1. **About Miradi:** Miradi Desktop ([www.Miradi.org](http://www.Miradi.org)) is project management software that supports use of the Open Standards for the Practice of Conservation ([http://cmp-openstandards.org/](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 11 different languages. Miradi Share ([www.miradishare.org](http://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.


3. **Launch Miradi:** Double-click on the Miradi Icon ([ ]) on your desktop to launch Miradi.

4. **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.
HANDS-ON MIRADI EXERCISES

Lessons included in this hands-on tutorial

• **Lesson 1** - Create a New Project (pages 3-5)
• **Lesson 2** - Create a Conceptual Model (pages 6-12)
• **Lesson 3** - Threat Rating View (page 13)
• **Lesson 4** - Results Chains (pages 14-15)
• **Lesson 5** - Add Goals, Objectives, Indicators, Activities to the Results Chain (pages 16-19)
• **Lesson 6** - Work Plan View – Introduction (pages 20-25)
• **Lesson 7** - Work Plan View – Progress Rating (page 26-27)
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HANDS-ON MIRADI EXERCISES

Lesson 1 Create a New Project

1. **Start a new Project**: Click the “Create” button (to start a new project), then assign a name (for purposes of this tutorial “Riparian system with knotweed”), 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 and as illustrated in sub-paragraphs 2a through 2d below:

   - **2a** Enter the **Project Name**: “Riparian system with knotweed”.
   - **2b** Click “Create Member” button and enter Given Name, Last name, & ID (Initials) for 3 people
   - **2c** Click on the “Location” tab. Then on the Countries “Select” button and assign your project to a country
   - **2d** Click on the “Planning” tab, then on the “Work Plan Settings” tab to add “Work Plan Dates” and “Fiscal Year” dates.
Lesson 1 - continued

2b. Enter people (staff) in the Summary View
   • Click on the “Team” tab then click on the “Create Member” button.
   • Normally team members are entered as names and ID as initials, but for purposes of this tutorial, enter team members as Staff as shown below.
     Note the Miradi default for “Roles” is “Team Member”.

2c. Enter project location information in the Summary View
   • Click on the “Location” tab then click on the “Countries” button and select country from the “Select” pull-down list and click on the box next to the country. For purposes of this tutorial select the “United States of America”.
Lesson 1 - continued

2d. Enter/change Work Plan Date and Fiscal Year dates.
   - Click on “Planning” tab, then click on the “Work Plan Settings” tab
   - Change the Work Plan Start date to 2014-07-01 and End date to 2018-06-30. Click on the calendar icon to select dates.
   - Change the Fiscal Year to “July to June” from the pull-down menu.

Quick Tip: Miradi saves automatically as you enter information.

Quick Tip: Miradi allows user to undo or redo data entered.

Quick Tip: For project teams that already have their project data in another software program - such as Excel - assistance can be provided to migrate their data to Miradi without having to copy and paste it or to re-enter it – contact support@miradi.org for assistance.
Lesson 2

2a. Create a Conceptual Model

A Conceptual Model diagram graphically depicts the conservation and human well being targets you want to conserve, the direct threats affecting the targets, and the contributing factors underlying the direct threats at the beginning of a project. It allows you to explore alternative ways to intervene to abate threats and conserve the targets. You can convert your Conceptual Model diagram to a Results Chain diagram to clarify how strategies will deliver intended results. Converting a Conceptual Model diagram to a Results Chain diagram is described in lesson 4.

1. Switch to Diagram View

2. In the Diagram view, use the buttons listed on the Control Bar to create the following Conceptual Model diagram

Diagramming tips

• 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

Note: “Factors” are those items listed in the menu on the Control Bar of the diagram view.
Lesson 2 - continued

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).
   - After entering text, click on the “Close” button in the lower right hand corner.
   - 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, by holding the control key down, select Riparian System, then Public Recreational Access, then “Insert Link”

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.

- If a link is uncertain it can be shown as a dotted line. Double click on the link to open the “Link Properties” and check the “Uncertain” box. An annotation can be entered to explain the uncertainty. The arrowhead of the link will be open and hovering the cursor over the link will show the annotation.

