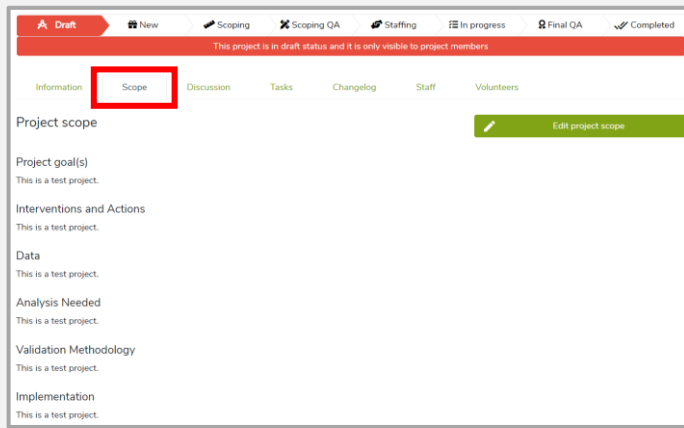
Once you have created a project, you will be able to see the full lifecycle of a Solve project.

- **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

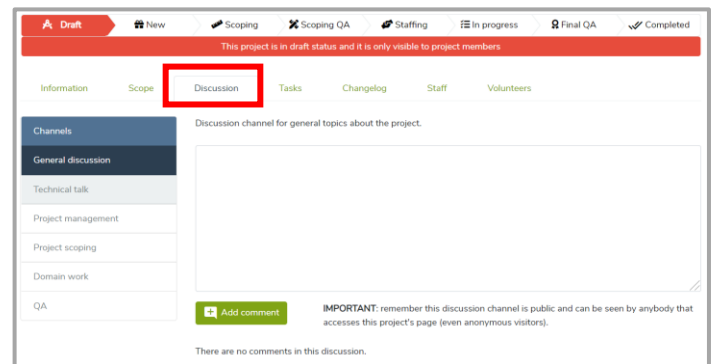
To see your project's scope click on the "Scope" tab.

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.

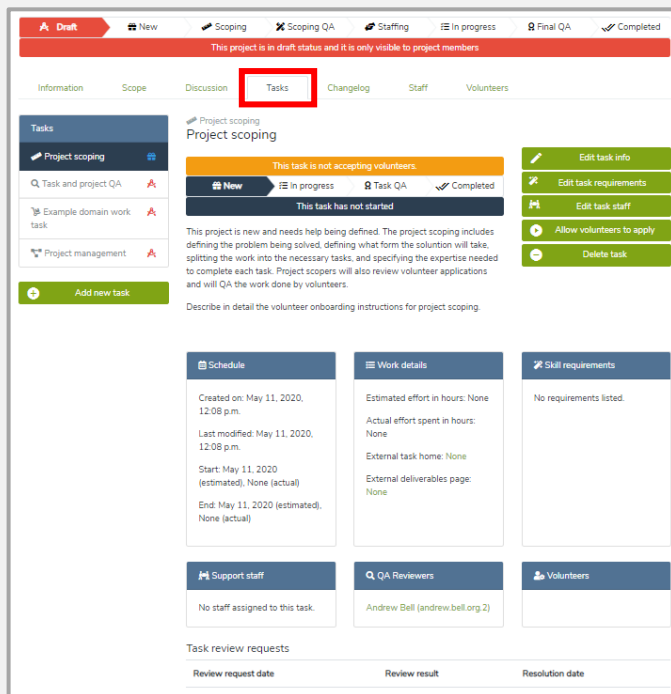


Step 8d: Task view

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!

