

User Guide for the ATI Matchmaking Platform

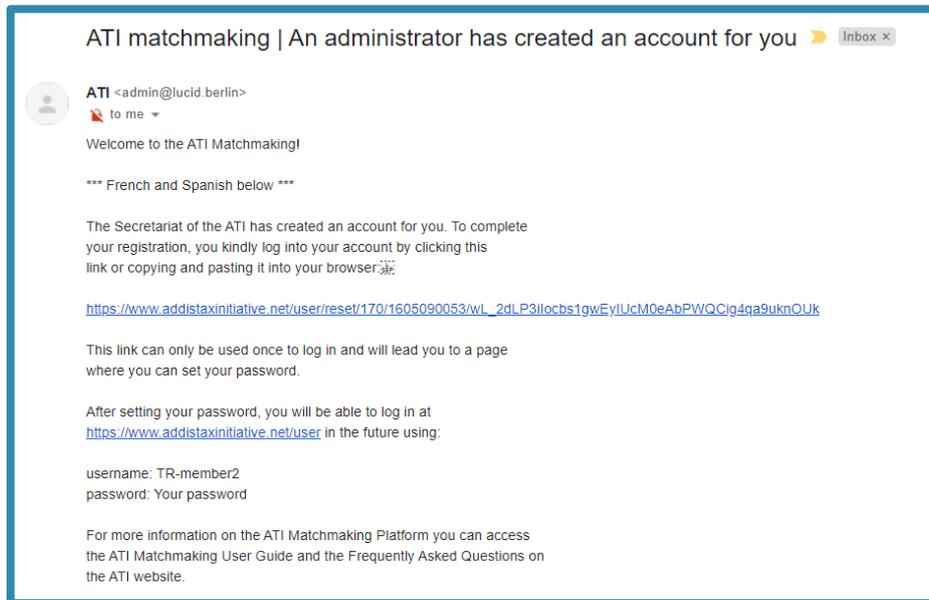
This document is a step-by-step guide for using the the beta version of the online ATI Matchmaking Platform. If you have any questions or encounter any problems, please contact the Secretariat of the Addis Tax Initiative (ATI), which administers the ATI website, via secretariat@taxcompact.net.

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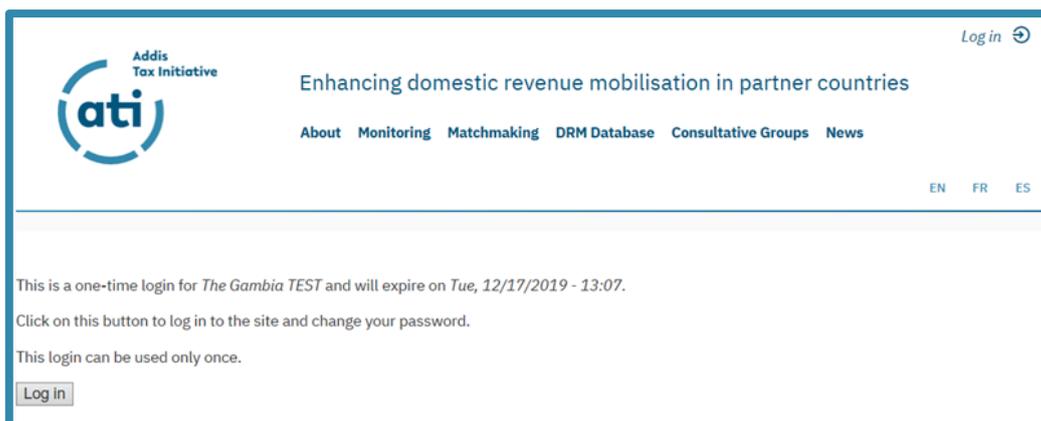
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Registering to the ATI Matchmaking Platform

1. To join the ATI Matchmaking Platform, please send an email to secretariat@taxcompact.net. Once you the Secretariat of the ATI has created an user account for you, you will receive a confirmation email from admin@lucid.berlin. Kindly access your account by following the link provided in the registration email.



2. After logging in, you will be asked to set a new password. You can may also change the language from English to French or Spanish. See below:



✔ You have just used your one-time login link. It is no longer necessary to use this link to log in. Please change your password.

Email address required

A valid email address. All emails from the system will be sent to this address. The email address is not made public and will only be used if you wish to receive a new password or wish to receive certain news or notifications by email.

Username required

Several special characters are allowed, including space, period (.), hyphen (-), apostrophe ('), underscore (_), and the @ sign.

Password

Password strength: Strong

Confirm password

Passwords match: **yes**

Recommendations to make your password stronger:

- Add punctuation

To change the current user password, enter the new password in both fields.

