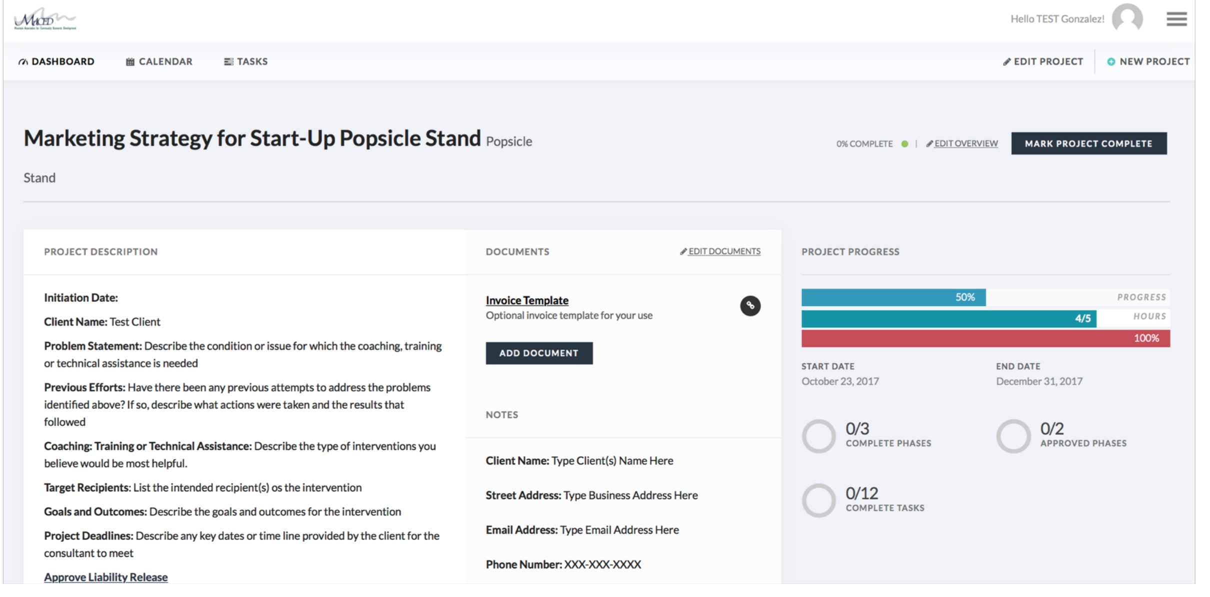
Mountain Association for Community Economic Development

TECHNICAL ASSISTANCE ONLINE PROJECT HUB

The MACED Enterprise Development team is excited to work on your technical assistance project. This project will be managed through our online project hub, where the MACED team, our consultants and clients can collaborate on projects together – providing more transparency, improving project management, and ensuring that goals and requirements have been met.



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TECHNICAL ASSISTANCE ONLINE PROJECT HUB

The Technical Assistance Online Project Hub allows us to virtually collaborate throughout this project. You will need an internet connection and updated browser (Chrome and Firefox are recommended, sometimes Microsoft browsers experience glitches).

To get started with your project, please take the following steps:

1 Go to LOANS.MACED.ORG and log-in
(You can log-in via top right-hand corner by selecting log-in or by navigating to the "Individual Coaching & Consulting" page)

2 User Portal– click blue button ACCESS MY TECHNICAL ASSISTANCE PROJECTS
Now that you have a MACED account, anytime you log-in (or visit our site already logged in), you will be directed into your user portal, where you can easily navigate to your current projects or loans, update your account information, or find additional resources.

3 CLICK ON YOUR PROJECT TO ENTER THE PROJECT DASHBOARD
In this initial view you can navigate between active and completed projects in the teal menu. Most likely you will only have 1 active project at a time.

4 REVIEW PROJECT DESCRIPTION
The project description is a short summary of the problem we are solving, goals, and other pertinent information.

5 REVIEW & APPROVE PHASE 2 PROJECT PROPOSAL
Phase 1 was the initial background assessment carried out by the consultant. Phase 2 is where the consultant will outline the project goals and tasks based on their findings from the assessment. Review the project by scrolling to bottom and selecting tasks to see what the consultant has proposed. Based on your review, open the approvals section under tasks in Phase 2 and select either "Accept, Decline, or Changes Needed"

6 MONITOR & APPROVE PROJECT
Once your project begins you will be able to monitor the progress made as the consultant checks off tasks completed vs the timeline. You will also be asked to approve invoices and work submitted by your consultant through the project dashboard

TECHNICAL ASSISTANCE ONLINE PROJECT HUB

LOGGING IN:

1 You will receive an email with your account information
Sender: loans@maced.org | Check your junk mail if you don't see it

MACED Enterprise Development Inbox -...nc@gmail.com 1:46 PM
Your MACED Account Information
To: Noah Landing,
Reply-To: Maced Enterprise Development