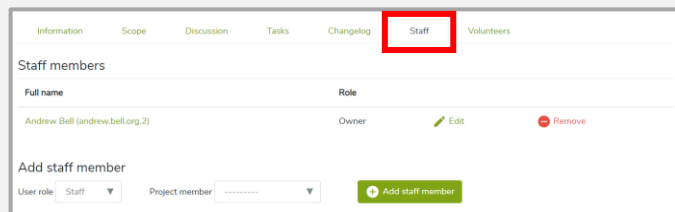
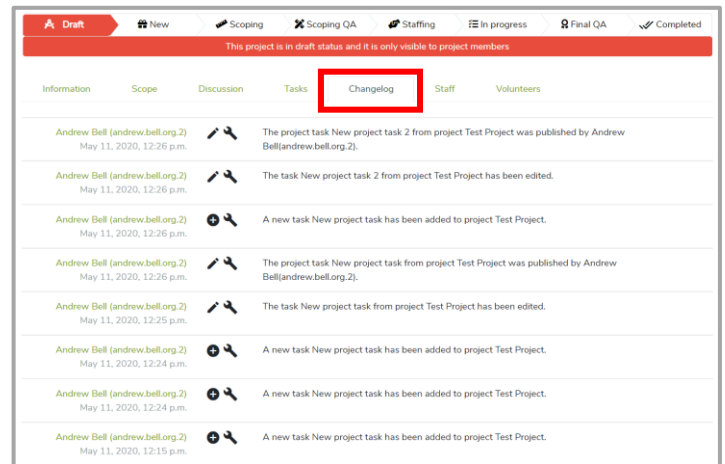
Because they are so important, we will do a deep dive on creating and publishing a task later.

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

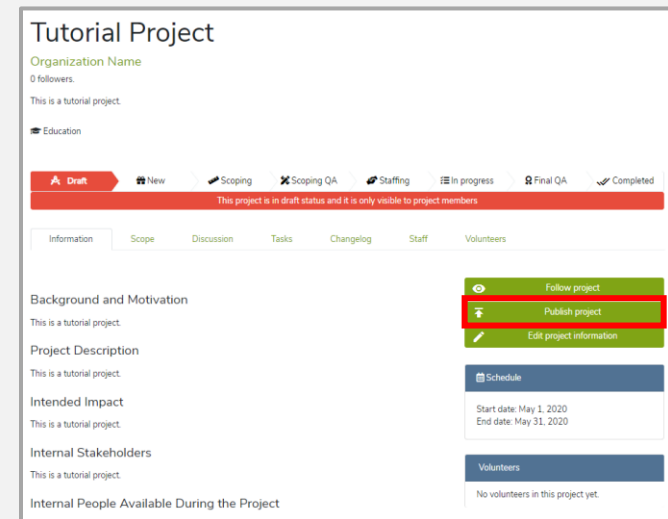
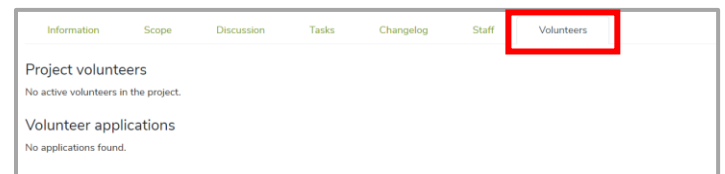
To see your project's staff click on the "Staff" tab.

