Video Tutorial: Create a Project

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Key points from the video

Context

Preparing a project for reporting requires assigning reporting periods, indicators, and geographic places. Partner users must either share an organization with the project or be listed on the project overview page.

Project index [0:11]

- The project index shows a list of all projects in the site.
- Filter the index to projects of interest using the left-hand filter options.
- Display information of interest by selecting columns from the gearbox drop-down.

Create project [0:35]

- Click on "New Project".
- Provide the name and click "Create Project".
- Fill out additional project details in the reference and details sections.

Assign reporting periods [1:55]

- Projects must be assigned reporting periods in order to enter data.
- Click on "Add Reporting Periods" and select the periods for which the project should enter data.

Assign indicators [2:10]

- Projects must be assigned indicators in order to enter data.
- Click on "Select indicators" and navigate through the results framework by clicking on the triangles by each objective. Use the check boxes to select single indicators or portions of the results frameworks.

Assign sectors and tags [2:47]

- Click on "add a tag" or "add a sector" to classify the project.
- Tags and sectors help with finding, sorting and grouping projects for reporting.

Assign organization [3:20]

- Denote the partner organization(s) for this project. Only the first one listed will be attributed indicator results.
- List the partner type and primary contact if desired.
- Optionally, add the awarding organization.

Assign users [4:15]

- Under "Staff Roles and Partner Access", list users associated users.
- Users have a single job title but might have different "roles" for different projects.
- Partners gain access to projects either by sharing an organization with the project or by being listed here.
- Users listed in this section will receive notifications about discussions and data submission.

Assign geographic places [5:18]

- Projects must be assigned geographic places in order to enter data.
- Click on the geography tab to add geographic places.
- A warning is shown on the tab each geographic level where places are required for reporting. (If a project reports on location-level indicators, you must specify *which* location, etc.)

Test for readiness [6:28]

- From the project's overview page, click on a reporting period and then choose a direct entry indicator.
- If there's a place to enter data, then the project is ready for reporting.

If you have any questions about any of this, please check out our **knowledge base article about projects**.

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