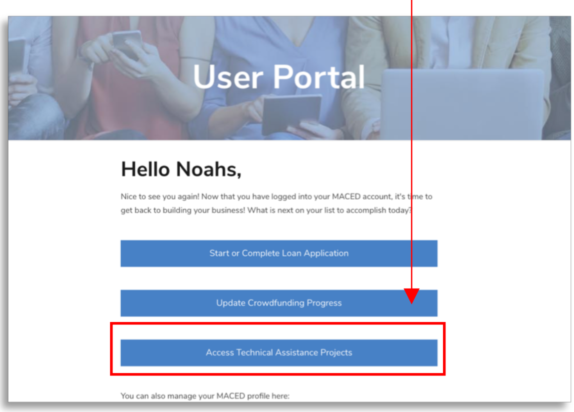
Congratulations on your new project with MACED. You will be able to access your project management dashboard at https://loans.maced.org/TAProject

Your login information is:
Username: noahslandingnc@gmail.com
Password: MigoMarketing

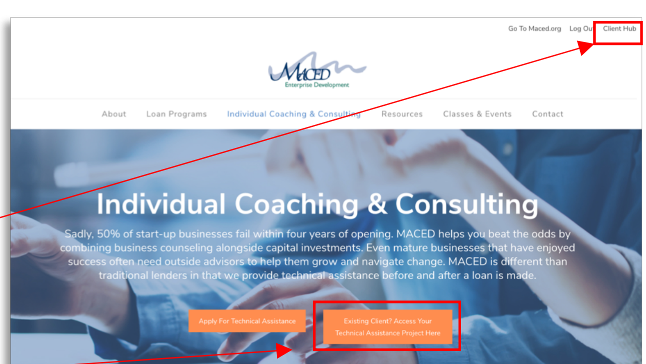
If you have any questions, please contact loans@maced.org

Thank you!

2 Log-in to your MACED Account at **loans.maced.org** in the top right of your screen (this is also where you can reset your password) and select Access Technical Assistance Projects from your client hub.



3 If you are already logged in when you arrive at loans.maced org you can simply navigate to your client hub or to the Individual Coaching & Consulting page. Then click Access Technical Assistance Project Button.



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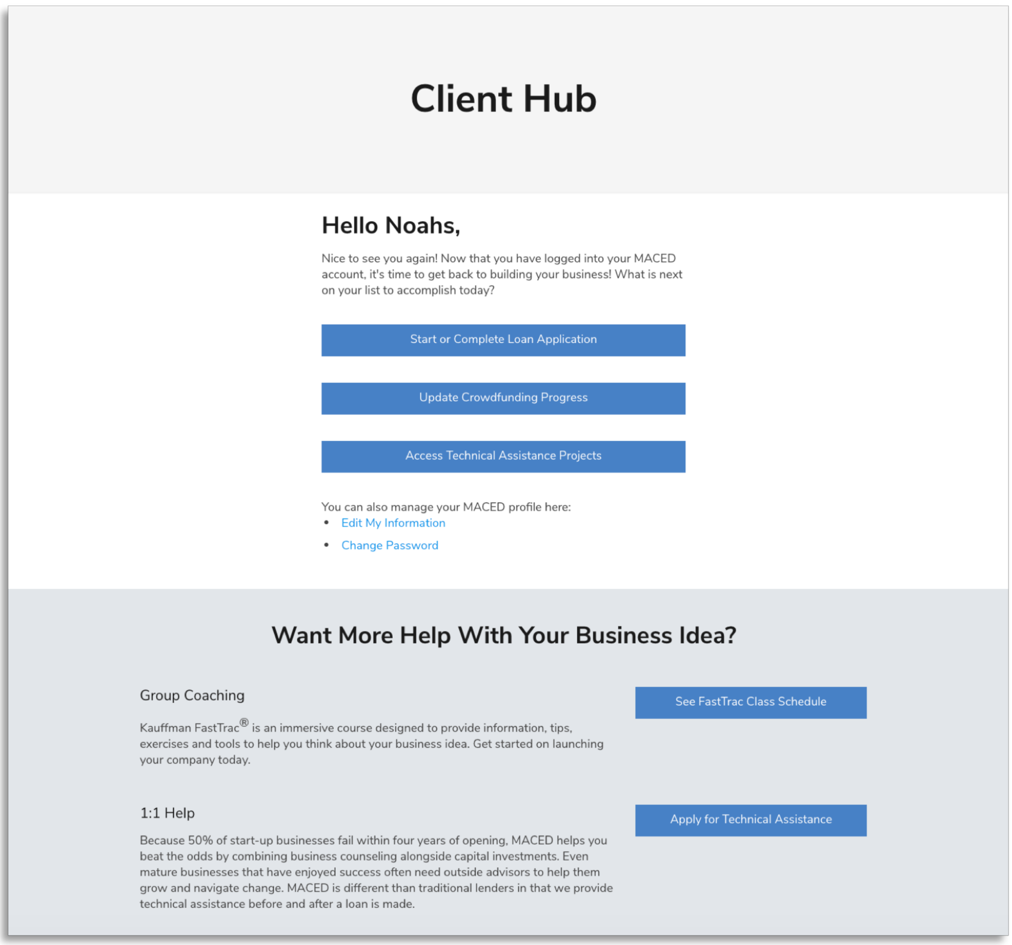
TECHNICAL ASSISTANCE ONLINE PROJECT HUB

MACED CLIENT HUB:

Whenever you log in at **loans.maced.org** you will be directed automatically directed into your user portal.



