



# STRATA

## P L A T F O R M S

Definitions and Tutorials Guide for  
Lasso Participants



# 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.



# Key Terms

## 4. Delegates

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.**

## 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.**



# Key Terms

## 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. 3<sup>rd</sup> 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 3<sup>rd</sup> 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 3<sup>rd</sup> party Contributor. Responses added/edited by a 3<sup>rd</sup> 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

# Distributing RFIs to Communities for Submissions

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# Step 1: Delegate to Communities

With Lasso, Project Owners, typically invite **state partners** first to a project known as Participants. They also typically give these partners the Delegator permission.

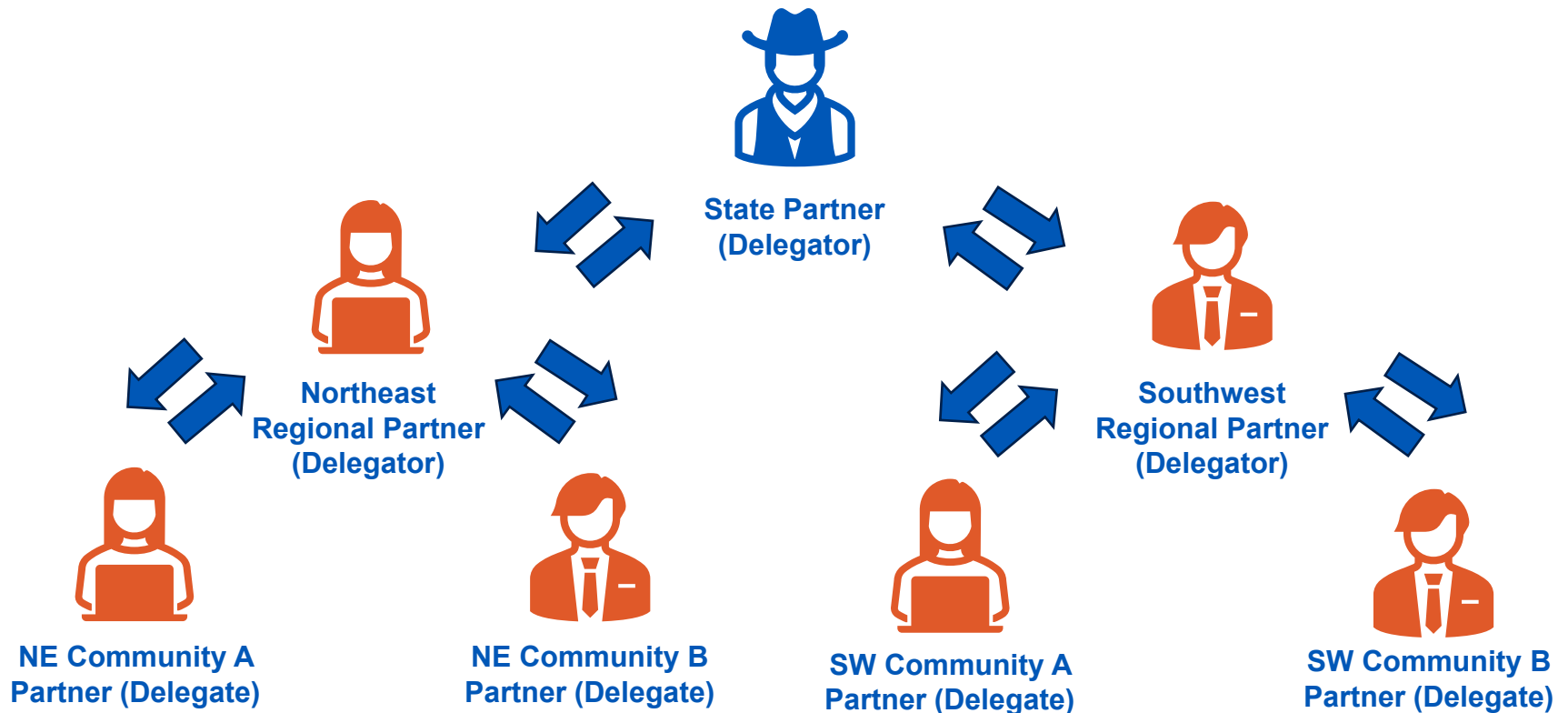
The Delegator permission grants state partners the ability to invite additional Participants to the project known as their Delegates, typically their **regional partners**.

When a state partner invites their regional partners as Delegates, the state partner can grant their regional partners the Delegator permission too. This then gives the regional partners the ability to delegate the RFI further by inviting their **county or local partners** as their Delegates.

**Note** – in the scenario described above, the state partner will see all regional, county, and local partners in their participant delegate downline. However, the regional partners would only see what they and their county and/or local partners they delegated to submit. So, regional partner A would not see regional partner B's or regional partner B's Delegates' submissions and vice-versa.



# Sample Participant Delegate Flowchart







# 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.



## Step 2: Invite Collaborators

With Lasso, Participants, regardless if they are a Delegator and/or a Delegate, can invite their co-workers as **Collaborators**.

