New Agency Training Manual

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Welcome – Note to Agency Administrators

Welcome to the e-CImpact Agency Training Manual. We have created this manual for your organization's use. This training manual will help guide you through the process of applying and reporting for Brown County United Way (BCUW) grants

This grant management site will house all documentation for your agency and programs specific to the grants you have applied and been approved to receive. If you have questions about the reporting process or need assistance utilizing the system, please reach out to the BCUW liaison for your grant funded program.

System of Care Grants, SOC (Three year granting cycle):
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Access Requirements as New Agency

Requirements: To access the e-CImpact grant management system you will need a computer with internet connection and current version of a web browser (example: Internet Explorer, Firefox, Chrome, Safari).

To login into the e-CImpact grant management system, you may either login through a web browser or through the Brown County United Way website.

New Agency Registration

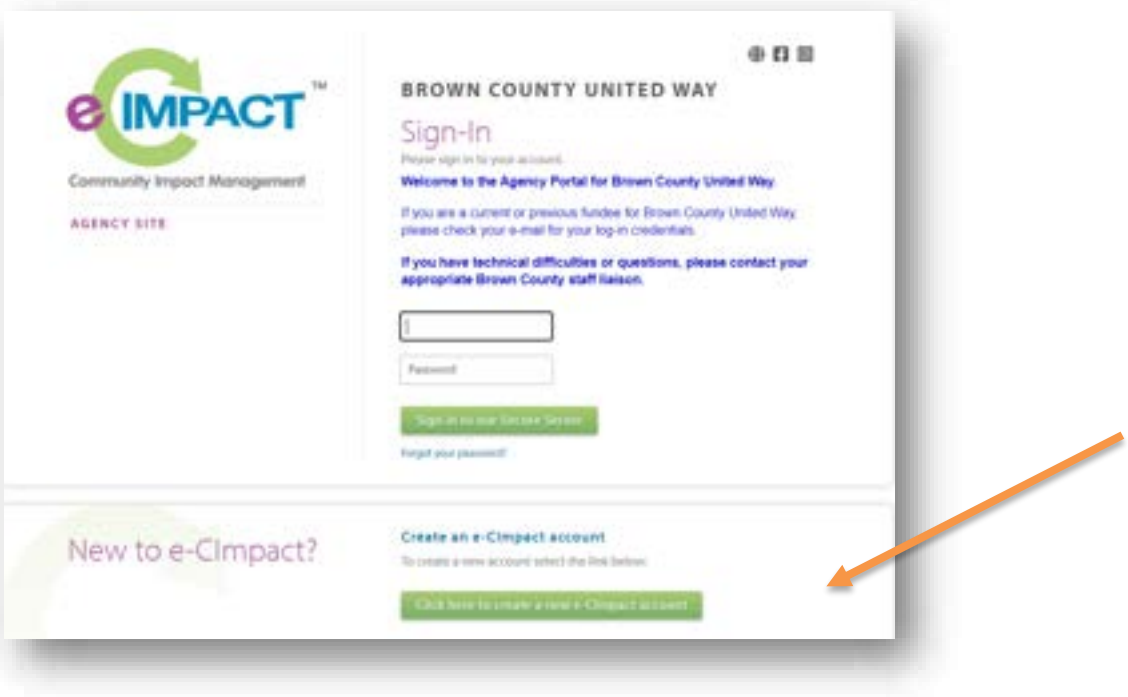
If you are not yet a United Way partner agency, please proceed with site registration. Registration is required for all non-partner agencies.

Currently, the default agency username is the email address of the agency's **primary contact**. The first time you login, the password will be pwd123. Once logged in you will be automatically prompted to change your password.

Web Browser Access:

Type into the web browser URL: https://agency.e-cimpact.com/login.aspx?org=53135U

Step 1: From the agency login page select 'Click here to create new account.'

