HANDS-ON MIRADI EXERCISES

Getting Started

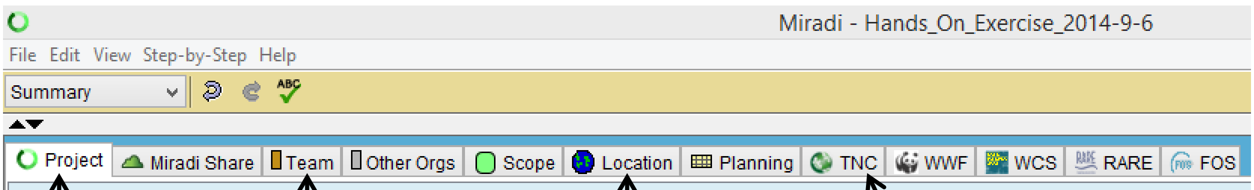
1. **Install Software:** www.miradi.org. TNC staff – follow the instructions in this YouTube video: https://youtu.be/tULXAa24BsI
2. **Launch Miradi:** Double-click on the Miradi Icon on your desktop to launch Miradi then click the Continue button at the "About Miradi" screen
3. **Stopping and restarting Tutorial:** At the start of this tutorial you will be creating a new project. You can complete the tutorial in a single session or in multiple sessions. Miradi saves as you work so if you close Miradi, you can resume the tutorial by re-opening Miradi then opening your saved project, which you'll see listed on the Welcome Screen.
4. **About Miradi:** Miradi Desktop (www.Miradi.org) is project management software that supports use of the Open Standards for the Practice of Conservation (http://cmp-openstandards.org/), helping teams to design, plan, implement, monitor, and learn from conservation projects and programs. There are over 11,000 registered Miradi users from over 170 countries and Miradi Desktop has been translated to 16 different languages. Miradi Share (www.miradishare.org) is cloud-based software that offers a searchable repository of conservation projects enabling cross-organization discovery, learning, and knowledge sharing with multiple audiences. This hands-on tutorial focuses on Miradi Desktop.
5. **Lessons included in this hands-on tutorial:**

HANDS-ON MIRADI EXERCISES

Lesson 1 Create a New Project

1. **Start a new Project:** Click the **Create** button (to start a new project), assign a name, then click the **Next** button

2. **Enter basic project information in the Summary View**
   - Click on the 4 tabs and enter the information listed below:



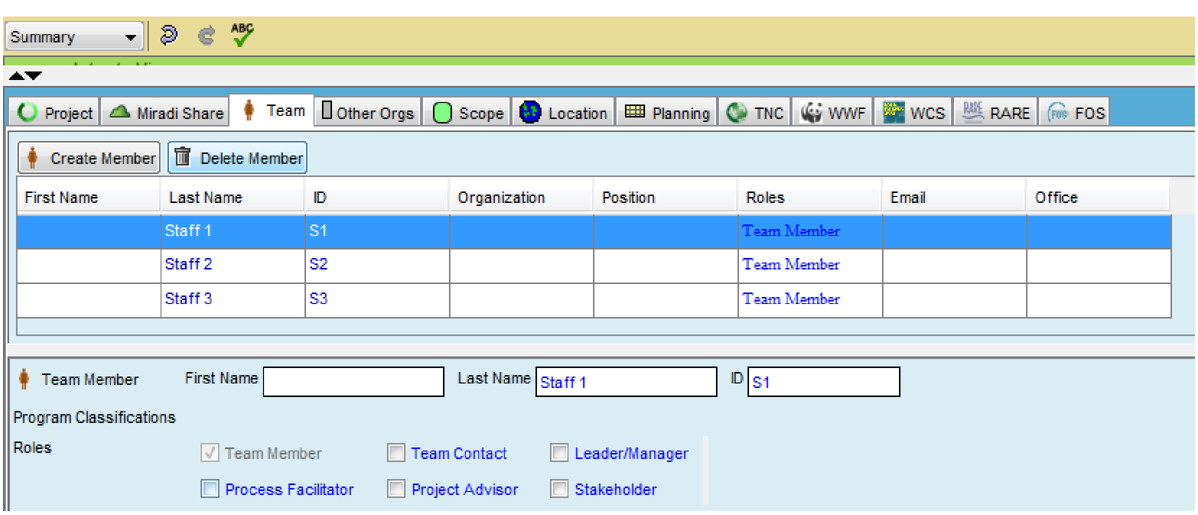
Enter the Project Name: “Riparian system with knotweed”.

Click “**Create Member”** button and enter Given Name, Last name, & ID (Initials) for 3 people

Click on the “Location” tab. Then on the Countries “Select” button and assign your project to a country

Click on the “TNC” tab, then click on the “Business Planning” tab located on the left side of the page and enter “Restore Riparian System with < 5% cover knotweed” text into the “Overall Project Goal” field

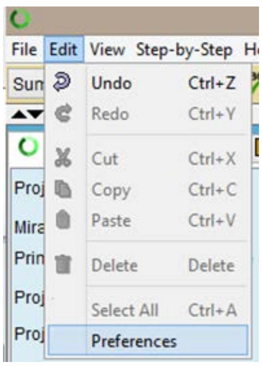
3. **Enter people (staff) in the Summary View**
   - Click on the “Team” tab then click on the “Create Member” button.
   - Normally team members are entered and indicated above, but for purposes of this tutorial, enter team members as Staff as shown below. Note the Miradi default for “Roles” is “Team Member”.

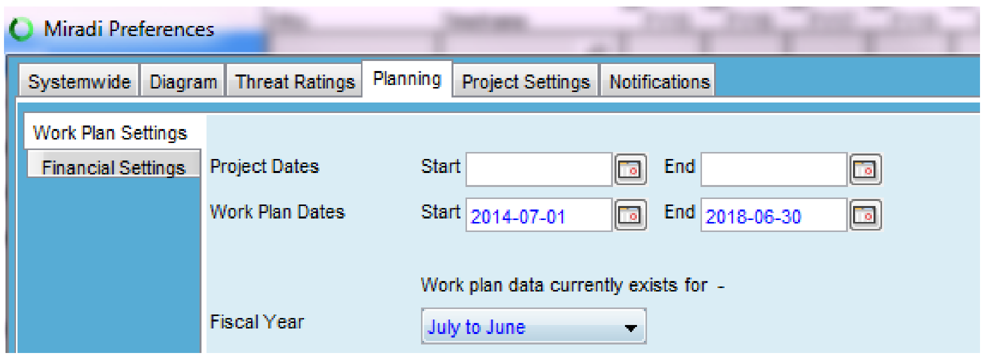


Lesson 1 - continued

4. Enter/change Work Plan and Fiscal Year dates.

- Select the “Edit” tab from the main Miradi tool bar, then select “Preferences”
- Click on Planning tab
- Change the Work Plan start date to 2014-07-01 and End Date to 2018-06-30
- Change the Fiscal Year to “July to June”



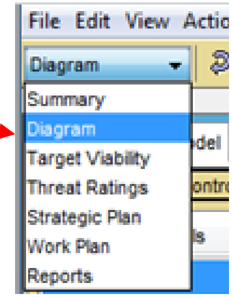


Quick Tip: Miradi saves automatically as you enter information.

Lesson 2

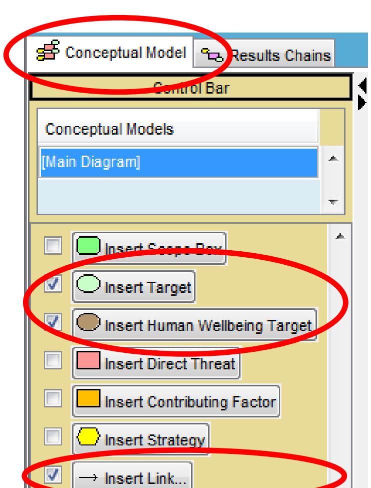
Create a Conceptual Model

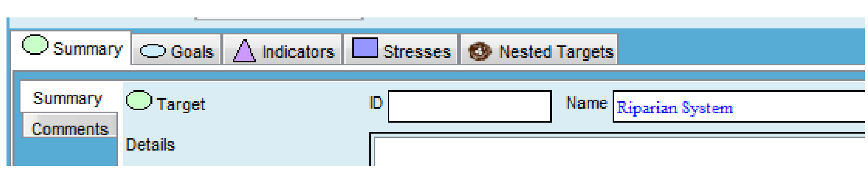
1. **Switch to Diagram View**

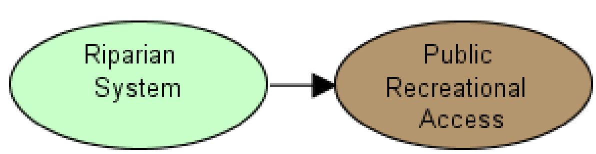


2. In the Diagram View, use the buttons on the Control Bar to create the following Conceptual Model Diagram
   - Factors that are highlighted will be automatically linked to new factors you add or you can link 2 factors by holding the Control key down, select one, then another, then click on the Insert link button on the Control Bar
   - Right-mouse click the diagram names to rename, create new diagrams, delete or add narrative text in the Diagram Properties – Details field.
   - Multiple items can be "lassoed" by drawing a box around them while holding down the left mouse button
   - Selected items can then be moved as a group using left-mouse & drag

3. **On the Conceptual Model tab, enter a Conservation Target**
   - Click on the "Insert Target" button on the Control Bar and enter "Riparian System" as the name of the target (Conservation Target).
   - Click on the "Insert Human Wellbeing Target" button and enter "Public Recreational Access" as the name of the target.
   - Link the two, as shown below, using the "Insert Link…" button.



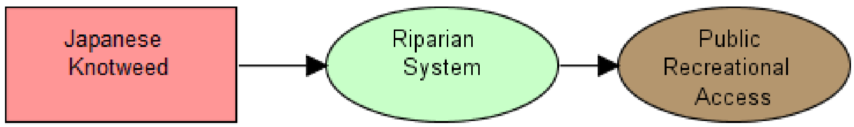




Lesson 2 - continued

4. Enter a Direct Threat

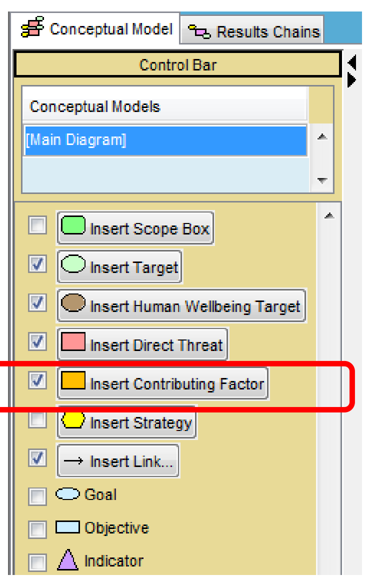
- With your Riparian System Target highlighted, click on the “Insert Direct Threat” button on the Control Bar to enter a threat of “Japanese Knotweed”.

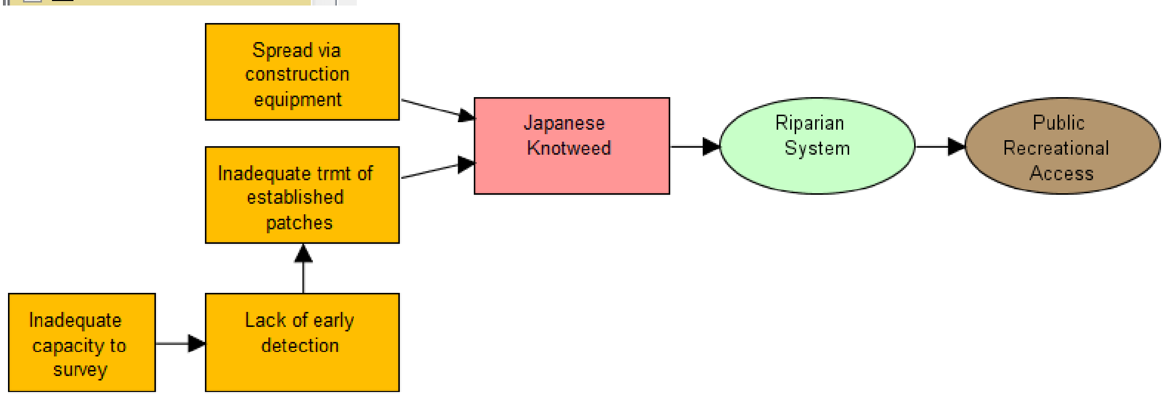


- To move factors, left-click then drag with the mouse or highlight the factor then use the cursor keys.

5. Enter Contributing Factors

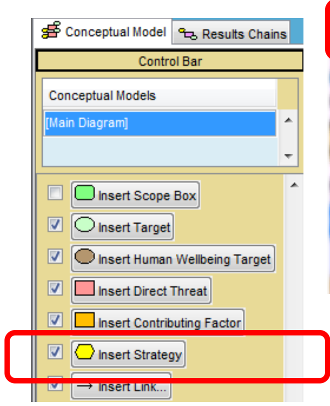
- With your “Japanese Knotweed” direct threat highlighted, click on the “Insert Contributing Factor” button on the Control Bar to enter a contributing factor, as shown. Repeat the step to add the rest of the contributing factors. Be sure to highlight the box for which you want the next contributing factor connected to.

