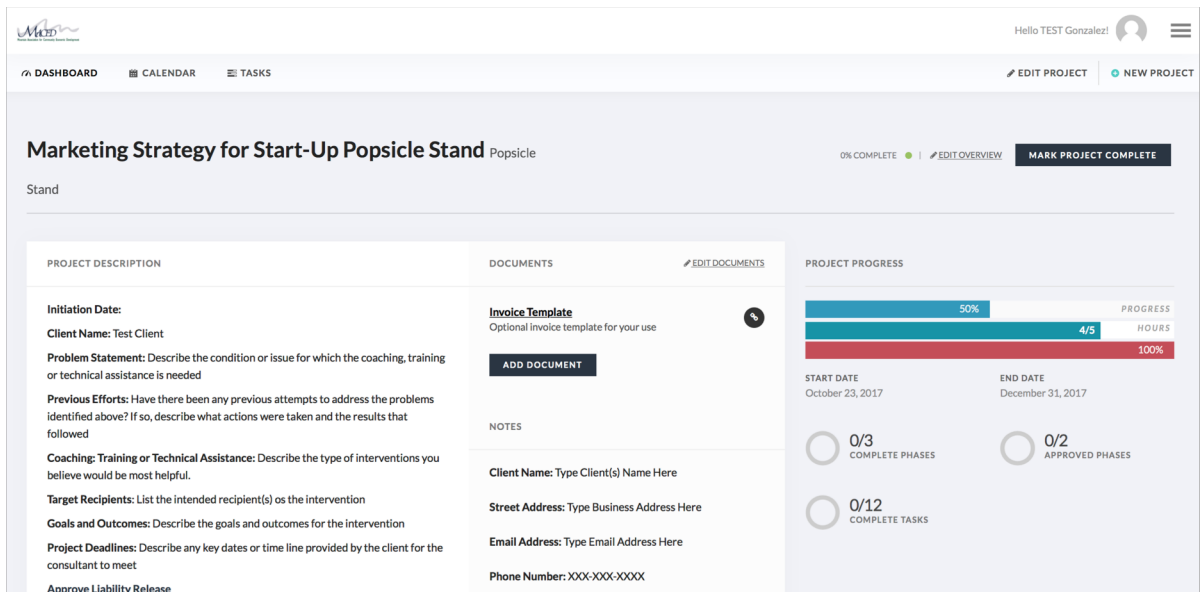


The MACED Enterprise Development team is excited to partner with you in supporting our client's businesses. Projects you work on will be managed through our online project hub, where the MACED team, consultants and clients can collaborate on projects together – providing more transparency, improving project management, and ensuring that goals and requirements are met.



The screenshot shows a user interface for a project titled "Marketing Strategy for Start-Up Popsicle Stand". The interface includes a navigation bar with "DASHBOARD", "CALENDAR", and "TASKS". The project name is displayed prominently, along with a progress indicator showing "0% COMPLETE" and a "MARK PROJECT COMPLETE" button. The main content area is divided into three columns: "PROJECT DESCRIPTION", "DOCUMENTS", and "PROJECT PROGRESS".

PROJECT DESCRIPTION:

- Initiation Date:**
- Client Name:** Test Client
- Problem Statement:** Describe the condition or issue for which the coaching, training or technical assistance is needed
- Previous Efforts:** Have there been any previous attempts to address the problems identified above? If so, describe what actions were taken and the results that followed
- Coaching: Training or Technical Assistance:** Describe the type of interventions you believe would be most helpful.
- Target Recipients:** List the intended recipient(s) on the intervention
- Goals and Outcomes:** Describe the goals and outcomes for the intervention
- Project Deadlines:** Describe any key dates or time line provided by the client for the consultant to meet
- Approve Liability Release**

DOCUMENTS:

- Invoice Template:** Optional invoice template for your use
- ADD DOCUMENT** button

NOTES:

- Client Name:** Type Client(s) Name Here
- Street Address:** Type Business Address Here
- Email Address:** Type Email Address Here
- Phone Number:** XXX-XXX-XXXX

PROJECT PROGRESS:

- PROGRESS:** 50% (4/5 HOURS)
- START DATE:** October 23, 2017
- END DATE:** December 31, 2017
- 0/3 COMPLETE PHASES**
- 0/2 APPROVED PHASES**
- 0/12 COMPLETE TASKS**

TABLE OF CONTENTS

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 - [Logging In](#)
 - [ConsultantHub](#)
 - [Project Hub](#)
 - [Project Dashboard](#)
- [Project Phases](#)
 - [Phase 1 - Assessment](#)
 - [Phase 2 - Proposal](#)
 - [Phase 3 - Completion](#)
- [Invoices](#)
- [Track Hours](#)
- [Communication](#)
- [FAQs & Troubleshooting](#)

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).

Below is a quick guide to managing your project:

1

LOG IN AT LOANS.MACED.ORG (You can log-in via top right-hand corner by selecting log-in). To reset your password - click forgot password below the log-in credentials. Your username is your email address.

2

NAVIGATE TO YOUR PROJECT Once logged in, you will automatically be navigated to the "Consultant Hub" any time you first visit the website. Inside the Consultant hub, click on the button "Access My MACED Project(s)". Click on your current project. <https://loans.maced.org/TAProject/>

3

GET STARTED - REVIEW PROJECT

Within the project dashboard you will be able to review the project description and contact information for the client, as well as propose your scope of work, track your progress, submit invoices and communicate with your client.