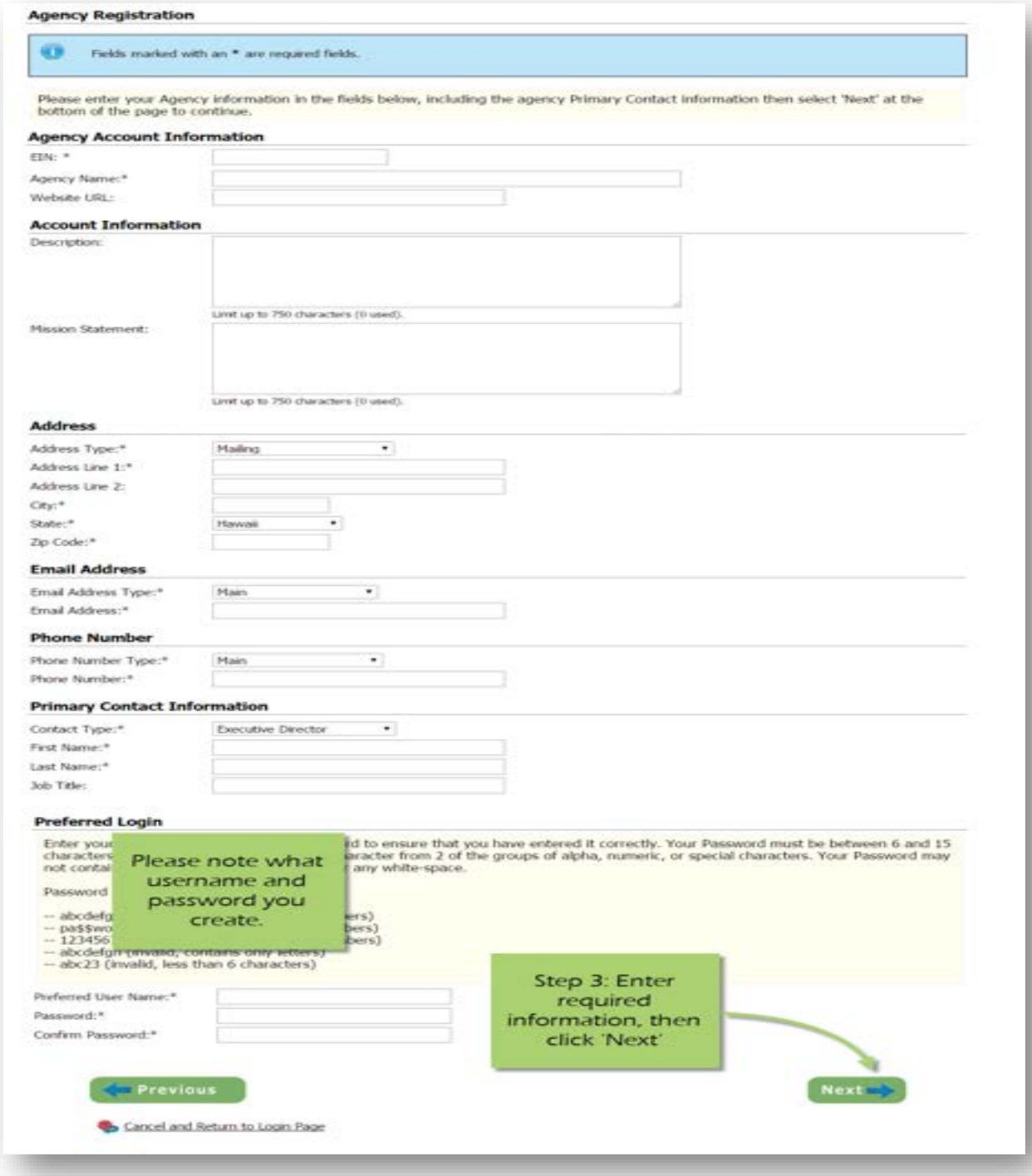


The Brown County United Way Welcome page will open, providing organization mission, staff liaison information and an introduction to the registration process. Please read and click the 'Next' button.

Step 2: This page requires you to input the agency EIN account information. This field is required to proceed forward in the registration process.

*EIN – the system will automatically validate your EIN, confirming you do not already have an e-CImpact account. The system will also automatically generate agency information linked to the EIN entered.

Step 3: The next prompt will require you to input your agency information. Once completed, proceed to the next page.



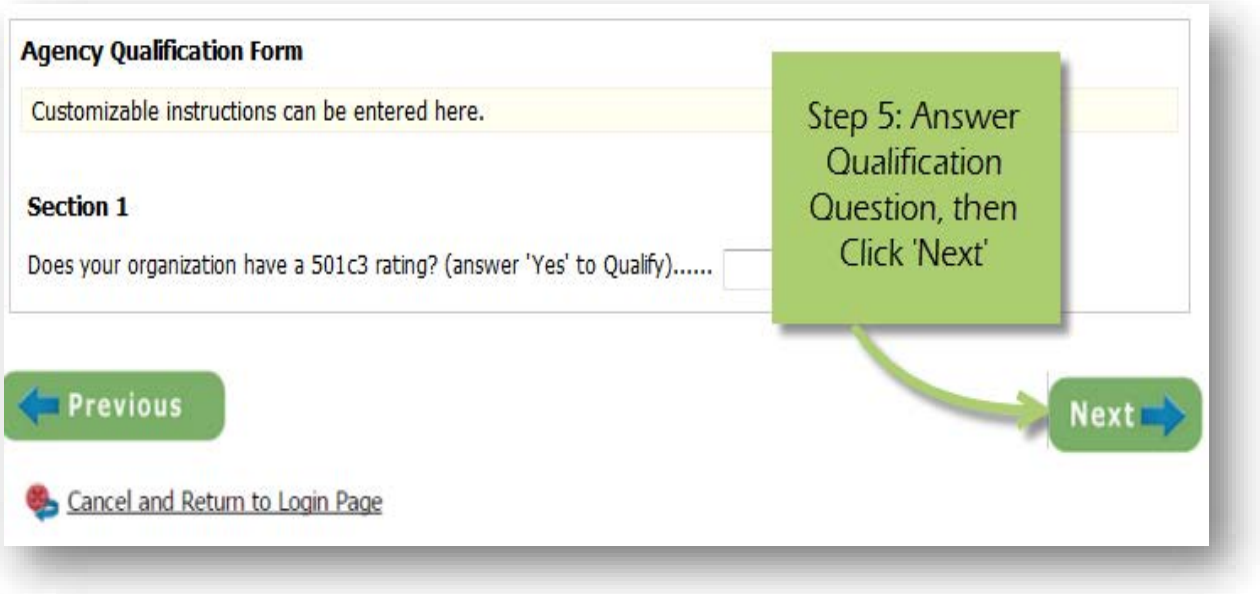
User Name and Password

Your username and password will be unique to you. Your username will be your email address. Please note the password requirements.

Once your account information has been created, you will be able to review the current list of available funding opportunities.

Step 4: Please select the grant that you would like to apply for and click 'Next'.

Step 5: The next page is a grant Qualification page. The Qualification form is used for most open process grants. This is the initial step for all applying agencies. Please answer all qualification questions and proceed to the next page.

