

Solve for Good

How to Sign-Up and Apply for Projects

In this step-by-step tutorial, you will learn how to sign up on Solve for Good as a volunteer, join a volunteer group, and start applying to project work.

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 a volunteer account, complete a volunteer profile, and apply to project tasks.

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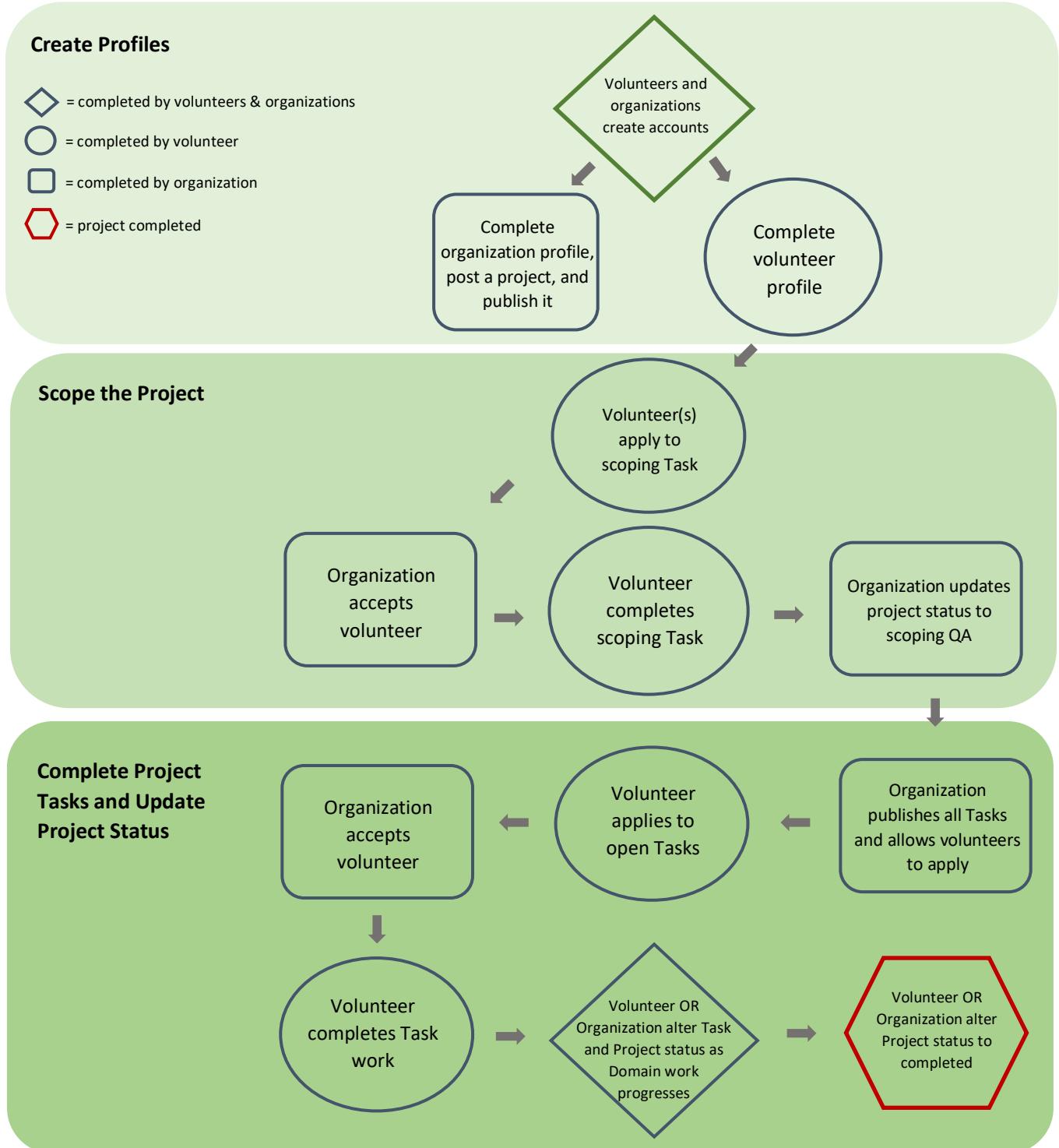
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Understanding the Solve for Good Project Process

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 a volunteer, press the **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.

SIGN UP

LOG IN

PROJECTS THAT MATTER
WORK THAT MATTERS
Data Science for Social Good.

Post a project Start volunteering

What is Solve for Good?

Solve for Good is an online platform for social good organization to post projects they need help with, for volunteers to help scope those projects into well-defined problems, and to help solve those problems.



For social good organizations

Solve enables organizations to use data-driven methods to better achieve their missions. Post your project to connect with skilled volunteers who can:

- Understand your goals and help scope projects
- Work with you and other volunteers on those projects
- Review the solutions and give feedback
- Help you understand and operationalize the results



POST A PROJECT NOW

For volunteers

Solve for Good needs a global community of volunteers that are passionate about using technology and data for social good. If you have project scoping, management, or data science skills, join us to:

- Apply your skills for work that matters
- Collaborate with other smart and passionate volunteers
- Gain data science experience and build your portfolio of work
- Showcase your skills and increase your visibility



READY TO HELP? SIGN UP NOW

Select your account type

To create a volunteer account, select “Sign up as a volunteer” highlighted in red in the image on the right.

The screenshot shows the DSSG SOLVE website's account creation page. At the top, there's a navigation bar with links for HOME, ABOUT US, PROJECTS, ORGANIZATIONS, VOLUNTEERS, and RESOURCES, along with SIGN UP and LOG IN buttons. Below the navigation, the page title is "Select your account type". A sub-header asks, "What type of account do you want to create? Select the option below that fits your role the best:". There are two main options: "Social Good Organization member" and "Volunteer". The "Volunteer" section is highlighted with a red box around the "Sign up as a volunteer" button. Both sections contain descriptive text and checkboxes for task preferences. At the bottom left is a "Cancel" button, and at the bottom right is a copyright notice: "DSSG SOLVE ©2018 DATA SCIENCE FOR SOCIAL GOOD INFO AT SOLVEFORGOOD DOT ORG".