4

PHASE 1

After reviewing your new project, set a date for the assessment with the client and provide your written assessment in Phase 2.

5

PHASE 2

Submit your proposal by editing the Phase 2 description and setting up a series of tasks to reflect your deliverables and key tasks within your scope of work. Also, edit the end date of the project and the hours proposed for the project. The completion of your tasks against the end date will be tracked to show project progress.

6

SUBMIT INVOICES

All invoices should be uploaded to the project dashboard invoice section by the 15th of every month. Please notify all users when an invoice is uploaded - the client must approve the invoice before payment can be made.

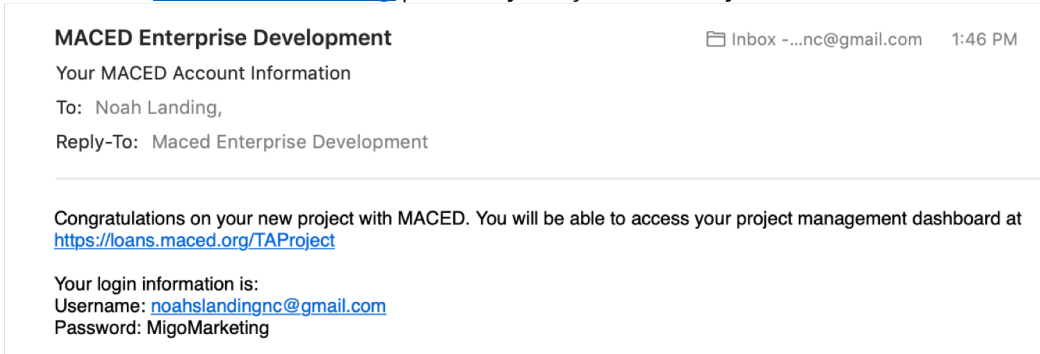
7

PHASE 3

Review and complete all tasks in Phase 3 at the end of the project.

LOGGING IN:

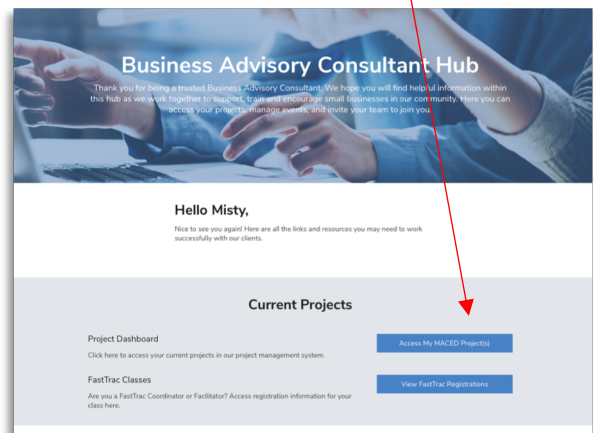
- 1 You will receive an email with your account information
Sender: loans@maced.org | Check your junk mail if you don't see it



- 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.



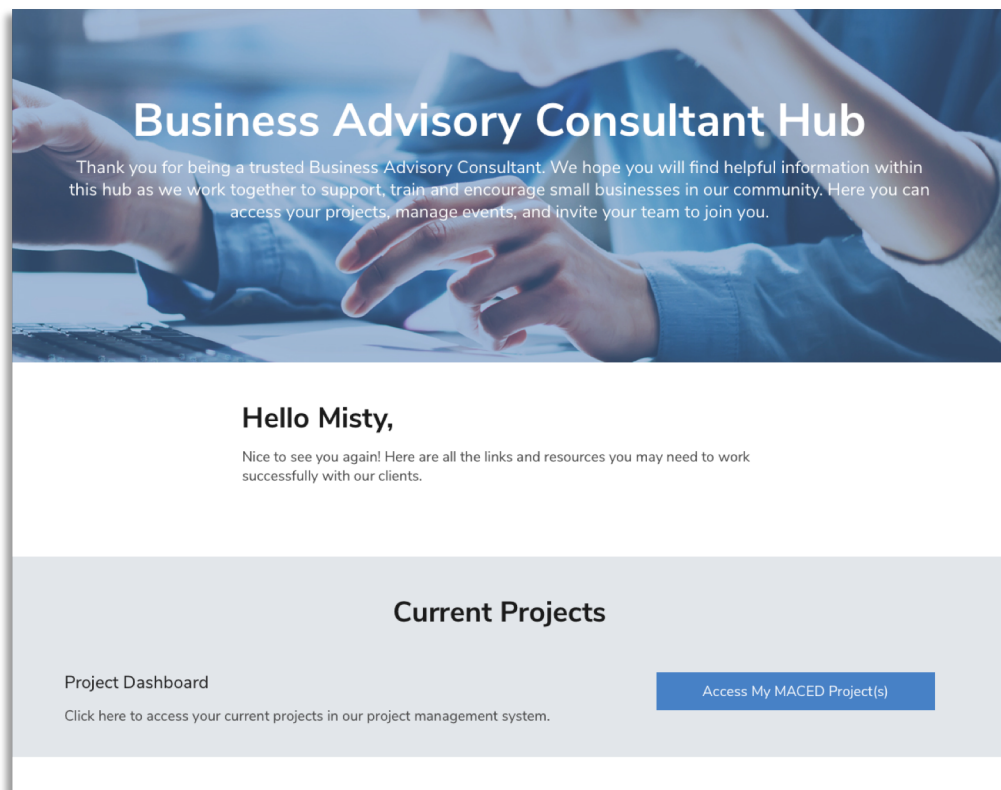
- 3 If you are already logged in when you arrive at loans.maced.org you can simply navigate to your consultant hub or to the Individual Coaching & Consulting page. Then click Access Technical Assistance Project Button.