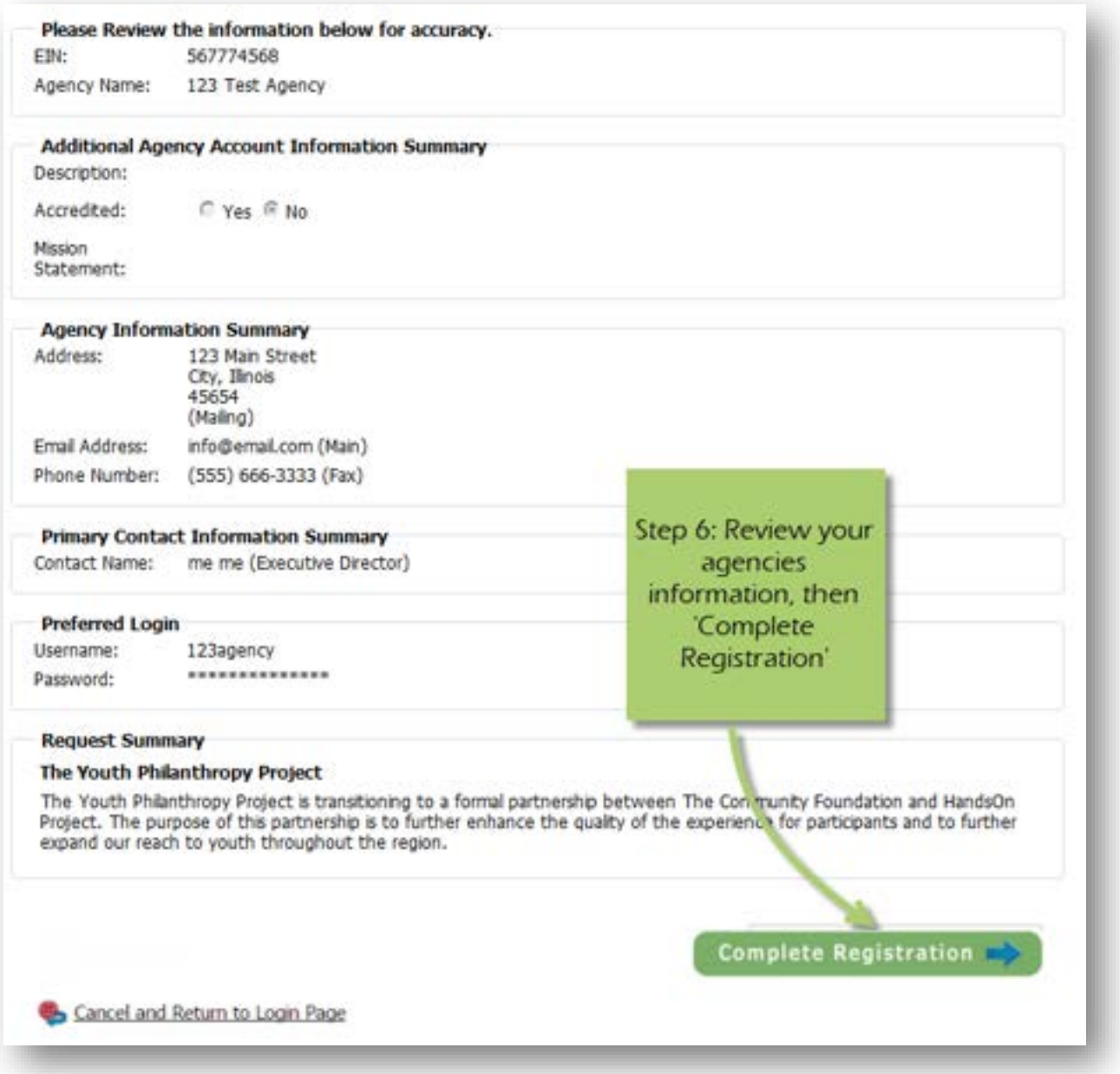


If your agency passes the initial qualification questions, you will then move on to confirm your registration.

In the event your agency does not qualify, you will be provided information on who to contact should you have any questions.

Step 6: Review all agency information entered, and then click 'Confirm Registration.'

Once your registration is completed you will be able to print your confirmation page. You will also receive a confirmation email.



Future Sign-In Information Accessing e-CImpact

Once you have created your new agency account and registration, you have multiple options for subsequent logins, via a web browser or through the Brown County United Way website.

Web Browser Access:

Type into the web browser URL: https://agency.e-cimpact.com/login.aspx?org=

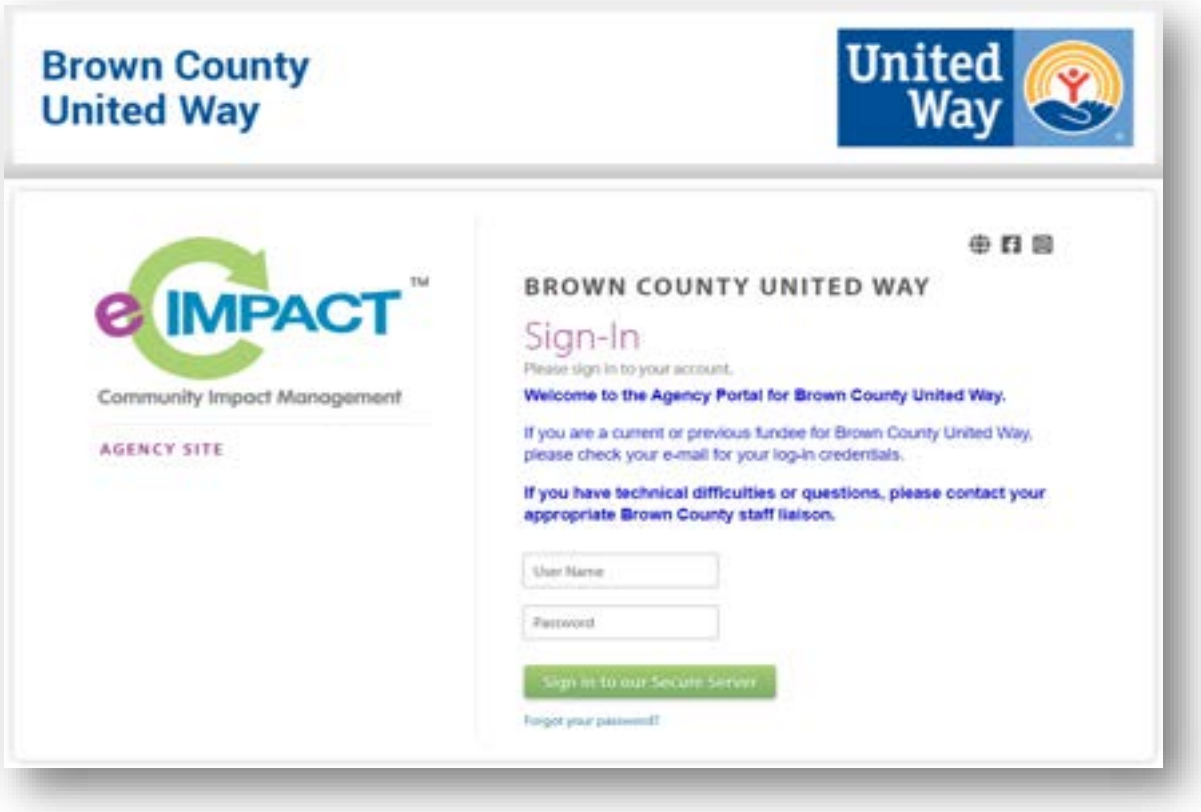
Organizational Code: **53135U**

Username: your email address

Password: the unique password that you created during initial registration.

Click 'Sign In-to our Secure Server' or use the enter key.

Please bookmark the address to easily access e-CImpact at your convenience.



Brown County United Way Website Access:

Type into the web browser URL: https://www.browncountyunitedway.org/

Go to the drop-down tab: Our Impact.

Click on: Brown County United Way Grants.

This page contains general Brown County United Way granting information. At the bottom of the page, you will see information pertaining to access for e-CImpact.

Click on the hyperlink for 'Brown County United Way Grant Partner.'

Please bookmark the address to easily access e-CImpact at your convenience.

Forgot Password

If you do not know or remember your password, you may either contact your council liaison or follow the steps to generate a new password.

Staff Liaisons:
Program Investment, Holly Ladwig
Impact Initiatives, Jill Sobieck

Step 1: Click 'Forgot your password?' on the agency login page.