The last section titled “task type preference” lists the four main tasks of a project: project scoping, project management, data science, and review/QA.

- Project scoping: detailing the project requirements and metrics used to evaluate the solution
- Task and project QA: quality assurance of the domain work
- Domain work: discrete pieces of the project (i.e. data science tasks, data analysis tasks, etc.)
- Project management: tracking the work of the project

Rather than being assigned to a whole project, volunteers will apply to work on one of these four tasks of a project. This is to ensure that your skills and interests are being optimally used. You can select as many of these task type preferences as you would like when setting up your account.

Note: You can still post projects even if you create a volunteer account. To do so, you must join an organization. More details on how to join an organization will come later in this tutorial.

Home / Sign up

Sign up

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

[GitHub](#) [Google](#)

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.](#)

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 following three 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.

The screenshot shows the DSSE Solve sign-up page. At the top, there is a navigation bar with links for HOME, ABOUT US, PROJECTS, ORGANIZATIONS, VOLUNTEERS, and RESOURCES, along with SIGN UP and LOG IN buttons. Below the navigation bar, a "Sign up" button is followed by a sub-header "Sign up". A note below the header says "Sign up and log in via one of these providers or by filling out the form below." Two options are shown: "GitHub" and "Google", with "Google" highlighted by a red box. The main form fields are "Username" and "Password", each with its own validation note. Below the password field is a list of password requirements.

DSSE
SOLVE

HOME ABOUT US PROJECTS ORGANIZATIONS VOLUNTEERS RESOURCES

SIGN UP LOG IN

Home / Sign up

Sign up

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

GitHub Google

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.

The screenshot shows the DSSE Solve sign-up page. At the top, there is a navigation bar with links for HOME, ABOUT US, PROJECTS, ORGANIZATIONS, VOLUNTEERS, and RESOURCES, along with SIGN UP and LOG IN buttons. Below the navigation bar, a "Sign up" button is followed by a sub-header "Sign up". A note below the header says "Sign up and log in via one of these providers or by filling out the form below." Two options are shown: "GitHub" and "Google", with "GitHub" highlighted by a red box. The main form fields are "Username" and "Password", each with its own validation note. Below the password field is a list of password requirements.

DSSE
SOLVE

HOME ABOUT US PROJECTS ORGANIZATIONS VOLUNTEERS RESOURCES

SIGN UP LOG IN

Home / Sign up

Sign up

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

GitHub Google

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.

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.

Update your volunteer profile

Before joining an organization or project, we will go over how to add more details to your volunteer profile. Click on the **My Profile** button on the upper right-hand side of your screen.



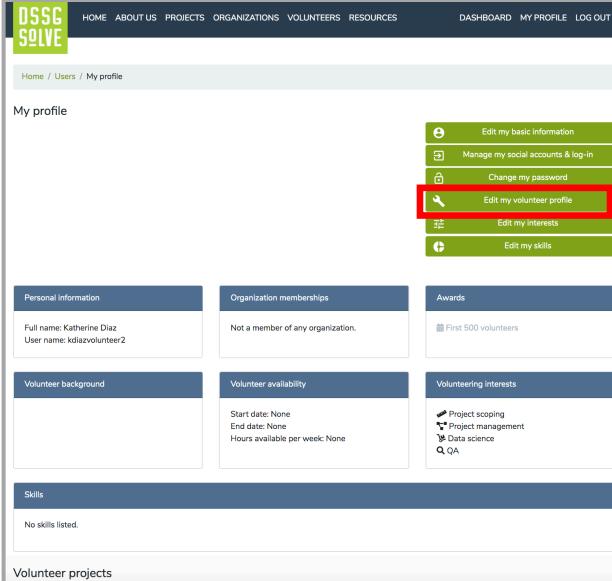
What is **Solve for Good?**
 Solve for Good is an online platform for social good organizations to post projects they need help with, for volunteers to help scope those projects into well-defined problems, and to help solve those problems.

For social good organizations
 Solve enables organizations to use data-driven methods to better achieve their missions. Post your project to connect with skilled volunteers who can:

- Understand your goals and help scope projects

For volunteers
 Solve for Good needs a global community of volunteers that are passionate about using technology and data for social good. If you have project scoping, management, or data science skills, join us to:

- Apply your skills for work that matters



My profile

- Personal information
- Organization memberships
- Awards
- Volunteer background
- Volunteer availability
- Volunteering interests
- Skills
- Volunteer projects

Edit my basic information

Manage my social accounts & log-in

Change my password

Edit my volunteer profile (highlighted with a red box)

Edit my interests

Edit my skills

Update your volunteer profile

The information on your volunteer profile is viewable by organizations and other volunteers.

To update your volunteer profile, click on **Edit my volunteer profile**, found in green on the right sidebar.

Note: This view is known as your **Profile**. Here you can see your saved personal information, what organizations or projects you are a part of, your displayed availability, and volunteer background and interests. You can update these items as needed using the green buttons on the right-hand side of the Profile page.

Update your volunteer profile

Fill out all the relevant information about yourself.

The volunteer profile information falls into three categories: URLs, education information, and availability. The URLs and educational information provide organizations a better sense of who you are and your relevant experience. Your availability is key so organizations can properly assess if your time constraints meet their project demand.

When you are finished, click **Save** at the bottom of the page.

Note: This information can be edited again at a later date. It's important that your volunteer profile remains up-to-date to ensure proper project placement.

This screenshot shows the 'Edit my volunteer profile' page. At the top, there are fields for 'Portfolio URL', 'GitHub URL', 'LinkedIn URL', 'Degree name', 'Degree level', 'Educational institution', and 'Cover letter'. Below these fields is a large text area for the 'Cover letter' which is currently empty.