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**Link Properties**

- Bidirectional Link
- Uncertain (- - -)
- Annotation: It is uncertain if construction equipment is actually spreading Japanese Knotweed.
6. **Enter Strategies:** Select the “Insert Strategy” button on 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 contributing Factors as shown.

7. **Add draft strategies in brainstorm mode.** Miradi also supports entering draft strategies in a mode called “Brainstorm Mode” where you can toggle draft status for strategies on and off via a check box. To enter 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.
7. Add draft strategies in brainstorm mode, continued.
Click on the “Insert Draft Strategy” button under 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 (Requirement for equipment cleaning) and 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:

2b. Reducing diagram complexity: Group Boxes

1. **Create Group Boxes**
   - Add a second threat of “Giant Knotweed” to the Conceptual Model diagram
   - Link Giant Knotweed to the “Riparian System” Target and the contributing Factors “Inadequate trmt of established patches”.

   ![Diagram showing the connections between threats and factors]

   - Then highlight both threats by holding down the control key (Command key for Mac’s) 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 reduces the multiple common links to and from the grouped factors to just one link to and one link from the Group Box.

   ![Diagram showing the group box with the text “Invasive Plants”]

   - The background color of the Group Box default color is “Light Gray”. The color can be changed by opening the Group Box and opening the Background Color pull-down menu. Select “Threat Light Pink”.

   ![Diagram showing the edited background color of the group box]
Lesson 2 continued:

2b. cont’d. Reducing diagram complexity: Bend Points

2. **Add bend points**
   - Right mouse click on the link from “Spread via construction equipment” and select “Create Bend Point” in the Control Bar.

   • 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
   • To move or delete a bend point use curser to lasso a point or points (see illustration below).
Lesson 3 – Threat Rating View

2c. Enter Threat Ratings Using Simple Threat Rating Mode

1. Switch to “Threat Ratings” view and select “Simple Threat Rating Mode” from the pull-down menu.

2. Click on the cell on the “Japanese Knotweed” row below “Riparian System”.

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 Conceptual Model diagram in Diagram view (“High” shows instead of “Very High” because the threat affects a single target).
Results Chains are a tool that allows you to convey the Theory of Change linking your selected Strategies to your intended results. Goals, Objectives, and Indicators can be added to your Results Chain diagram to clarify intended results and the measurement approach you are using to track progress. Also, Activities with who and when information, progress ratings, and indicator measurements can be added to your Results Chain diagram.

1. **Results Chains**

   - Results Chain diagrams can be built by converting a Conceptual Model. To convert, follow the steps listed below. Note: a Results Chain can also be constructed without a Conceptual Model by developing them in the same manner as constructing a Conceptual Model (Lesson 2)
   - In the Conceptual Model diagram, right mouse-click on the green Target ellipse “Riparian System” and choose “Select Factor Chain” from the pull-down menu.
   - 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 box. The name of the Results Chain can be entered in the dialog box. Enter the name as “Knotweed control treatments”. Close the dialog box and view the Results Chain. (Note: the Results Chain is shown on the following page of this tutorial)
Lesson 4 – continued

- Double-click on the “Intermediate Results”, “Threat Reduction Results” and “Group” boxes to re-word them to desired results to convey your Theory of Change, i.e., the desired results from successful strategy implementation.
- **Note:** text in the various boxes requiring changes are enclosed in brackets.

- Add additional factors as needed. For example, add the new Intermediate Result “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**
   - In the Diagram mode open the Results Chain and 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 ("Goal A"), 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”.

In the diagram view, the goals can be viewed as hover text by holding the cursor over the Goal. Hover text works for all elements of the Results Chain and the Conceptual Model.
Lesson 5, continued

2. **Add a Threat Reduction objective**
   - Double-click on the “Reduced spread of knotweed” factor in the Results Chain, 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 as shown below.

3. **Create an indicator for “Reduce spread of knotweed”**
   - Double click on the “Indicators” tab, click on the “Create Indicator” button, then enter an Indicator ID as “1”, and indicator Name as “% of river km knotweed free”, and Unit as “%”.