Step 2: Enter your username

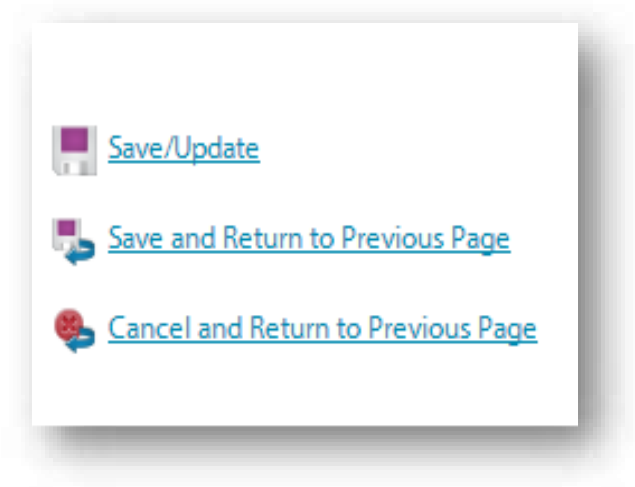
Step 3: Select 'Auto-Generate my Password'

Step 4: Check your email, return to the login page and procede to login. If you do not see the email in your inbox, be sure to check the 'junk' folder. If the email is not in either, please contact your staff liason.

Agency Site Home Page

Common Navigation on the Agency Home Page

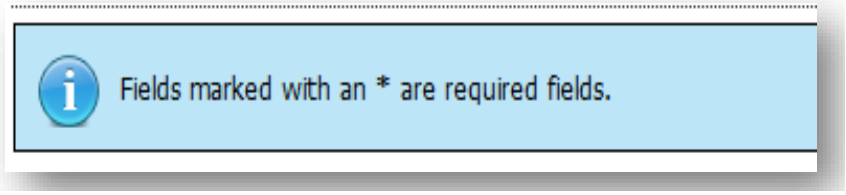
The navigation links in e-CImpact are consistent throughout the site.



Save/Update: Refreshes the page while saving any changes made to your data.

Save and Return to Previous Page: Returns you to the page last visited while saving any changes made to your data.

Cancel and Return to Previous Page: Will return you to the previous page and will NOT save any changes made to your data.



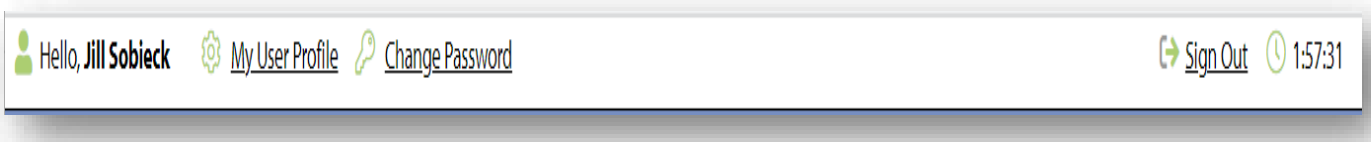
Please note any fields marked with an asterisk.

Home Page Sections

From the home page you will be able to access all parts of the agency site. There are four basic sections:

1. Account Management
2. Agency Information
3. News, Events, and Calendars
4. Applications and Resource Center

Account Management



User Profile

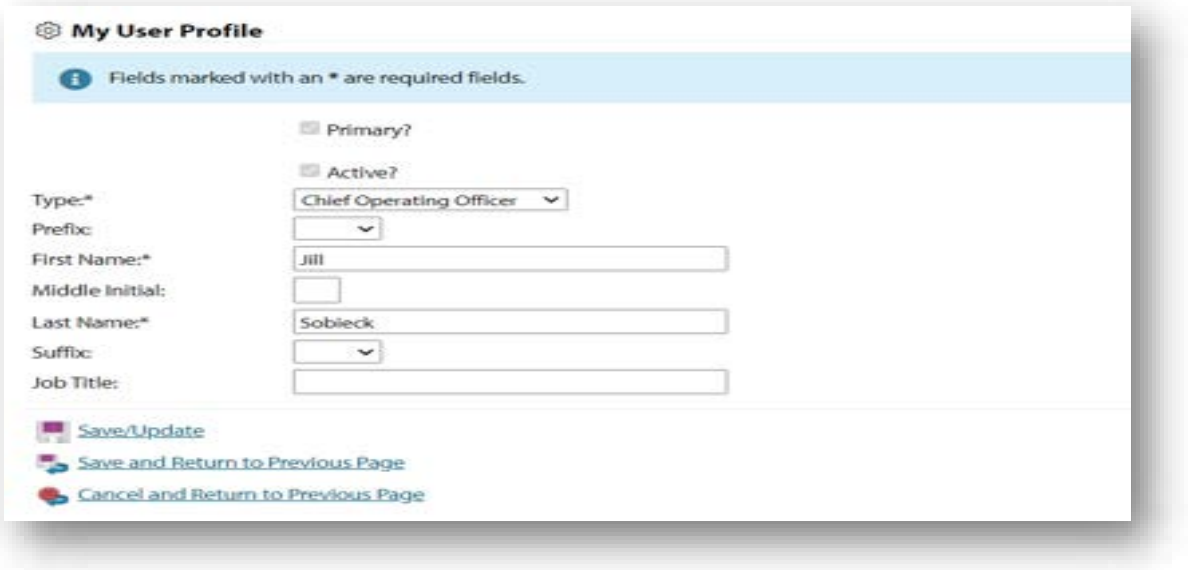
The User Profile is located at the top of the portal page. The various hyperlinks will allow you to edit your profile information, including primary contact, basic information, email addresses, phone numbers, and mailing addresses.

Primary Contact: There can only be one primary contact per agency. This can be set by selecting the check box 'Primary'. The primary contact is automatically included in all emails and cannot be deactivated unless a new primary contact is selected. Any agency contact can update which contact should be set as the primary contact. The primary contact will be primary person at your agency that is responsible for grant reporting.

Agency Contacts: An agency contact is an element of the agency profile that houses agency employee information. Each contact at the agency can have their own address, phone, and email address information. Agency contacts have access to applications, reports, and the ability to input or amend any of those documents. Agency contacts have capacity to update agency profile information, including their contact type (or role). If the agency contact would like to be included in all bulk emails, Admin. will enable that from the user side upon request.

Active: Make sure your account is 'Active'. Once a user is deactivated you will need to contact your Brown County United Way granting liaison to reactivate the user account.

Enter any necessary information, and then click 'Save/Update'.



To Change Your Password

Step 1: To change your password, select the hyperlink 'Change Password'

Step 2: Enter the old password.

Step 3: Then enter the new password two times.

Password Rules:

- Must be between 6 and 15 characters.
- Must contain at least 1 character from 2 of the groups of alpha, numeric, or special characters.
- Characters NOT accepted are: “, % or any white-space.

Sign-Out

Users should ‘Sign Out’ of e-CImpact to ensure the security of their data. Once signed out of e-CImpact, press the ‘X’ in the upper right-hand corner of your browser to close the window.

