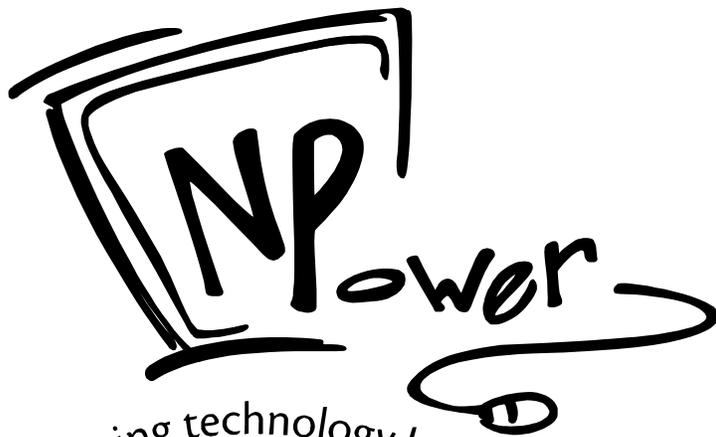


# Using TechAtlas



putting technology know-how in the hands of Non-Profits.

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## Introduction to TechAtlas

TechAtlas is a web-based planning tool developed by NPower and Tech Rocks. Your nonprofit can use TechAtlas to assess its current technology and to receive recommendations on how to better implement technology to achieve your mission. TechAtlas was created to help nonprofits gain an understanding of the role technology plays in their organizations. It works best when coupled with its companion tool, TechSurveyor, to tackle technology planning. Though each tool can be used separately, TechSurveyor and TechAtlas were designed to work together, providing one account for each organization. This means you have the same account profile for both tools, and use the same login name and password for each.

To make the most effective use of technology, start by assessing your current capacity and then plan on how to improve it. This is particularly true for smaller nonprofits that have few resources to devote to technology. TechAtlas assists your organization in doing this assessment and planning.

TechAtlas provides technical advice and planning assistance and is designed to be used either: a) directly by a staff member at your nonprofit organization, or b) with the support of a technical assistance provider or consultant.

The first time you use TechAtlas, you'll set up the foundation for your technology planning work. Later, when you return to TechAtlas, you'll automatically go to the Planning Center so you can review what you've done, look at recommendations, and continue working through your goals.

Because TechAtlas is an online application, you don't have to install anything, and you can access it from any computer that has an Internet connection and a web browser (such as Internet Explorer or Netscape Navigator).

As you work with TechAtlas, you'll see references to users and partners—and possibly the tool owners. Who's who? Any nonprofit with a TechAtlas account is a TechAtlas user; an organization or individual you share your data with is your partner; and the owners of the tool, who update and maintain it, are NPower and Tech Rocks. (For more information about partners, check out Appendix A.)

## Create a free account.

To use TechAtlas, your organization needs to have an account. Your account stores all of your information, such as your mission statement, assessments, and your action plan.

To start working with TechAtlas, do one of the following:

- Follow the link from a host's web site if you are participating in Tech Fitness Day or another event that uses TechAtlas.
- Follow the link from an invitation you were sent through email.
- Type <http://techatlas.org> in a web browser to open TechAtlas if you weren't sent any other instructions.

You'll see the TechAtlas home page.

*Click here to create a new account.*

The screenshot shows the TechAtlas home page. At the top, it says 'TechAtlas helps nonprofits map out a customized technology plan that includes guides to successful implementation, step by step.' Below this is a 'How to get started:' section with four numbered steps: 1. Envision, 2. Assess, 3. Prioritize, and 4. Act. To the right of these steps is a 'Login' form with fields for 'Email Address' and 'Password', an 'Enter' button, and a 'Save my login' checkbox. Below the login form is a 'Forgot your password?' link. To the right of the login form is a 'The TechAtlas Tool' section with a 'Read more' link and a 'TechAtlas Policies' section with a 'Read more' link. At the bottom right, there is a 'Your Partner' section with a logo for NPower Seattle.

*Type your login name and password if you already have a TechAtlas or TechSurveyor account; then click Enter.*

If you've already got a TechAtlas or TechSurveyor account, type your email address and password in the Login box, and then click Enter. You'll automatically be taken to the Planning Center.

If you don't yet have an account, click Sign Up. The sign-up screen appears. If you've accessed TechAtlas through a partner's web site or invitation, you'll see a note informing you that your information will be shared with that partner. With access to your data, your partner can assist you appropriately. However, you can also choose not to share your information with the partner. The following note appears if you use the link from the NPower Seattle web site to get to TechAtlas.

NPower Seattle is a nonprofit dedicated to helping other nonprofits better use technology to serve their communities.