MACED BUSINESS ADVISORY CONSULTANT HUB:

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

<https://loans.maced.org/consultant-hub/>



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

- Access your MACED
- Review helpful tutorials for managing your projects
- Review consultant contracts
- Edit your profile
- Change password
- Add team members to your project team, so they can also manage projects

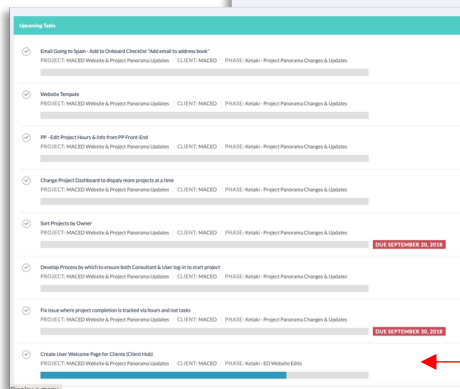
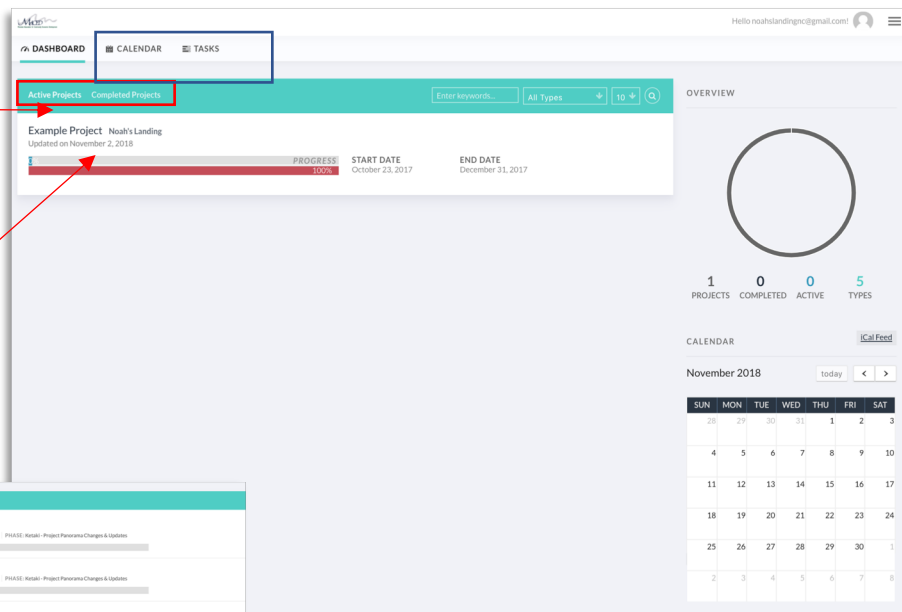
PROJECT HUB:

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 consultant 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

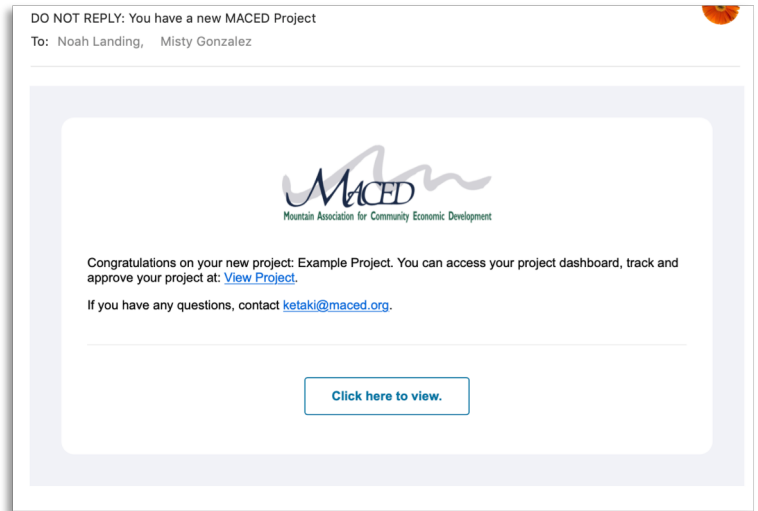
Click on a specific project to enter into the Project Dashboard