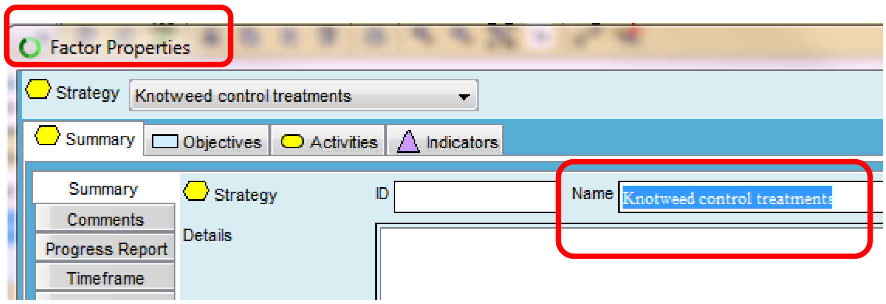


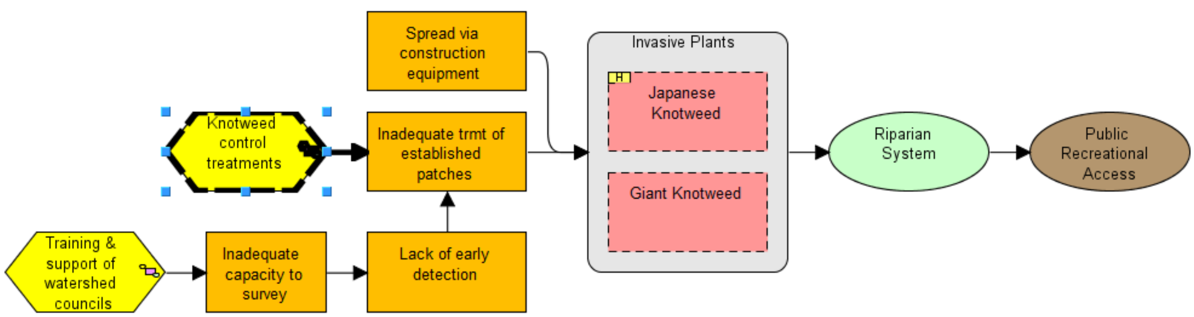


Lesson 2 - continued

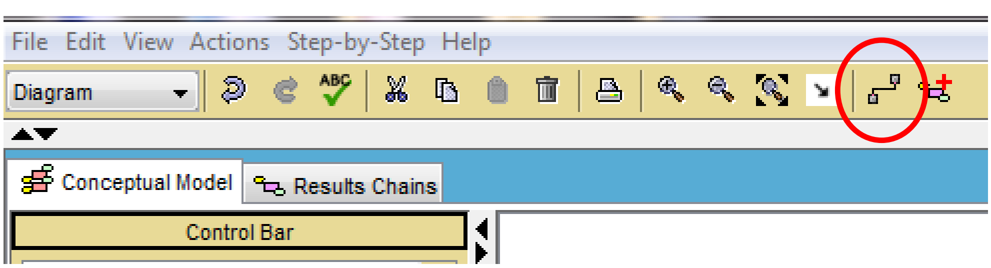
6. **Enter Strategies:** Select the “Insert Strategy” button in the Control Bar to add 2 strategies as shown below. Enter strategy names in the “Name” box in “Factor Properties”. Link the strategies to the Direct Threats as shown.







7. **Add draft strategies in brainstorm mode.** Highlight the “Spread via construction equipment” contributing factor then click on the Brainstorm icon at the top of the screen to enter Brainstorm Mode. Additional controls are now available in the Control Bar.



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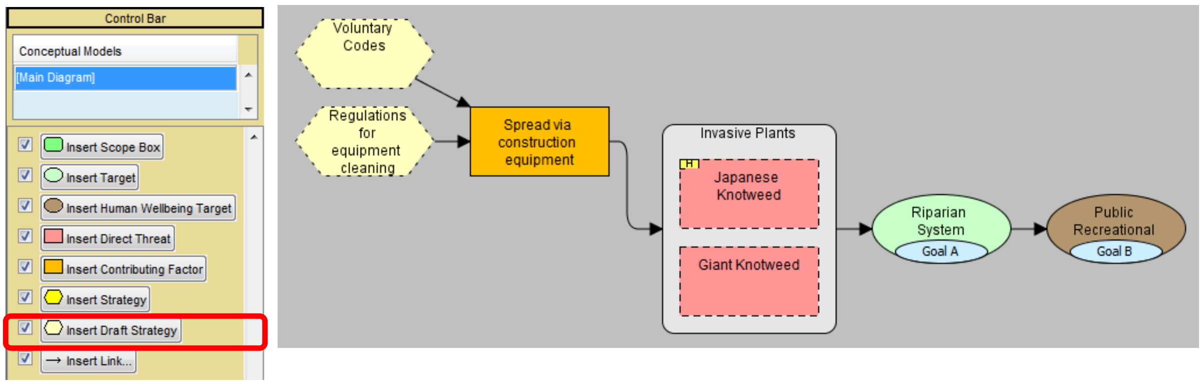
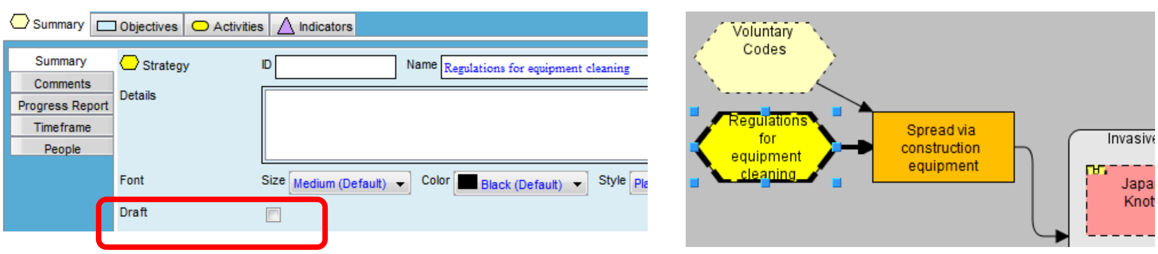
7. Add draft strategies in brainstorm mode, continued.

Click on the "Insert Draft Strategy" button in the control bar and add two draft strategies as shown below. Link the draft strategies to the contributing factor as shown.

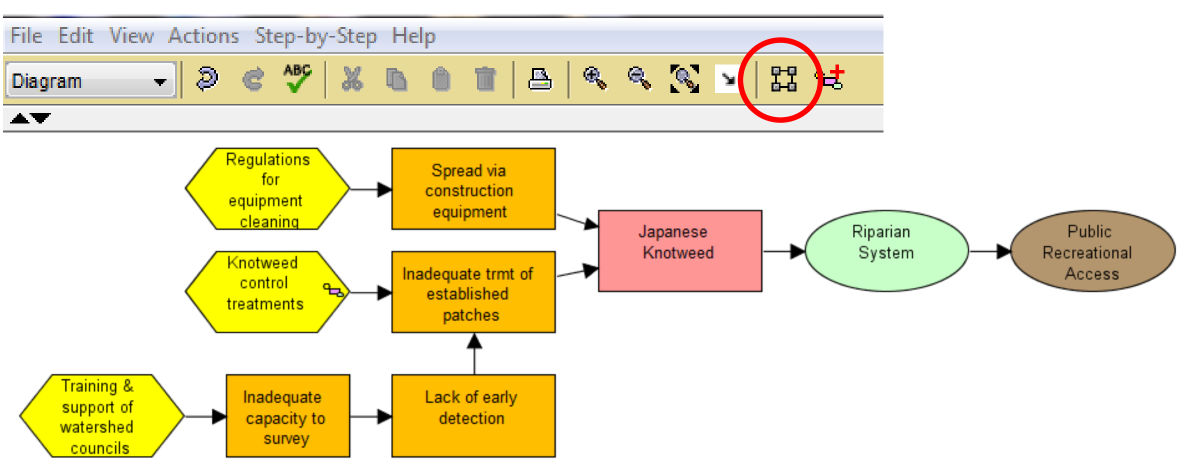


8. Convert draft strategy to regular strategy.

Double-click on the second one to uncheck the "Draft" checkbox to convert it to regular strategy.



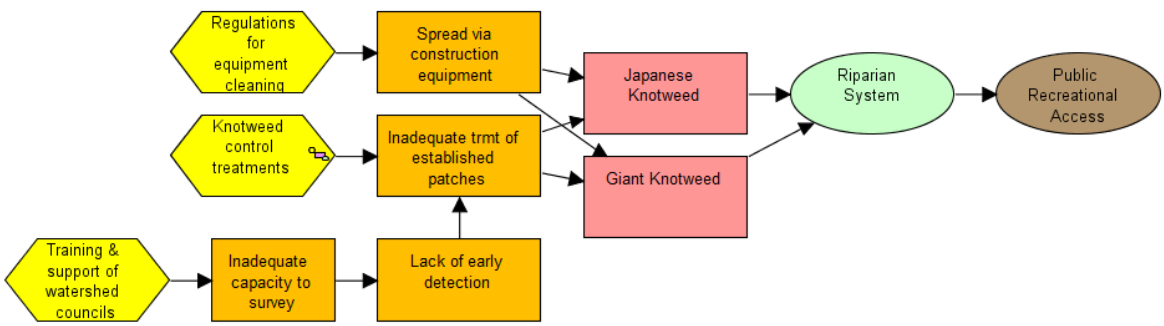
9. Click on the "Full Diagram" icon on the menu bar, or click the "Show Full Diagram" button at the bottom of the screen, to return to normal conceptual model view. Note the one remaining "Draft" strategy does not show in the normal conceptual model view.



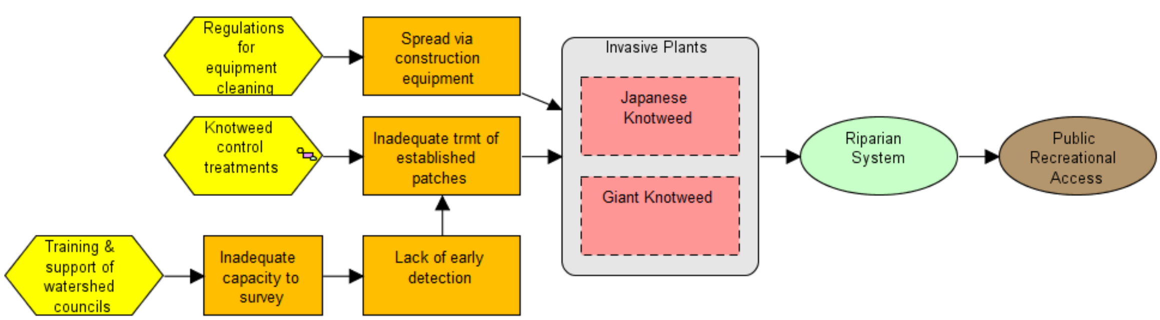
Lesson 2 continued:

Reducing diagram complexity: Group Boxes & Bend Points

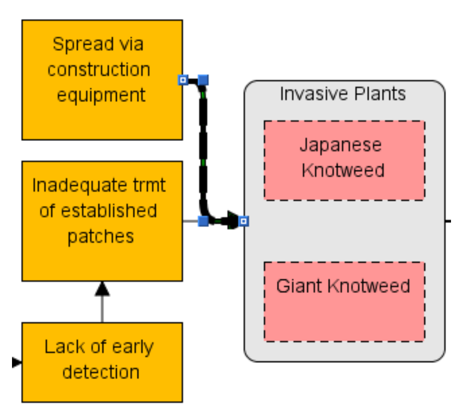
1. **Create Group Boxes**
   - Add a second threat of "Giant Knotweed" to the Conceptual Model diagram
   - Link Giant Knotweed to the same Target and Contributing Factors as Japanese Knotweed.