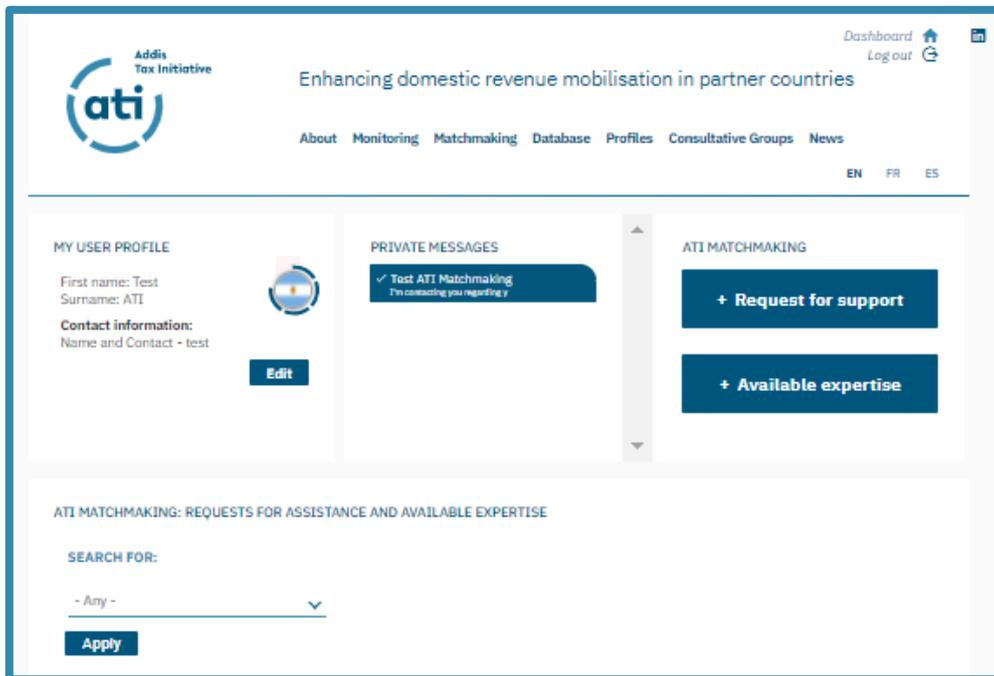
3. Lastly, you can change your contact settings. If you do not want to receive or send messages via the ATI Matchmaking Platform, uncheck the respective box. Please note that the messaging function is one of the key elements of the matchmaking mechanism. Thus, **the Secretariat of the ATI highly recommends to keeps this box checked**. Now, kindly click on “Save” to save your personal settings.

▼ **CONTACT SETTINGS**

Personal contact form

Allow other users to contact you via a personal contact form which keeps your email address hidden. Note that some privileged users such as site administrators are still able to contact you even if you choose to disable this feature.

4. You can now access the ATI Matchmaking Platform using your username and your selected password. Please go to <https://www.addistaxinitiative.net/dashboard> to view your online profile.



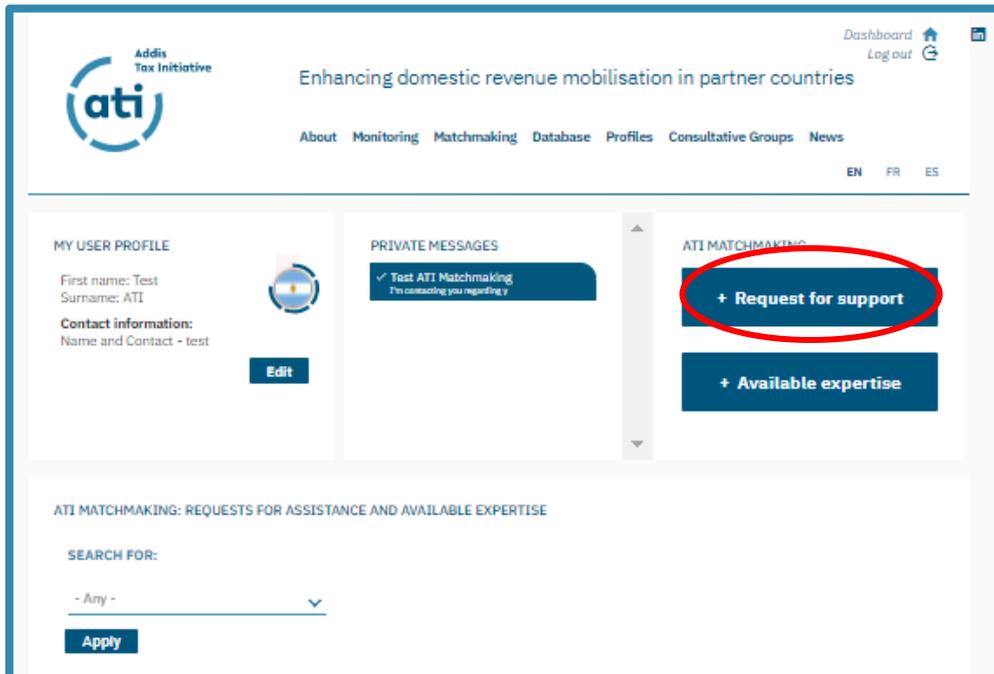
*Note: Your contact information will have been inputted by the Secretariat of the ATI. Once you have submitted a request for support or announcement of available expertise, other ATI members will be able to view your request/announcement and can contact you directly using this contact information. For the matchmaking process it is therefore of **upmost importance that your contact information is accurate and up to date**. If there are any errors or outdated information, please contact secretariat@taxcompact.net. As the ATI Matchmaking Platform is exclusively for ATI members, the general public will not be able to view your request/announcement or contact information.*

Submitting a “Request for support”

- If you are no longer logged in, login to the [ATI website](https://www.addistaxinitiative.net) by clicking on “Log in” in the top right corner.