You can access your client hub by logging in via the top right corner, or if you are already logged in just click “client hub”. Once inside, you can:

- Start or complete a loan application
- Update your Crowdfunding Progress (may not apply to you)
- Access Technical Assistance Projects
- Edit your profile
- Change password
- Access resources to help with your business development

MACED
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TECHNICAL ASSISTANCE ONLINE PROJECT HUB

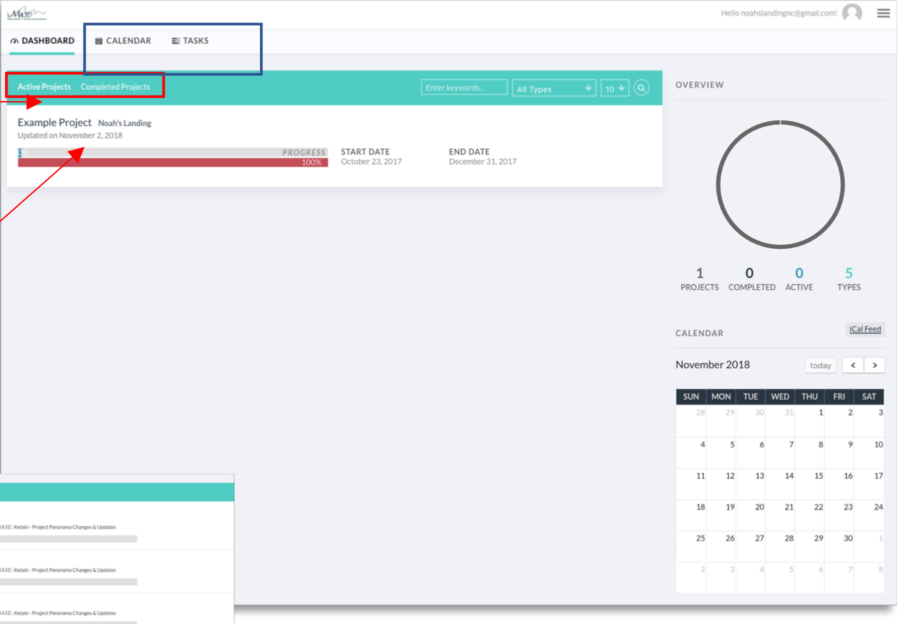
PROJECT HUB:

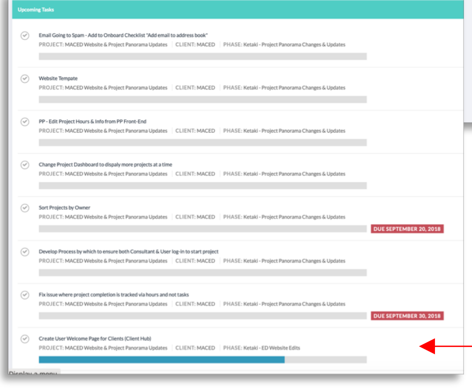
The project hub (www.loans.maced.org/TAProject) can be accessed by typing in the URL directly, or via clicking the “Access my TA Project” button inside your client hub or on the Individual Coaching & Consulting Page.

When you arrive in your Project Hub you will see a list of your active projects. Here you can navigate between active projects, completed projects, view the calendar for upcoming deadlines and see assigned tasks.

View active and completed projects

Click on a specific project to enter into the Project Dashboard





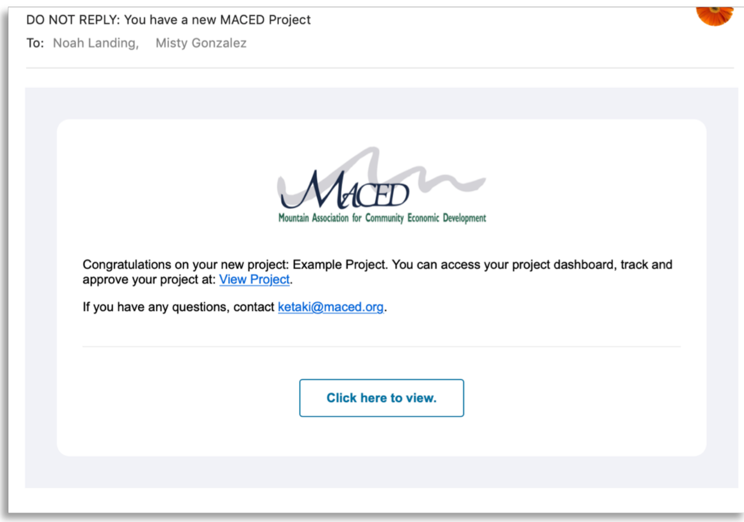
View tasks that have been set by your consultant and due dates by hitting the “Tasks” tab at the top (see blue square above).