Inviting your co-workers as Collaborators **gives your co-workers the ability to see and do exactly what the Participant that invited them to collaborate can.**

This includes seeing all the Participant's Delegates, and any properties being submitted by the Participant and/or their Delegates.

**Note** – there is no limit to the number of Collaborators you can invite for a project. If the Project Owner has invited your coworkers as participants, we recommend you contact the Project Owner or your Delegator to request the Project Owner or Delegator remove your co-workers as Participants so you can invite them as Collaborators. That way, you and your co-workers will be able to see each others work.



# Sample Participant Collaborator Flowchart





## Step 3: Send Questionnaires

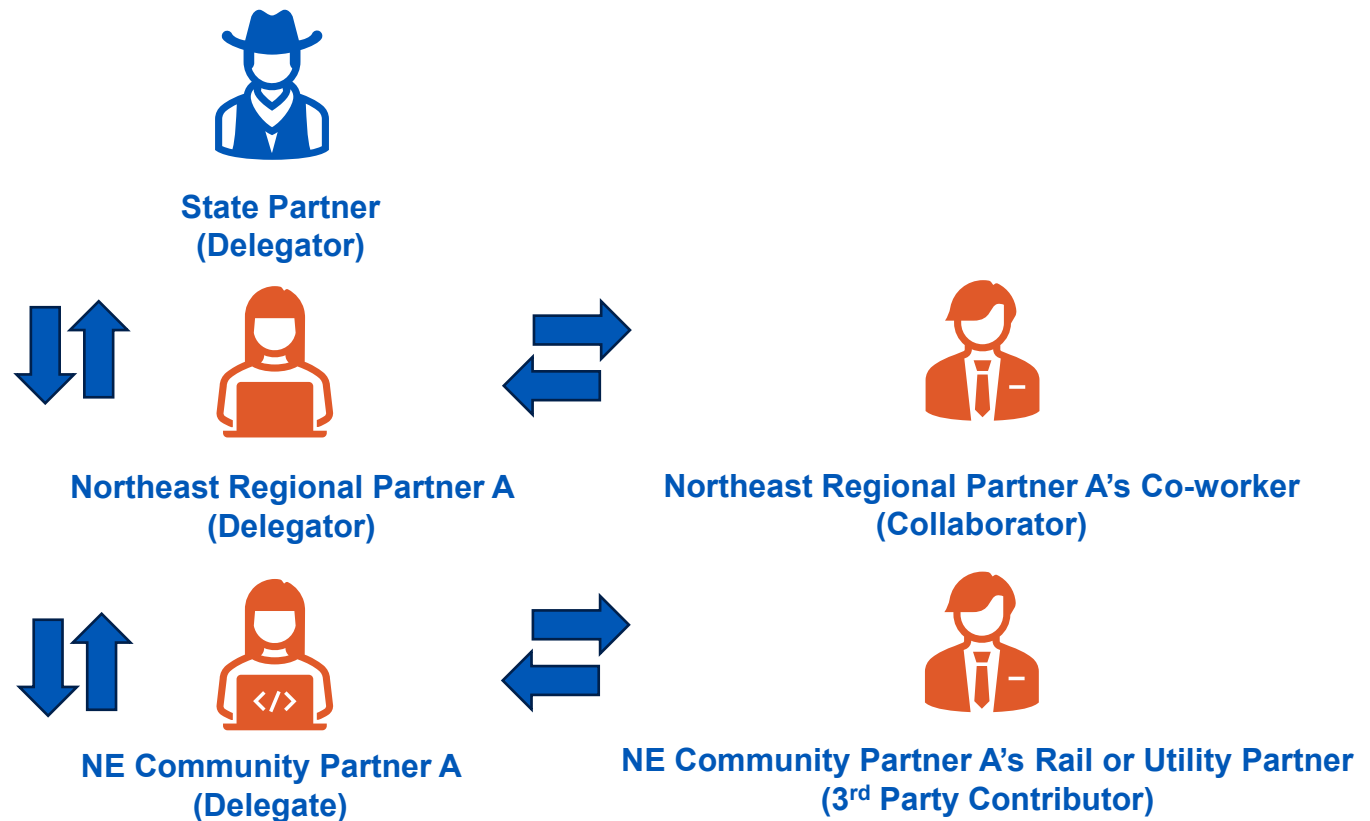
With Lasso, Participants that are submitting a property and responding to most questions can request support from **third-party partners** such as a **utility or rail partner** by sending them **questionnaires**. These third-party partners are known as **Contributors**.

Unlike Collaborators, questionnaires sent to Contributors **consist only of the questions you assign to your third-party partners**. Questionnaires are a great tool for distributing specific RFI questions to your third-party partners.

**Note** – there is no limit to the number of questionnaires you can send for a property in a project. You can assign a question to multiple questionnaires in case there are two (2) or more Contributors that could respond to the question(s).



# Sample Participant Contributor Flowchart





# 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 3<sup>rd</sup> Party Questionnaire - [link](#)

3<sup>rd</sup> 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 3<sup>rd</sup> Party Questionnaire - [link](#)

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