6. Once logged in, click on “+ Request for support” under the heading “ATI MATCHMAKING”.

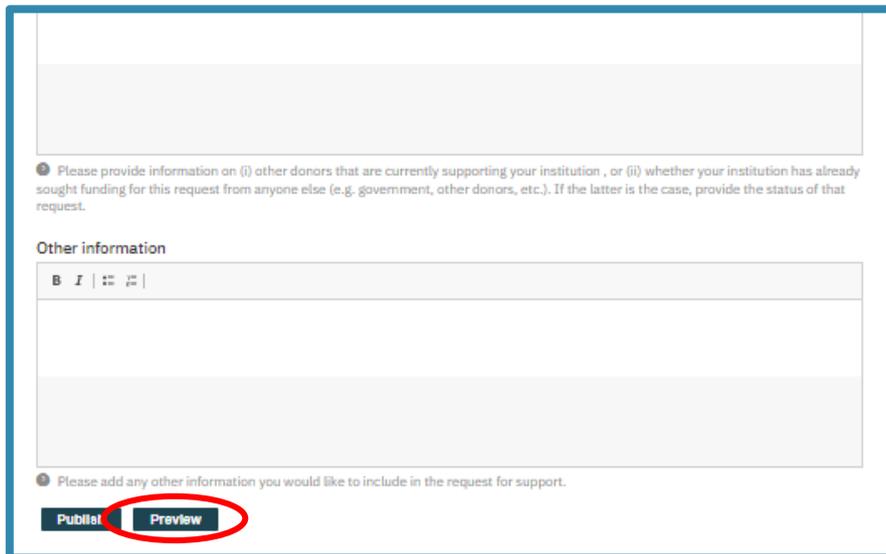


7. You will be redirected to a page where you can specify the support that you require. You can provide the following information:

Agency/institution requesting support	Name of the country and department requesting support.
Type of support	Use the dropdown menu to select the support type or specify another type of support in the “Type of support other” box.
Summary of request	Provide a description of the requested support in less than 200 words.
Duration and finance	If relevant, specify the estimated duration and financial value of the requested support. Where possible, provide specific calculations (including e.g. estimates for labour, hardware, software, other capital expenses, travel etc.).
Benefits	Describe how the support will benefit your agency/institution/organisation and its stakeholders. Specify some of the benefits that are expected from the implementation of your requested support.
Activities needed	In implementation order, list specific activities to be carried out under the requested support.
Needs assessment/strategic plan	Specify how the requested support is embedded in a needs assessment or in the strategic plan/MTRS of the revenue authority.

Sustainability	Describe what measures are being put in place to ensure sustainability of the project benefits after the funding ends.
Risks and mitigation	List possible implementation risks or challenges as well as proposed risk mitigation strategies.
Current support donors	Provide information on (i) other donors that are currently supporting your institution and (ii) whether your institution has already sought funding for this request from anyone else (e.g. government, other donors etc.), including the status of that request.
Other information	Add any other information relevant for the request for support.

8. Once this information has been put in, you can review your request by clicking on “Preview”.



Please provide information on (i) other donors that are currently supporting your institution , or (ii) whether your institution has already sought funding for this request from anyone else (e.g. government, other donors, etc.). If the latter is the case, provide the status of that request.

Other information

B I | 

Please add any other information you would like to include in the request for support.

[Publish](#) [Preview](#)

9. To publish the request, click on “Back to content editing”.



[← Back to content editing](#)

 About Monitoring Matchmaking Database Profiles Consultative Groups News

Dashboard   

EN FR ES

DRM PROFILE



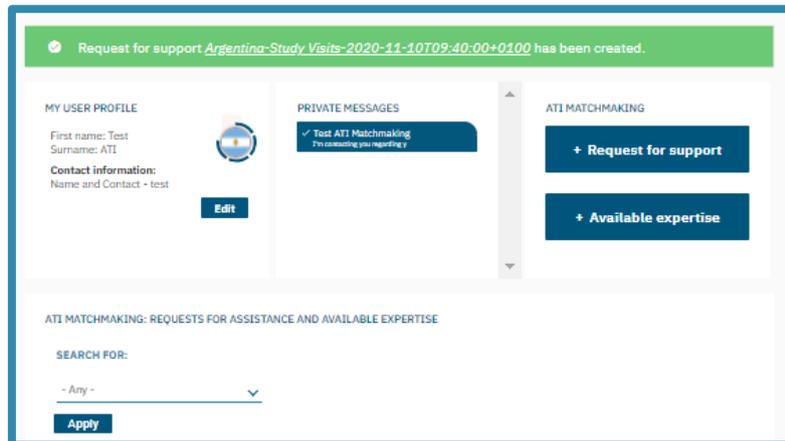
CONTACT DATA

Name and Contact - test

[Contact ATI Member](#)

REQUEST FOR SUPPORT

10. To publish the request, click on “Save”. You will be shown a confirmation that your request for support has been successful created.