*You'll see a description of the partner organization.*

NOTE: By completing the form below, you will automatically give NPower Seattle permission to view the plan information and assessment responses you store in your TechAtlas account. You may remove or add their access to your data at any time by going to Your Profile in your account. If you want to start a TechAtlas account and not allow NPower Seattle to view your information, [Click Here](#).

*Click here if you want to start a TechAtlas account without giving the organization access to your data.*

1. Scroll down until you see the heading "Create a new TechAtlas account."
2. Enter the information about your organization. Fields with asterisks are required; TechAtlas won't create an account until you've completed them. Other fields are optional, but can be useful for you in creating your technology plans.

NPower collects the data in aggregate to better understand and serve the nonprofit community, but only partners you've specified see your data connected to your organization.

### Organization Basics

\* Indicates required information.

\* Full Organization Name

\* Mailing Address

\* City

\* State

\* Postal Code

Employer ID Number (EIN)

Organization Phone

Organization Fax

Annual Budget

Number of Employees

Number of Locations  (Would be more than one if you organization has multiple offices / addresses.)

*Enter the number of physical offices your organization has, whether they're in one city or in different parts of the world.*

3. Enter the contact information for your primary contact.

TechAtlas uses the primary contact's email address as the Login Name. Make sure you write down your password in a place that is secure, but that you'll be able to find later.

### Primary Contact Info

\* First Name

\* Last Name

Title or Role

Contact Phone

*The primary contact is the person who will be responsible for managing the TechAtlas account for your organization.*

### Primary Contact Email/Login

**NOTE:** Your Login Name will be the same as your **Contact Email** address.

\* Contact Email Address

\* Password  (must be at least four characters)

*The contact email address becomes your organization's Login Name.*



Use a full, active email address so we can send you any information about changes to TechAtlas.



Consider using a generic email address, such as info@yourdomain.org, so that the email address will exist even if the employee who creates the account leaves your organization. But make sure to use an email account someone checks.

#### 4. Designate a secondary contact.

The secondary contact serves as a back-up person in case the primary contact is unavailable, to ensure your organization continues to have access to its data. It's a good idea to name your executive director as the secondary contact.

**Secondary Contact**

**NOTE:** Assuming s/he isn't your organization's Primary Contact, we suggest making your Executive Director your Secondary Contact.

First Name

Last Name

Title or Role

Email

#### 5. Specify a type of organization.

Choose an organization type from the dropdown menu. Choose the type that is closest to your organization's purpose; if nothing comes close, choose Other.

**Type of Organization**

**NOTE:** TechAtlas may aggregate information entered by users to create reports regarding the general state of the nonprofit sector and to inform services and tools that will benefit nonprofits. These reports are always stripped of organizational identifiers.

Organization Type  Please choose the closest type.

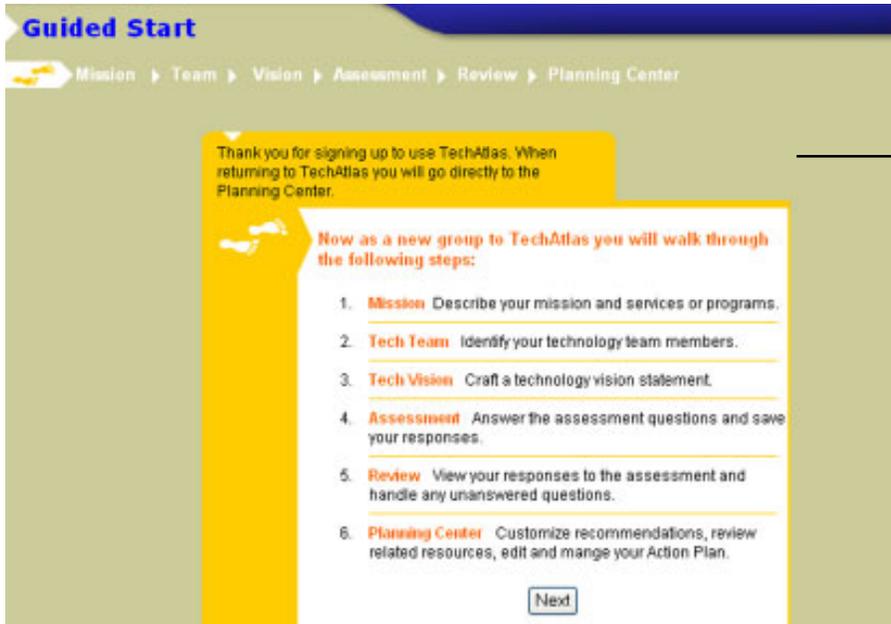
*Your organization may not fall neatly into one of these categories, but pick the closest option. If you serve multiple purposes, choose a primary purpose.*

#### 6. Click Create New Account.

You'll receive an email message (at the primary contact's email address), confirming your account and noting your password for your records. You don't have to wait for the email message to start using TechAtlas, though!