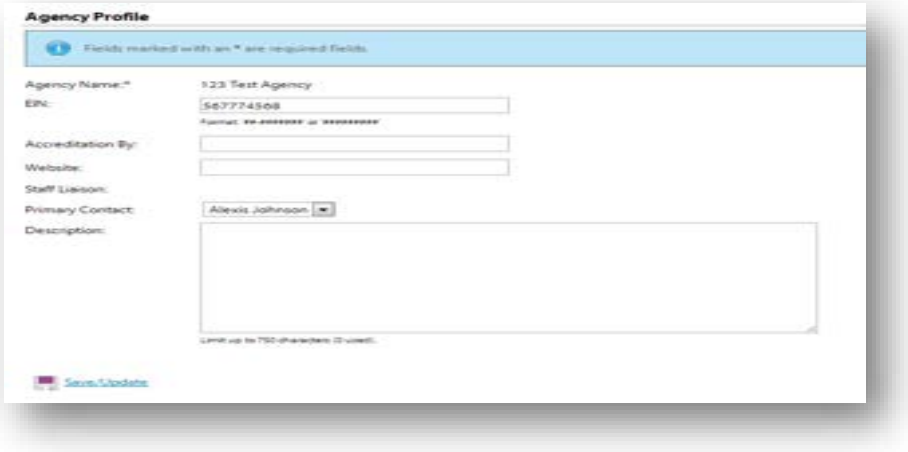
Agency Information

Upon initial agency login, you will be prompted to review your agency information, and periodically throughout the year. The Agency Information section, located on the left-side of the page in the blue box, is where account information, contacts, statements (mission / vision / agency) and program information are located. From this section you will be able to update your address(es), contact information, and other agency information.

Agency Profile

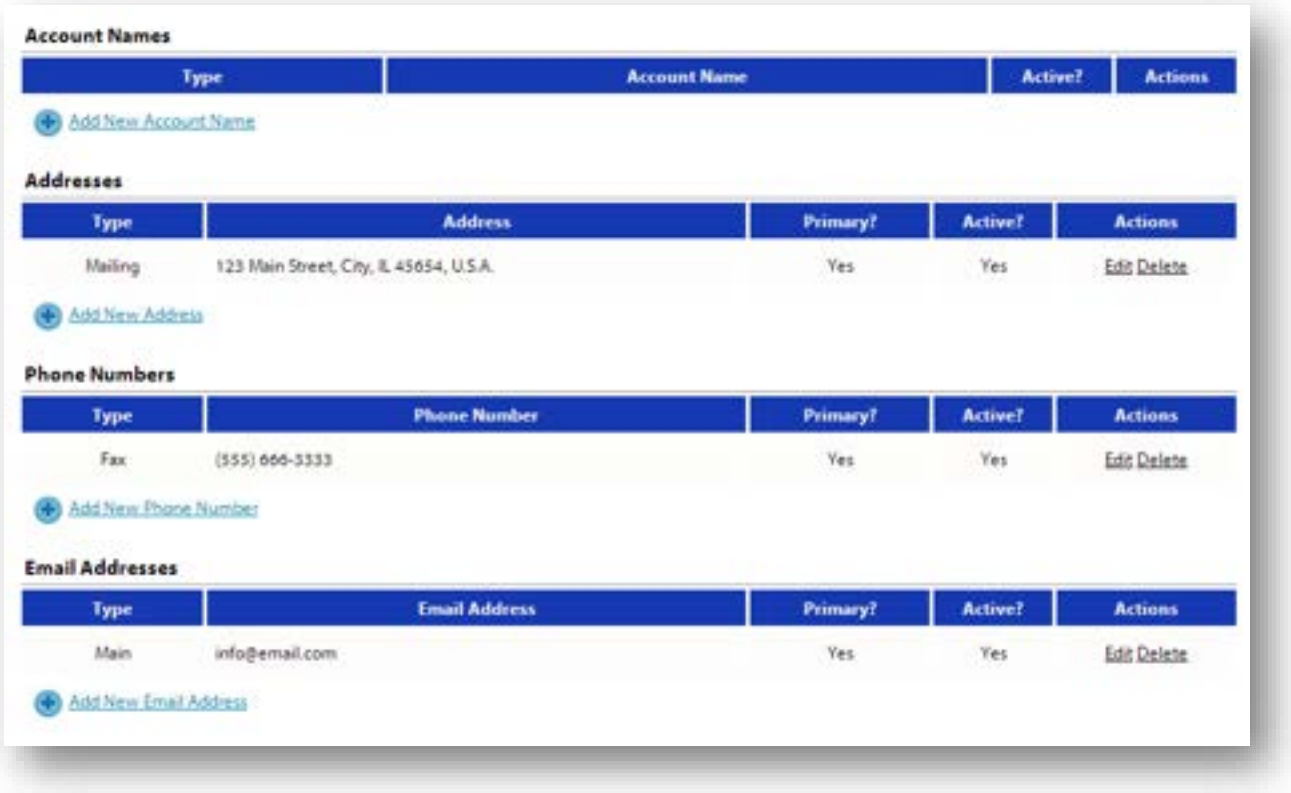
The profile page is where all agency specific information is housed and can be updated. This includes the basic information – agency name, EIN, staff contact, primary contact, website, etc.

Profile information includes primary information about the agency, including the agency name, staff liaison, and description. Access and manage the agency account names (which are more specific or alternate names used to identify an agency, such as a formal name), addresses, phone numbers, email addresses, associated agency groups, and more.



Account name(s), address(es), phone number(s) and email address(es)

You may also add, edit, or delete agency account names, address, phone numbers and email addresses. Agencies can have multiple records for each section.



Agency Contacts

To view all agency contacts – click ‘Contacts’ from the agency information section on the homepage. From this area you will be able to see anyone who is currently listed as a contact at your agency, as well as add, edit, deactivate, or delete an agency contact.

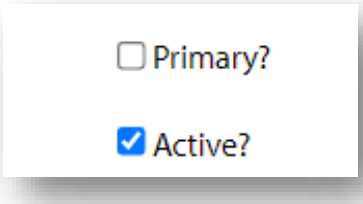
To add or edit contact information, click on Contacts, and click on ‘Add New’.

The agency contact profile page is like the user profile and contains the same information.

- Name and preference
- Email addresses
- Phone Numbers
- Addresses
-

When adding a new record, or updating existing records, be sure to select ‘Active’ appropriately.

‘Primary’ can only be selected for one record.