11. If you scroll down, you can review your request for assistance

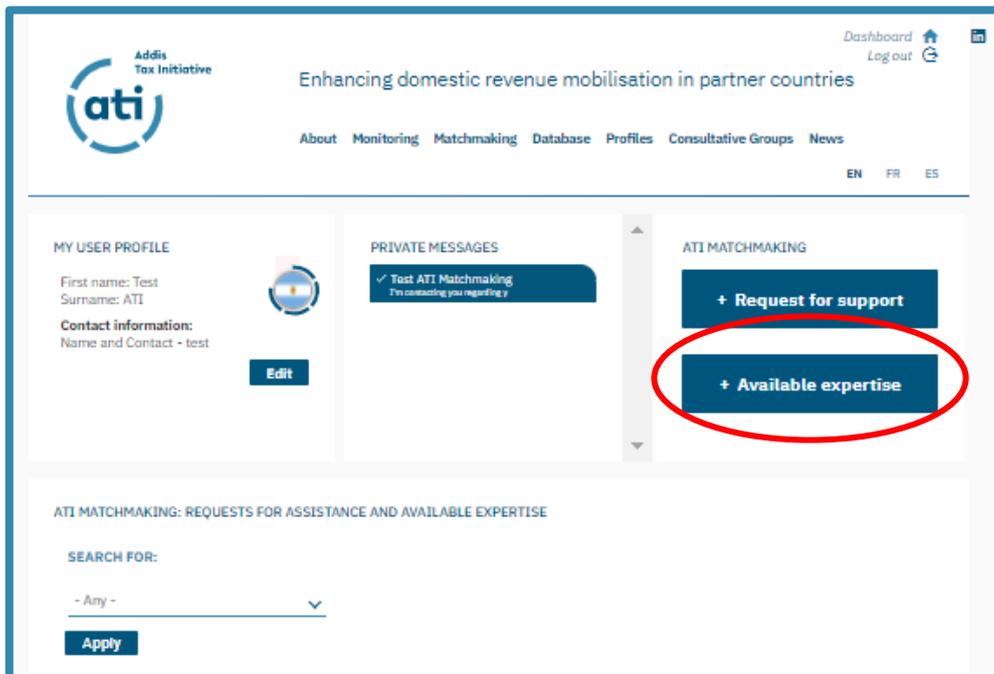
ATI MATCHMAKING: REQUESTS FOR ASSISTANCE AND AVAILABLE EXPERTISE

SEARCH FOR:
 - Any -
 Apply

Type	Member	Lang.	Last modified		
Request for support	Argentina	EN	Tuesday, November 10, 2020	view	edit
Available expertise	Kenya	EN	Friday, October 30, 2020	view	
Request for support	Argentina	EN	Friday, October 30, 2020	view	edit
Available expertise	Argentina	EN	Thursday, October 22, 2020	view	edit
Request for support	Kenya	EN	Thursday, October 8, 2020	view	
Request for support	Kenya	EN	Monday, September 7, 2020	view	
Request for support	Burkina Faso	EN	Thursday, September 3, 2020	view	

Submitting an announcement of “Available expertise”

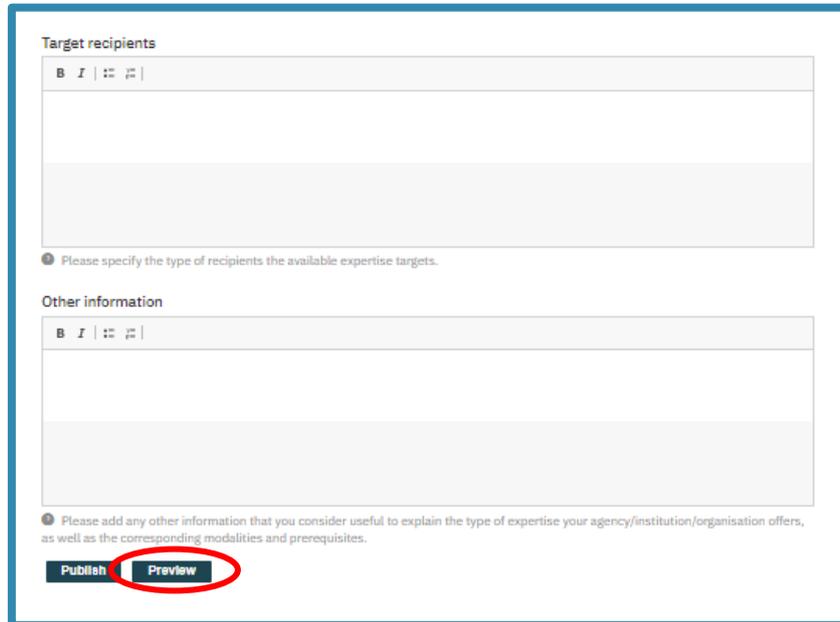
12. If you are no longer logged in, log in as described in 7. Click “+ Available expertise” under the heading “ATI MATCHMAKING”.