   - Then highlight both threats by holding down the Control key and clicking on each one (or lasso both threat factors)
   - Click on the Create Group Box button in the Control Bar and in Group Box Properties, add the name "Invasive Plants" in the Text field
   - Miradi eliminates half of the links with the new Group Box



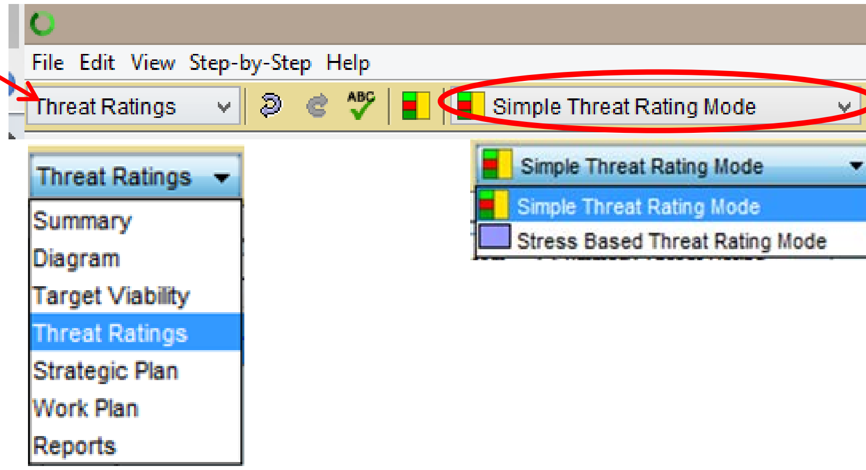
2. **Add bend points**
   - Right mouse click on the link from "Spread via…" and select Create Bend Point
   - Left-click on the new bend point and drag it up to be horizontal with the middle of the Contributing Factor
   - Add another bend point and drag it down to create a second 90 degree bend point



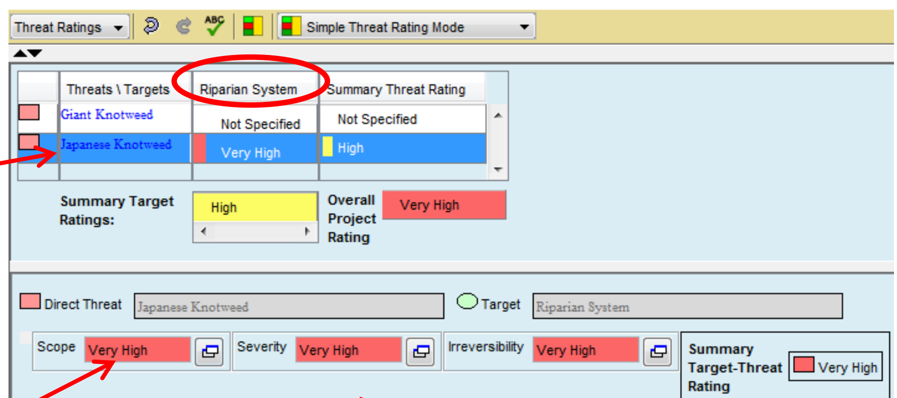
Lesson 3 – Threat Rating View

Enter Threat Ratings Using Simple Threat Rating Mode

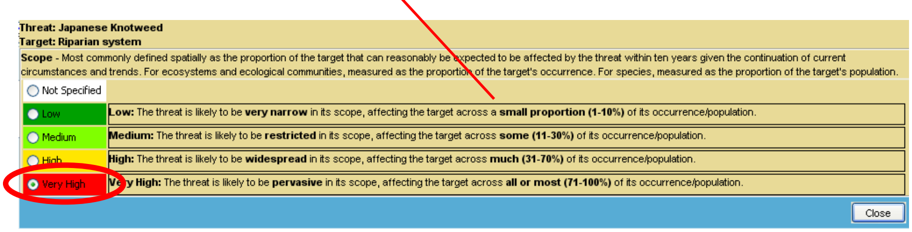
1. Switch to “Threat Ratings” view and select **“Simple Threat rating Mode”.**

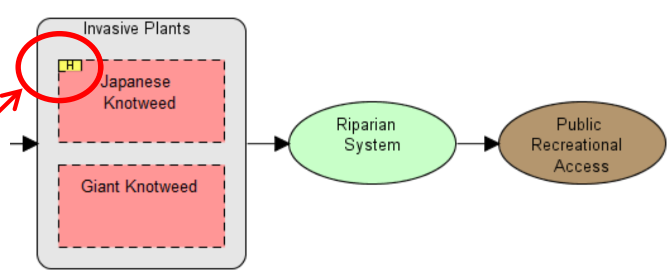


2. Click on the cell on the Japanese Knotweed row below Riparian system target



3. Click in each score box to assign a threat rating. For “Scope” select **Very High**, for “Severity” select **Very High,** and for “Irreversibility” select **Very High** from pull-down menus.

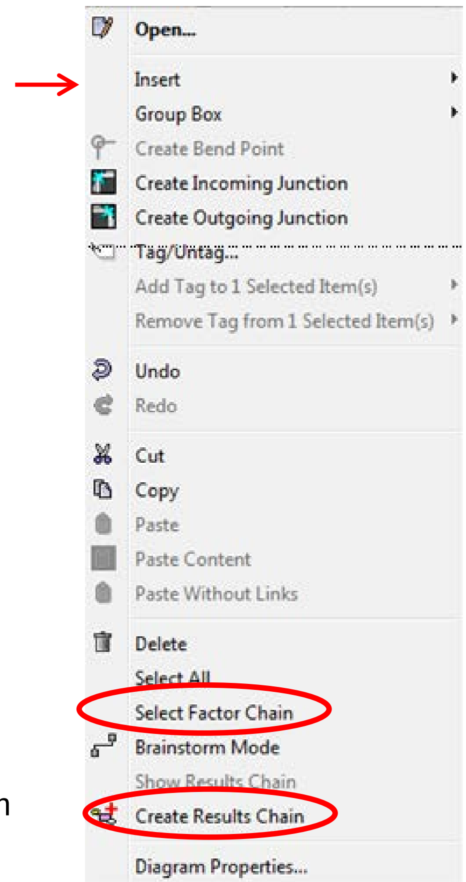




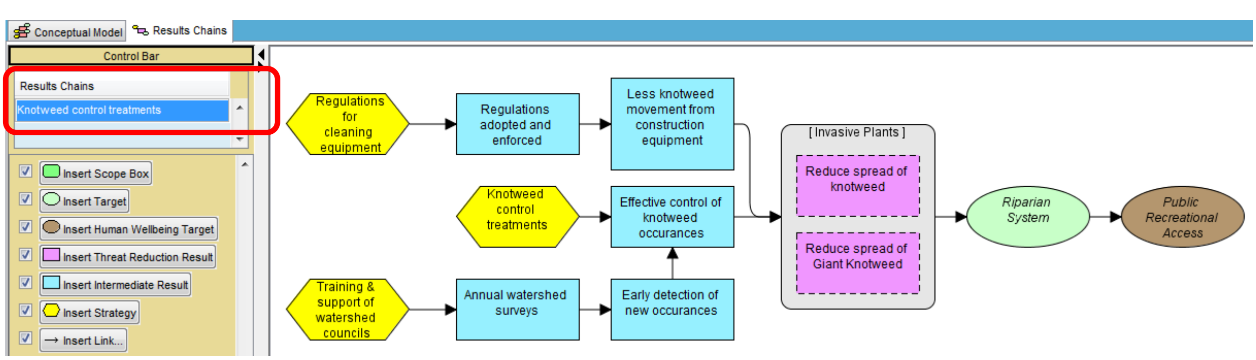
The Summary Threat rating is shown on the diagram. To see that, select the Diagram view from the main toolbar.

Lesson 4 – Results Chains

1. Results Chains

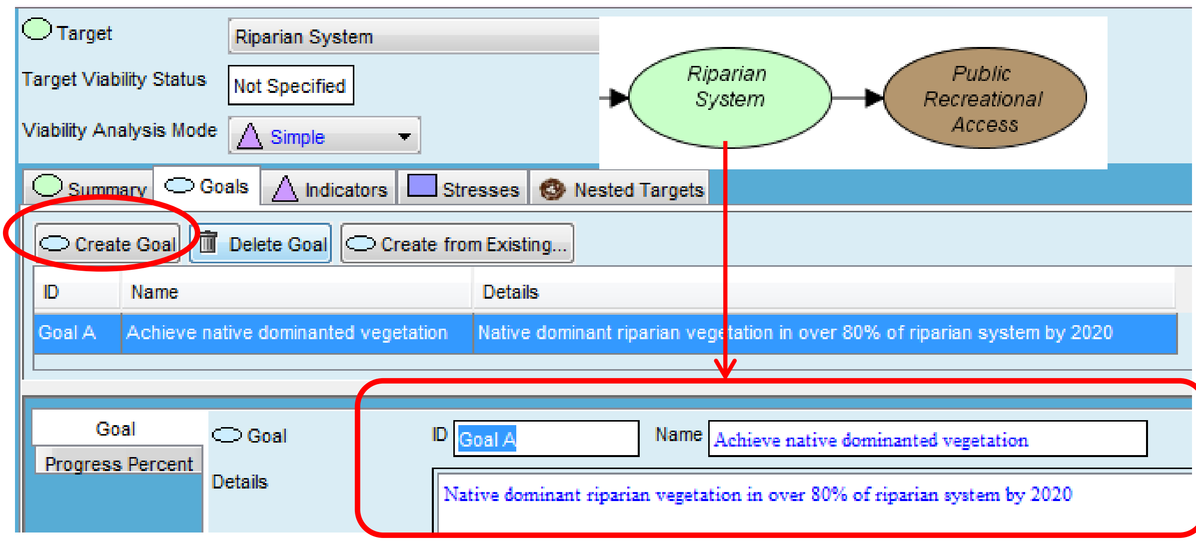


- Result Chain diagrams can be built using 2 methods. When in the Diagram View, right-click in a blank area of the diagram and select “Create Results Chain” from the menu or you can convert a Conceptual Model to a Results Chain
- In your Conceptual Model Diagram, right mouse-click on the green Target ellipse (“Riparian System” and choose “Select Factor Chain”
- Right mouse-click again and choose “Create Results Chain”
- This will automatically shift you to the Results Chain tab in the Diagram view and opens the Results Chain Properties dialog. The function generates a draft Results Chain based on your Conceptual Model. Close the dialog.
- Under the “Results Chains” bar, Click on [“New Results Chain]” and change the name to “Knotweed control treatments”>
- Double-click on the “Intermediate Results” and “Threat Reduction Results” boxes to re-word them to desired results to convey your theory of change, i.e., the desired results from successful strategy implementation
- Add additional factors as needed. For example, add the new factor “Regulations adopted & enforced” and delete the existing Strategy link and establish a new link from the Strategy to the new factor.

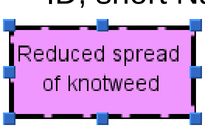


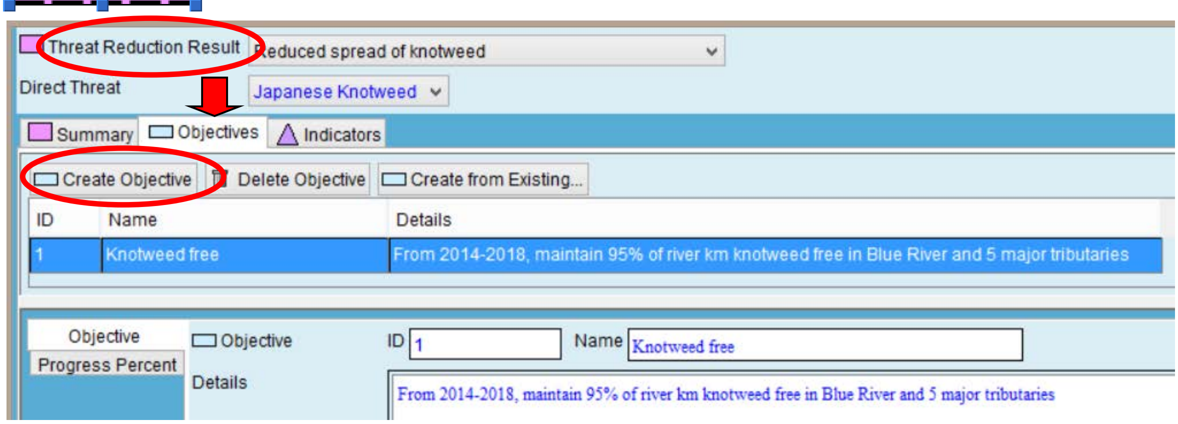
Lesson 5: Add Goals, Objectives, Indicators, Activities to the Results Chain

1. **Add a goal to the Target**
   - Double-click on the ”Riparian System” target to open the “Factor Properties” dialog. Click on the “Goals” tab, click on the “Create Goal” button then enter a goal ID, short Name, and full text of the goal in the “Details” box as shown below.
   - Repeat these steps to create a goal for the “Public Recreational Access” target with ID = “Goal B”, Name = “Public access” and Details = “At least 80% of the riparian system is accessible by the public by 2020**”.**



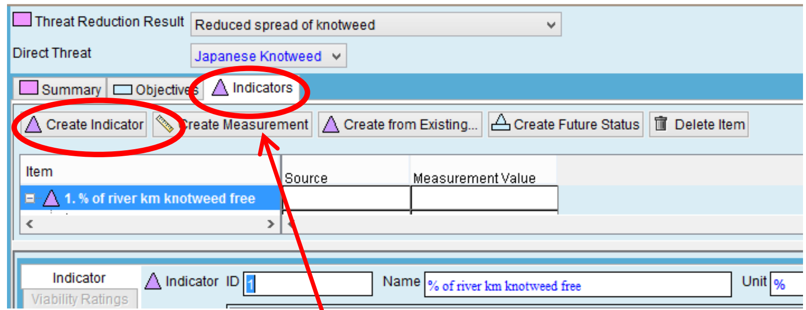
2. **Add a threat-reduction objective**
   - Double-click on the “Reduced spread of knotweed factor”, click on the “Objectives” tab, click on the “Create Objective” button then enter an objective ID, short Name, then the full text of an objective statement in the Details field