This screenshot shows the 'My profile' dashboard. On the left, there are sections for 'Personal information' (Full name: Katherine Diaz, User name: kdiazvolunteer2), 'Volunteer background' (Not a member of any organization), 'Skills' (No skills listed), and 'Volunteer projects' (Empty). On the right, there is a sidebar with links: 'Edit my basic information', 'Manage my social accounts & log-in', 'Change my password', 'Edit my volunteer profile', 'Edit my interests', and 'Edit my skills' (which is highlighted with a red box).

Update skills

The Solve platform allows you to choose your expertise level in a variety of social science, data science, project management, and other skills that would be needed to complete project tasks. This information is viewable by organizations and volunteers who view your profile.

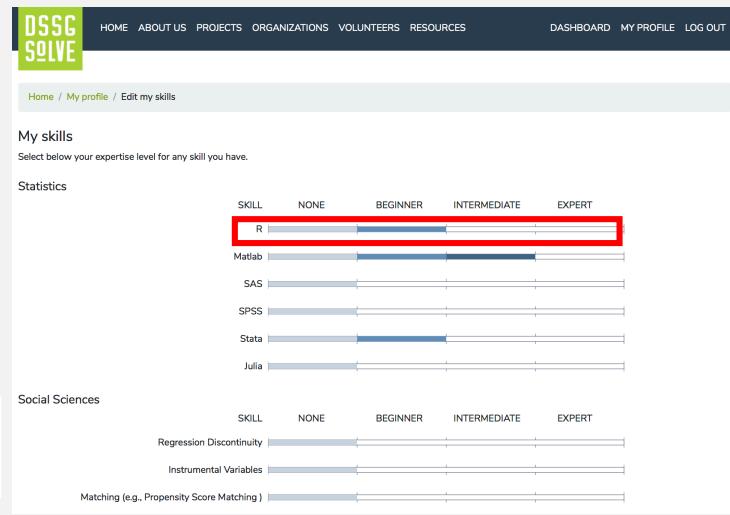
Update your skills by pressing the “Edit my skills” button.

Update skills

On this page, you can select your expertise level for each of the displayed skills by selecting the section of the bar that pertains to the four levels: None, Beginner, Intermediate, or Expert.

When you are finished, click **Save my skills** at the bottom of the page.

Note: This information can be edited again at a later date.



Apply for a project task

To begin doing volunteer work, you will start by applying to a project task. From the Dashboard, press the “search for projects” button.

Projects have four main tasks: scoping the project, data science, project management, and quality assurance. These were the tasks outlined in earlier when creating your account.

The screenshot shows the DSSC Solve Dashboard. At the top, there's a navigation bar with links for HOME, ABOUT US, PROJECTS, ORGANIZATIONS, VOLUNTEERS, and RESOURCES, along with DASHBOARD, MY PROFILE, and LOG OUT. Below the navigation is a breadcrumb trail: Home / Dashboard. On the left, there's a sidebar with buttons for 'Search for projects' (highlighted with a red box), 'Create volunteer group', 'Search for volunteer groups to join', and 'Search for organizations to join'. The main area shows two notifications: one about a membership request being accepted and another about applying to a member of Organization A. Below these are sections for 'My volunteer tasks' (with a note about accepting a volunteer application) and 'My pending TODOS' (with a note about finding a new project). There's also a note about adding expertise to the profile.

Now you are ready to apply to join a project. First, return to your Dashboard by clicking on **Dashboard** in the upper right-hand side of your screen.

To apply for a project, click on “**Search for projects**”, found in green on the left-hand toolbar.

Note: Your organization membership request and decision can be found on the right-hand side of this page. All future notifications can be found here.

Search for project

Select the project you wish to join by clicking on the project name.

On this page, projects are listed by alphabetical order of the project name. This page allows you to filter for projects by the project name, organization name, skill requirements, social impact area, or project status. If you would like to use filters, make sure to click the green “Apply filters” button to apply them to your search.

You can also get to this page by clicking on the Projects tab on the top menu.

The screenshot shows the OSIG Solve project search interface. At the top, there's a navigation bar with links for Home, About Us, Projects, Organizations, Volunteers, Resources, Dashboard, My Profile, and Log Out. Below the navigation is a breadcrumb trail: Home / Projects. A "Filter results" section on the left contains input fields for Project name, Organization name, Address geocoding, Skill requirements, and dropdown menus for Social impact area (Education, Health, Environment, Social Services, Transportation, Energy and Environment, International Development, Public Safety, Economic Development, Other) and Project status (New, In progress, Completed). There are also "Apply filters" and "Clear filters" buttons. The main area displays a table of projects:

Project name	Organization name	Summary	Status	Social impact areas
Metropolis Department of Public Health	Metropolis Department of Public Health	We have a database of our residents and their addresses that needs to be geocoded for us to determine what public health resources are needed where	New	Health
COVID Mali	The George Washington University School of Engineering and Applied Science	COVID Mali is a consortium of skilled engineers, designers, architects, and makers working on prototyping and refining PPE equipment and other medical supplies with localized raw materials in Bamako, Mali. Our team builds much-needed equipment including shields, gowns, prototypes for N95 equivalent respirators, and vacuum molding for bending/forming plastic or plexiglass (i.e. for face shield(s)) to name a few. We plan to procure some raw materials abroad but aim to mainly rely on locally-procured materials for production, while simultaneously bolstering our local community partnerships for those who will most vulnerable to the virus.	Waiting for volunteers	Health, Social Services, Public Safety
Data Integration - Matching records	Metropolis Department of Public Health	Match records of people coming from disparate data sources from various health services that the city provides	New	Health
Disparities in Erdos Numbers	Paul Erdos Admiration Society	The goal of this project is to better understand disparities in the global distribution of Erdos Numbers.	New	Education
GraphLab and IDDP Members	The George Washington University	Dr. Howie Huang's GraphLab, together with Dr. David Broniatowski and IDDP (Institute for Data, Democracy, and Politics), are working to map the connections between	Waiting	

Project overview

This page provides a Project overview.