13. You will be redirected to a page where you can specify the type of expertise you want to announce. You can provide the following information:

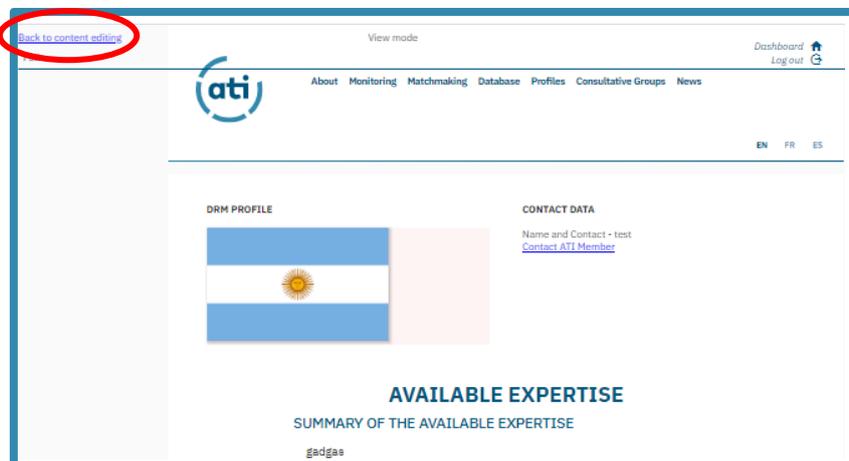
Agency/institution announcing available expertise	Name of the country and department with available expertise.
Type of support	Use the dropdown menu to select the support type or specify another type of support in the “Type of support other” box.
Summary of request	Provide a description of the support provided in less than 200 words.
Target recipients	Specify the type of recipients your announcement of support is targeting.
Other information	Add any other information that you consider useful to explain the type of support announced by your organisation as well as the corresponding modalities and prerequisites.

14. Once this information has been put in, you can review your announcement by clicking on “Preview”.



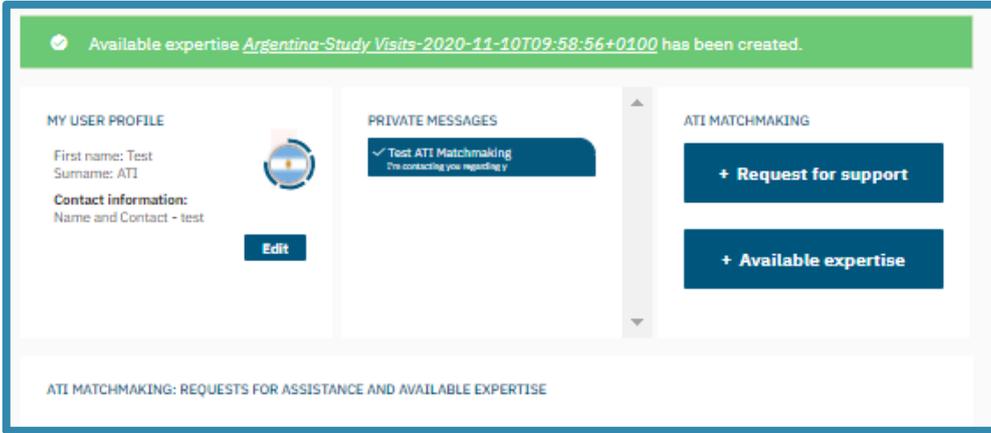
The screenshot shows a form with two main sections: "Target recipients" and "Other information". Each section has a rich text editor with "B I | :: ¶" icons. Below the "Target recipients" section is a note: "Please specify the type of recipients the available expertise targets." Below the "Other information" section is a note: "Please add any other information that you consider useful to explain the type of expertise your agency/institution/organisation offers, as well as the corresponding modalities and prerequisites." At the bottom of the form are two buttons: "Publish" and "Preview". The "Preview" button is circled in red.

15. To publish the announcement, click on “Back to content editing”.



The screenshot shows the ATI website dashboard. At the top left, there is a link "Back to content editing" circled in red. The dashboard includes a navigation menu with "About", "Monitoring", "Matchmaking", "Database", "Profiles", "Consultative Groups", and "News". There is also a "Dashboard" link and a "Logout" button. The main content area displays a "DRM PROFILE" with the flag of Argentina and a "CONTACT DATA" section with the text "Name and Contact - test" and a link "Contact ATI Member". Below this is a section titled "AVAILABLE EXPERTISE" with the subtitle "SUMMARY OF THE AVAILABLE EXPERTISE" and a small "gadgaa" logo.

16. To publish the announcement, click on “Save”. You will be shown a confirmation that your announcement of available expertise has been successful created.



Available expertise *Argentina-Study Visits-2020-11-10T09:58:56+0100* has been created.

MY USER PROFILE
 First name: Test
 Surname: ATI
Contact information:
 Name and Contact - test
 Edit

PRIVATE MESSAGES
 ✓ Test ATI Matchmaking
 Its contacting you regarding y

ATI MATCHMAKING
 + Request for support
 + Available expertise

ATI MATCHMAKING: REQUESTS FOR ASSISTANCE AND AVAILABLE EXPERTISE

17. If you scroll down, you can review your announcement of available expertise.



ATI MATCHMAKING: REQUESTS FOR ASSISTANCE AND AVAILABLE EXPERTISE

SEARCH FOR:
 - Any -
 Apply

Type	Member	Lang.	Last modified		
Available expertise	Argentina	EN	Tuesday, November 10, 2020	view	edit
Request for support	Argentina	EN	Tuesday, November 10, 2020	view	edit
Available expertise	Kenya	EN	Friday, October 30, 2020	view	
Request for support	Argentina	EN	Friday, October 30, 2020	view	edit
Available expertise	Argentina	EN	Thursday, October 22, 2020	view	edit
Request for support	Kenya	EN	Thursday, October 8, 2020	view	
Request for support	Kenya	EN	Monday, September 7, 2020	view	
Request for support	Burkina Faso	EN	Thursday, September 3, 2020	view	

Viewing requests for support and announcements of available expertise

18. If you are no longer logged in, login as described in 7. After your request for support or announcement of available expertise is published, you will be able to view it and all other requests/ announcements in your dashboard. You can sort the available requests for support and announced expertise based on “Type”, “Member”, “Language” and “Modification Date”. Clicking on “Search for” > “Apply” will filter requests/ announcements.



