LASSO PARTICIPANTS

Definitions and Tutorials

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COLLECT. COLLABORATE. COMPETE.

Key Terms

1. **Projects**

   RFIs/RFPs created by Project Owners (Lasso subscribers) for the purpose of receiving property submissions by Participants (state, region, county, and local EDOs).

2. **Project Owner**

   A Lasso subscriber that pays an annual fee to send RFIs/RFPs to Participants. Only Project Owners can create projects.

3. **Participants**

   EDOs or contacts that receive an invitation to participate in a Lasso project. There is no fee for Participants to participate (submit properties) in Lasso projects.

4. **Delegators**

   Participants that have been granted delegator authority for a project. Delegators can invite additional participants to projects known as Delegates. Delegators can view/edit/add their Delegates' properties and responses. However, Delegates will only see their properties and responses and not another Delegate's or their Delegator's property data. **An example of a Delegator would be a state and/or regional EDO partner.**

Key Terms Cont.

5. Delegates

Participants that have been invited to a project by a Delegator (state and/or regional EDO partners). Delegates will only be able to see their properties and responses and cannot see their Delegator's other Delegates including their properties and responses. **An example of a Delegate would be a local community site representative, the site expert, responsible for adding properties and entering responses.**

6. Collaborators

Participants that have been invited to collaborate on a project by a Delegator or Delegate. Collaborators will be able to see and do exactly what the Delegator or Delegate can that invited them to collaborate. Note, if you're a Delegator, your Collaborators will see your properties, properties added by your other Collaborators, and your Delegates' properties. **An example of a Collaborator would be a co-worker operating at the same level as the Delegator or Delegate.**

7. 3rd Party Contributors

Contacts that have been invited by a Participant to a project to complete a questionnaire for a property. Contributors will only be able to view/edit/add responses to questions a Participant assigns to them for a property. **An example of a 3rd party Contributor would be a Utility or Rail partner that only needs to view/edit/add responses some questions.**

8. Questionnaires

A list of questions that have been selected and assigned by a Participant to a 3rd party Contributor. Responses added/edited by a 3rd party Contributor are applied in real time.

Tutorial Videos: Essentials

1. **How to Login to Lasso - link**
   Covers how to login to Lasso and reset your password.

2. **How to Accept a Project Invitation - link**
   Covers how to accept an invitation to participate in a project

3. **How to Add New and Existing Properties to a Project - link**
   Covers how to add properties to a project, the first step to submitting responses to a project

4. **How to Recall Answers - link**
   Covers how to automatically import responses to questions you've answered in past projects.
   Note, you must submit a property to at least one Lasso project to utilize this feature.

5. **How to Submit Property Responses to a Project - link**
   Covers how to enter and save responses to RFI questions for properties added to a project

Tutorial Videos: Multilevel Delegation

1. **Multilevel Delegation: Creating a Participant Downline - link**

   Covers how states can invite regions, regions can invite counties, and counties can invite local site representatives to participate in an RFI/project. Multilevel Delegation enables economic developers to employ any response process that works best for their org, team, and partners.

2. **Multilevel Delegation: Managing and Hiding Delegates - link**

   Covers how to manage Delegates in your participation downline, allowing you to view/edit/add responses and approve their properties. Alternatively, you can hide your Delegates to focus on others in your participation downline.

3. **Multilevel Delegation: Approving Delegates and Submitting Projects - link**

   Covers how to approve your Delegates project submissions and complete your participation in a project.

Tutorial Videos: "Phone a Friend"

1. **How to Invite Collaborators - link**

   Collaborators are contacts in your network that you invite to assist with responses to RFI questions. Collaborators will have full access to your properties, as well as your Delegates if you're a Delegator and can answer all RFI questions. **It is recommended to invite someone as a Collaborator if they will be assisting you with most project questions**.

2. **How to Create and Send a 3rd Party Questionnaire - link**

   3rd party Contributors are also contacts in your territory that you invite to assist with responses to RFI questions. Contributors will have limited access to your properties and can only answer RFI questions you assign to them. **It is recommended to send questionnaires to Contributors if they will only be assisting you with just some project questions**.

3. **How to Complete a 3rd Party Questionnaire - link**

   Covers how 3rd party Contributors accept an invitation to contribute to a project, submit responses, and complete a questionnaire sent to them.

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