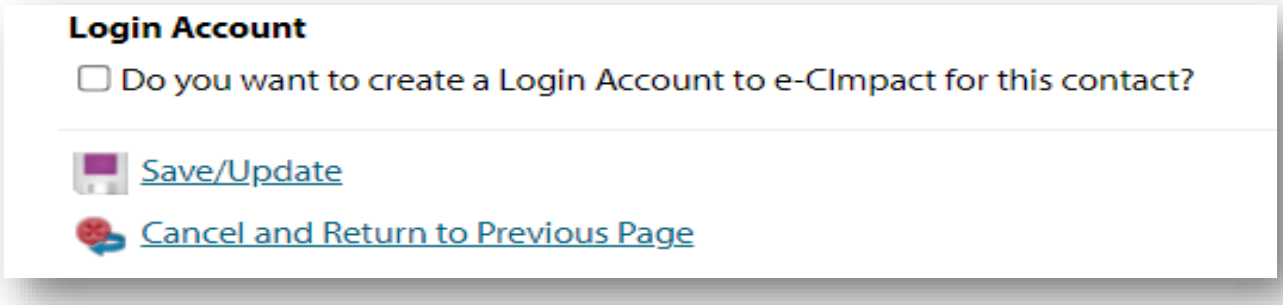


Ability for Agency to Request Login for an Agency Contact

Agencies can request a login for their staff from the Agency Site. When an agency requests a new login, an automated email is sent to the agency's council liaison email address to alert them of a new agency login request. The council liaison will approve all

new agency requests. Agency contacts or volunteers that have not been approved of login credentials will display 'No Web Access' under the username column.

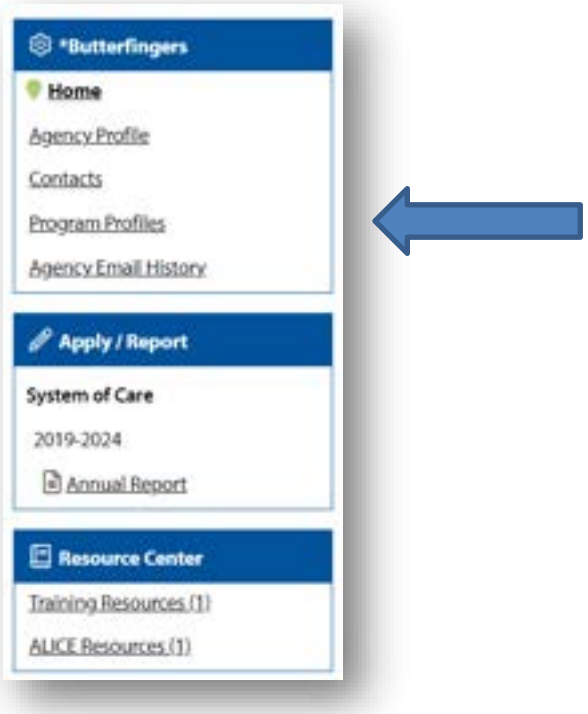
Once a new contact has been created, you are able to request a login for this user. At the bottom of the contact information page, check the box that requests a login account for the contact.



Registering a New Program

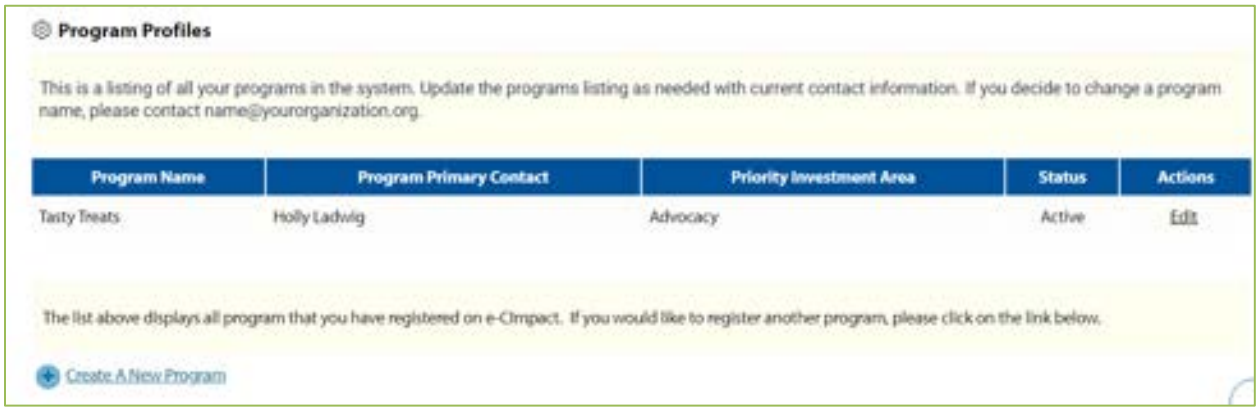
Agencies can access and update their program profile information via the Agency Site. The program profile contains information specific to the program, such as the program description, addresses, phone numbers, email addresses, program contacts, Impact Area and Managing Volunteer Group alignment, program level statements (such as Mission, Vision, etc.), and comments.

Step 1: Go to the programs area by selecting ‘Program Profiles’



Step 1: Go to the Agency Program Profiles area.

Step 2: Select 'Create a New Program'



Step 2: Click on 'Create a New Program.

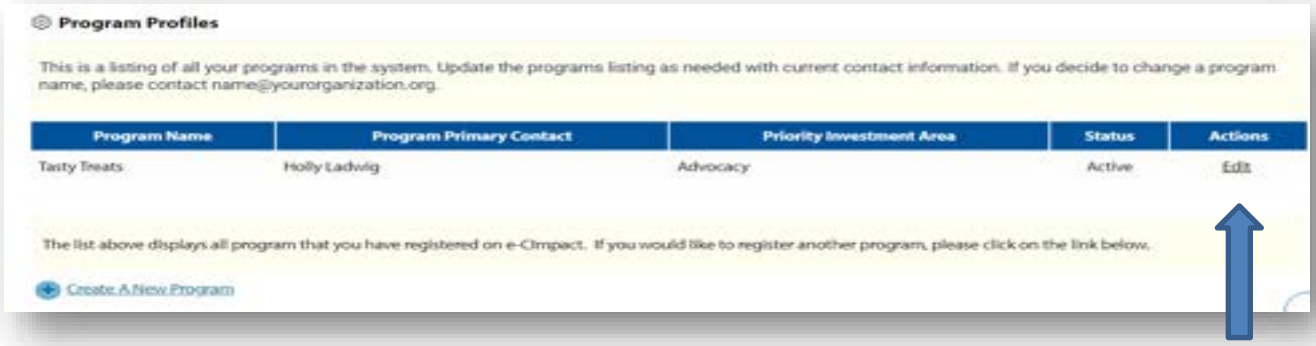
Step 3: Enter all required program information, and then select 'Save / Complete Registration'

After selecting 'Save/Complete Registration' you will be directed to the program profiles page, here you will see a validation message stating that you have successfully registered your program.