7. Read the Guided Start summary and click Next.

The Guided Start summary screen describes the process you'll go through to lay the foundation for your work in TechAtlas. After you've read the information, click Next to proceed.



*You'll see this screen the first time you use TechAtlas. Guided Start introduces you to each section of TechAtlas. Later, when you log in, you'll go directly to the Planning Center. There, you can choose which section you want to work in. You can change your information at any time.*

## Describe your mission and services.

Your organization's mission guides the work you do, so it makes sense that it should also guide your technology planning. Ultimately, the technology you use should serve your mission—not the other way around.

So that you can refer to your mission statement as you work in TechAtlas, enter it in the Mission Statement and Services field. Type the text, or if it already exists electronically, copy and paste it into the field.

*If your mission statement isn't handy, move on and plan to add it later. You need the mission statement for planning, but not for completing the initial assessment.*

**Lead with your Mission**

Because a technology plan is a detailed, written document that connects your organization's use of technology (current and future) to achieving your organization's mission, it is critical to begin any planning activity with your mission statement and services. This statement will be included in your technology plan and will act as your compass when moving forward with technology.

 [More on Mission Statements and Services >>](#)

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**Describe your mission and services or programs**

Mission Statement and Services

Any Nonprofit empowers poor people and works with the greater community to identify and eradicate the causes of poverty.

**Mission Statement and Services Examples:**

1) It is the mission of Nonprofit ABC to enhance the lives and protect the rights of people with disabilities by providing guardianship; personal attention; advocacy; trust and financial management; and personal services.

2) To promote voluntary land conservation and strengthen the land trust movement by providing the leadership, information, skills and resources land trusts need to conserve land for the benefit of communities and natural systems. Nonprofit ABC serves six states.

Be as brief or detailed as you like. You can return later to edit from the Planning Center.

*Click here to read more about how mission statements inform technology plans, and why they're so critical. If you don't have a mission statement, you can use the information and examples to write a draft that can guide you.*



If someone is helping you use this tool, this is an excellent time to talk with them about your mission and the services you provide.

Click Next when you've got a good mission statement, or a summary of the services your organization provides.

## Form a technology team.

Your technology plan affects the entire organization. Assemble a team of people who have different roles, or who represent different programs, in your organization.

1. Type the name of your plan leader. By default, TechAtlas fills in the primary contact's name. If you identify a different plan leader, make sure that person is listed as your secondary contact.
2. Type the plan leader's email address.
3. Type the email addresses for everyone on your technology team, separating them with a semi-colon (;) or a comma (,).

The members of your team depend on how large your organization is, how it's organized, and how technologically savvy your staff are. Ideally, you should have people on the team who represent different roles (such as a board member, a program manager, a person on the "front lines," and so on). It can also be beneficial to have people with different attitudes and levels of experience (such as one person who is very familiar with the organization's current technology and someone who isn't; someone who is excited about what technology can do, and someone who is skeptical).

Typically, technology teams have between three and ten members.

4. Click Next to move on to the vision statement.

*TechAtlas automatically uses the primary contact name and email address here. You can change this if you want to.*

*You don't have to name all your team members right away. You can add and remove people later.*

### Assemble a Technology Team

Build a team that includes voices from a broad spectrum of program and activity areas. Finding the right mix of board members, staff, volunteers, and others will help shape a technology plan that supports your mission and will be successfully implemented.

[Strategies for Building a Technology Team >>](#)

#### Identify Your Technology Team Members

Plan Leader

Plan Leader Email

Technology Planning Team

**Plan Leader Example:**  
Jane Technophobe

The plan leader may be the person most interested in the use of technology at your organization or a person assigned to lead the effort.

**Leader Email Example:**  
Jane@nonprofit.org

Including the Plan Leader's email allows Tech Atlas to send reminders to the Plan Leader as appropriate.

**Technology Planning Team Example**  
Jane@nonprofit.org; Boardmember@nonprofit.org; ProgramPerson@nonprofit.org  
(separate email addresses with "," or ";")

Tech Atlas includes features that can send email reminders to team members if you include their email addresses here.

*Click here to learn more about assembling a team that works effectively.*

*Enter email addresses for team members, or, if they don't have email addresses, enter their names. If you use email addresses, you can configure TechAtlas to send automatic reminder messages later.*

## Craft a technology vision statement.

This is your opportunity to dream up a better future. A vision statement essentially describes the benefits you'd like to receive from technology. How could technology help you serve your constituents better? How could it help your staff be more efficient so you could expand your efforts?

Type your technology vision statement in the field provided. Be as general or precise as you like. You can add to the vision statement or revise it later.

Click Next when you're ready to proceed..

### Dream up a Technology Vision

A vision statement helps guide your technology planning process and reflects the process of meeting your organization's mission with support from technology. Many organizations have yet to develop a technology vision statement, so you may be among the first to do this. Developing a vision statement is a great exercise for the technology team.