TECHNICAL ASSISTANCE ONLINE PROJECT HUB

PROJECT DASHBOARD:

1

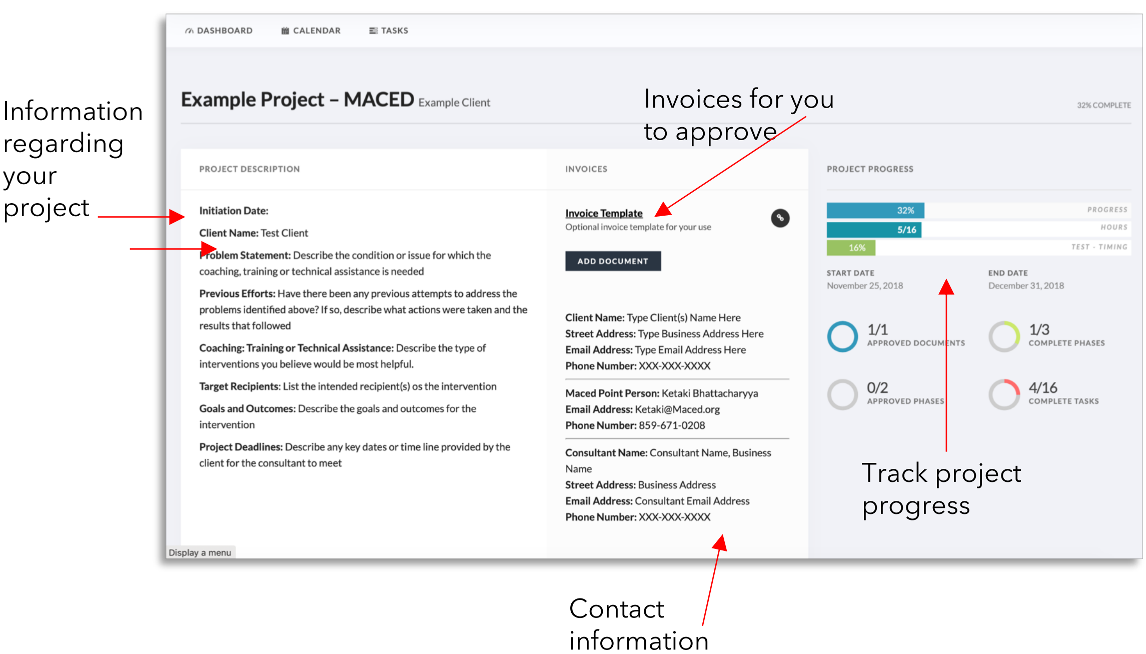
Once your project has been created, you will receive an email like the one below with links to access that project directly. If you are not already logged in when you click the link, you will be directed into your client hub and need to navigate to your project by clicking the "Access My TA Project Button" and then clicking on the title of your project in the project hub.



Inside the Project Dashboard you will be able to view and approve the project objectives, tasks, invoices and more. This is how you will track the project of your progress and communicate with parties involved.

2

At the top of the page you will see important information about your project, contact information and invoices (which you will need to approve).