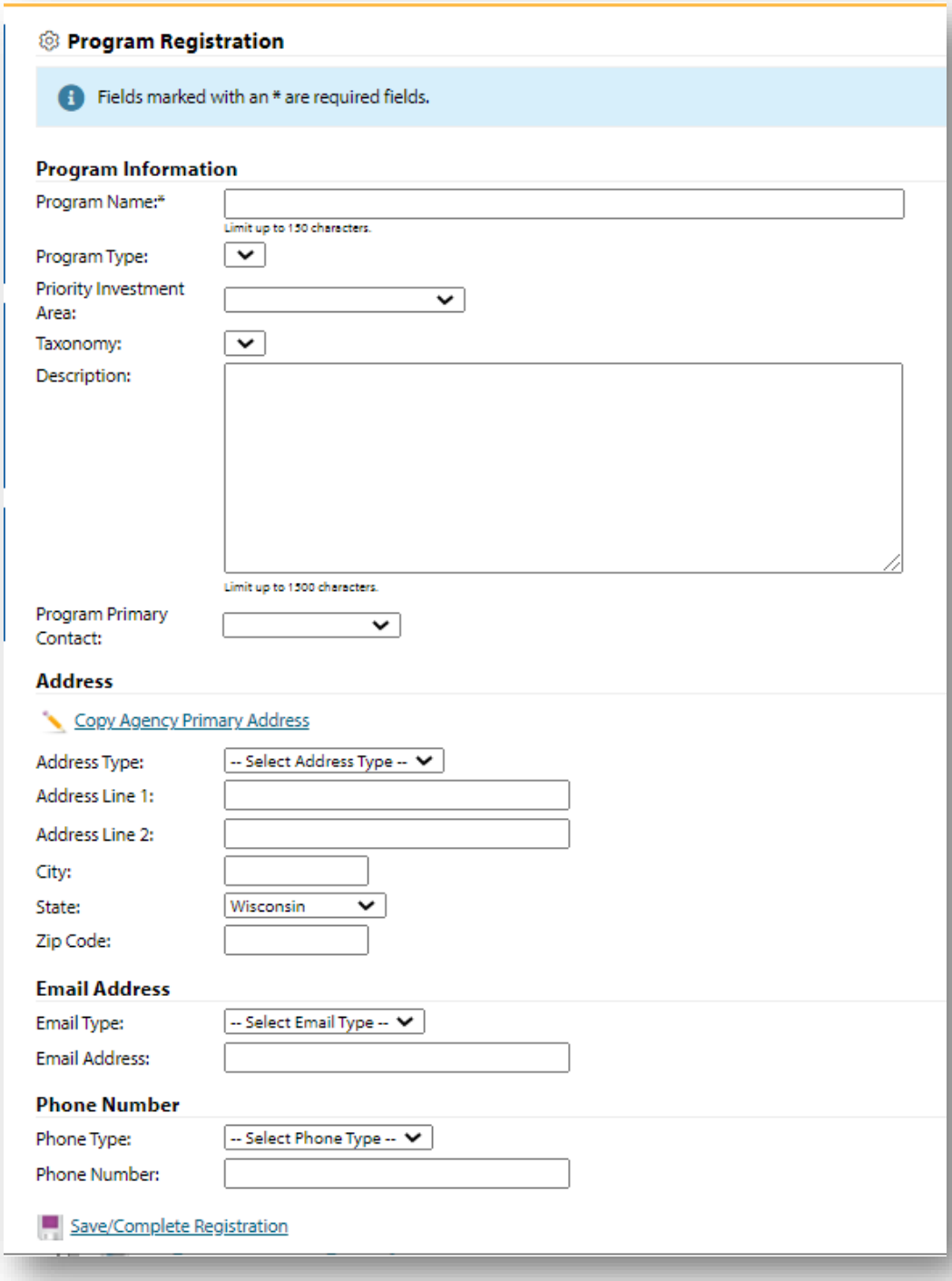
Updating Program Information

Step 1: To edit a program, go to the program profiles area.

Step 2: Select 'Edit' next to the desired program. From here you will be able to update information as needed.



Update all required and relevant information related to the individual program. Click 'Save/Complete Registration' at the bottom of the page.


Program Registration
Fields marked with an * are required fields.
Program Information
Program Name:*
Limit up to 150 characters.
Program Type:
Priority Investment Area:
Taxonomy:
Description:
Limit up to 1500 characters.
Program Primary Contact:
Address
Copy Agency Primary Address
Address Type:
-- Select Address Type --
Address Line 1:
Address Line 2:
City:
State:
Wisconsin
Zip Code:
Email Address
Email Type:
-- Select Email Type --
Email Address:
Phone Number
Phone Type:
-- Select Phone Type --
Phone Number:
Save/Complete Registration

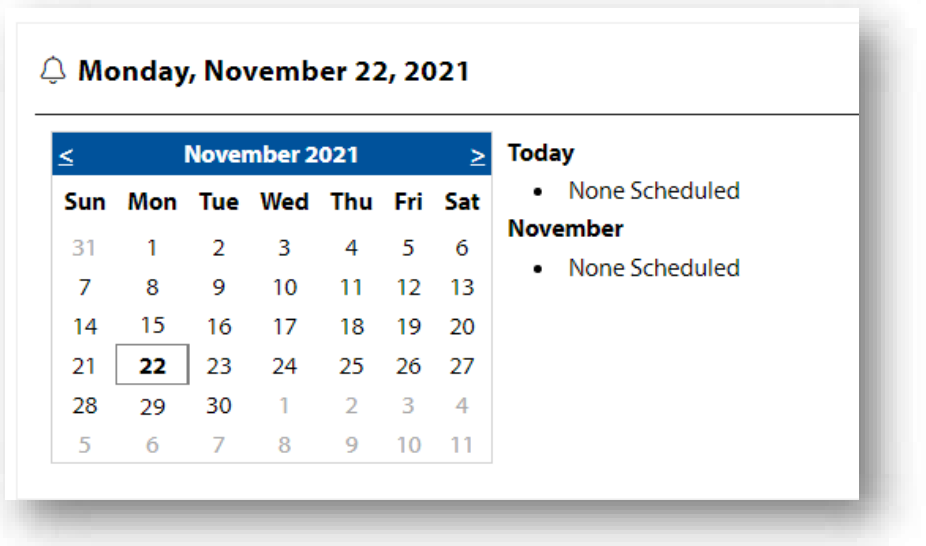
Calendar

The calendar area will display any events, deadline dates, or scheduled site visits you have upcoming for the month. Some news items will display here as well.