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

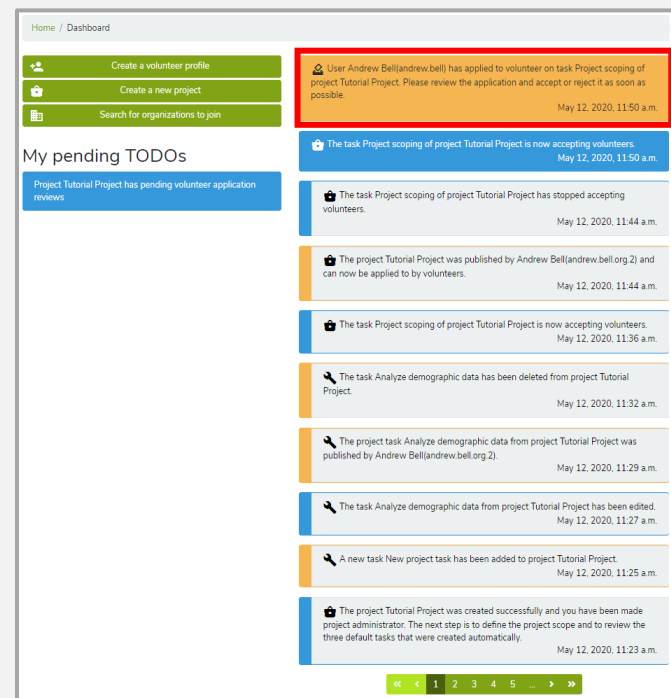
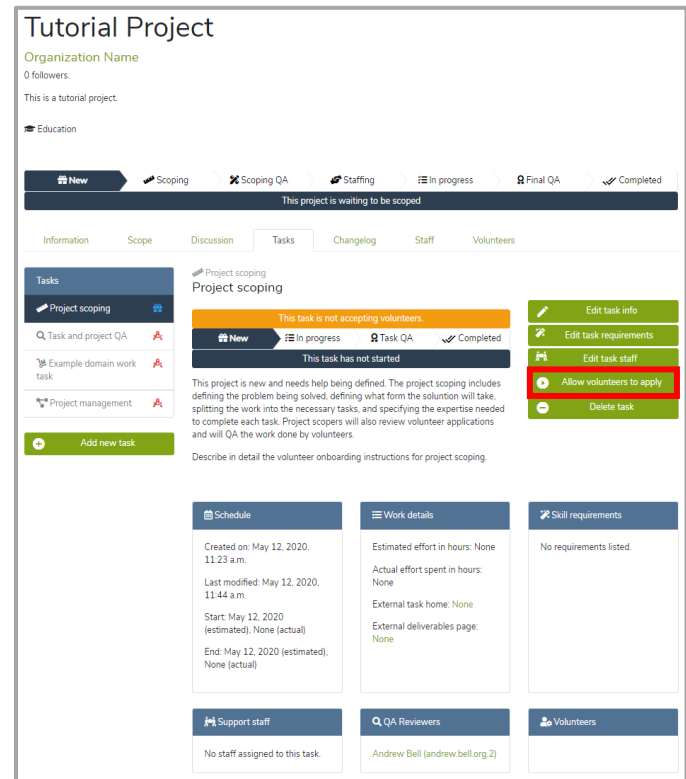
Press the allow volunteers to apply button.

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 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.

Information Scope Discussion Tasks Changelog Staff **Volunteers**

Volunteer application
This person has applied to volunteer in your project.

User: Andrew Bell (andrew.bell) 🌟🔥

Application date: May 12, 2020, 11:50 a.m.

Task: Project scoping

Volunteer application letter
This is my application.

Reviewer's comments
This is a comment visible to the candidate.

Private reviewer's notes
Private notes about the application. These notes will be shared with the rest of the project staff but not with the candidate or anybody else.

✓ Accept volunteer application ✗ Reject volunteer application ✕ Cancel

New Scoping **Scoping QA** Staffing In progress Final QA Completed

This project is waiting to be scoped

Information Scope Discussion Tasks Changelog Staff **Volunteers**

Project volunteers
No active volunteers in the project.

Volunteer applications

Full name	Project task	Application date	Status	Resolution date
Andrew Bell (andrew.bell) 🌟🔥	Project scoping	May 12, 2020, 11:50 a.m.	Pending review	

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.

New Scoping **Scoping QA** Staffing In progress Final QA Completed

This project is waiting for the final scope approval

Information Scope Discussion **Tasks** Changelog Staff Volunteers

Tasks
Project scoping
Task and project QA
Example domain work task
Project management

Project scoping
Project scoping
This task is accepting volunteers.
New In progress **Task QA** Completed
This task is pending the QA review

This project is new and needs help being defined. The project scoping includes defining the problem being solved, defining what form the solution will take, splitting the work into the necessary tasks, and specifying the expertise needed to complete each task. Project scopers will also review volunteer applications and will QA the work done by volunteers.

Describe in detail the volunteer onboarding instructions for project scoping.