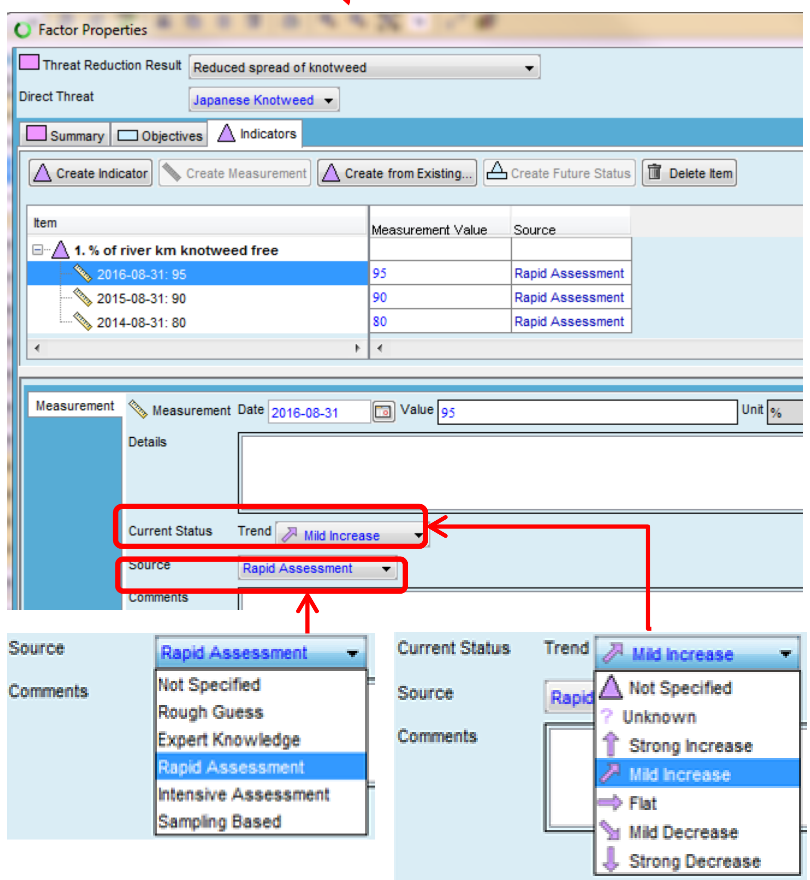
2. Create an indicator

- Double click on the "Indicators" tab, click on the "Create Indicator" button, then enter an Indicator ID, and indicator Name, and Unit

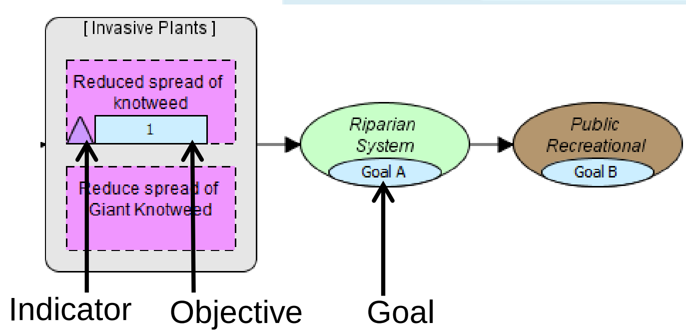


3. Add 3 measurement values: Click on the "Create Measurement" button

- Add Date (use Calendar icon), Value, Trend, and Source information.
- To add create another measurement, select the indicator in the item list.

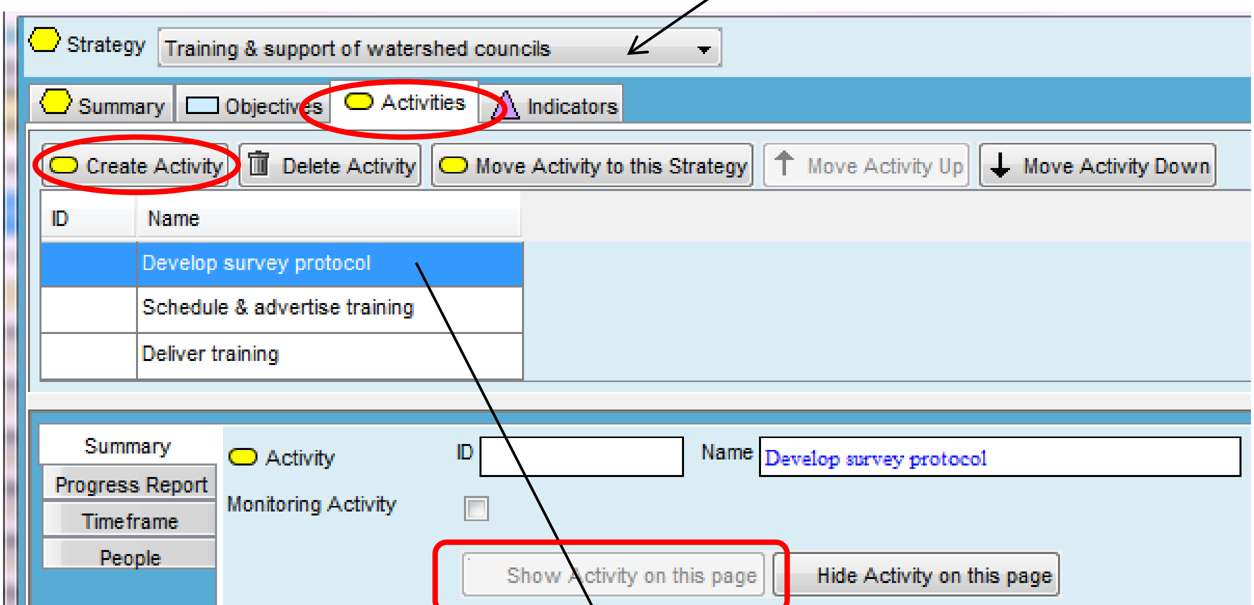


- Goal, Indicator and Objective as shown on Results Chain diagram. Hovering the cursor over these icons shows the full Goal, Indicator, and Objective information



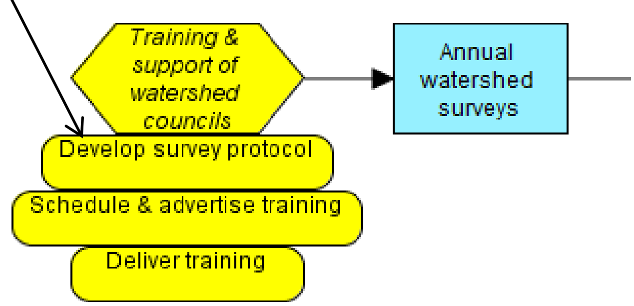
4. Add Activities to one of the Strategies

- Double-click on the “Training & support of watershed councils” strategy hexagon
- Click on the Activities tab
- Add the 3 Activities shown below using the “Create Activity” button
- Click the button “Show Activity on this page” for each Activity



5. Adjust size & Position of Activity factors

- In the Diagram View, use the mouse to change dimensions of activity factors and move to new positions



Lesson 6 - Work Plan View

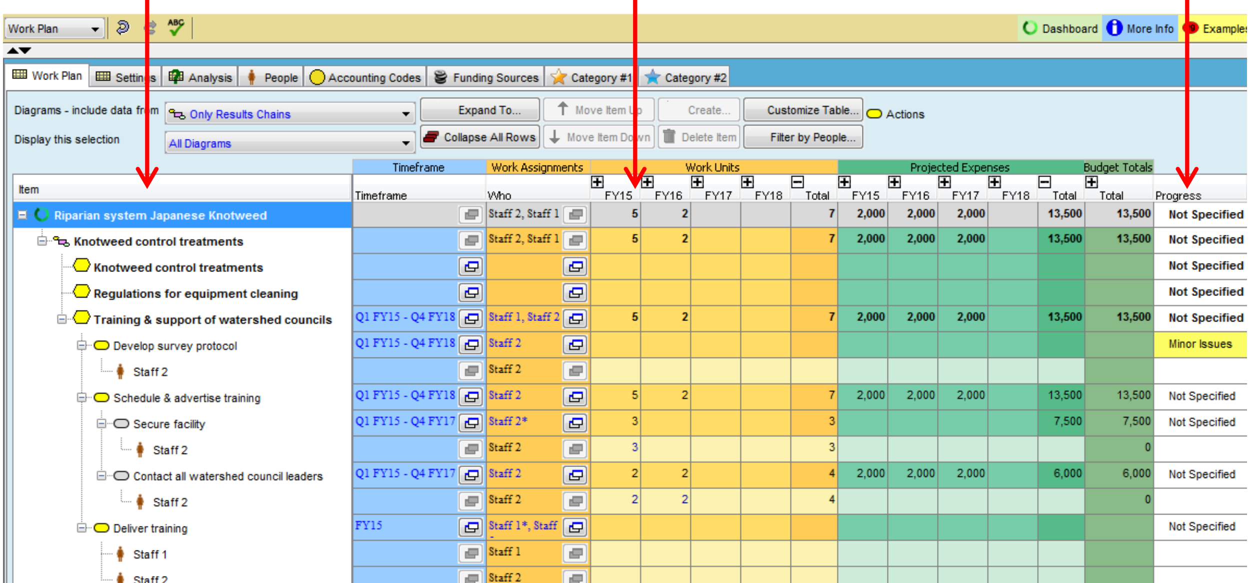
Overview of Work Plan

Work Plan View is designed to help a team efficiently implement their project's strategies and monitoring plan. It assumes that the most valuable resource that a project has is the time of its team members. It also assumes that a project team will want to start with high-level planning for the life of the project and then add more detailed planning in the short-term.

The main **Work Plan Tree** shows the project's actions (strategies, activities, tasks) organized by Results Chain

Project teams can **plan at a high level** (life of project) **or in increasing detail** (by year, month or quarter)

Projects can **track status** of implementation and **flag actions** requiring management intervention



Timeframe specifies when actions will be implemented

Work assignments detail who on the project team is involved in the action and allocation of their effort

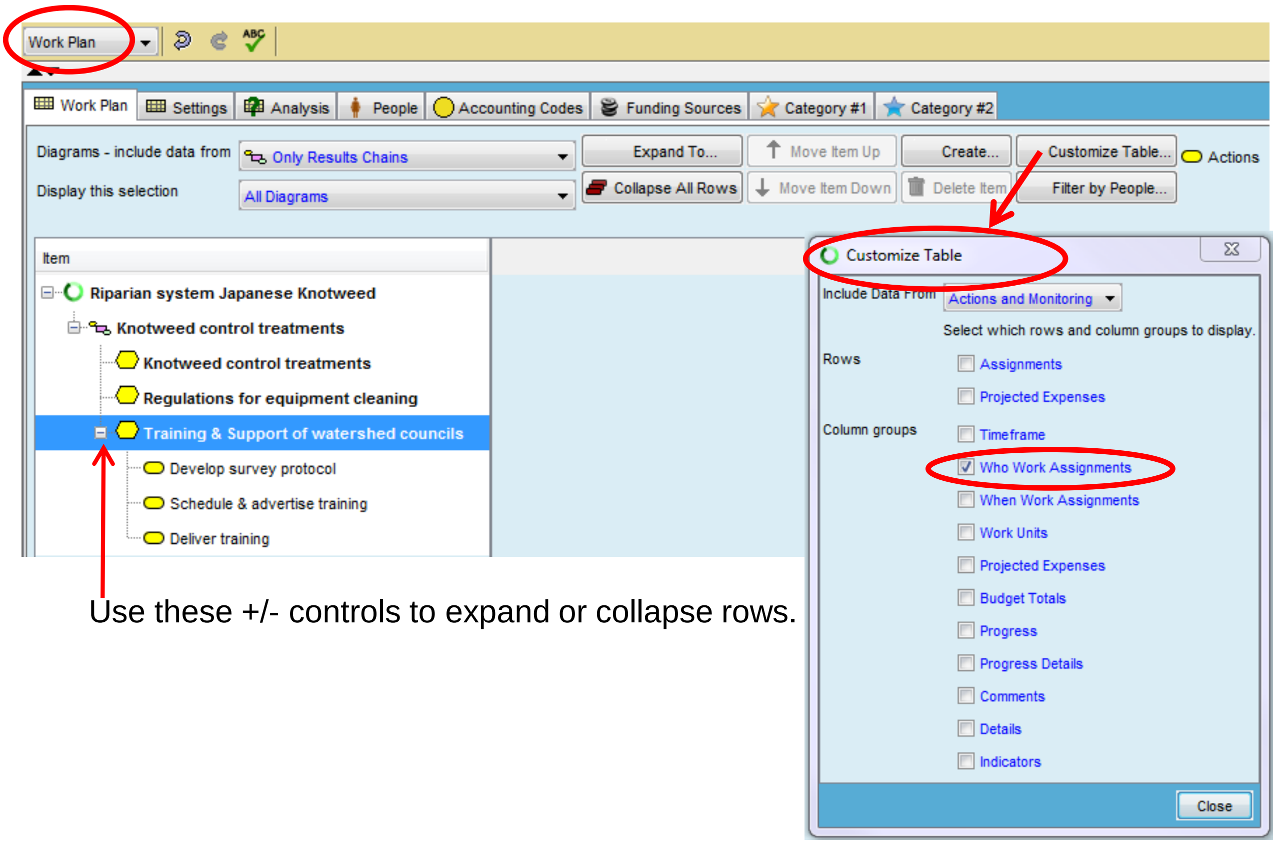
Expenses **track other costs** which, when combined with team salaries, **provide budgets**

Quick Tip

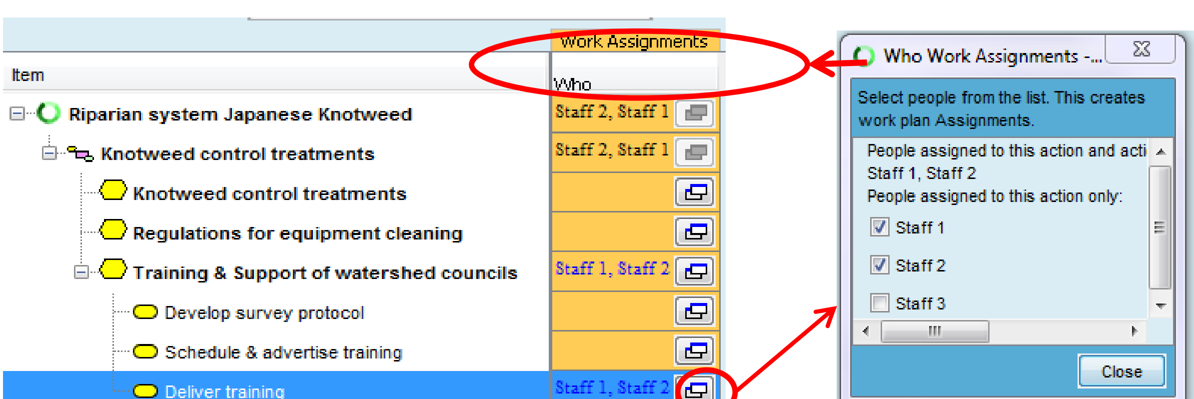
Throughout the work plan, **blue text** means you can directly edit the information in the cell, whereas **black text** is a rolled up value that cannot be directly edited. To edit these rolled up values, you need to find the lower level entry either vertically or horizontally.