Indicator shown in the diagram view

Hover text for Indicator

Objective shown in the diagram view

Place cursor over Objective on Threat Reduction to see hover text.
Lesson 5, continued

4. Add measurement values and sources

- Highlight the “Indicator”, then select “Create Measurement” tab. Then add 3 measurements and sources as shown.
- Add Date (use Calendar icon), Value, Trend, and Source information. Enter Trend and Source information from the pull-down menus.
- **Note:** when using the Calendar icon, dates must be selected in the following sequence; year, month, day.
- To create another measurement, first highlight the row with the indicator name in the item list.
5. **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.

6. **Adjust size & Position of Activity factors**
   - In the Diagram View, use the mouse to change dimensions of activity factors and move to new positions.

   You control whether Activities are displayed visually on the diagram with the “Show…” and “Hide…” buttons. Activities are shown by default.
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 the work units required for implementation at a high level (life of project) or in increasing detail (by year, month or quarter).

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

Timeframe specifies when actions will be implemented and completed.

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 horizontally. (Rolled up value is described in Lesson 6, paragraph 3)
Lesson 6 Work Plan – Add “Who” data

1. Select the “Work Plan” view from the main toolbar. Click on the + control to expand rows. Click on – control to collapse rows.

2. Click on the “Customize Table” button to simplify the view. If any boxes are checked turn them off (uncheck them) and turn on (check) the “Who Work Assignments”.
3. **Add People (staff) to 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.

**Note:** When staff are added at the Activity level, Miradi automatically enters (rolls up) the staff at the Strategy, Results Chain, and Project levels. Staff is also entered automatically in the Conceptual Model.

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.
4. **Add People, continued**

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

5. **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.
6. **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. Note: Timeframe is automatically assigned to the Strategy.
7. Activities can be broken down into Tasks. Create two “Tasks” by highlighting the “Schedule & advertise training” Activity then click on the “Create” button then “Create Task” to add the first task (“Secure Facility”). To add the second task click on the “Create” button and select “Create Task at Same Level” and enter the task of “contact all watershed council leaders.”

- Assign both Tasks to the same person (Staff 2). Staff is automatically assigned to the Activity.
- Enter date in “Timeframe” column from the pull down menu as “Specific Quarter(s)”

- An alternative method for adding Tasks is to right click on an Activity and select “Create Task” from the menu and proceed in the same manner as described above.
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 of “staff change in watershed council”.
   - 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.
   - Additional progress ratings for this activity can be added by clicking on the “Create Progress” button, which adds a new progress row to the table.
Lesson 7 Work Plan – Progress Rating, continued

- Work Plan columns can be relocated to suit needs/preferences by grabbing the column header with the cursor and dragging it to the desired column location.
- Move “Progress” column to show before “Progress Details” by above method.

<table>
<thead>
<tr>
<th>Item</th>
<th>Work Assignments</th>
<th>Progress Details</th>
<th>Progress</th>
<th>Timeframe</th>
</tr>
</thead>
<tbody>
<tr>
<td>Riparian system with knotweed</td>
<td>$1, $2</td>
<td>Not Specified</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Knotweed control treatments</td>
<td>$1, $2</td>
<td>Not Specified</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Knotweed control treatments</td>
<td></td>
<td>Not Specified</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Requirement for equipment cleaning</td>
<td>$1, $2</td>
<td>Not Specified</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Training &amp; support of watershed controls</td>
<td>$1, $2</td>
<td>Not Specified</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- The “Progress” column now shows before “Progress Details”.

![Image of spreadsheet with modified column order]
Lesson 8 Work Plan – 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 Total column header to expand the columns to display years.
   - Work Units must be entered at the Staff level.
   - If Staff is not showing for the task click on the + symbol.
   - 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 rollup at the task, activity, strategy, Results Chain, and project levels after entering and leaving a cell.

   ![Customize Table](image)

   ![Work Plan](image)

**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 decide to enter work units in quarters, Miradi will automatically convert the Year total to match to the total of entries in quarters. Miradi always honors the finest granularity of data entered in columns (dates).
Lesson 8 Work Plan – Work Units, 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” for work specifically associated with the Strategy (and not Activity or Task).
   - 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 Units column for FY15.
3. **Using the “Filter by People” button**
   - In “Customize Table” turn on “Who Work Assignments” if it’s not already turned on.
   - Click on the “Filter by People” button and select “Staff 2”. 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).
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”.