The screenshot shows the OSIG Solve project overview page for a project titled "Tutorial Project". At the top, a message says "The project was created successfully and you were assigned administrator privileges over it." Below this is a breadcrumb trail: Home / Projects / Tutorial Project. The main content area has a title "Tutorial Project" and sections for "Organization Name" (0 followers), "Description" (This is a tutorial project), and "Category" (Education). A red box highlights the "Lifecycle" section, which shows the project is currently in "Draft" status. Below this are tabs for "Information", "Scope", "Discussion", "Tasks", "Changelog", "Staff", and "Volunteers". The "Tasks" tab is active, showing a "Project tasks" section with a "Project scoping" task (0 volunteers, due May 31, 2020) and a note that it's not currently accepting volunteers.

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!

You may join a project by clicking the green **Apply to volunteer** button located above the lifecycle.

Note: This button is presented only when the organization administrator is actively seeking volunteers for the project. If the button is not there but you would still like to receive updates on the project, click on the green **Follow project** button on the middle right-hand side of the screen.

Complete volunteer application

Fill out the application letter and click “Apply to volunteer” at the bottom to submit the application.

This image is demonstrating the user applying for **Project scoping**, as seen at the right of the application page (highlighted in red in the image). When future **Tasks** are created and visible by volunteers, they will be displayed on the same menu. This process of applying to scope for a project will be followed when applying for data science, project management, and quality assurance tasks.

This volunteer application is your opportunity to share what excites you about the project! You can share what makes you qualified for this particular Task you are applying for. This is also where you can share contact information with the organization.

The screenshot shows the 'Scope' tab of a volunteer application for 'Project A'. At the top, there's a navigation bar with links for HOME, ABOUT US, PROJECTS, ORGANIZATIONS, VOLUNTEERS, RESOURCES, DASHBOARD, MY PROFILE, LOG OUT, and a search bar. Below the navigation is a sidebar with sections for Organization A (0 followers), Test project, and Environment. The main content area has tabs for Information, Scope (which is selected and highlighted in red), and Discussion. A large button labeled 'Apply to volunteer' is at the bottom. Above it, a status bar says 'This project is waiting to be scoped' with icons for New, Scoping, Scoping QA, Staffing, In progress, Final QA, and Completed. Below the tabs, there are sections for 'Open tasks' (highlighted in red) and 'Project scoping'. To the right, there are boxes for 'Schedule' (Start: May 13, 2020, End: May 13, 2020), 'Current volunteers' (No staff assigned to this task), and 'Support staff' (No staff assigned to this task). On the left, there's an 'Application Letter' section with instructions to introduce自己 and explain why you think you're the right candidate. At the bottom, there's a 'Volunteer agreement' section with a checkbox and a link to the terms. Finally, there are 'Apply to volunteer' and 'Cancel' buttons.

The screenshot shows the 'Project A' page. At the top, a blue banner says 'You have applied to work on Project scoping. The project staff will evaluate your request and notify you of the results of the review.' Below the banner, the URL is 'Home / Projects / Project A'. The page title is 'Project A'. It features sections for 'Organization A' (0 followers), 'Test project', and 'Environment'. A green 'Apply to volunteer' button is prominently displayed. Below the button is a status bar with icons for New, Scoping, Scoping QA, Staffing, In progress, Final QA, and Completed, and the text 'This project is waiting to be scoped'. The main content area includes tabs for Information, Scope (selected), and Discussion. There are sections for 'Background and Motivation' (Test project), 'Project Description' (Test project), 'Intended Impact' (Test project), and 'Internal Stakeholders' (No volunteers in this project yet). A 'Follow project' button is also present.

Pending volunteer application notification

You will receive a blue notification on the project page confirming your application. You will be notified of a decision once your request has been reviewed by the organization administrator.

Find your Project and Task(s)

If your volunteer application is approved, you will be able to view the Project's page and task information. To view the project and your tasks, start by going to your **Dashboard**.

Your **Task(s)** will be displayed on the middle left-hand side under the **My volunteer tasks** header (highlighted in red).

Click on the **Task** (in this image, it is Project A: Project scoping).

The screenshot shows the DSSC SOLVE dashboard. At the top, there is a navigation bar with links for HOME, ABOUT US, PROJECTS, ORGANIZATIONS, VOLUNTEERS, RESOURCES, DASHBOARD, MY PROFILE, and LOG OUT. Below the navigation bar, the page title is "Home / Dashboard". On the left, there is a sidebar with four buttons: "Search for projects", "Create volunteer group", "Search for volunteer groups to join", and "Search for organizations to join". The main content area has two sections: "My volunteer tasks" and "My pending TODOs". The "My volunteer tasks" section contains a single item: "Project A: Project scoping". This item is highlighted with a red box. To the right of the tasks, there is a list of notifications with timestamps. One notification is highlighted with a red box: "Congratulations! Your volunteer application for task Project scoping of project Project A has been accepted. You can now start working on this project. The reviewer's comments are: May 13, 2020, 9:17 a.m." Other notifications include: "The user Katherine Diaz(kdiazvolunteer2) has been accepted as volunteer for task Project scoping of project Project A. May 13, 2020, 9:17 a.m.", "The status of project Project A has changed to 'Scoping' as new volunteers have been accepted to work on the project scope. May 13, 2020, 9:17 a.m.", "You have applied to volunteer on task Project scoping of project Project A. The project staff will review the application and notify you of their decision as soon as possible. May 13, 2020, 8:56 a.m.", "The project Project A was created by Katherine Diaz(kdiaz) within the organization Organization A. May 13, 2020, 8:02 a.m.", and "Congratulations! Your membership request for Organization A was accepted. May 13, 2020, 7:55 a.m."