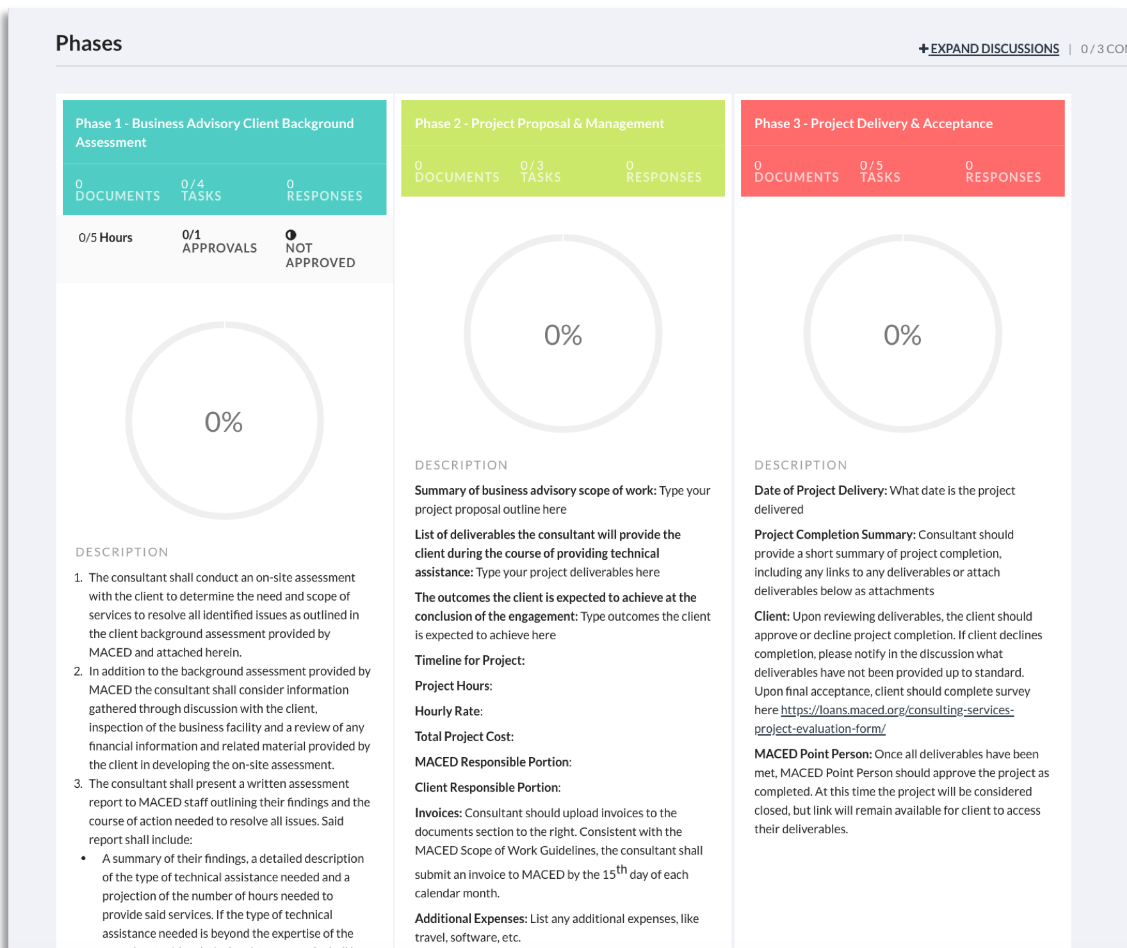
TECHNICAL ASSISTANCE ONLINE PROJECT HUB

PROJECT PHASES:

3

As you scroll down, you will see your project – divided into 3 phases. You will primarily be working in Phase 2.

1. Phase 1 is the initial assessment that your consultant provided and should already be completed once you access the project. You will not need to do anything in Phase 1.
2. Phase 2 is where your consultant will propose the project based on the initial assessment that occurred in Phase 1. This will happen in the Phase 2 description and in the tasks laid out below. Be sure to review Phase 2 very closely and then approve the Phase if the project proposal meets your satisfaction.
3. Phase 3 is where the project is closed. You will be assigned a task in Phase 3 to complete a Consultant survey following the completion of your project.



TECHNICAL ASSISTANCE ONLINE PROJECT HUB

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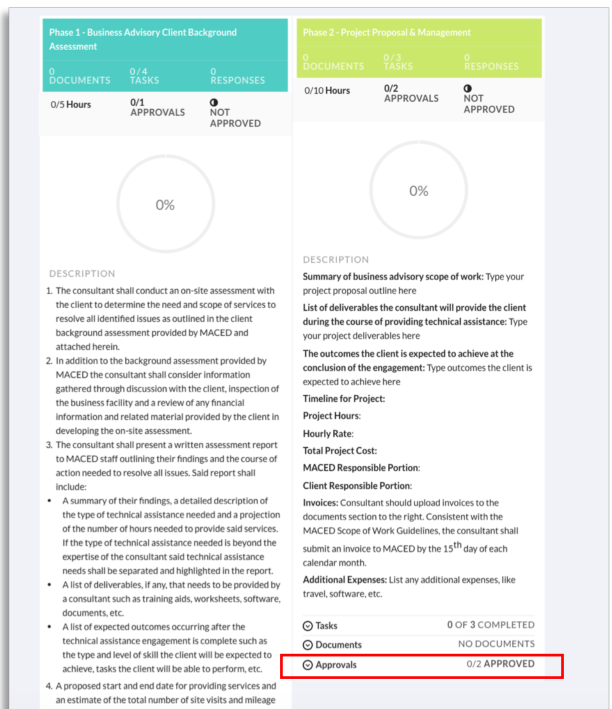
APPROVALS:

4

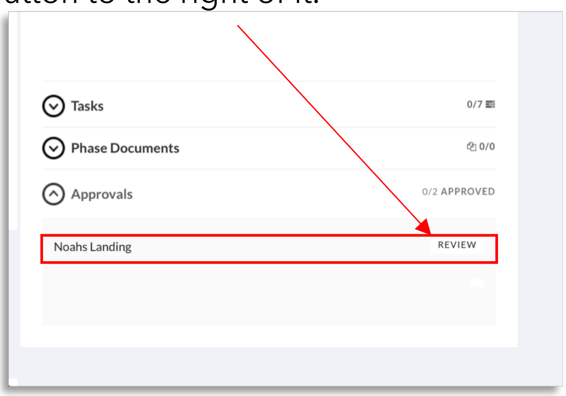
As part of your project requirements, you must approve two things:
1. The project proposed by your consultant in Phase 2.
2. Invoices submitted by your consultant for work completed.