<table>
<thead>
<tr>
<th>Expense</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Material required to secure facility</td>
<td>7500</td>
</tr>
</tbody>
</table>
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.)
- To add a “Projected Expense” for “Contact all watershed council leaders”, right click on “Contact all watershed council leaders” then select “Create Projected Expense”.
- For the task “Contact all watershed council leaders” enter $2000 in FY15, FY16 and FY17 in the row for Projected Expense.
- If you had entered an expense in the Total column, then later entered data into individual year columns, Miradi will replace the previous entry in the Total column with the sum of the yearly values.
- Enter 125,000 into the “Projected Expenses” “Total” column for the “Knotweed control treatments” Strategy.

Pull-down menu from right click on “Contact all watershed council leaders”
3. Coding Expense data

- Expense data can be coded by Accounting Codes, Funding Sources, and two optional fields (Category #1 and Category #2).
- 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 expense row “Contact all watershed council leaders” task.
- You can now use the pull-down menu under “Accounting Codes” to assign the expense to the CONTRACTUAL category (Note: if you don’t see your new entry in the pull-down, switch from Work Plan view to Summary or Diagram view and then back to Work Plan view to refresh). The contractors name “Contractor XYZ” can be entered in the first data entry cell.

Pull-down menu
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.

   ![Strategic Plan View](image)

   - 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
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. Enter “Report 1” then click on “Save RTF”.
   - File saves to “My Documents”.
   - Open this Word file (Report 1) 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 in the menu). For example, check the boxes for “Conceptual Model”, “Results Chains”, and “Work Plan”.
3. Custom Reports, continued
   • Click on “Run Selected”, then in “Report Template” name the report “Report 2” the click on the Save RTF” button”. Screen will show Information that “Selected Report Template Was Exported as RTF”. Click “OK” button.
   • To view report, open Windows Explorer, then “My Documents” and double click on “Report 2.rtf”.

4. Exporting Diagrams & tables
   • In Miradi click on the top “File” menu, select “Export Current Page as…”,
   • Then select JPEG or PNG Image for diagrams or RTF for tables
   • Create a folder in “My Documents” entitled “Miradi Export” (for purposes of this tutorial) and export the page to that folder.
Lesson 11 Results Status

Entering Results Status

• One of the very popular features of Miradi has been the ability in the Work Plan to quickly assign red, yellow, green progress ratings to Intermediate Results to show how a team is doing implementing their plan. Another method for entering this information in the diagram view is by a new option under the Control Bar entitled “Results Status”. The method for entering progress rating using “Results Status” is shown below.

• In the Results Chain diagram, click on “Results Status” in the “Control Bar” menu.

• Next open the Intermediate Result titled “Regulations adopted & enforced”.

• In the open Intermediate Result, open the tab “Result Report” then click on “Create Result Report” to enter Result Report information as shown on the next page.
Lesson 11 Results Status, continued

- Complete Result Report information and status by entering Result Date and selecting Result Status from the pull-down menu. In this case, enter “2016-12-01” for date and select “Achieved” for the Results Status. Details can also be entered if desired or necessary.

- Multiple entries can be made in the same manner. Make second entry as shown below.

- In the Results Chain, the Results Status shows as a box in the lower right hand corner of the factor and the information for the current Result Status can be read in the hover text box.
Lesson 12 Progress Status

Entering Progress Status

- Miradi also provides the ability to quickly assign progress status to Strategies and Activities to show how a team is progressing with their plan. This information can be entered in the diagram view by a new option under the Control Bar titled “Progress Status”. The method for entering progress status using “Progress Status” is shown below.

- In the Results Chain diagram click on “Progress Status” in the “Control Bar” menu.
- Next open the Activity “Develop survey protocol”.

- In the open Activity, open the tab “Progress Report” then click on “Create Progress Report” to enter Progress Report information as shown on the next page.
Lesson 12 Progress Status, continued

- Complete Progress Report information and status by entering Progress Date and selecting Progress Status from the pull-down menu. Details can also be entered if desired or necessary.