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.

The screenshot shows the "Project A" page. At the top, there is a navigation bar with links for HOME, ABOUT US, PROJECTS, ORGANIZATIONS, VOLUNTEERS, RESOURCES, DASHBOARD, MY PROFILE, and LOG OUT. Below the navigation bar, the page title is "Home / Projects / Project A / My tasks / Project scoping". The main content area has a "Project A" heading and a "Organization A" section with "0 followers." and "Test project". There is also an "Environment" section. Below these, there is a "Apply to volunteer" button. The "My Tasks" tab is selected and highlighted with a red box. The "Project scoping" task is listed with the status "In progress". To the right of the task, there are buttons for "Cancel this volunteer work" and "Mark this task as complete". Below the task, there is a "Schedule" section with start and end dates. At the bottom, there is a "Volunteers" section listing "Katherine Diaz (kdiazvolunteer2)".

My tasks view

On the “My tasks” page you can find:

- The tasks assigned to you under the “My tasks” heading on the middle left-hand side of the screen
- The lifecycle for your assigned **Task** (this is different from the lifecycle of the **Project**)
- A description of the task
- The schedule
- “Cancel this volunteer work” button, giving you the option of leaving the project task
- “Mark this task as completed” button for when you have completed your task, allowing the project to continue to the next task
- The other volunteers working with you

Note: Completed lifecycle steps are highlighted in green, the current lifecycle step is highlighted in blue, and future lifecycle steps are highlighted in white.

Project A

Organization A
0 followers.

Test project

Environment

Apply to volunteer

New Scoping Scoping QA Staffing In progress Final QA Completed

This project is being scoped

Information Scope Discussion Tasks Changelog Staff Volunteers My tasks

Project scoping Project scoping

This task is accepting volunteers.

New In progress Task QA Completed

Volunteers are working on this task

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.

Volunteers

Katherine Diaz (kdiaz@volunteer2)

Schedule

Start: May 13, 2020 (estimated), May 13, 2020 (actual)
End: May 13, 2020 (estimated), None (actual)

Information view

The information tab outlines all the basic information regarding the project.

Project A

Organization A
0 followers.

Test project

Environment

Apply to volunteer

New Scoping Scoping QA Staffing In progress Final QA Completed

This project is being scoped

Information Scope Discussion Tasks Changelog Staff Volunteers My tasks

Background and Motivation

Test project

Project Description

Test project

Intended Impact

Test project

Internal Stakeholders

Test project

Internal People Available During the Project

Test project

Project tasks

Project scoping 1

Project scoping task to define the project work.

You are already a volunteer

The screenshot shows the DSSG SOLVE website interface. At the top, there is a navigation bar with links for HOME, ABOUT US, PROJECTS, ORGANIZATIONS, VOLUNTEERS, RESOURCES, DASHBOARD, MY PROFILE, and LOG OUT. Below the navigation bar, the URL indicates the user is on the 'Scope' page of 'Project A' under 'Organization A'. The main content area is titled 'Project A' and 'Organization A'. It displays a progress bar at the top stating 'This project is being scoped' with stages: New (green), Scoping (yellow), Scoping QA (red), Staffing (blue), In progress (orange), Final QA (purple), and Completed (grey). A red box highlights the 'Scope' tab in the navigation menu below the progress bar. The 'Scope' tab is currently active, showing sections for Project scope, Project goal(s), Interventions and Actions, Data, Analysis Needed, Validation Methodology, Implementation, and Scope version notes. A note at the bottom indicates the initial scope was set at project creation time on May 13, 2020, at 8:02 a.m. by user kdiaz.

Scope view

The **Scope** tab allows you to see and edit the scope of the project.

Discussion view

The **Discussion** tab allows you to start discussion threads on the six topics located on the left-hand side of the page: General discussion, Technical talk, Project management, Project scoping, Domain work, and QA.

Project A

Organization A
0 followers.
Test project
Environment

Apply to volunteer

New Scoping X Scoping QA Staffing In progress Final QA Completed
This project is being scoped

Information Scope Discussion Tasks Changelog Staff Volunteers My tasks

Channels
General discussion
Technical talk
Project management
Project scoping
Domain work
QA

Add comment

IMPORTANT: remember this discussion channel is public and can be seen by anybody that accesses this project's page (even anonymous visitors).

There are no comments in this discussion.

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.

Project A

Organization A
0 followers.
Test project
Environment

Apply to volunteer

New Scoping X Scoping QA Staffing In progress Final QA Completed
This project is being scoped

Information Scope Discussion Tasks Changelog Staff Volunteers My tasks

Tasks

Project scoping
Project scoping
This task is accepting volunteers.
New In progress Task QA Completed
Volunteers are working on this task

Edit task info
Edit task requirements
Edit task staff
Stop accepting volunteers
Delete task

This task 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 Work details Skill requirements

Created on: May 13, 2020, 8:02 a.m.
Last modified: May 13, 2020, 9:17 a.m.
Start: May 13, 2020 (estimated), May 13, 2020 (actual)

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

No requirements listed.

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.

Changelog view

The **Changelog** tab shows all the updates made to a project.