ATI MATCHMAKING: REQUESTS FOR ASSISTANCE AND AVAILABLE EXPERTISE

SEARCH FOR:

- Any -

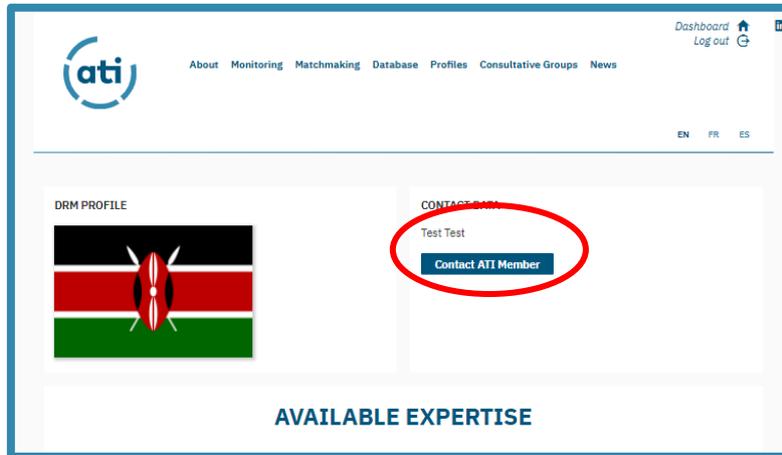
Apply

Type	Member	Lang.	Last modified		
Available expertise	Argentina	EN	Tuesday, November 10, 2020	view	edit
Request for support	Argentina	EN	Tuesday, November 10, 2020	view	edit
Available expertise	Kenya	EN	Friday, October 30, 2020	view	
Request for support	Argentina	EN	Friday, October 30, 2020	view	edit
Available expertise	Argentina	EN	Thursday, October 22, 2020	view	edit
Request for support	Kenya	EN	Thursday, October 8, 2020	view	
Request for support	Kenya	EN	Monday, September 7, 2020	view	
Request for support	Burkina Faso	EN	Thursday, September 3, 2020	view	

19. To view the details of a request or available expertise, click “view” on the right side of the request/expertise. This will open the respective request/expertise.

Type	Member	Lang.	Last modified		
Request for assistance	Argentina	EN	Thursday, October 22, 2020	view	edit
Request for assistance	Kenya	EN	Thursday, October 8, 2020	view	
Available Expertise	Kenya	EN	Monday, September 7, 2020	view	

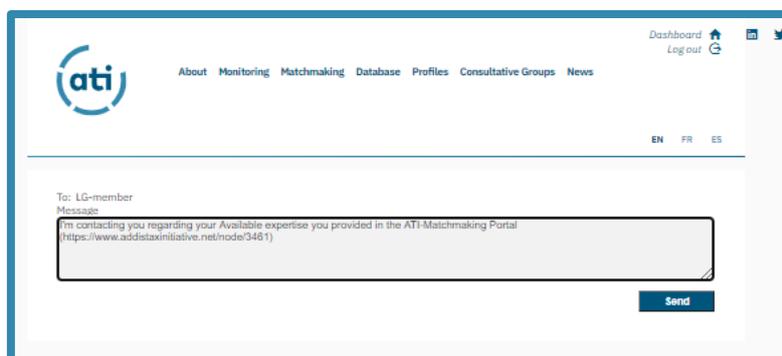
20. If you would like to contact the respective ATI member regarding the selected request/expertise, please click on “Contact ATI Member” on the top right.



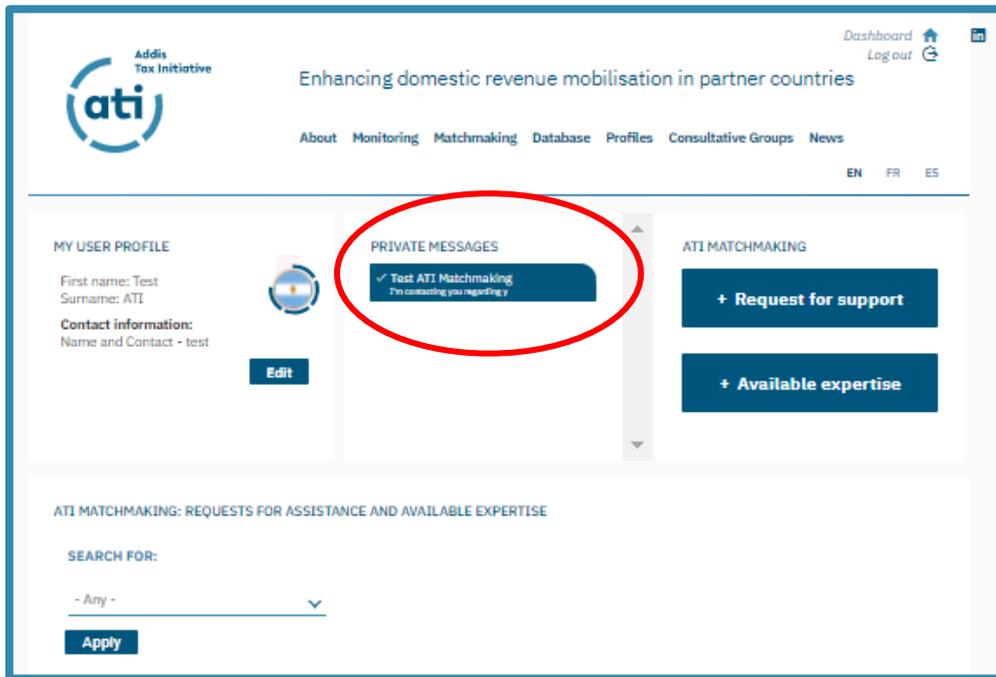
Note: The ATI Matchmaking Platform merely provides the platform for connecting actors. All further negotiations of accepting and implementing a request/expertise should be conducted bilaterally through direct contact with the respective person/department.