Lesson 6 - Continued

1. Select the "**Work Plan**" view from the main toolbar. Click the "CustomizeTable" button to simplify the view. Turn off all check boxes except "Who Work Assignments".

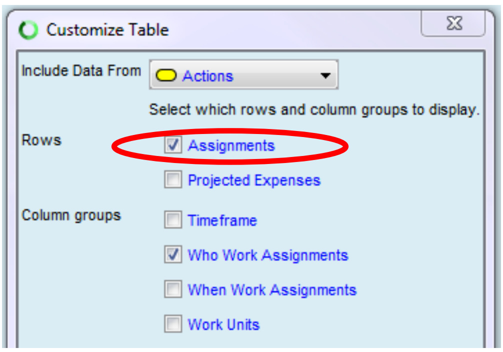


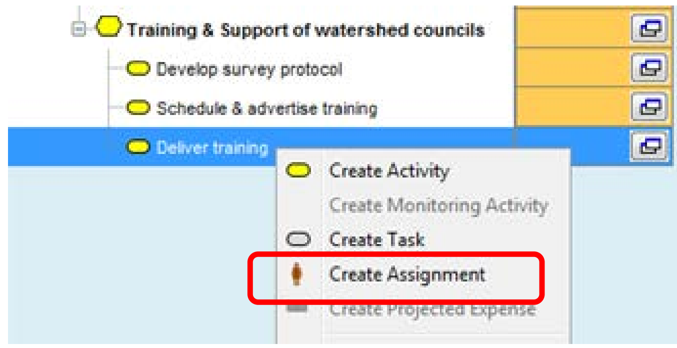
2. **Add People** (staff) to each of the Activities. Assign 2 people to the "Deliver Training" activity by highlighting the activity, then clicking on the widget in the "Who" column then check the box for the specific staff member as shown.



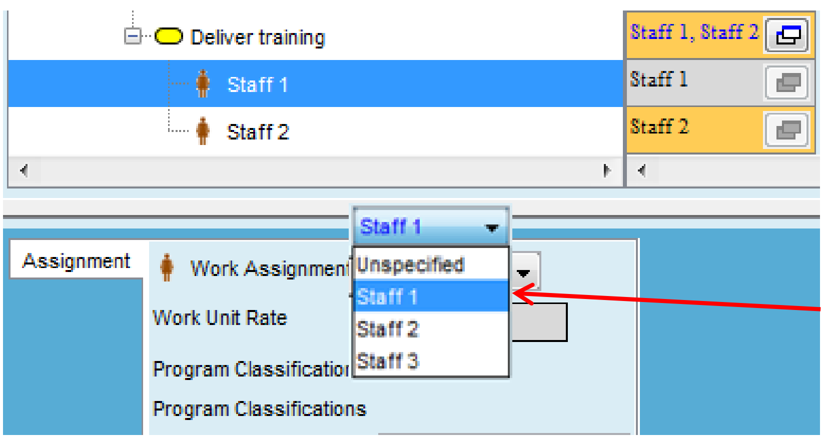
3. Add People, continued

Alternatively, People (staff) could be added by clicking on “Customize Table” and adding “Assignments” row. Then right clicking on the “Deliver training” row, and then click on “Create Assignment” in the menu.



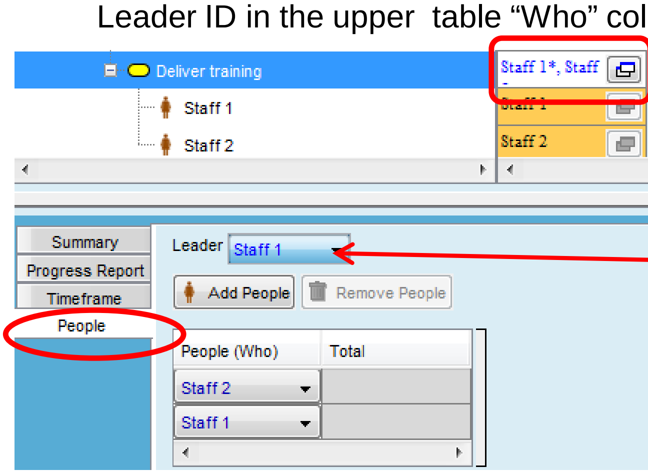


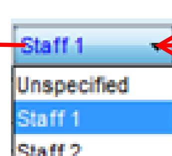
Then assign staff by selecting staff from the “Work Assignment” pull-down list in the panel at the bottom of the screen below.



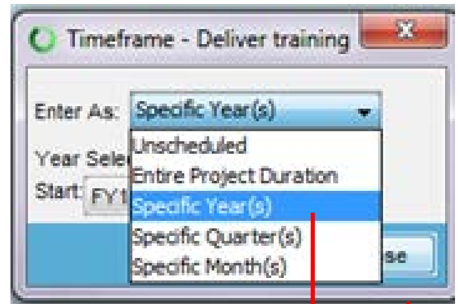
“Work Assignment” pull-down menu

4. **Specify one of the people assigned to the final Activity as the Leader** by using the lower panel – “People” side tab then the pull-down menu for “Leader”. The Leader ID in the upper table “Who” column will have an asterisk next to their name.

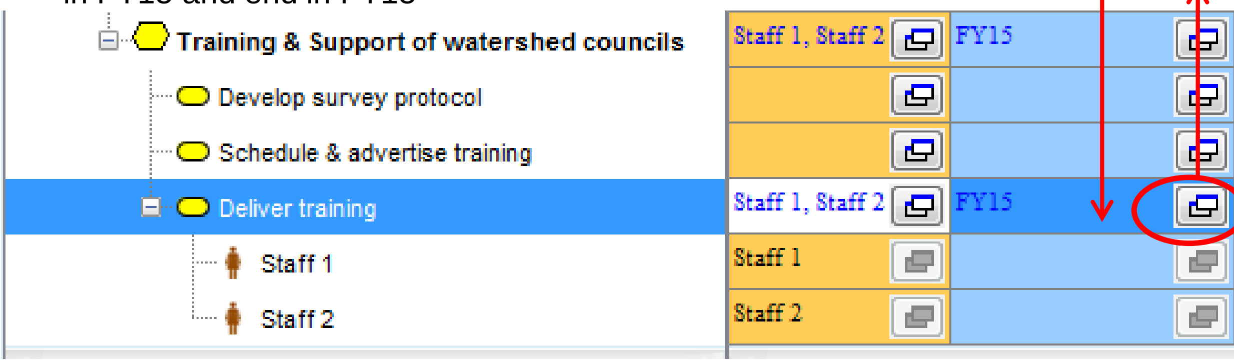




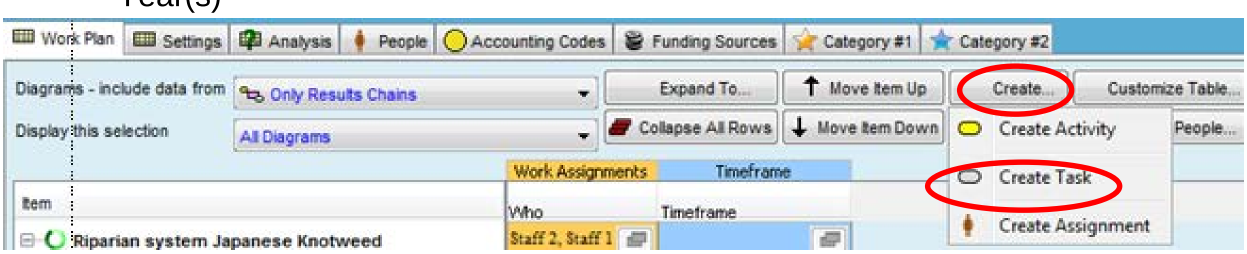
“Leader” pull-down menu

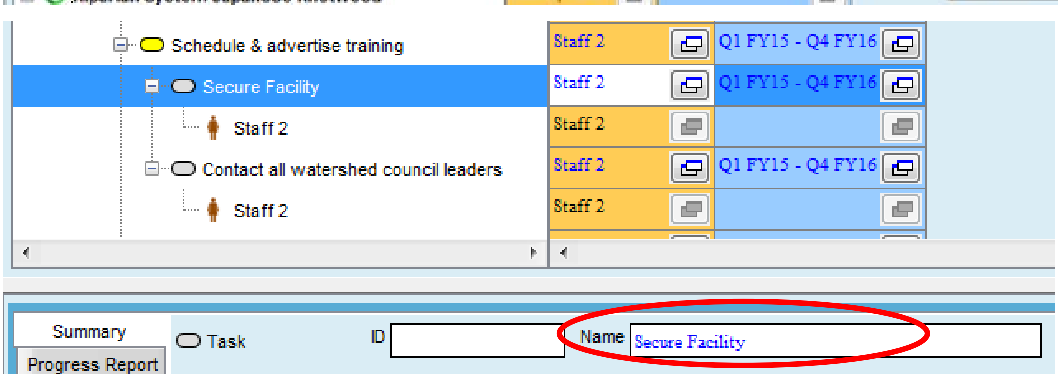


5. **To enter start and end dates**, open "Customize Table" and click on "Timeframe". You can specify start and end dates at a variety of different scales by double-clicking on the icon in the Timeframe column. Use the "Specific Year(s)" option and specify that the "Deliver training" activity is scheduled to start in FY15 and end in FY15

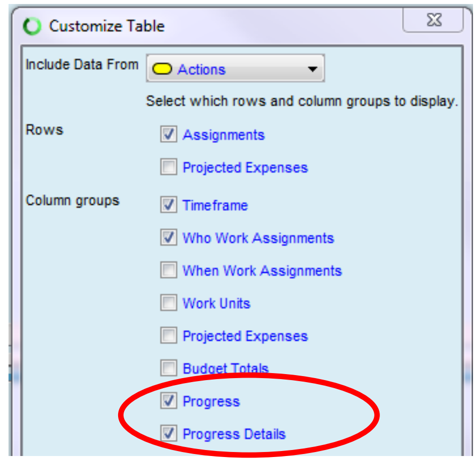


6. **Create two "Tasks**" by highlighting the "Schedule & advertise training" Activity then click on the "Create" button then "Create Task" to add the following two tasks:
   - Secure facility
   - Contact all watershed council leaders
   - Assign both Tasks to the same person. Staff is automatically assigned to the Activity.
   - Enter date in "Timeframe" column from the pull down menu as "Specific Year(s)"