APPROVING PHASES

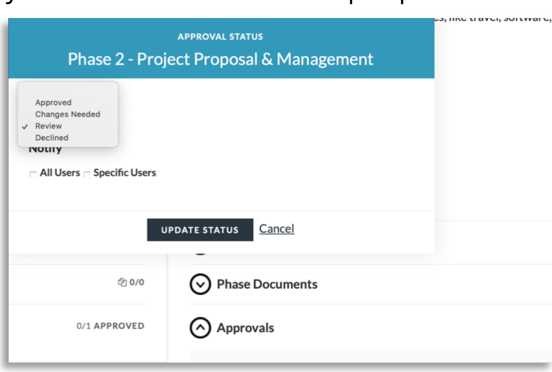
Navigate to the bottom of the phase you are approving (Phase 2).

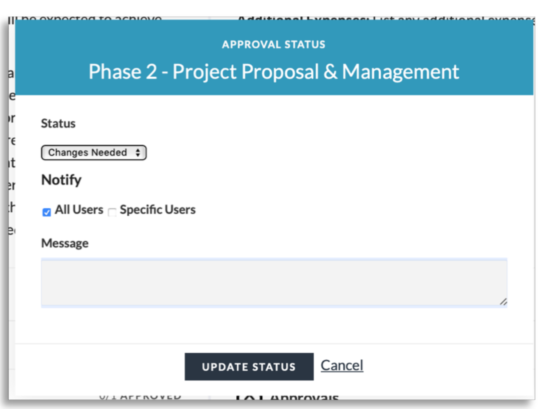


Expand the approvals list by clicking on the arrow, find your name and click the button to the right of it.



In the pop-up box select approve, decline or changes needed based on your assessment of the proposal



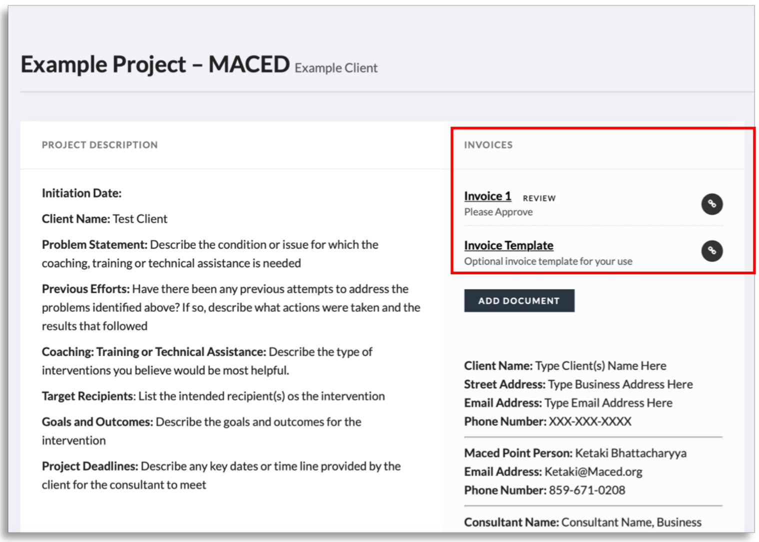


Once a selection is made, you will have the opportunity to notify the other project participants and can add a message explaining your reason for declining or the changes requested if you do not approve.

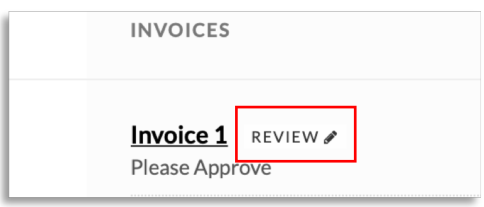
TECHNICAL ASSISTANCE ONLINE PROJECT HUB

APPROVALS:

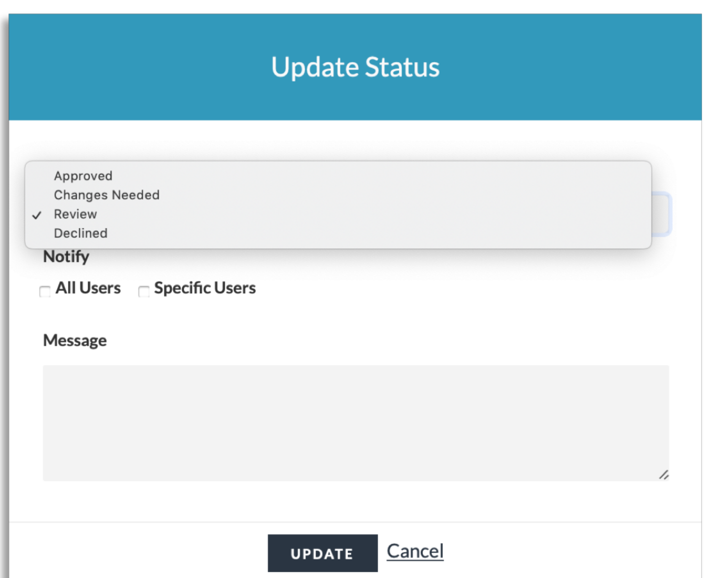
APPROVING INVOICES



Invoices will be located at the top of your project dashboard



Click on the invoice 1 text to download a copy of the invoice, and then click on the review text next to the invoice to update the status to approved or declined based on your review.