- In the Results Chain, the Progress Status shows as a box in the lower right hand corner of the activity and the information for the current Progress Status can be read in the hover text box.

- The method for entering Progress Status for Strategies is the same as for entering Progress Status for Activities.
Lesson 13 Evidence Documentation

Entering Evidence

• Miradi provides strong support for documenting the type of evidence being used to support your work. There are evidence rating systems that pertain to different types of evidence:
  • For goals and objectives an evidence rating can be assigned that serves as the basis for any quantitative values specified in your goal or objective statement.
  • There is a basis for capturing the evidence around indicator measurement data you are gathering.

• To add evidence for the Goal for the Target “Riparian System” in the Results Chain, right click on the Goal A to open the dialog box.

• In the dialog box the Goal is to achieve native dominate vegetation in over 80% of riparian system by 2020. To establish where this number came from there is a “Goal Evidence” selection box.
• Clicking on the Goal Evidence “Select” box brings up 5 categories of evidence in the pull-down menu. For purposes of this exercise, select “External Research”. In Evidence Notes add the note “Martin, J. 2017. Restoration of native vegetation after knotweed control”. Natural Areas Journal: volume 45, pages 34-38.

• Objective Evidence (for instance Objective 1 for the Threat Reduction factor “Reduce spread of knotweed”) can be entered using the same process as for Goal Evidence. In this case “Expert Knowledge” was selected.
Lesson 13 Evidence Documentation (cont.)

• To enter evidence for an Indicator, click on the Indicator for the Threat Reduction “Reduce spread of knotweed”. Highlight the measurement for 2014-08-31: 80 then click on the Source Select box to open the pull-down menu. For purposes of this exercise, select “Rapid Assessment”.

• The Evidence Ratings for the above can be viewed by customizing the table in the Strategic Plan view. (See Strategic Plan Views in Lesson 10)
Lesson 14: Managing Tags

Using and Managing Tags

• The tagging feature is an important way for displaying only portions of a diagram when you are describing the logic to others. Tags can be used in Conceptual Model diagrams and Results Chains diagrams. Tags are diagram specific, i.e.; you just see the tags that are being used on a specific diagram. Following is the method for tagging in the Conceptual Model (process is the same for Results Chains).

• In the Conceptual Model diagram, click on “Manage Tags” in the Control Bar, then click on “Create” then enter an ID number and a name in the “Name” box. In this exercise enter ID number “1” and name “Training & Support” which represents the Strategy “Training & support of watershed councils”. Then close dialog box.

• In the Conceptual Model diagram, highlight the factors you want to include in the tag for “Training & Support”.

![Conceptual Model Diagram](image-url)
Lesson 14: Managing Tags, continued

• Next right-click on the Strategy “Training & support of watershed councils”, then click on “Add tag to 9 Selected Item(s)” then click on “1. Training & Support”.

• Then in the diagram Control Bar, click on “1. Training & Support” to view Tag.
Lesson 14: Managing Tags, continued

- An alternative method for creating a Tags is as follows. In the Conceptual Model diagram, click on “Manage Tags” in the Control Bar, then click on “Create” then enter an ID number and a name in the “Name” box. In this exercise enter ID number “2” and name “Equipment Cleaning” which represents the Strategy “Requirement for equipment cleaning”.

- In the Conceptual Model diagram, right click on the Strategy “Requirement for equipment cleaning”, then from the pull-down menu click on “Select Factor Chain” to select the factors to be included in Tag 2.
Lesson 14: Managing Tags, continued

- “Selected Factor Chain” is shown below.

- Note that in the above diagram illustration the group box for “Invasive Plants” was not selected by the “Select Factor Chain”. The group box must be manually selected so the link between “Japanese Knotweed” and the target “Riparian System” will show in the Tag.
• Next open the Strategy “Requirement for equipment cleaning”, then click on “Add tag to 6 Selected Item(s)” then click on “2 Equipment Cleaning” to establish the factors to be included in Tag.

• Then in the diagram Control Bar, click on “2. Equipment Cleaning” to view Tag.