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

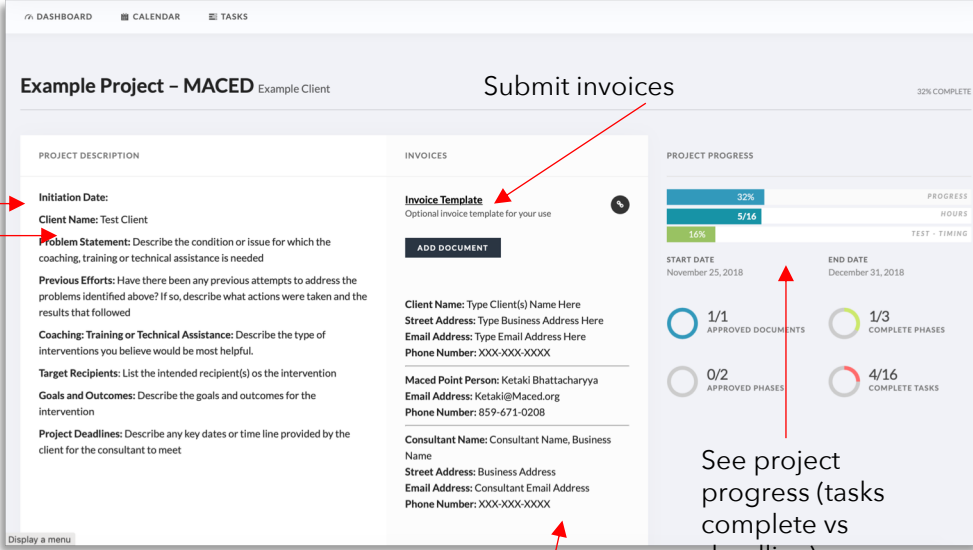
PROJECT DASHBOARD:

Once you have been invited to consult on a project, 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 consultant 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 propose your project, submit invoices, update project status and communicate with your client.

At the top of the page you will see important information about your project, contact information and invoices (which you will need to submit for approval). You will navigate to Phase 1 to accept your project.



Information regarding your project →

Submit invoices →

Contact information →

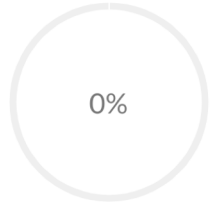
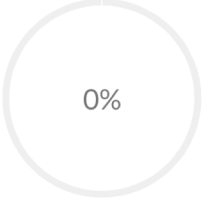
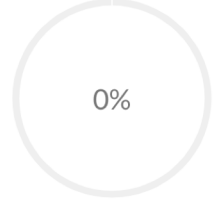
See project progress (tasks complete vs deadline) →

OVERVIEW OF PROJECT PHASES:

As you scroll down, you will see your project - divided into 3 phases.

1. [Phase 1](#) is the Background Assessment. After reviewing the project, you will schedule a time with the client for the initial assessment.
2. [Phase 2](#) is the Project Proposal & Management. After the assessment you will create an SOW (Statement of Work) for the client in the project description, add proposed hours to the project as well as add key tasks and deliverables of the project, that will allow clients and MACED to track the progress.
3. [Phase 3](#) is where the project is closed. After you have completed the project review the tasks outlined in Phase 3 and ensure you have completed all expectations.

Phases
[+EXPAND DISCUSSIONS](#) | 0/3 COI

Phase 1 - Business Advisory Client Background Assessment	Phase 2 - Project Proposal & Management	Phase 3 - Project Delivery & Acceptance
<div style="display: flex; justify-content: space-around; font-size: small;"> 0 DOCUMENTS 0/4 TASKS 0 RESPONSES </div> <div style="display: flex; justify-content: space-around; font-size: small; margin-top: 5px;"> 0/5 Hours 0/1 APPROVALS 0 NOT APPROVED </div> <div style="text-align: center; margin-top: 20px;">  <p>0%</p> </div> <div style="font-size: x-small; margin-top: 10px;"> <p>DESCRIPTION</p> <ol style="list-style-type: none"> The consultant shall conduct an on-site assessment with the client to determine the need and scope of services to resolve all identified issues as outlined in the client background assessment provided by MACED and attached herein. In addition to the background assessment provided by MACED the consultant shall consider information gathered through discussion with the client, inspection of the business facility and a review of any financial information and related material provided by the client in developing the on-site assessment. The consultant shall present a written assessment report to MACED staff outlining their findings and the course of action needed to resolve all issues. Said report shall include: <ul style="list-style-type: none"> A summary of their findings, a detailed description of the type of technical assistance needed and a projection of the number of hours needed to provide said services. If the type of technical assistance needed is beyond the expertise of the consultant said technical assistance needs shall be </div>	<div style="display: flex; justify-content: space-around; font-size: small;"> 0 DOCUMENTS 0/3 TASKS 0 RESPONSES </div> <div style="text-align: center; margin-top: 20px;">  <p>0%</p> </div> <div style="font-size: x-small; margin-top: 10px;"> <p>DESCRIPTION</p> <p>Summary of business advisory scope of work: Type your project proposal outline here</p> <p>List of deliverables the consultant will provide the client during the course of providing technical assistance: Type your project deliverables here</p> <p>The outcomes the client is expected to achieve at the conclusion of the engagement: Type outcomes the client is expected to achieve here</p> <p>Timeline for Project:</p> <p>Project Hours:</p> <p>Hourly Rate:</p> <p>Total Project Cost:</p> <p>MACED Responsible Portion:</p> <p>Client Responsible Portion:</p> <p>Invoices: Consultant should upload invoices to the documents section to the right. Consistent with the MACED Scope of Work Guidelines, the consultant shall submit an invoice to MACED by the 15th day of each calendar month.</p> <p>Additional Expenses: List any additional expenses, like travel, software, etc.</p> </div>	<div style="display: flex; justify-content: space-around; font-size: small;"> 0 DOCUMENTS 0/5 TASKS 0 RESPONSES </div> <div style="text-align: center; margin-top: 20px;">  <p>0%</p> </div> <div style="font-size: x-small; margin-top: 10px;"> <p>DESCRIPTION</p> <p>Date of Project Delivery: What date is the project delivered</p> <p>Project Completion Summary: Consultant should provide a short summary of project completion, including any links to any deliverables or attach deliverables below as attachments</p> <p>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/</p> <p>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.</p> </div>