Schedule
Created on: May 12, 2020, 11:23 a.m.
Last modified: May 12, 2020, 12:02 p.m.
Start: May 12, 2020 (estimated), May 12, 2020 (actual)
End: May 12, 2020 (estimated), None (actual)

Work details
Estimated effort in hours: None
Actual effort spent in hours: None
External task home: None
External deliverables page: None

Skill requirements
No requirements listed.

Support staff
No staff assigned to this task.

QA Reviewers
Andrew Bell (andrew.bell.org.2)

Volunteers
Andrew Bell (andrew.bell) 🌟🔥

Task review requests

Review request date	Review result	Resolution date
May 12, 2020, 12:02 p.m.	Pending review	None

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**.

This project is in draft status and it is only visible to project members

Information Scope Discussion **Tasks** Changelog Staff Volunteers

Tasks

- Project scoping
- Task and project QA
- Example domain work task
- Project management
- Add new task**

Project scoping

This task is not accepting volunteers.

New In progress Task QA Completed

This task has not started

This project is new and needs help being defined. The project scoping includes defining the problem being solved, defining what form the solution will take, splitting the work into the necessary tasks, and specifying the expertise needed to complete each task. Project scopers will also review volunteer applications and will QA the work done by volunteers.

Describe in detail the volunteer onboarding instructions for project scoping.

Schedule

Created on: May 11, 2020, 12:08 p.m.
Last modified: May 11, 2020, 12:08 p.m.
Start: May 11, 2020 (estimated), None (actual)
End: May 11, 2020 (estimated), None (actual)

Work details

Estimated effort in hours: None
Actual effort spent in hours: None
External task home: None
External deliverables page: None

Skill requirements

No requirements listed.

Support staff

No staff assigned to this task.

QA Reviewers

Andrew Bell (andrew.bell.org 2)

Volunteers

Task review requests

Review request date	Review result	Resolution date
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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.

Tasks

- New project task**
- Task and project QA
- Example domain work task
- Project management
- Project scoping
- Add new task**

Edit task New project task

Name

Analyze demographic data

Description

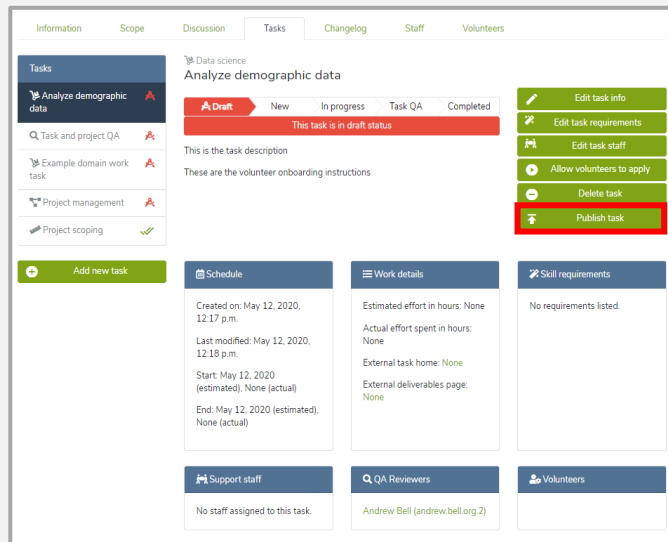
This is the task description

Task type

Data science

Volunteer onboarding instructions

These are the volunteer onboarding instructions



Step 11c: Publish the task

Press on the “Publish task” button.

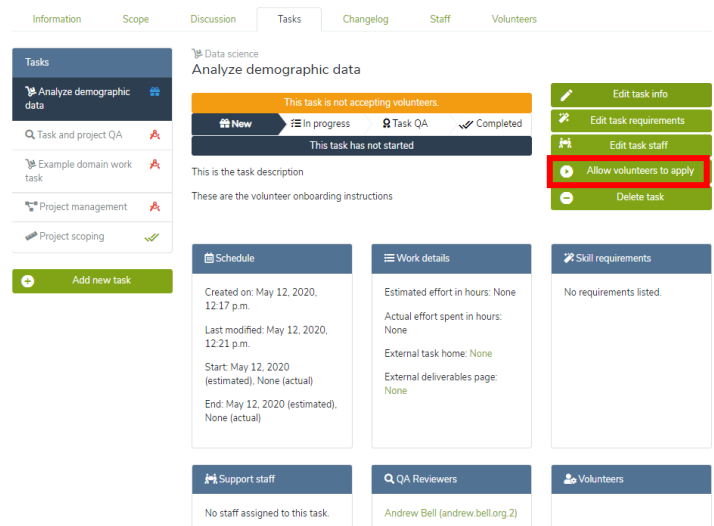
Like with creating a project, a new **Task** will be in **Draft** stage until it is published. To **publish a Task**, click **Publish task** on the right side of the page.