The screenshot shows the DSSG SOLVE interface for Project A. At the top, there's a navigation bar with links for Home, About, Projects, Organizations, Volunteers, Resources, Dashboard, My Profile, Log Out, and a search bar. Below the navigation is a breadcrumb trail: Home / Projects / Project A / Change log. The main title is "Project A" under "Organization A". It says "Test project" and has a "Environment" section with an "Apply to volunteer" button. A progress bar at the top indicates the project is "being scoped". Below the progress bar is a table with tabs for Information, Scope, Discussion, Tasks, Changelog (which is highlighted with a red box), Staff, Volunteers, and My tasks. The Changelog table lists four entries:

Date	User	Action	Description
May 13, 2020, 11:23 a.m.	Katherine Diaz (kdiaz)	✓ ✅	The user Katherine Diaz(kdiazvolunteer) has been accepted as volunteer for task Project scoping of project Project A.
May 13, 2020, 11:23 a.m.	Katherine Diaz (kdiazvolunteer)	⌚ ✅	User Katherine Diaz(kdiazvolunteer) has applied to volunteer on task Project scoping of project Project A. Please review the application and accept or reject it as soon as possible.
May 13, 2020, 9:17 a.m.	Katherine Diaz (kdiaz)	✓ ✅	The user Katherine Diaz(kdiazvolunteer2) has been accepted as volunteer for task Project scoping of project Project A.
May 13, 2020, 9:17 a.m.	Katherine Diaz (kdiaz)	☛ ✅	The status of project Project A has changed to 'Scoping', as new volunteers have been accepted to work on the project scope.

Staff view

Under the **Staff** tab, you can see the staff members of the project and their role.

The screenshot shows the DSSG SOLVE interface for Project A. At the top, there's a navigation bar with links for Home, About, Projects, Organizations, Volunteers, Resources, Dashboard, My Profile, Log Out, and a search bar. Below the navigation is a breadcrumb trail: Home / Projects / Project A / Staff. The main title is "Project A" under "Organization A". It says "Test project" and has an "Environment" section with an "Apply to volunteer" button. A progress bar at the top indicates the project is "being scoped". Below the progress bar is a table with tabs for Information, Scope, Discussion, Tasks, Changelog (which is highlighted with a red box), Staff (also highlighted with a red box), Volunteers, and My tasks. The Staff table lists one entry:

Full name	Role
Katherine Diaz (kdiaz)	Owner

Volunteers view

The **Volunteers** tab allows you to see the volunteers, their assigned task, and their status. You can also change their assigned task or remove them from the project.

Project A

Organization A
0 followers.
Test project
Environment

Apply to volunteer

This project is being scoped

Information	Scope	Discussion	Tasks	Changelog	Staff	Volunteers	My tasks
Project volunteers							
Full name	Task	Status					
Katherine Diaz (kdiazvolunteer2)	Project scoping	Active	<input type="button" value="Change task"/>	<input type="button" value="Remove"/>			
Katherine Diaz (kdiazvolunteer)	Project scoping	Active	<input type="button" value="Change task"/>	<input type="button" value="Remove"/>			
Volunteer applications							
Full name	Project task	Application date	Status	Resolution date			
Katherine Diaz (kdiazvolunteer)	Project scoping	May 13, 2020, 11:23 a.m.	<input checked="" type="checkbox"/> Accepted	May 13, 2020, 11:23 a.m.			
Katherine Diaz (kdiazvolunteer2)	Project scoping	May 13, 2020, 8:56 a.m.	<input checked="" type="checkbox"/> Accepted	May 13, 2020, 9:17 a.m.			

Project A

Organization A
0 followers.
Test project
Environment

Apply to volunteer

This project is being scoped

Information	Scope	Discussion	Tasks	Changelog	Staff	Volunteers	My tasks
My Tasks							
Project scoping							
This task is accepting volunteers.							
<input type="button" value="New"/>	<input type="button" value="In progress"/>	<input type="button" value="Task QA"/>	<input type="button" value="Completed"/>				
Volunteers are working on this task							
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.							
<input type="button" value="Cancel this volunteer work"/>							
<input checked="" type="checkbox"/> Mark this task as complete							
Schedule							
Start: May 13, 2020 (estimated), May 13, 2020 (actual)							
End: May 13, 2020 (estimated), None (actual)							
<input type="button" value="Volunteers"/>							
Katherine Diaz (kdiazvolunteer2)							

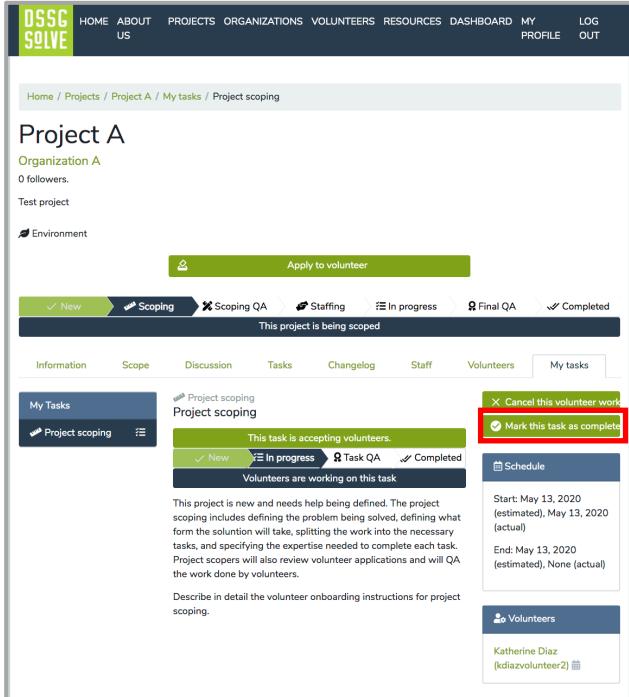
Working on a project

As mentioned previously, volunteers are assigned to **Tasks**, not the Project as a whole. To understand what is expected of your **Task**, return to the “My tasks” tab.

The highlighted portion describes the details given by the organization to the volunteer regarding the task. This section should include goals, analysis needed, and onboarding materials for the volunteer to properly complete the Task.

Working on a project

Once the task is completed, click the “Mark this task as completed” green button.