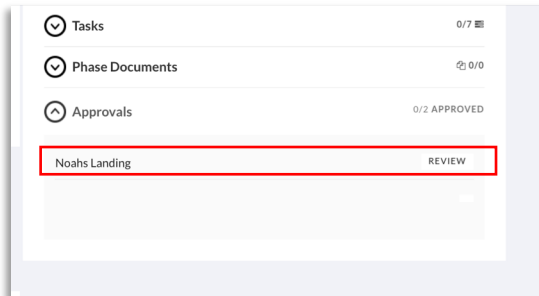
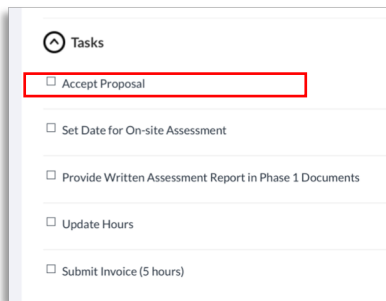
PHASE 1: ACCEPTANCE/APPROVAL/ASSESSMENT

In Phase 1 the consultant has five tasks to complete:

1. Accept Project from MACED
2. Set date for on-site assessment (directly with client, nothing to input into project portal)
3. Provide written assessment report (submit via Phase 1 Documents)
4. Update hours (up to 5 hours completed) reflect time spent on assessment
5. Submit invoice

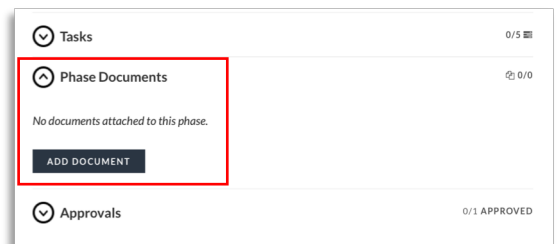
1. ACCEPTANCE/APPROVAL

Navigate to the bottom of Phase 1 and locate the tasks section - click on the arrow to expand and check off each task as you complete (starting with Accept Proposal). Then navigate to approvals - locate your name in the approvals, menu and change status to approved. Once approved you will be given an option to notify users - please select notify all users and then click "update status.

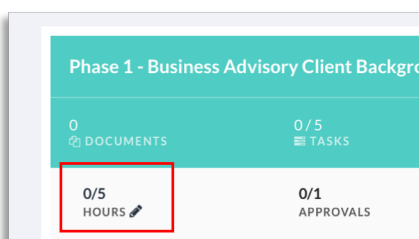


2. UPLOAD WRITTEN ASSESSMENT

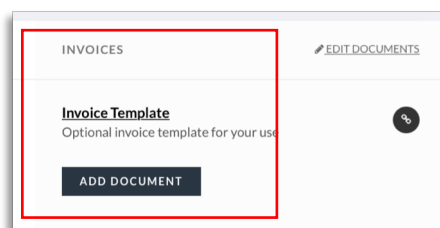
Instructions for what to include in your assessment are located in the Phase 1 Description. Upon completing the assessment, navigate to PHASE 1 "Phase Documents" and upload a written assessment.



3. UPDATE HOURS



4. UPLOAD INVOICE



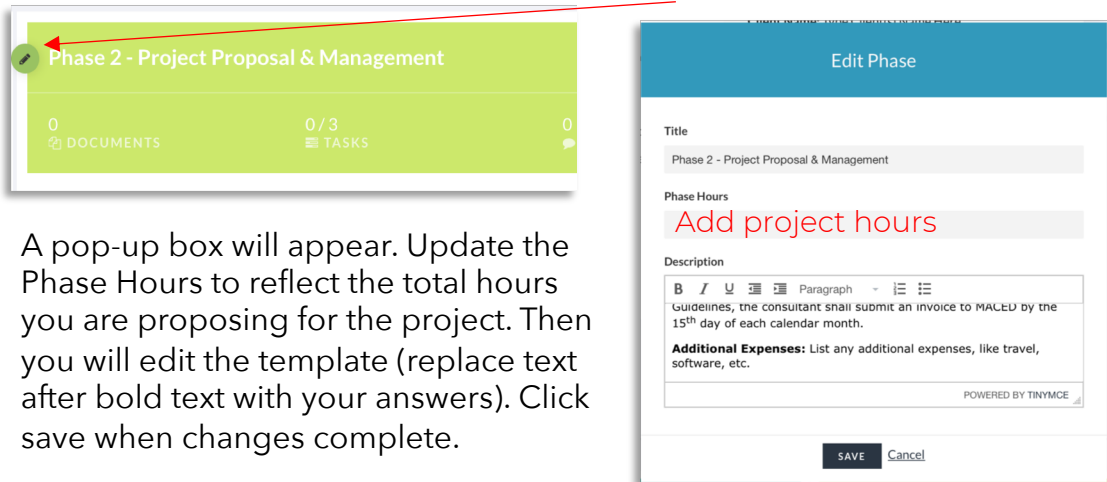
Located at the top/center of project dashboard

PHASE 2: PROJECT PROPOSAL

Upon completion of the Assessment in Phase 1, the next step is proposing the project in Phase 2 and setting up project details

1. UPDATE PHASE 2 DESCRIPTION & HOURS

As you hover over the Phase 2 - Project Proposal Management title a pencil icon will appear (symbol for edit throughout), click on this to edit the project details.