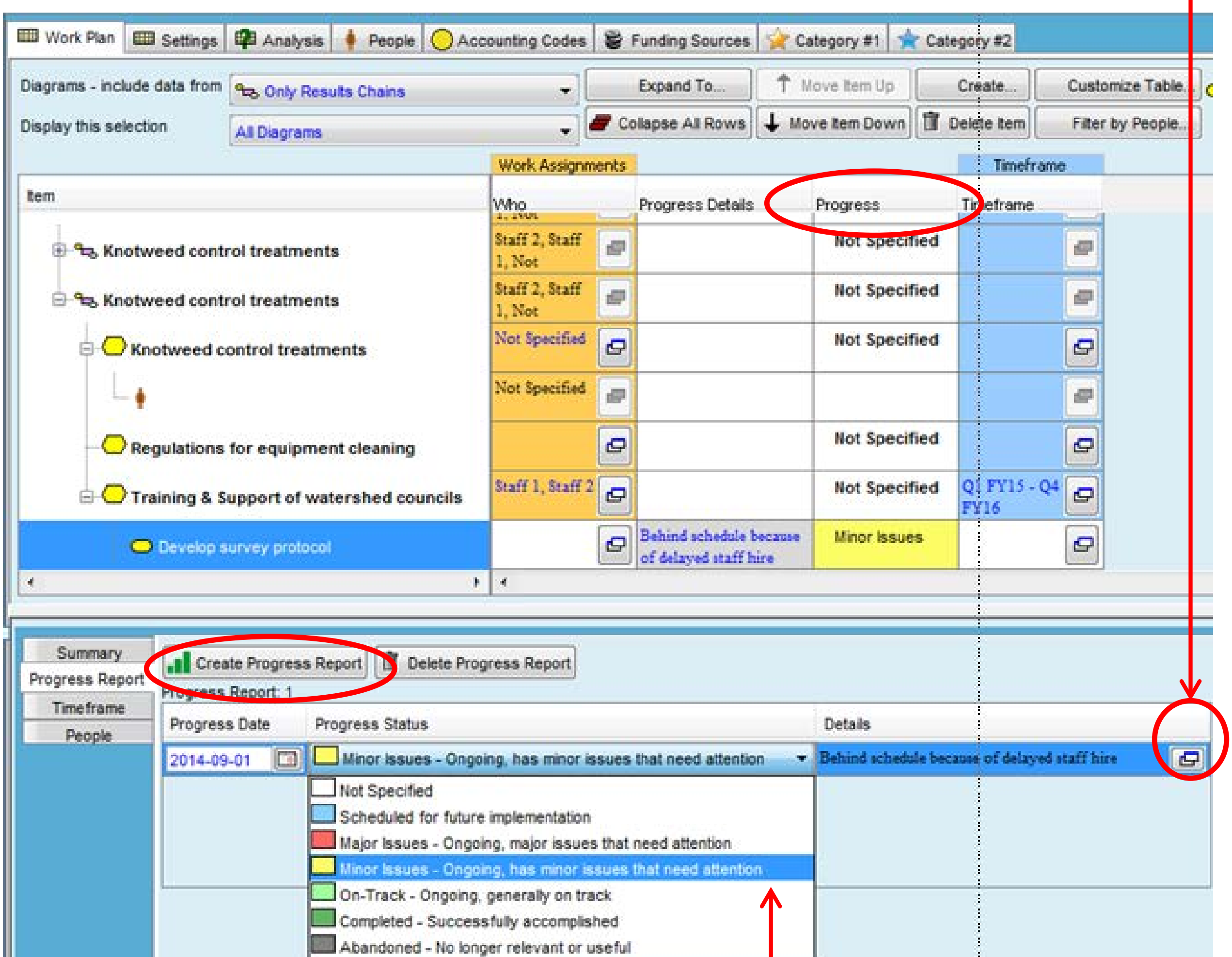




Lesson 7 Work Plan View – Progress Rating



1. **Add a Progress Rating**
   - Click on the “Customize Table” button and turn on “Progress” and “Progress Details” columns
   - Click in the “Progress” cell for the “Develop survey protocol” Activity.
   - Click on the “Create Progress Report” button in the lower panel, enter a date (using the calendar widget), rating (using pull-down menu) and type narrative Details.
   - To enter and view multiple lines of details text, click on the icon to the right of the Details field to open up the “Edit Text” entry window

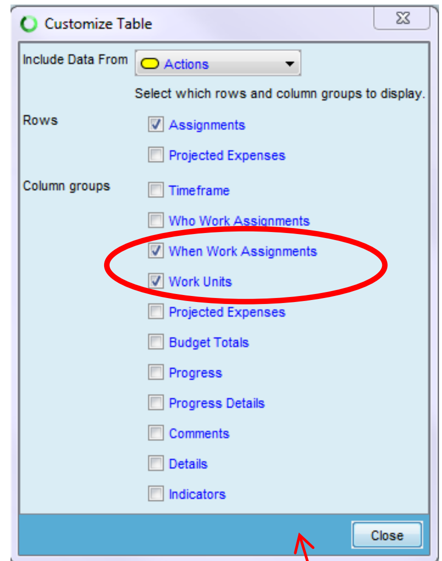


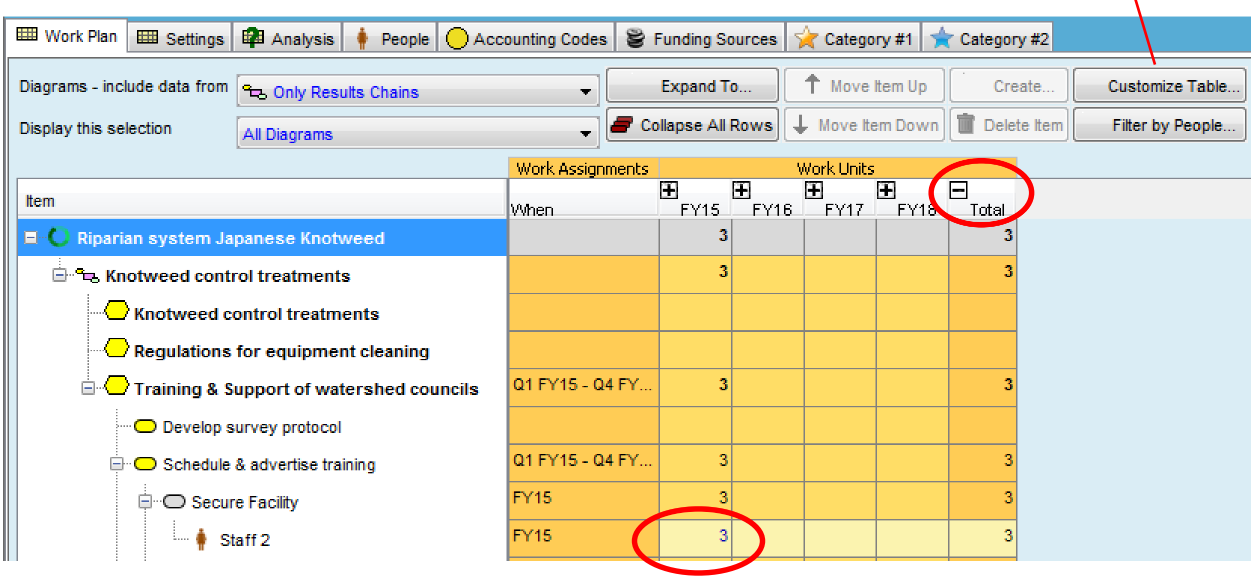
Rating pull-down menu

Lesson 8 Work Plan View – Work Units

1. Add Work Units (days of effort)

- Click on the “Customize Table” button and turn on the “Work Units” and “When Work Assignments” columns.
- Click on the “+” symbol in the Totals column header to expand the columns to display years.
- Work Units must be entered at the Staff level.
- Enter “3” for “Staff 2” for the task “Secure facility” by highlighting the “Staff 2” row then clicking the cell for FY15 which shows the cursor.
- Note that work units automatically enter at the task, activity, strategy, results chain, and project levels.



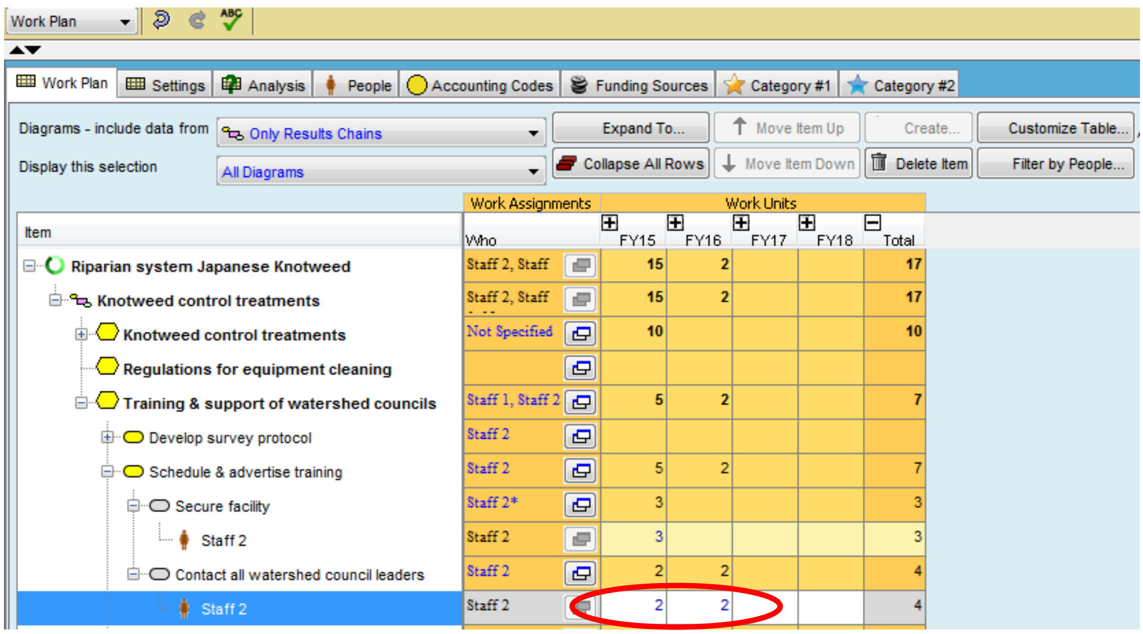


Note: You can click on the “+” symbols on the Year date columns to display quarters or months. If you’ve entered work days by year, then enter data into quarters, Miradi will automatically convert the Year to a roll-up field. Miradi always honors the finest granularity of data entered in columns (dates)

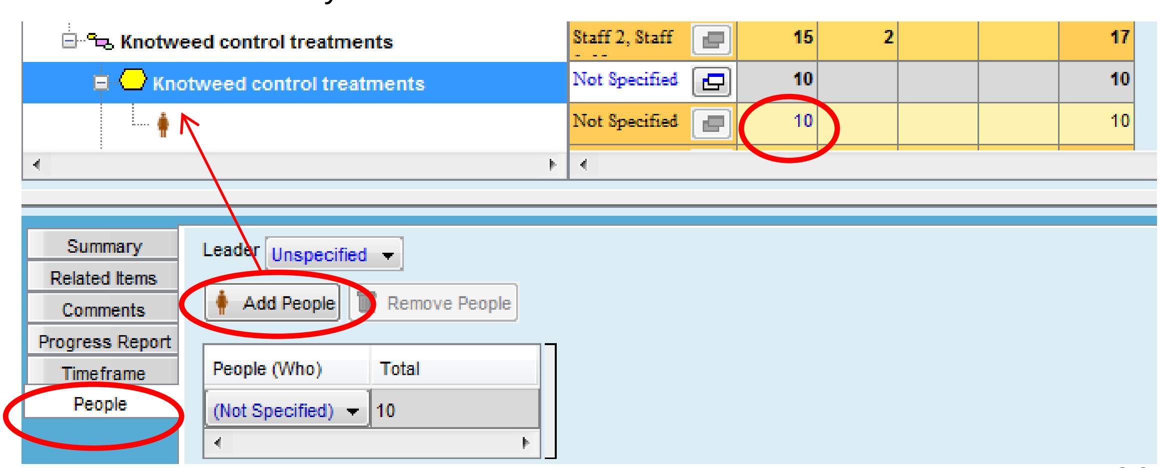
Lesson 8, continued

2. Add Work Units (days of effort), continued.

- Next enter “2” for “Staff 2” for the task “Contact all watershed council leaders” for FY15 and FY16.
- The Work Unit entries are all automatically totaled at the task, activity, strategy, results chain, and project levels for each FY and in the Total column for all FYs. Note that Work Units in these cells can not be changed. Work Units can only be changed at the Staff level.