To begin drafting a vision statement envision the possibilities: If technology were working to help your organization achieve your mission, what would this look like?

[Strategies for Creating a Vision Statement>>](#)

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#### Craft a Technology Vision Statement

Technology Vision Statement

Internet - communicate with decisionmakers and community

Database - record campaigns; don't have to re-invent the wheel each time

Finances!

Create our newsletter?

**Vision Statement Example:**

The Nonprofit ABC vision for technology is to insure that the overall quality of service that Nonprofit ABC provides to the community is not compromised because of inadequate technology. Our tradition of comprehensive help to persons living with HIV/AIDS and their families will be complimented and supported by up to date infrastructure, staff well-trained in technology and information technology that allows us to deliver the highest quality service. We will pursue, where appropriate and sustainable, technology tools that increase our capacity to educate the public, get vital information to those who need it most, measure and evaluate our work, enable staff to do their work efficiently, and effectively communicate with our community.

Be as brief or detailed as you like. You can return later to edit from the Planning Center.

Click here for help crafting your technology vision statement.

*The technology vision statement is best when it's developed by the technology team, rather than an individual. The first time you use TechAtlas, jot a couple of ideas here and then move on. You can come back later to revise it, after the team has had a chance to form a vision.*

## Assess your current status.

To plan any journey, you have to identify your starting point. A technology assessment gives you a place to record all the information about your current technology, and a way to compare your current situation with recommended configurations and practices.

1. Select an assessment. (If you accessed TechAtlas using a link, you may not see this screen. Instead, the assessment you're using may open automatically. If so, skip this step.)

TechAtlas includes a default basic assessment that covers most of the areas nonprofit organizations need to think about. You may have access to other assessments, as well.

To begin working with an assessment, click **Begin** in the **Select** column for the assessment. (If you've used the assessment previously, click **Retake** in the **Select** column.)

### Select an Assessment

TechAtlas can help you assess the current state of your technology and offer recommendations based on your responses. Choose from the list of assessments below. (Check back; more assessments will be added in the future.)

Assessment Name	Description	Assessment Creator	Your Responses (Date Completed)	Select
Basic Assessment (2002)	The basic assessment provides feedback on the set of technology that most organizations should consider having in their office. This technology is the foundation for ensuring that your organization is off on the right foot to increasing your effectiveness.	<a href="#">TechAtlas (An NPower and TechRocks Partnership)</a>		<a href="#">Begin</a>

If "Begin" appears in the "Select" column, you have not yet taken this assessment. If "Retake" is in the "Select" column, you can update or completely retake an assessment you already began. In addition, if you've already begun or completed an assessment, you can "View" the responses you made to the assessment. The date in the "Your Responses" column (if there is a date) indicates the date that you completed the assessment.

Click here to begin the assessment.

2. Answer the questions in the assessment.



For some questions, you'll select a single answer (such as Yes or No); for others, you'll choose an answer from a pop-up menu; and sometimes you'll need to type a number. If you aren't sure about an answer, leave it blank. You can do some research and return to complete it later. (It's more important that the information be accurate than that all questions be answered.)



You may see a different assessment, if a technology partner has customized one for you.

3. When you've completed as many questions as you can, click "Save Your Responses."

TechAtlas assessments often offer recommendations based on your responses. Answer the questions to the best of your ability. You'll have an opportunity to review before finalizing your answers. If you need help with terms used in this assessment check out [Tech Terms](#).

### Basic Assessment (2002)

The basic assessment provides feedback on the set of technology that most organizations should consider having in their office. This technology is the foundation for ensuring that your organization is off on the right foot to increasing your effectiveness.

#### Hardware

1 How many computers does the organization use on a regular basis?  (numbers only)

2 How many printers does your organization have?

3 Does your organization use more than one operating systems?  Yes  No

20 Do you have a current record of staff members' computer skills?  Yes  No

*Click here to see a list of terms and what they mean in this context.*

*Sometimes you might want to answer "Maybe" or "Occasionally," but in order for TechAtlas to provide recommendations, you must choose either Yes or No. If you're not sure which is more accurate, leave it blank for now.*

*Always click this button before you leave this screen, even if you haven't answered any question. Your responses aren't saved until you click Save Your Responses. You can change your answers later, if necessary.*

## Fill in the gaps in your assessment.

You can move forward and see the results of your assessment—and the recommendations TechAtlas provides, or you can revisit your assessment to complete the answers you weren't sure about.

To wait, and see the recommendations after you've finished the assessment, click "Not Finished with my assessment, go to my Planning Center without suggesting recommendations now." (If you select this option, you'll go to the Planning Center, where you can see a summary of what you've done and what you have left to do in creating a technology plan. Click "Finish Now" when you're ready to finish the assessment .)