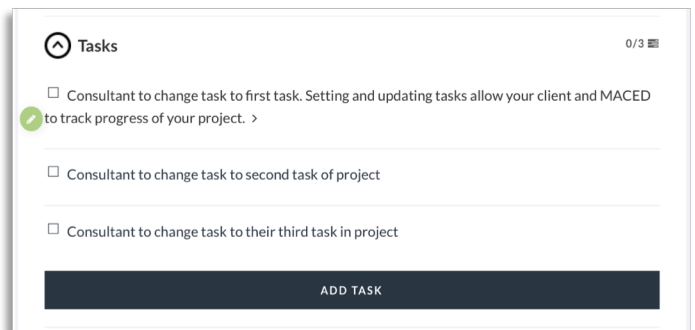


The image shows two screenshots. The left screenshot shows a dashboard for 'Phase 2 - Project Proposal & Management' with a pencil icon on the title bar. Below the title bar are sections for 'DOCUMENTS' (0) and 'TASKS' (0/3). The right screenshot shows the 'Edit Phase' form. It has a title field with 'Phase 2 - Project Proposal & Management', a 'Phase Hours' field with a red 'Add project hours' button, and a 'Description' field with a rich text editor. The description contains text about invoice submission and additional expenses. At the bottom are 'SAVE' and 'Cancel' buttons.

A pop-up box will appear. Update the Phase Hours to reflect the total hours you are proposing for the project. Then you will edit the template (replace text after bold text with your answers). Click save when changes complete.

2. ADD/EDIT TASKS

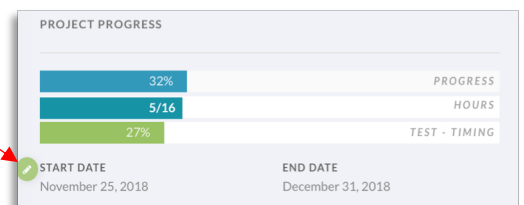
Scroll to the tasks section of Phase 2, where you can edit or add tasks. To edit, click the green pencil icon (you can also delete tasks here). You can set a deadline for a task (not required) and assign them to a client or team member as well (also not required). As you complete tasks - check off, as to report on project progress.



The image shows a 'Tasks' section with a '0/3' indicator. It contains three task items, each with a checkbox and a green pencil icon. The first task is checked and has a right arrow. The tasks are: 'Consultant to change task to first task. Setting and updating tasks allow your client and MACED to track progress of your project. >', 'Consultant to change task to second task of project', and 'Consultant to change task to their third task in project'. At the bottom is an 'ADD TASK' button.

3. UPDATE PROJECT END DATE

Click on the pencil icon next to Start Date (located near top of dashboard) to edit dates. Change the end date to your estimated project delivery date.



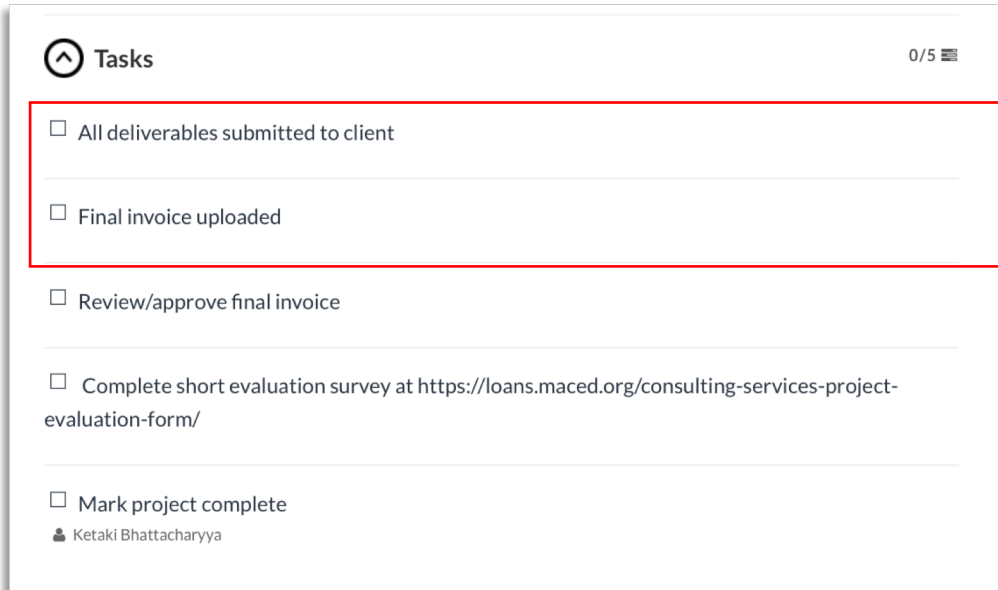
The image shows a 'PROJECT PROGRESS' section with a bar chart and a table. The bar chart shows 32% progress, 5/16 hours, and 27% timing. The table below has columns for 'START DATE' and 'END DATE'. The start date is 'November 25, 2018' and the end date is 'December 31, 2018'. A green pencil icon is next to the start date.

PROGRESS	PROGRESS
32%	PROGRESS
5/16	HOURS
27%	TEST - TIMING

START DATE	END DATE
November 25, 2018	December 31, 2018

PHASE 3: PROJECT COMPLETION

Phase 3 is an opportunity to review requirements of your project and ensure you have provided all deliverables. There are only two tasks assigned to the consultant.