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.



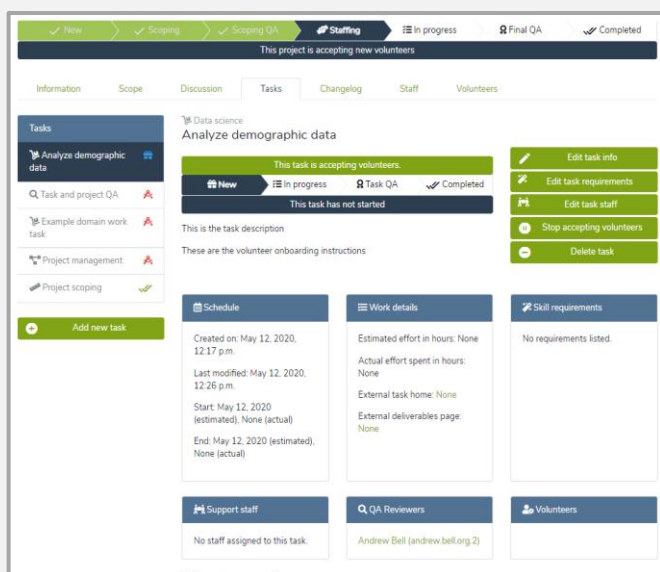
Step 12: Begin staffing the project

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).

The screenshot shows a project page for 'Data science' with a progress bar at the top indicating stages: New, Scoping, Scoping QA, Staffing, **In progress**, Final QA, and Completed. The 'Tasks' tab is selected, showing a list of tasks: 'Example domain work task' (In progress), 'New project task 2' (Completed), and 'Add new task' (button). The 'Example domain work task' details are shown, including a description, a schedule, work details, and skill requirements.

Task	Status
Example domain work task	In progress
New project task 2	Completed

Example domain work task

This task is accepting volunteers.

Domain work tasks represent the tasks that need to be completed to finish the project.

Describe in detail the volunteer onboarding instructions for this domain work task.

Schedule

Created on: May 11, 2020, 12:08 p.m.
Last modified: May 11, 2020, 12:53 p.m.
Start: May 11, 2020 (estimated), May 11, 2020 (actual)
End: May 11, 2020 (estimated), None (actual)

Work details

Estimated effort in hours: None
Actual effort spent in hours: None
External task home: None
External deliverables page: None

Skill requirements

No requirements listed.

The screenshot shows the same project page, but the progress bar now indicates the 'Final QA' stage. The 'Example domain work task' is now 'Completed'. The 'Task review requests' table at the bottom shows a review request from May 11, 2020, 12:54 p.m., which was 'Accepted' on May 11, 2020, 12:56 p.m.

This project is pending the final review

Example domain work task

This task is completed

Domain work tasks represent the tasks that need to be completed to finish the project.

Describe in detail the volunteer onboarding instructions for this domain work task.

Schedule

Created on: May 11, 2020, 12:08 p.m.
Last modified: May 11, 2020, 12:56 p.m.
Start: May 11, 2020 (estimated), May 11, 2020 (actual)
End: May 11, 2020 (estimated), May 11, 2020 (actual)

Work details

Estimated effort in hours: None
Actual effort spent in hours: 10
External task home: None
External deliverables page: None

Skill requirements

No requirements listed.

Task review requests

Review request date	Review result	Resolution date
May 11, 2020, 12:54 p.m.	Accepted	May 11, 2020, 12:56 p.m.

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**!