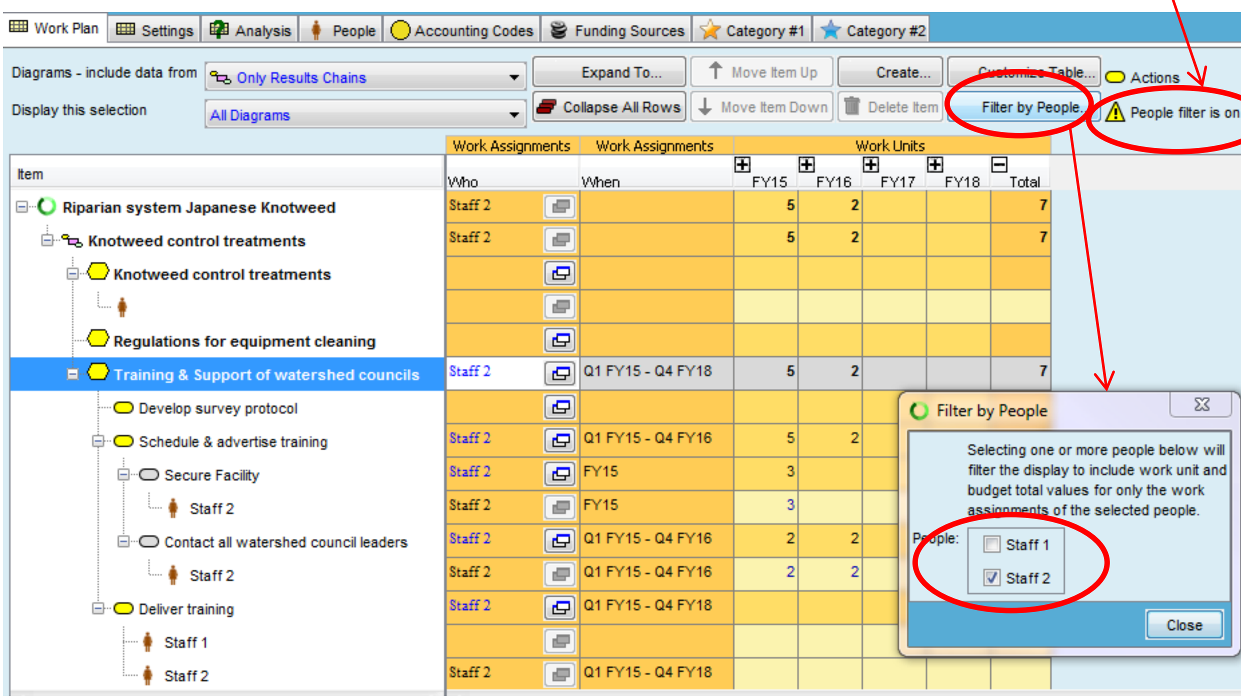
- Work units can also be added to a “Strategy”.
- To add Staff to the strategy “Knotweed control treatments”, highlight the strategy, then click on the “People” tab, then click on “Add People”.
- Add 10 to the work day column for FY15



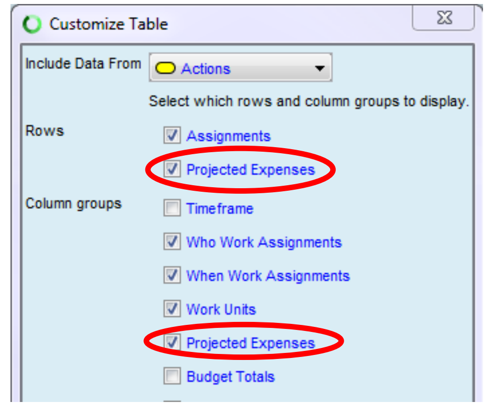
Lesson 8, continued

3. Using the “Filter by People” button

- In “Customize Table” turn on “Who Work Assignments”
- Click on the “Filter by People” button and select one of the staff resources you entered. Miradi will still show all of the rows of work plan data (i.e., Strategies, Activities, Tasks) but the work day values and total at the top of the table will only reflect the selected staff.
- Be sure to uncheck the staff person to see all of the staff work day data again (a small status message displays in the bottom left of the screen when you have filtered your data).

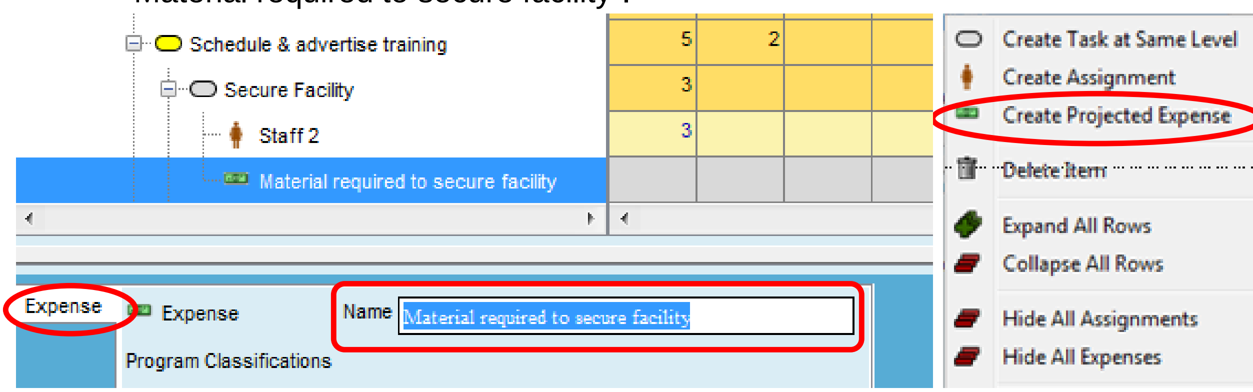


Lesson 9 Work Plan View – Projected Expense

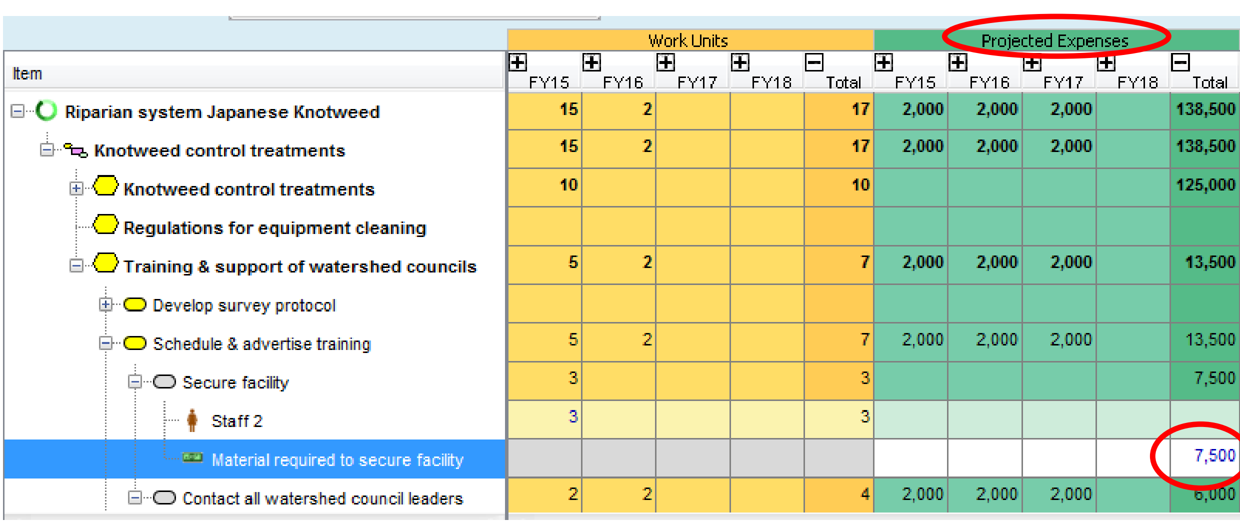


1. Add a Projected Expense

- In "Customize Table" click "Projected Expenses" in both the row and column sections.
- To add a "Projected Expense" for "Secure Facility", right click on "Secure Facility" then select "Create Projected Expense".
- Highlight the "Expense Name" and name it "Material required to secure facility".



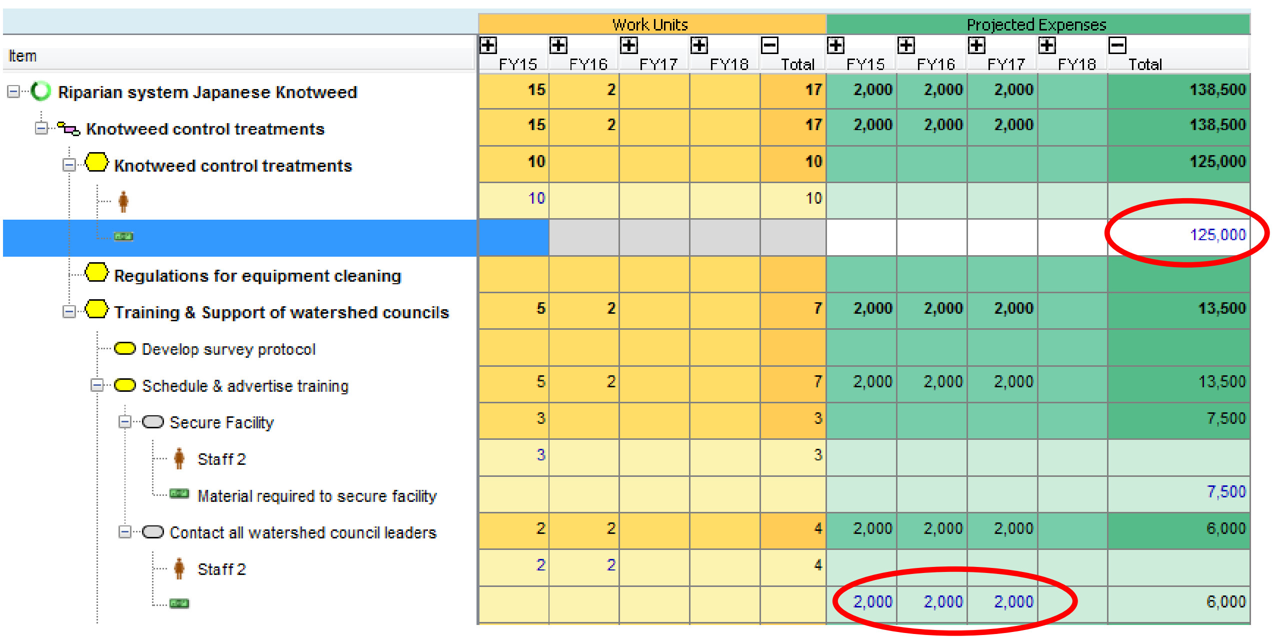
- Highlight the projected expense, click on the "Total" cell under "Projected Expenses", and enter "7500".



Item	Work Units FY15	FY16	FY17	FY18	Total	Projected Expenses FY15	FY16	FY17	FY18	Total
Riparian system Japanese Knotweed	15	2			17	2,000	2,000	2,000		138,500
Knotweed control treatments	15	2			17	2,000	2,000	2,000		138,500
Knotweed control treatments	10				10					125,000
Regulations for equipment cleaning										
Training & support of watershed councils	5	2			7	2,000	2,000	2,000		13,500
Develop survey protocol										
Schedule & advertise training	5	2			7	2,000	2,000	2,000		13,500
Secure facility	3				3					7,500
Staff 2	3				3					
Material required to secure facility										7,500
Contact all watershed council leaders	2	2			4	2,000	2,000	2,000		6,000

2. Add a Projected Expense, continued

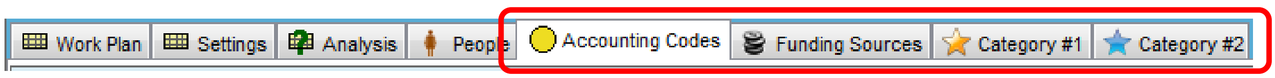
- Projected expense data entry behaves similarly to the Work Unit data entry – you can enter expenses at any Action level (i.e., Strategy/Activity/Task) and any calendar/date level (i.e., project overall, by Year, by Quarter, etc.)
- For the task “Contact all watershed council leaders” enter add “$2000 in FY15, FY16 and FY17.
- Miradi will honor the finest granularity of data entry and will automatically convert higher levels fields into roll-up fields.
- Enter 125,000 into the Projected Expenses column for the “Knotweed control treatments” Strategy.



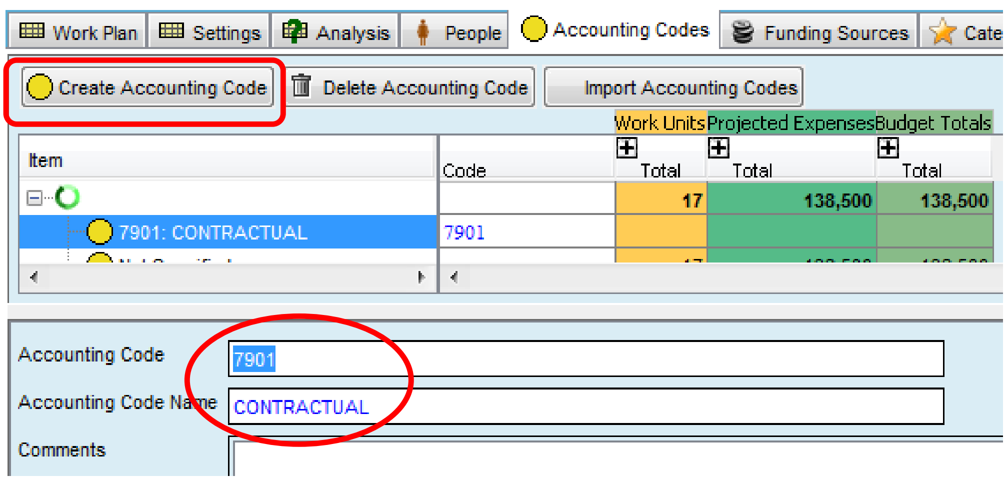
	Work Units					Projected Expenses				
Item	FY15	FY16	FY17	FY18	Total	FY15	FY16	FY17	FY18	Total
Riparian system Japanese Knotweed	15	2			17	2,000	2,000	2,000		138,500
Knotweed control treatments	15	2			17	2,000	2,000	2,000		138,500
Knotweed control treatments	10				10					125,000
	10				10					
										125,000
Regulations for equipment cleaning										
Training & Support of watershed councils	5	2			7	2,000	2,000	2,000		13,500
Develop survey protocol										
Schedule & advertise training	5	2			7	2,000	2,000	2,000		13,500
Secure Facility	3				3					7,500
Staff 2	3				3					
Material required to secure facility										7,500
Contact all watershed council leaders	2	2			4	2,000	2,000	2,000		6,000
Staff 2	2	2			4					
						2,000	2,000	2,000		6,000