If you answered every question in the assessment, or if you don't want to wait to finish before seeing the recommendations for the questions you did answer, click "Finished! See Suggested Recommendations." You'll see your recommendations in the Planning Center.

*Click here if you're participating in a Tech Fitness Day. This is the only link that gives you recommendations.*

*Click here if you want to email questions to other members of your organization. (See the FAQ for more information about this.)*



If you click "Finished! See Suggested Recommendations" and then change or add responses to your assessment later, TechAtlas will add all the recommendations to your list again. This ensures that TechAtlas does not overwrite any recommendations you have modified. You can delete any duplicate recommendations.

## Prioritize recommendations and review resources.

TechAtlas provides suggestions based on the answers you gave. Though these recommendations are appropriate for a majority of organizations, they can't replace common sense and the knowledge you and your technology team have about your own organization. Use the recommendations as a starting place for research and planning.



The recommendations appear in the third section of the Planning Center. From now on, when you log in to TechAtlas, you'll start in the Planning Center.

To prioritize recommendations, click "Prioritize" at the bottom of the list, and then choose High, Medium, or Low for each recommendation. Click "more" to learn the rationale behind a suggestion, things to consider when deciding whether to adopt it, steps required to implement it, and resources or tools to help you.

Priority	Recommendation	Action
	Document your network configuration and mission critical software information... <a href="#">more</a>	<a href="#">Customize</a> <a href="#">Delete</a>
	Document your network configuration and mission critical software information... <a href="#">more</a>	<a href="#">Customize</a> <a href="#">Delete</a>
	Keep an up-to-date inventory of the hardware and software your organization uses... <a href="#">more</a>	<a href="#">Customize</a> <a href="#">Delete</a>
	Keep an up-to-date record of the technology skills your organization's staff members have... <a href="#">more</a>	<a href="#">Customize</a> <a href="#">Delete</a>
	Train staff how to protect their computers from viruses... <a href="#">more</a>	<a href="#">Customize</a> <a href="#">Delete</a>
	Train staff how to protect their computers from viruses... <a href="#">more</a>	<a href="#">Customize</a> <a href="#">Delete</a>

[Add Your Own Recommendation](#)

[Prioritize](#)

Click the triangle to expand or collapse the view.

TechAtlas can only provide general recommendations. Click here to customize one to meet your organization's needs.

Delete a recommendation if it isn't appropriate for your organization.

Click "More" to see information about the recommendation.

Create additional recommendations, based on ideas and priorities your technology team, advisors, and partners have.



Reviewing recommendations is a good stopping point for Tech Fitness Day or if you're just getting to know the tool.

**Use the same operating system on most of your computers.** [Why this was suggested](#)

**Rationale**  
If you use the same operating system on all or most of your computers, you can update them all at the same time, use the same software on all of them, install the same printer drivers on all of them, and troubleshoot problems more quickly because you're more familiar with the operating system. There is no right or wrong operating system to use. Choose an operating system that will work with the applications and devices you need to use.

**Special Considerations**  
There are valid reasons to have more than one operating system in use. If you need an application that requires a particular operating system, obviously you'll need to have a computer that runs it. Or one operating system may perform a certain function better than another, and therefore be requested by a department or a particular employee. Also, if your organization's mission requires you to support and understand multiple operating systems, you'll want to have those in-house.

You may further reduce the time you spend troubleshooting problems and maintaining computers if you purchase identical hardware models.

**Implementation Steps:**

1. Research the operating systems you're considering. Is one a stronger fit for your needs than the others? Are there any applications you use that require a particular operating system?
2. Determine which operating system your organization will adopt as a standard, and note any need for exceptions.
3. Purchase and install the standard operating system for computers that aren't using it, or install it on new computers as you replace outdated machines.
4. Train staff on the standard operating system.

The Rationale section describes the benefits of the recommendation.

The Special Considerations section provides information about why this might or might not apply to you.

The Implementation section provides the general steps.

Click “Customize” to modify the rationale or special considerations, add and remove steps, and see cost and time estimates for each step. Click Done when you’ve finished.

To further manage the implementation, click “Edit” Next to a step. You can assign tasks, send email reminders, assign due dates, note the actual cost and time of each step, and check off steps as they’re completed. Click Update to record your changes.

**Customize Recommendation:**

Based on your responses to an assessment the following recommendation has been provided. Customize any part of the recommendation to better suit your organization's needs or to add clarifying language.