Tasks 0/5

- All deliverables submitted to client
- Final invoice uploaded
- Review/approve final invoice
- Complete short evaluation survey at <https://loans.maced.org/consulting-services-project-evaluation-form/>
- Mark project complete

Ketaki Bhattacharyya

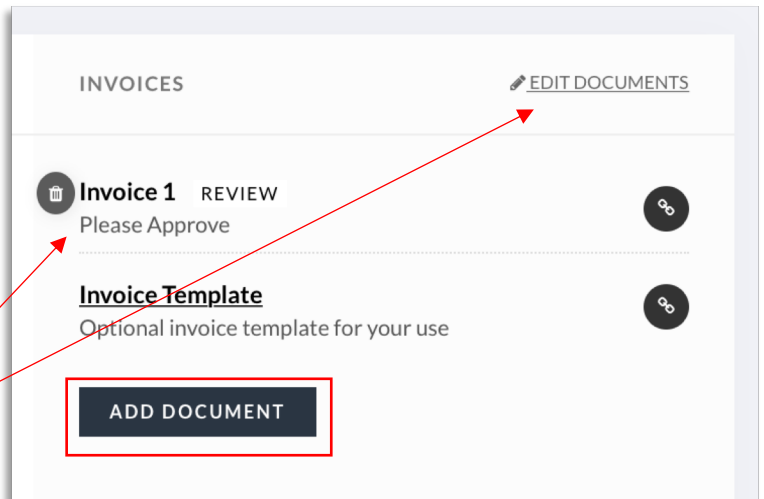
After all tasks in Phase 3 have been checked as complete and the project is completed, ensure all deliverables are provided to the client (you can add to Phase 2/3 documents if desired by the client) and check the task as complete. Upload your final invoice for work completed.

ADDING INVOICES

1. ADD INVOICE

Invoices is located at the top/center of your project dashboard. Please add your invoice by the 10th of every month for hours completed of your project.

Click add document to upload an invoice. To edit/delete an invoice you can click edit documents or the trashcan symbol next to the invoice.



Do not update the status of your invoice to approved/declined - the client must approve your invoice.

Add Document

Title
Invoice 2

Description
Please approve

No Approval Needed

File Type
 Upload
 Web Address

Upload File
 after

Notify
 All Users Specific Users

Message
 This is my December invoice - please review and approve.

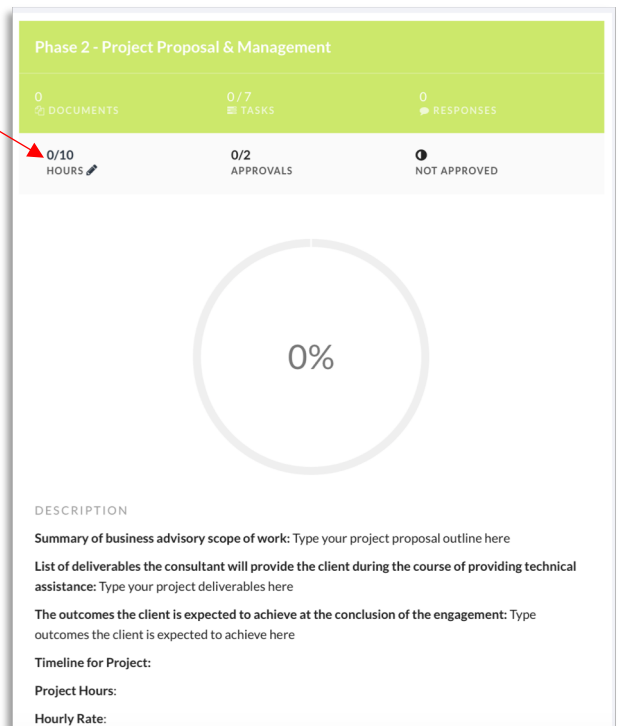
- Title invoice with month/number
- Add any notes for the client and MACED in the description area
- Upload a file or add a link
- Select notify "ALL USERS"

TRACK YOUR HOURS

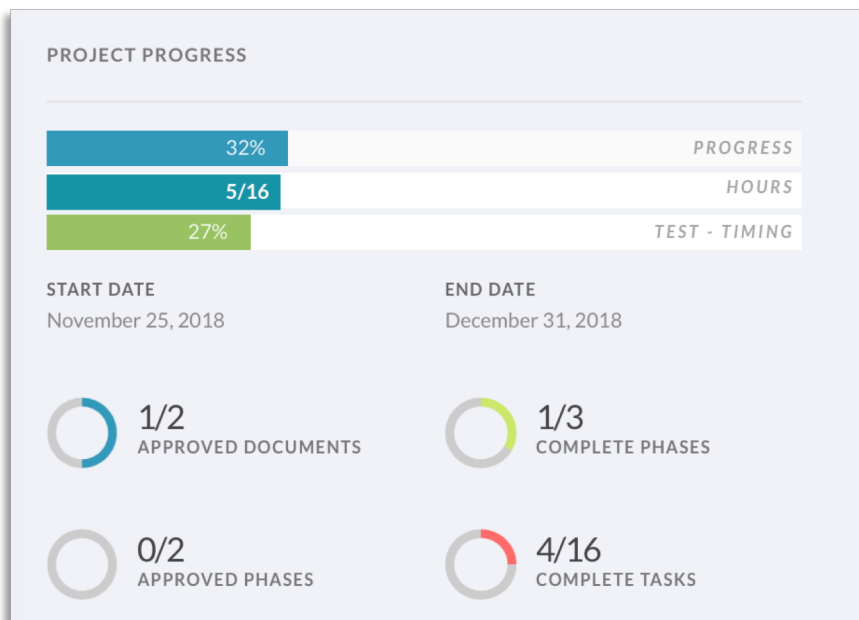
You will need to update your hours in both Phase 1 and Phase 2.