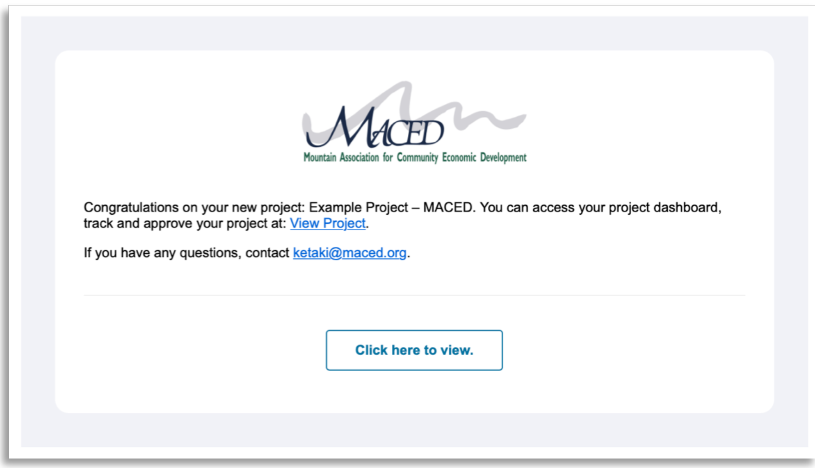
Change the status to approve, declined or changes needed based on your review of the invoice. Please then check to notify “ALL USERS” of your invoice update.

You can add a message regarding changes needed or any notes if you like.

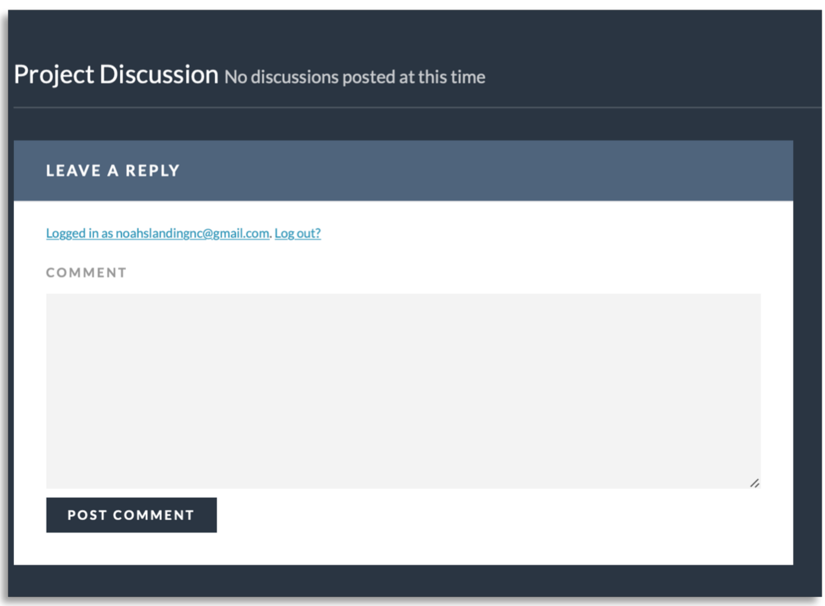
TECHNICAL ASSISTANCE ONLINE PROJECT HUB

COMMUNICATING

Communicating back and forth on your project is important for making sure your consultant and the MACED team no what your needs and expectations are. Below are helpful tips in communicating.



You will receive email notifications whenever new invoices have been added to the project or changes have been made. We ask that you not reply to the email notifications with your response, but rather navigate into the project dashboard and respond accordingly.



At the bottom of each project dashboard you will find a project discussion section where you can post and reply to comments. This is a great place to add notes regarding project tasks, timelines, expectations, changes so that they can be tracked and referenced by all parties involved.

When approving phases or invoices you also have the opportunity to send a message to your consultant and MACED team member. This message will be delivered via email as a project notification. If you would like it recorded in your project dashboard be sure to also copy your message to the project discussion section.