Contacting ATI members – The ATI Matchmaking Instant Messaging Function

21. In order to contact an ATI member that has submitted a request for assistance or an announcement of available expertise, click on “Contact ATI Member” as specified in 20. You will be directed to the messaging function of the AIT Matchmaking Platform. You can type an individual message here or use the pre-typed text. Once you click send, your message will be directly sent to the respective ATI member.



22. In order to view your private messages or to continue an ongoing conversation, you can follow the message thread on your profile page.

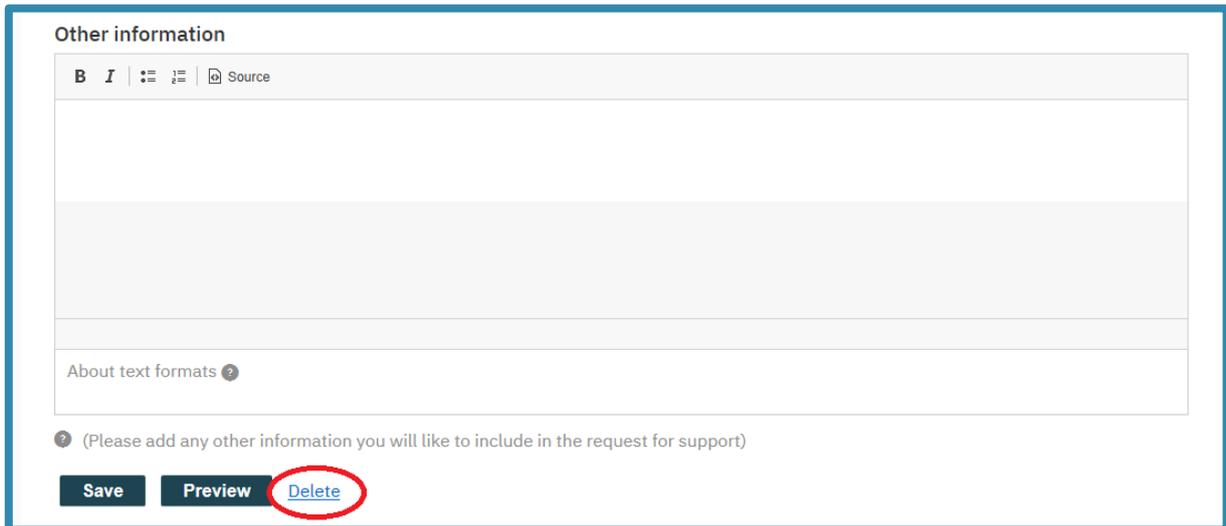


Editing or removing a “Request for assistance” or announcement of “Available expertise”

23. When entering your [ATI dashboard](#), scroll down to the requests/announcements and find your request/announcement. On the very righthand side of the respective request/ announcement, click on “edit”.

Type	Member	Lang.	Last modified	view	edit
Request for assistance	Argentina	EN	Thursday, October 22, 2020	view	edit
Request for assistance	Kenya	EN	Thursday, October 8, 2020	view	
Available Expertise	Kenya	EN	Monday, September 7, 2020	view	

24. When clicking “edit” you can change the information you provided in your request/ announcement. Alongside saving and previewing your request/ announcement, you can also remove it by clicking “Delete”.



Other information

B I    Source

About text formats ?