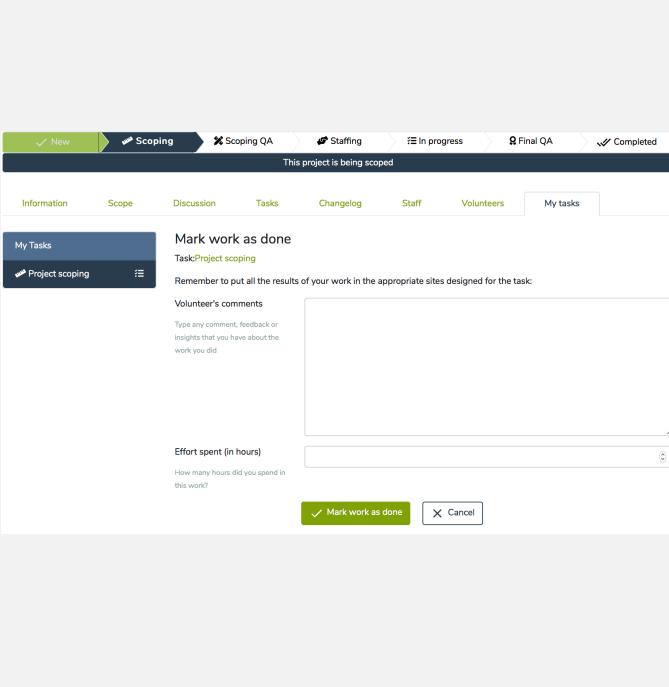
Working on a project

Include any comments on this page prior to submitting the final approval to marking the work as done. Comments may include a link or instructions to files/data analysis.

Include the approximate amount of hours worked on this **Task**. This will help determine if the initial approximation of effort spent was accurate.

Click “Mark work as done” on the green button to submit your work.

Note: The Task work must be approved by the organization or other volunteer before the project can move forward.



Working on a project

Organizations or volunteers are able to review the work submitted by other volunteers.

Click on “Pending review” at the bottom of the Tasks screen.

Note: You cannot review your own work.

This screenshot shows the 'Project scoping' task details page. At the top, there's a navigation bar with steps: New, Scoping, Scoping QA, Staffing, In progress, Final QA, and Completed. A message says 'This project is waiting for the final scope approval'. Below the navigation, tabs include Information, Scope, Discussion, Tasks (which is selected), Changelog, Staff, and Volunteers. The main content area shows the task details: 'Project scoping' (status: Pending review), 'Task and project QA' (status: In progress), and 'Example domain work task' (status: Pending review). A sidebar on the right has options: Edit task info, Edit task requirements, Edit task staff, Stop accepting volunteers, and Delete task. A note below the tasks says 'This project is new and needs help being defined. The project scoping includes defining the problem being solved, defining what the solution will take, splitting the work into the necessary tasks, and specifying the expertise needed to complete each task. Project scorers will also review volunteer applications and will QA the work done by volunteers.' A green button 'Add new task' is at the bottom left. To the right, sections for Schedule, Work details, Skill requirements, Support staff, QA Reviewers, and Volunteers are shown. Under 'Task review requests', a row for 'Pending review' is highlighted with a red box.

This screenshot shows the 'Completed task review' page for the 'Project scoping' task. At the top, tabs include Information, Scope, Discussion, Tasks (selected), Changelog, Staff, and Volunteers. The main content area shows the task details: 'Project scoping' (status: Completed), 'Task and project QA' (status: Completed), and 'Example domain work task' (status: Completed). A note says 'Estimated effort in hours: None' and 'Total effort spent (in hours): 20'. 'Volunteer's comments' mention a request date of July 13, 2020, 8:59 a.m. A 'Score' dropdown is set to 'Needs improvement'. 'Reviewer's comments' and 'Private reviewer's notes' sections are present. At the bottom, buttons for 'Accept task as finished' (with a red box), 'Reject task and reopen it', and 'Cancel' are shown.

Working on a project

On this page, the organization or volunteer may provide feedback on the completed Task work.

Click on the accept or reject button to submit the feedback.

Working on a project

If the Task work is accepted, the Task will be marked as completed on the Tasks page and your work will be completed!

You may also apply to future Tasks if they are available for volunteers to apply.

The screenshot shows a "Project scoping" section with a "Tasks" table. The tasks listed are:

Task	Status
Task and project QA	A
Example domain work task	A
Project management	A
Project scoping	V

Below the table is a green button labeled "Add new task". To the right, there is descriptive text about project scoping and a link to "Describe in detail the volunteer onboarding instructions for project scoping."

Project A

Organization A

0 followers.

Test project

Environment

[Apply to volunteer](#)

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

This project is accepting new volunteers

Information

Scope

Discussion

My tasks

Background and Motivation

Test project

Project Description

Test project

Intended Impact

Test project

Internal Stakeholders

Test project

Internal People Available During the Project

Test project

[Follow project](#)

Schedule

Start date: May 13, 2020
End date: Aug. 1, 2020

Volunteers

Katherine Diaz (katherine.pdiaz257)



Project tasks

Task and project QA 0 people

Task for performing QA on the domain tasks.

[Apply to volunteer](#)

Project scoping 1 2 3 4

Working on a project

If you would like to continue doing work on that same project, return to the “Information” tab of the project. The “Project tasks” section on the bottom right side of the screen lists what other **Tasks** are open for volunteers to apply for.

If there are no open tasks available, you can click the “Follow project” button to be alerted about future opportunities.

If you would like to volunteer for a different Project, return to the Project page.

The screenshot shows the DSSG SOLVE dashboard with a sidebar and main content area. The sidebar includes links for "Search for projects", "Create volunteer group", "Search for volunteer groups to join" (which is highlighted with a red box), and "Search for organizations to join". The main content area shows a message: "Congratulations! Your membership request for Organization A was accepted. May 13, 2020, 7:55 a.m.". Below this, another message says: "You have applied to be a member of Organization A. You will be notified when the organization's administrators review your membership request. May 13, 2020, 7:54 a.m.". The main content also includes sections for "My volunteer tasks" and "My pending TODOS".