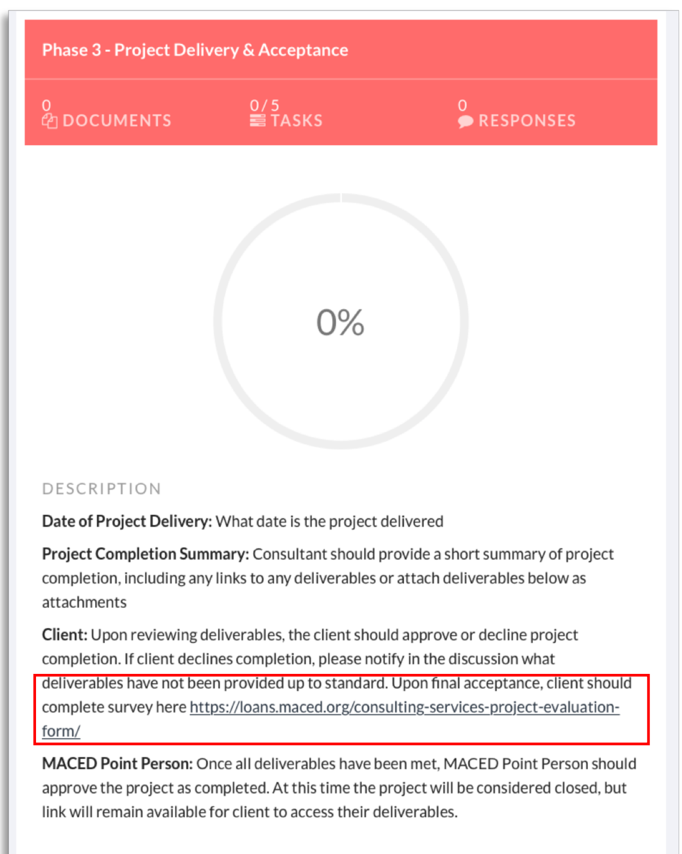
TECHNICAL ASSISTANCE
ONLINE PROJECT HUB

PROJECT COMPLETION

Upon completion of your project, all final invoices should be reviewed and approved by the you, the client. Be sure that you have received all project deliverables as expected:

- Do you have all necessary files relevant to your project.
- Do you have proper training for moving forward without your consultant.
- If applicable, do you have all necessary log-in information for any programs you may be utilizing.
- If applicable, have you been made the administrator of any programs you might be using.
- If applicable, have you set up any recurring billing for programs with your payment information.

Once you have received all items and information necessary to maintaining the success of your project, please complete the Consultant Evaluation Survey. You will find the link in Phase 3 – click on it, and complete the form.



Phase 3 - Project Delivery & Acceptance

0 DOCUMENTS | 0 / 5 TASKS | 0 RESPONSES

0%

DESCRIPTION

Date of Project Delivery: What date is the project delivered

Project Completion Summary: Consultant should provide a short summary of project completion, including any links to any deliverables or attach deliverables below as attachments

Client: Upon reviewing deliverables, the client should approve or decline project completion. If client declines completion, please notify in the discussion what deliverables have not been provided up to standard. Upon final acceptance, client should complete survey here https://loans.maced.org/consulting-services-project-evaluation-form/

MACED Point Person: Once all deliverables have been met, MACED Point Person should approve the project as completed. At this time the project will be considered closed, but link will remain available for client to access their deliverables.

Consulting Services Project Evaluation Form

Consulting Services Project Evaluation

Did you recently complete a business advisory project with one of our referred consultants? Please provide feedback on that project and your experience with the consultant here.

Your First Name

Your Last Name

Your Business Name

Point Person in Your Organization

Who was the person within your organization working directly with the consultant

Your Phone Number

Your Email Address

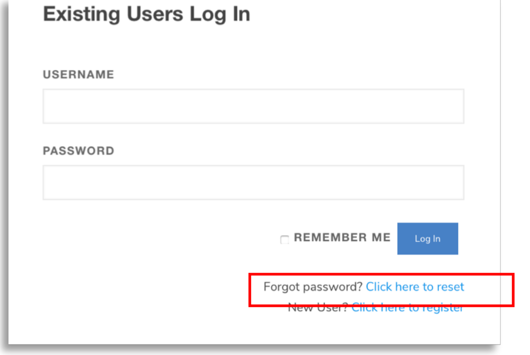
Consultant You Worked With

Next

TECHNICAL ASSISTANCE ONLINE PROJECT HUB

FAQs & TROUBLESHOOTING

How do I change my password?



There are 2 ways to change your password.

1) Click on the "log-in" button in the top right corner. Below the log-in area is "Forgot Password", you can click to reset your password and an email with a reset password link will be sent to you.

2) If you are already logged in and would like to change your password, click on "Client Hub" in the top right corner and you will be able to do so within your client hub.

What if I can't remember my username
Your username is your email address.

What if I can't remember the web address for my project?
That's fine, there are plenty of ways to locate your project when you log-in.

Refer to the slide on logging-in and project hub

Some quick links to guide you:
Client Hub - https://loans.maced.org/user-portal/
Technical Assistance Project Hub - https://loans.maced.org/TAProject/
Log-in - https://loans.maced.org/login/
Web Support - https://loans.maced.org/website-support/