Name: Document your network configuration and mission critical s

Rationale: The best way to establish self-sufficiency and aid in the maintenance and troubleshooting of any network is to have accurate and up to date documentation for all your hardware and software. Any and all information related to hardware set-up, software configuration and use (like shared databases or the registration number for QuickBooks), Internet connectivity,

Special Considerations: (special cases, gotchas, caveats and other considerations)

Priority: [dropdown]

Done

*There may be additional reasons a recommendation is appropriate for your organization. You may even want to add examples of how this will benefit the organization or specific stakeholders.*

*Add any special considerations that are unique to your organization.*

**Edit Implementation Steps**

Step	Estimated Cost	Estimated time	Action
1. Create notebook or other system for storing all computer related information		2 hours	Edit
2. Make a list of all mission critical software. Insure you have version numbers, support information, web site information for the providers and purchase dates written down.		2 hours	Edit

*Click the Edit button to customize a step.*



Capture the ideas that volunteers, contractors, or staff members have by creating recommendations for them. When people put their ideas in writing, ask them to include the rationale for the recommendation and any special considerations. Then, you have the information you need to keep all your plans in mind while prioritizing.

**Implementation Details**  
You can also edit this information while working on the Action Plan

Assigned to (Email Address): [text box] Click a member to assign  
(required if you want email reminders sent)  
[jane@nonprofit.org](mailto:jane@nonprofit.org)  
[boardmember@nonprofit.org](mailto:boardmember@nonprofit.org)  
[ProgramPerson@nonprofit.org](mailto:ProgramPerson@nonprofit.org)

Date Due: [calendar icon] (required if you want email reminders sent)

Send Email Reminder (s):  
 tonight  on the 1st day overdue  
 on the Date Due  on the 7th day overdue.  
 7 days before the Date Due on [calendar icon]

Actual Time: [text box] hours (numbers only)

Actual Cost: [text box] (numbers only)

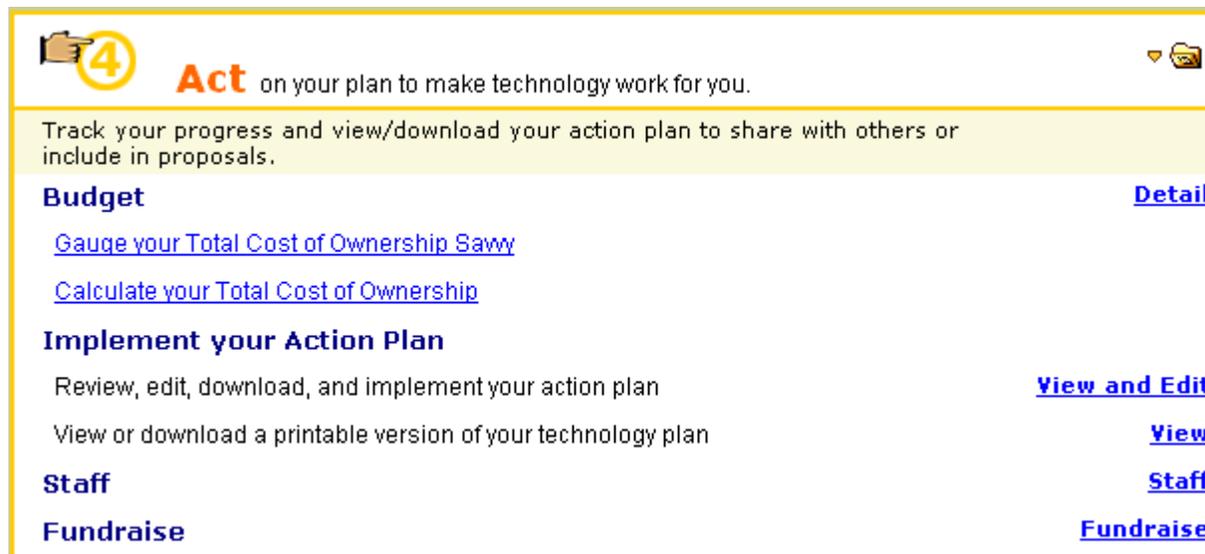
Completed:

Sort Order: 1 (sorts order of process steps within the recommendation)

Update Delete

## Act!

You've prioritized your recommendations, checked out the steps for implementation—maybe even assigned tasks and deadlines. Use the resources in the Act section of the Planning Center to make it all happen: understand the technology roles of your staff, budget for technology improvements, raise funds to support those efforts, and implement all these great ideas.



**Act** on your plan to make technology work for you.

Track your progress and view/download your action plan to share with others or include in proposals.

**Budget** [Detail](#)

[Gauge your Total Cost of Ownership Sawy](#)

[Calculate your Total Cost of Ownership](#)

**Implement your Action Plan**

Review, edit, download, and implement your action plan [View and Edit](#)

View or download a printable version of your technology plan [View](#)

**Staff** [Staff](#)

**Fundraise** [Fundraise](#)

*Click here to see more information about budgeting.*

*View your action plan on-screen or download it to a spreadsheet.*

*Learn more about staff roles to support your use of technology.*

*Learn the ins and outs of raising the money to support your technology plan.*

## Frequently Asked Questions

### Why does my Planning Center look different?

There are two views for each section of the Planning Center: the minimized view and the expanded view. In the minimized view, you see only the major links for the section; in the expanded view, you see all of the resources and options associated with that section.