3. Coding Expense data

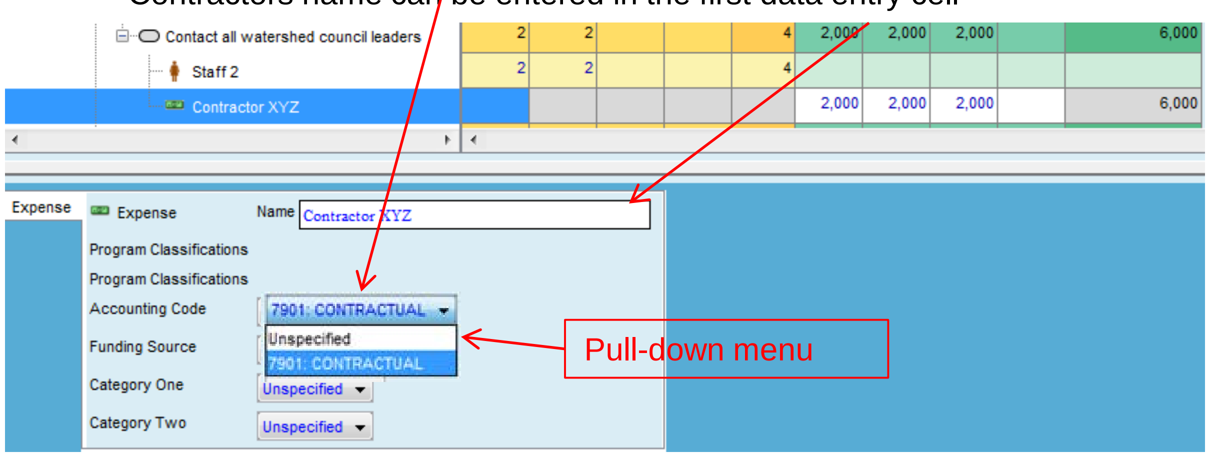
- Expense data can be coded by Account Codes, Funding Sources, and two optional fields.
- You enter codes into tables via the tabs at the top of the Work Plan view



- Click on the “Accounting Codes” tab, and then the “Create Accounting Code” button.
- Enter an Accounting Code of “7901” and an Accounting Code Name of “CONTRACTUAL”



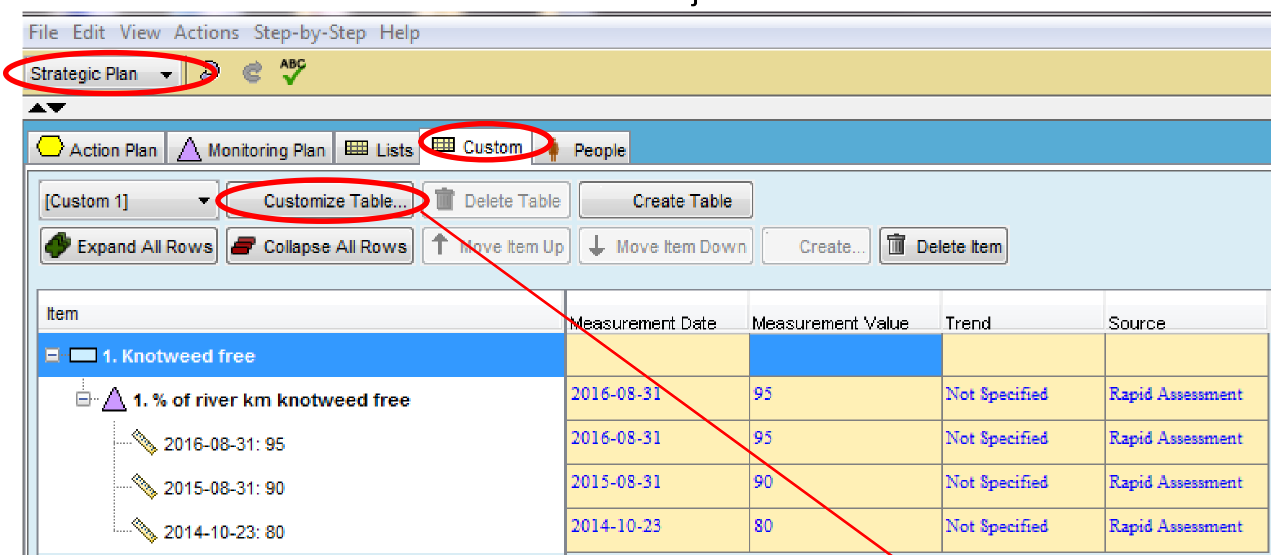
- Return to the Work Plan tab and highlight the “Contact all watershed council leaders” task.
- You can now use the pull-down menu under “Accounting Code” to assign the expense to the CONTRACTUAL category (Note: if you don’t see your new entry in the pull-down, switch from and then back to Work Plan view to refresh). The Contractors name can be entered in the first data entry cell



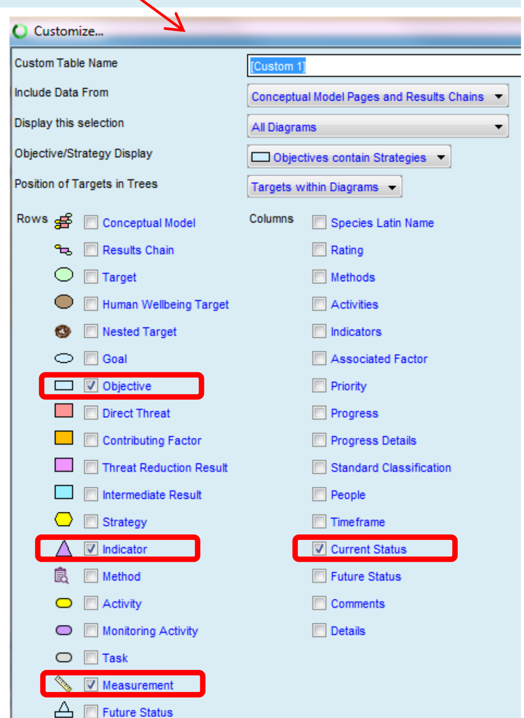
Lesson 10: Additional Views & Miradi reports

1. Strategic Plan Views

- Switch to the Strategic Plan View
- Click on different tabs and try expanding and collapsing the “tree”
- Click on the “Custom” tab, then “Customize Table” to create custom tables with the rows and columns you want displayed
- For example, choose to display Objectives, Indicators, and Measurement data as rows and Current Status as columns to display indicator measurement data with indicators associated with their Objectives.



- Adjust column & row height/ width with mouse cursor at edge of columns and rows
- Columns can be moved to new positions by holding the left-mouse button on column header and dragging the column left or right
- Check out the Action Plan, Monitoring Plan, and List Views Use the Expand All Rows button to completely open up all branching trees
- Data can be edited in the lower panel of the screen for rows highlighted in the upper portion

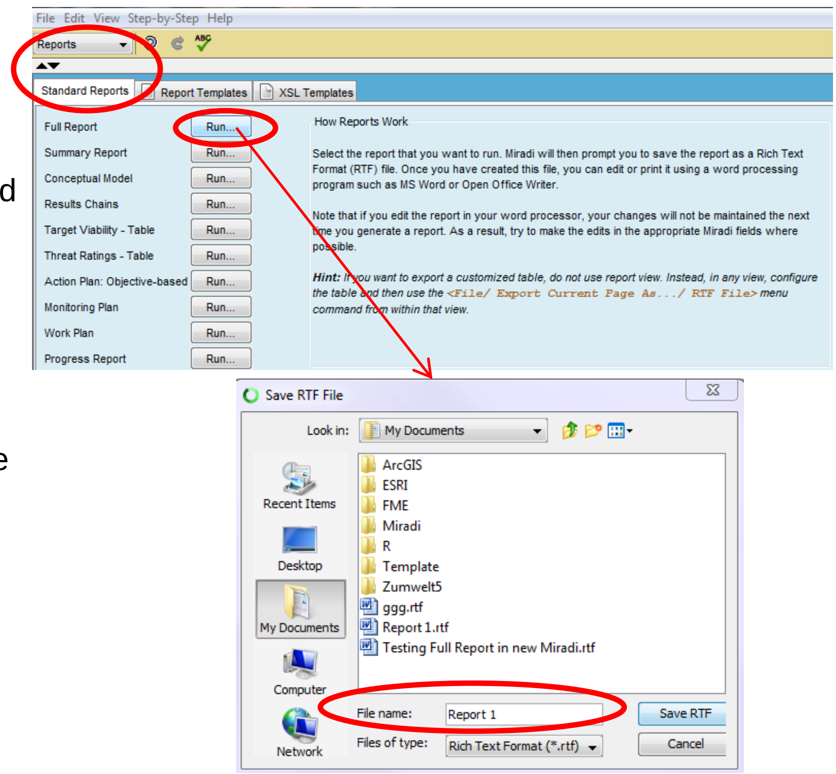


Lesson 10, continued

Exporting information from Miradi

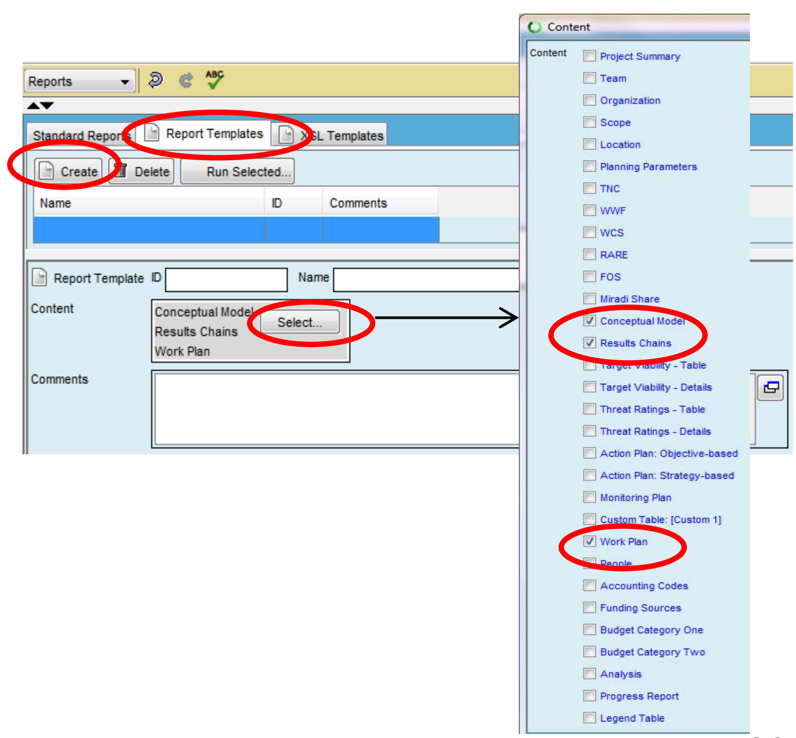
2. Export Standard Reports

- Change to the "Reports" view then click on the "Standard Reports" tab, then click on the "Full Report" – "Run" button. You will be prompted to name a RTF file. Open this file in Word and page through the Report



3. Custom Reports

- Click on the "Reports Templates" in the "Reports" view, then click the "Create" button then the "Content" – "Select" button (you can pick and choose among the available check boxes). For example, check the boxes for "Conceptual Model", "Results Chains", and "Work Plan".

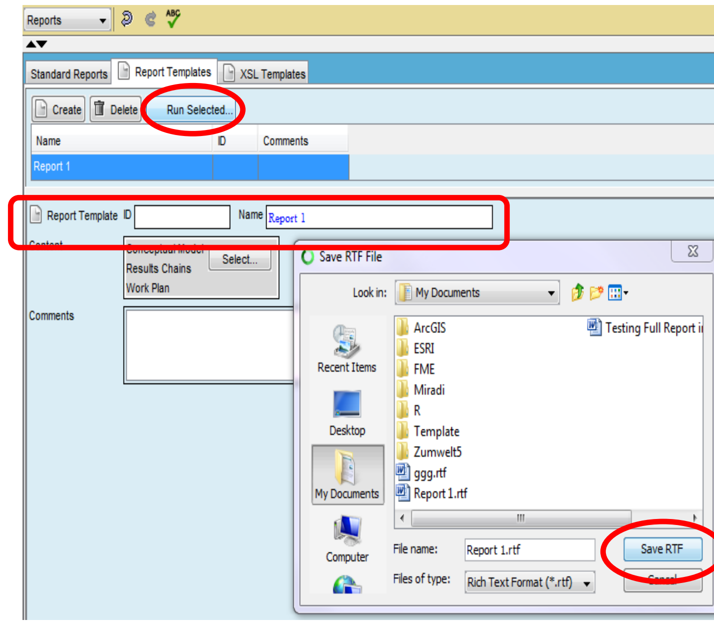


Lesson 10, continued

Exporting information from Miradi, continued

3. Custom Reports, continued

- Click on “Run Selected”, then in “Report Template” name the report “Report 1” the click on the Save RTF” button”. Screen will show Information that “Selected Report Template Was Exported as RTF”.
- To view report, open Windows Explorer, then “Documents” and double click on “Report 1.rtf”



4. Exporting Diagrams & tables

- Click on the top “File” menu, select “Export Current Page as…”,
- then select JPEG or PNG Image for diagrams or RTF for tables