Note: The following steps outline how to create or join a volunteer group, which is *optional* for completing projects.

Creating a volunteer group

If you will be working with a volunteer group, you can create a group (or join an existing group) by pressing “Volunteer group” (or “Search for volunteer groups to join”).

A volunteer group is a group of Solve volunteer members who share an interest in types of projects they would like to complete. By creating and joining volunteer groups, you will be able to easily find members to complete projects with.

To join an existing group, skip to the step titled “Joining a volunteer group”.

In the **Dashboard** view, you can create or join volunteer groups. Volunteer groups are useful for teams that will complete projects together and also as a way for volunteers that have similar interests to group themselves.

The screenshot shows the 'Create new volunteer group' page. At the top, there's a navigation bar with links for HOME, ABOUT US, PROJECTS, ORGANIZATIONS, VOLUNTEERS, RESOURCES, DASHBOARD, MY PROFILE, and LOG OUT. Below the navigation, the URL is 'Home / Organizations / Create new volunteer group'. The main form has fields for 'Organization name' (with placeholder 'Type the name of your organization.'), 'Short summary' (with placeholder 'Write a short description of the organization that will be used throughout the site when needing a compact description.'), 'Organization description' (with placeholder 'Write a description for volunteers to understand the context of your projects.'), and 'Organization logo' (with a file upload field labeled 'Choose File' and 'No file chosen').

The screenshot shows the 'Test Volunteer Group' page. At the top, there's a navigation bar with links for HOME, ABOUT US, PROJECTS, ORGANIZATIONS, VOLUNTEERS, RESOURCES, DASHBOARD, MY PROFILE, and LOG OUT. A blue banner at the top says 'You have created a new organization and are now its first administrator user.' Below the banner, the URL is 'Home / Organizations / Test Volunteer Group'. The main content area has tabs for 'Organization information' (selected) and 'Staff'. It displays a message 'This is a test volunteer group.' and a table of 'Projects that our members are volunteering at'. The table has columns for Project name, Summary, Status, and Social impact area. One row shows 'Project A' with 'Test project' in 'In scoping phase' status under the 'Environment' social impact area. On the right side, there are buttons for 'Edit organization information' and 'Leave volunteer group', and a list of 'Volunteer group members' with one entry: 'Katherine Diaz (kdiazvolunteer2)'.

Volunteer group view

You will be redirected to your organization’s volunteer group page. At any time, you can edit organization information, leave the volunteer group, or view the other members of your organization by clicking the **Staff** tab.

Note: You cannot manually invite other members to your volunteer group, they must request membership.

Joining a volunteer group

Press “Search for volunteer groups” to join.

You may also join an organization that is already created. To do so, return to your Dashboard and click on the **Search for volunteer groups to join** button on the left-hand side of the screen.

The screenshot shows the DSSG SOLVE dashboard. At the top, there is a navigation bar with links: HOME, ABOUT US, PROJECTS, ORGANIZATIONS, VOLUNTEERS, RESOURCES, DASHBOARD, MY PROFILE, and LOG OUT. Below the navigation bar, the page title is "Home / Dashboard". On the left side, there is a sidebar with several buttons: "Search for projects" (green), "Create volunteer group" (light blue), "Search for volunteer groups to join" (red box), and "Search for organizations to join" (light blue). To the right of the sidebar, there are two notifications: one in a green box saying "Congratulations! Your membership request for Organization A was accepted. May 13, 2020, 7:55 a.m." and another in a blue box saying "You have applied to be a member of Organization A. You will be notified when the organization's administrators review your membership request. May 13, 2020, 7:54 a.m.". Below the notifications, there are sections for "My volunteer tasks" and "My pending TODOs".

The screenshot shows the "Organizations" page. At the top, there is a navigation bar with links: HOME, ABOUT US, PROJECTS, ORGANIZATIONS, VOLUNTEERS, RESOURCES, DASHBOARD, MY PROFILE, and LOG OUT. Below the navigation bar, the page title is "Home / Organizations". On the left side, there is a sidebar with a "Filter results" section. It includes fields for "Organization name" (with a search input) and "Social impact area" (with a dropdown menu containing categories like Education, Health, Environment, Social Services, Transportation, Energy and Environment, International Development, Public Safety, Economic Development, and Other). There are also sections for "Organization type" (with checkboxes for "Social good organization" and "Volunteer group" - the latter is checked), "Project status" (with checkboxes for "With new projects", "With projects in progress", and "With completed projects"), and buttons for "Apply filters" and "Clear filters". The main content area displays a table of organizations:

Organization name	Type	Description	Social impact areas
Test Volunteer Group	Volunteer group	This is a test volunteer group.	Environment
Volunteer Organization A	Volunteer group	This is a test volunteer organization.	Environment

Join a volunteer group

Join a volunteer group by clicking on the volunteer group name.

On this page, all volunteer groups are listed in alphabetical order of the volunteer group name. This page allows you to filter for groups by the organization name, social impact area, organization type, or project status.

Join a volunteer group

To join the organization, press the green “Request membership” button.

You will be redirected to the volunteer group’s page, where you can see the organization’s information and the current members.

The screenshot shows a web page for "Volunteer Organization A". At the top, there is a navigation bar with links: HOME, ABOUT US, PROJECTS, ORGANIZATIONS, VOLUNTEERS, RESOURCES, DASHBOARD, MY PROFILE, and LOG OUT. Below the navigation bar, the page title is "Volunteer Organization A". Underneath the title, it says "Volunteer group: Environment". There is a section titled "Organization information" which contains the text "This is a test volunteer organization. Projects that our members are volunteering at This organization has not posted any project yet." To the right of this information is a green button with a person icon and the text "Request membership", which is highlighted with a red border. On the far right, there is a sidebar titled "Volunteer group members" which lists "Katherine Diaz (kdiaz)".