To change the view, click the triangle in the upper-right corner of the section. When the triangle points up, the section is minimized; when the triangle points down, it's expanded.

### How do I change a response in an assessment?

The primary contact is the only person who can make changes in an assessment. To make changes, click on the assessment in the Assess section of the Planning Center. (When you log in, TechAtlas takes you directly to the Planning Center.)

### Why don't I see any recommendations?

TechAtlas creates recommendations based on the responses in your assessment. You won't see recommendations if any of the following are true:

- Based on your responses, TechAtlas has no recommendations to offer.
- You chose to email questions to other people; after you email the questions, TechAtlas takes you to the Planning Center without generating recommendations.
- You clicked "Not Finished" after taking your assessment. TechAtlas doesn't generate recommendations until you have finished the assessment.
- You closed TechAtlas before clicking "Finished" on the Review Assessment page. If you go to a different Web page or close your Web browser before you click "Finished," TechAtlas doesn't have a chance to generate recommendations.

### How do I view my TechAtlas recommendations?

To see any recommendations TechAtlas has for you based on your responses, do the following:

1. Log in to TechAtlas.
2. Expand the Assess section in the Planning Center (click on the triangle to expand it)
3. Click "Begin a new or modify an existing assessment."
4. Click Retake next to the assessment.
5. Click "Begin a new assessment using your existing responses."
6. Make any changes you want to make.
7. Click Save Your Responses.
8. Click "Finished! See Suggested Recommendations."

### Why do I see duplicate recommendations?

Every time you take an assessment and click "Finished", TechAtlas generates recommendations. Because you may have customized existing recommendations, TechAtlas adds the recommendations to the list, rather than replacing similar recommendations. You can delete duplicate recommendations; just click Delete next to the one you want to delete.

## Appendix A: Working with a technology partner

It can be challenging to implement a technology plan alone, especially when your organization is continuing to perform the day-to-day tasks required to fulfill your mission. That's why many organizations share their information with a Partner.

Partners are groups or individuals who are working with you to evaluate, prioritize, and implement a technology plan that is right for your organization. They may develop a separate assessment, appropriate for nonprofits in your service sector (e.g., environmental groups) or your geographic area (e.g., the greater Chicago area). Or they may just help you understand and implement the recommendations you receive from the Basic Assessment.

You give one or more Partners permission to access your TechAtlas data so that they can help you. Partners must start a Partner account with TechAtlas, which requires that they agree to the Terms of Use. Note, though, that TechAtlas does not screen Partners. Make sure the Partner you're selecting is an individual or organization with whom you already have a relationship. You may add or remove Partners from your account at any time. And if you have a relationship with a consultant or company that does not yet have a Partner account, encourage them to become a TechAtlas Partner by visiting [techatlas.org/tools/partner](http://techatlas.org/tools/partner).

To add or remove a Partner, click "Your Profile and Partners" at the top of any TechAtlas screen. Then either select an existing Partner and click Remove, or click a new Partner and click Add.

The Partner features are evolving, so this screen may look different when you use it. For help, click Contact TechAtlas and type your question.

*Click here on any TechAtlas screen to jump to this page.*

[back to the Planning Center](#)

### Choose Your Partners

Partners are groups or individuals you give permission to access your TechAtlas data in order to help you. Partners must agree to the [Terms of Use](#), but TechAtlas does not screen Partners.

You are responsible for choosing Partners with which you have a relationship. You may add or remove Partners provided in the list below at any time. If you have a relationship with a consultant or company not listed below, encourage them to become a TechAtlas Partner by visiting [techatlas.org/tools/partner](http://techatlas.org/tools/partner).

#### Current Partners You Have Chosen

Partner Name	Description	Action
<a href="#">NPower Seattle</a>	default partner	<a href="#">Remove</a>

#### Potential Partners You May Choose

Partner Name	Description	Action
<a href="#">ACL Time Warner Foundation</a>		<a href="#">Add</a>

*Click here to remove a current Partner from your account.*

*Click "Add" next to the Partner name to add a Partner to your account. You can have designate more than one Partner.*

## Appendix B: A detailed look at the Planning Center

Tech Atlas Planning Center - Microsoft Internet Explorer

File Edit View Favorites Tools Help

TechAtlas

Your Profile and Partners Tech Terms Resources

you're in the **Planning Center**

The Planning Center is your "home" on TechAtlas. From here you can view, edit and act upon the various components of your technology plan.