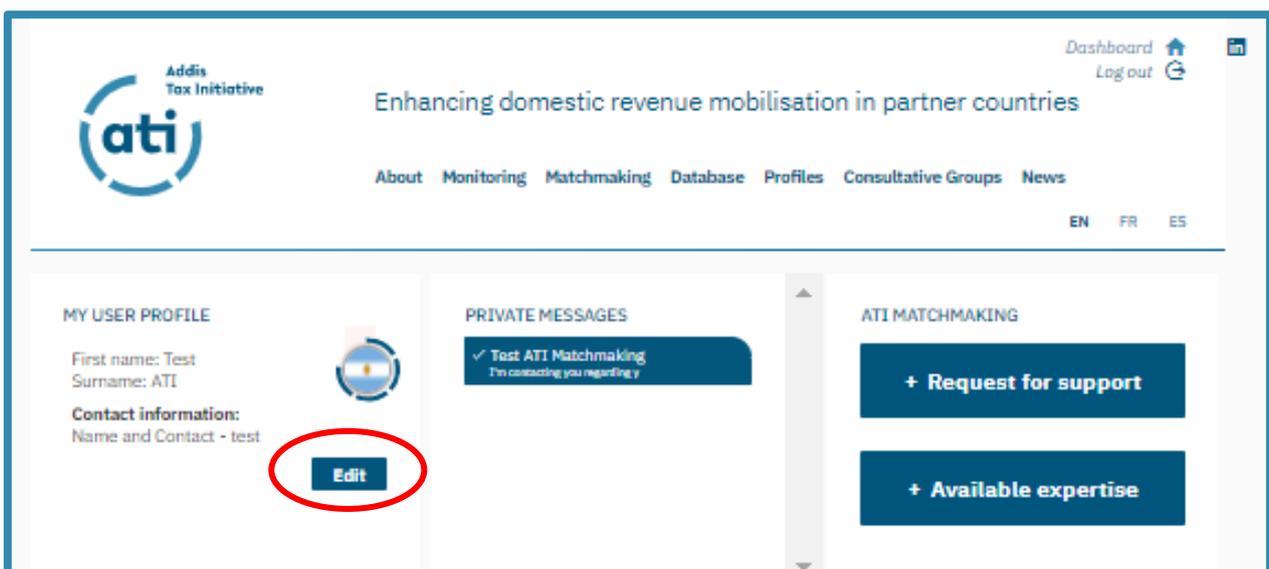
? (Please add any other information you will like to include in the request for support)

Save Preview **Delete**

25. To finalize the deletion of your request/expertise, kindly confirm the deletion once more. Your request/expertise will be removed from the ATI Matchmaking Platform.

Deleting my account

26. If you do not want to continue your account on the ATI Matchmaking Platform, you can delete it at any time by clicking “Edit” and “Cancel account” on the next page.



Dashboard   

EN FR ES

ati Addis Tax Initiative

Enhancing domestic revenue mobilisation in partner countries

About Monitoring Matchmaking Database Profiles Consultative Groups News

MY USER PROFILE

First name: Test
Surname: ATI

Contact information:
Name and Contact - test

Edit

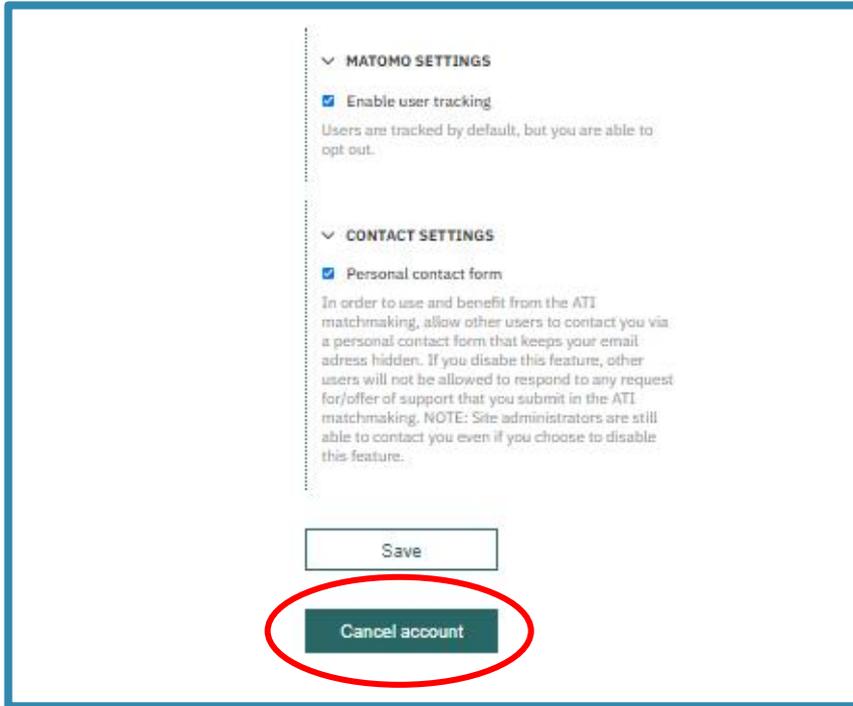
PRIVATE MESSAGES

✓ Test ATI Matchmaking
I'm contacting you regarding y

ATI MATCHMAKING

+ Request for support

+ Available expertise



▼ MATOMO SETTINGS

Enable user tracking
Users are tracked by default, but you are able to opt out.

▼ CONTACT SETTINGS

Personal contact form
In order to use and benefit from the ATI matchmaking, allow other users to contact you via a personal contact form that keeps your email address hidden. If you disable this feature, other users will not be allowed to respond to any request for/offer of support that you submit in the ATI matchmaking. NOTE: Site administrators are still able to contact you even if you choose to disable this feature.

Save

Cancel account

27. If you have additional questions about how to use the ATI Matchmaking Platform, please refer to the [“Frequently Asked Questions”](#) or contact the Secretariat of the ATI (secretariat@taxcompact.net).