Phase 1 - you are allotted 5 hours for assessment

Phase 2 - you will propose the number of hours for the project and update accordingly ([see Phase 2 info](#)). Every month when you submit an invoice (or as you go at shorter intervals) update your hours in the Phase 2 area. The hours are cumulative - so if month 1 you added 10 hours and month 2 you clocked 12 hours, then in month 2 you would update the number to "22" rather than "12".

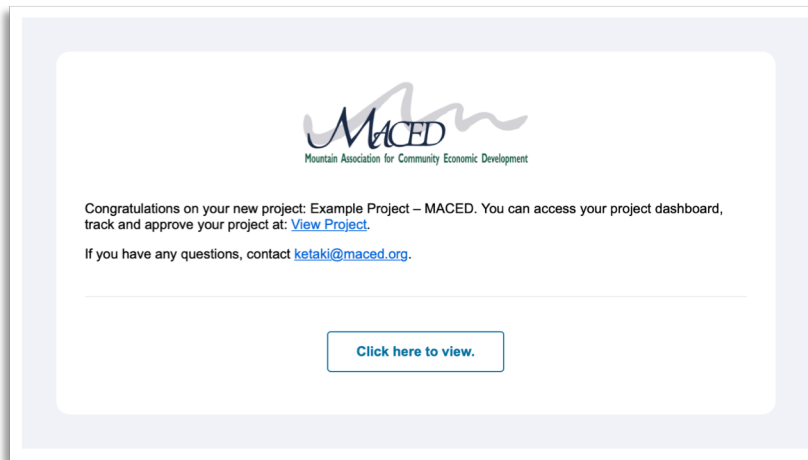


By updating hours and checking off project tasks, we are able to provide the client and you a visualization of items completed vs hours available vs the deadline to provide a better understanding of project progress.

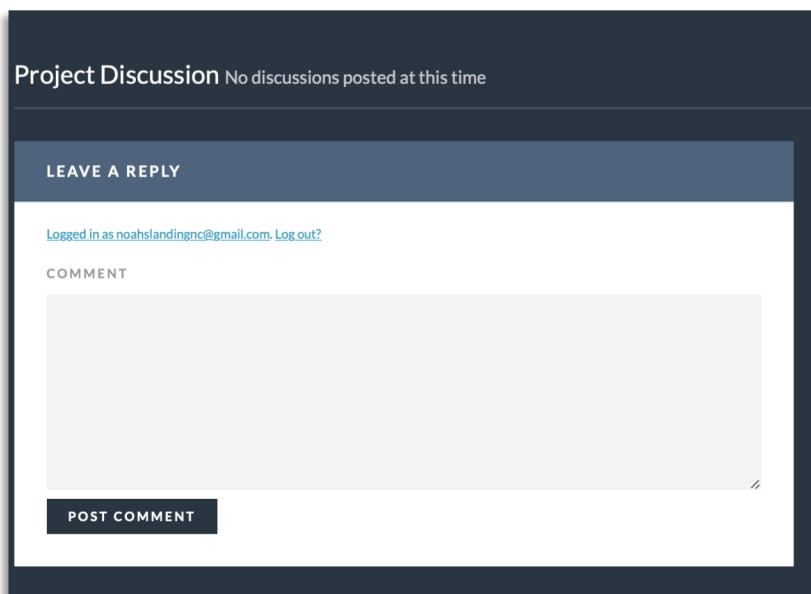


COMMUNICATING

Communicating back and forth on your project is important for making sure your consultant and the MACED team know 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.

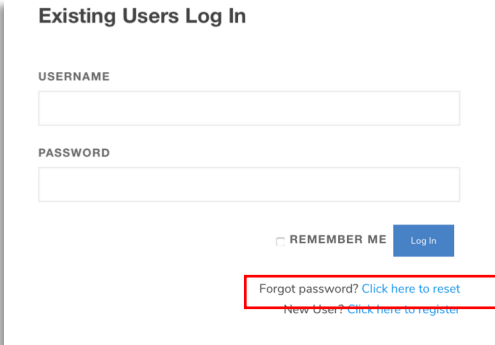
When approving phases or invoices you also have the opportunity to send a message to your consultant and MACED team member. This message will be delivered via email as a project notification. If you would like it recorded in your project dashboard be sure to also copy your message to the project discussion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

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.



Existing Users Log In

USERNAME

PASSWORD

REMEMBER ME

[Forgot password? Click here to reset](#)
[New User? Click here to register](#)

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:

[Technical Assistance Project Hub - https://loans.maced.org/TAProject/](https://loans.maced.org/TAProject/)

[Log-in - https://loans.maced.org/login/](https://loans.maced.org/login/)

[Consultant Hub - https://loans.maced.org/consultant-hub/](https://loans.maced.org/consultant-hub/)

[Web Support - https://loans.maced.org/website-support/](https://loans.maced.org/website-support/)