**1** **Envision** goals for technology by using your mission as your guide.  
[Mission](#) [Team](#) [Vision](#)

**2** **Assess** your current technology.  
[Assess](#) [Inventory](#) [Staff Skills](#)

**3** **Prioritize** tech improvements best suited to your organization.  
[Customize Recommendations](#) [Prioritize](#)

**4** **Act** on your plan to make technology work for you.  
[Budget](#) [Staff](#) [Fundraise](#) [Implement](#)

Click a triangle to expand the section. (See the following pages for a detailed description of each expanded section.)

Click a blue link to go directly to the information about that topic.

 **1 Envision** goals for technology by using your mission as your guide.

Technology planning rooted in your organization's mission, led by a dynamic group, and guided by a vision of what success looks like will help you implement changes that make a difference.

**Mission** Any Nonprofit empowers poor people and works with the greater community to identify and eradicate the causes of poverty. [Edit/View](#)

**Team** jane@anynonprofit.org, tom@anynonprofit.org, julie@anynonprofit.org, exec@anynonprofit.org, bill@anynonprofit.org, tina@anynonprofit.org [Edit/View](#)

**Vision** Internet - communicate with decisionmakers and community Database - record campaigns; don't have to re-invent the wheel each time Finances! Create our newsletter? inhouse? [Edit/View](#)

Click the triangle to collapse the section, when you want to see only the header and the main links.

View and make changes to your organization's mission statement.

View and add or remove members of your team.

View and modify your organization's technology vision.

 **2 Assess** your current technology.

Getting a complete picture of your current technology includes taking assessment surveys, completing a technology inventory and surveying your staff to discover their technology skills.

**Assessments**

Your Assessments	Responses	Status (modified)
<b>Basic Assessment (2002)</b>	<a href="#">View</a>	<b>Completed (9/5/02)</b>

[Begin a New or Modify an Existing Assessment](#)

**Inventory on Tech Surveyor**  
[Inventory Snapshot from Tech Surveyor](#)

**Staff Skills on Tech Surveyor**

Click the triangle to collapse the section, when you want to see only the header and the main links.

See the current responses in the assessment.

This is the status and the date it was last modified.

Click here to start over or to change your responses in an existing assessment.

If you've created an inventory in Tech Surveyor, click here to see a summary of it.

These links take you to Tech Surveyor. You'll use the same account in Tech Surveyor that you use in TechAtlas. Use Tech Surveyor to inventory your equipment and your staff skills.



## Prioritize tech improvements best suited to your organization.



Customize and prioritize technology recommendations generated by your assessment responses. Add your own or delete any that you don't find useful. Recommendations include an explanation of why they may be important, implementation steps with possible estimates, along with helpful resources.

### Customize Recommendations

Priority	Recommendation	Action
	Document your network configuration and mission critical software information... <a href="#">more</a>	<a href="#">Customize</a> <a href="#">Delete</a>
	Document your network configuration and mission critical software information... <a href="#">more</a>	<a href="#">Customize</a> <a href="#">Delete</a>
	Keep an up-to-date inventory of the hardware and software your organization uses... <a href="#">more</a>	<a href="#">Customize</a> <a href="#">Delete</a>
	Keep an up-to-date record of the technology skills your organization's staff members have... <a href="#">more</a>	<a href="#">Customize</a> <a href="#">Delete</a>
	Train staff how to protect their computers from viruses... <a href="#">more</a>	<a href="#">Customize</a> <a href="#">Delete</a>
	Train staff how to protect their computers from viruses... <a href="#">more</a>	<a href="#">Customize</a> <a href="#">Delete</a>
	<a href="#">Add Your Own Recommendation</a>	
		<a href="#">Prioritize</a>

Delete recommendations that aren't appropriate for your organization.

Customize recommendations for your organization.

Capture ideas from consultants, staff members or others by creating your own recommendations.

### Prioritize Recommendations

Click here to read about the recommendation, including the steps required, the benefits you'll receive, and any special considerations to keep in mind.

Prioritize the recommendations so you know where to focus your efforts.

 **Act** on your plan to make technology work for you. 

Track your progress and view/download your action plan to share with others or include in proposals.

**Budget**

[Gauge your Total Cost of Ownership Sawy](#)

[Calculate your Total Cost of Ownership](#)

**Implement your Action Plan**

Review, edit, download, and implement your action plan

View or download a printable version of your technology plan

**Staff**

**Fundraise**

[Detail](#)

[View and Edit](#)

[View](#)

[Staff](#)

[Fundraise](#)

*Learn about creating technology budgets.*

*See your action plan as a whole and make any adjustments to it. Or download it as a spreadsheet.*

*View your action plan and download a printable version.*

*Learn about common technology roles at nonprofits.*

*Find out what you know about total cost of ownership, and then calculate what your technology will cost you.*

*Find out how to successfully raise money to implement your technology plan.*