Please note that the items listed in the calendar area are specific to the selected month.

If you wish to view items from another month use the arrows to switch months.

Step 2: Click arrow buttons to switch months.



Site Visits

The Site Visit section in e-CImpact can be used to manage scheduling of agency site visits. Once an agency is invited to schedule a site visit, they will see a 'Current Site Visit' link on the left side navigation box on the Agency Site. There are two (2) methods by which a time slot can be reserved for an agency/program:

- An agency chooses a sign-up day/time slot from the Agency Site, OR
- An Admin Site user assigns a time slot to the agency from the Administrative Site.

Site Visits can be created as agency-level visits, meaning each agency can only sign up once, or program-level visits, where an agency can sign up for a site visit time slot for each individual program. Site Visit scheduling includes the ability to limit numbers of attendees to specific time slots, specify a location, set start and end times, and send email notifications.

This feature will be activated once the Admin. at United Way coordinates with the agency regarding site visit availability. This is currently inactive on the agency site.

Step 1: To access the site visit area select 'Current Site Visit'

Step 2: Select 'Reserve Time Slot' for the agency or program.

Step 3: Choose the date and address desired.

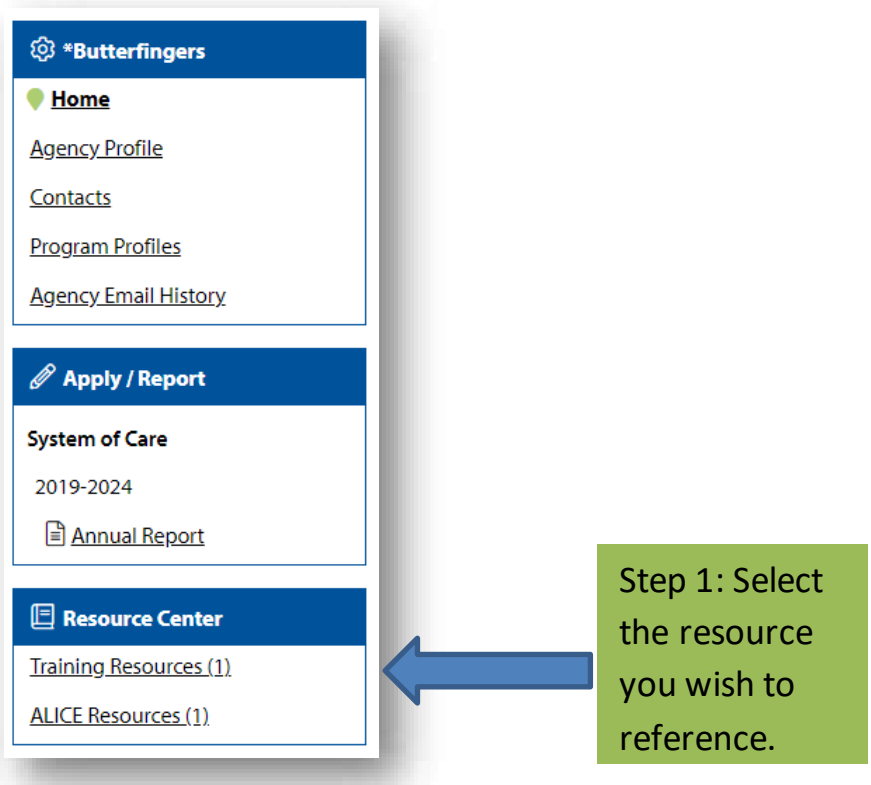
Step 4: 'Save/Update' or 'Save and Return to Previous Page'

Resource Center

The agency resource center is where you will be able to find any documents you may need to reference from United Way. The Resource Center is in the lower half of the left-hand navigation.

Accessing Resources

Step 1: Select desired resource item.



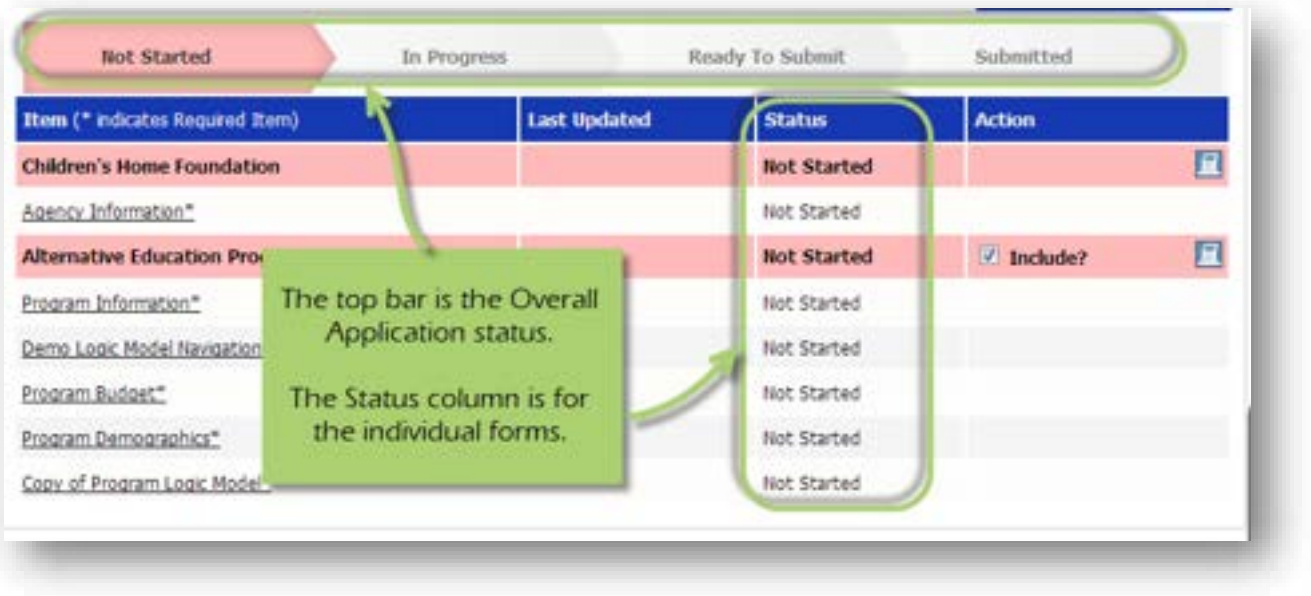
Step 2: Click on the attachment link to open.

Accessing Application / Grant Process

Step 1: Choose the application or grant process from the list located in the left-hand navigation.

Form Status

This page works much like a check list. You can easily see how much of your application you have submitted.



Not Started: When the application or form is in 'Not Started' status, it means that there has not been any data entered yet.

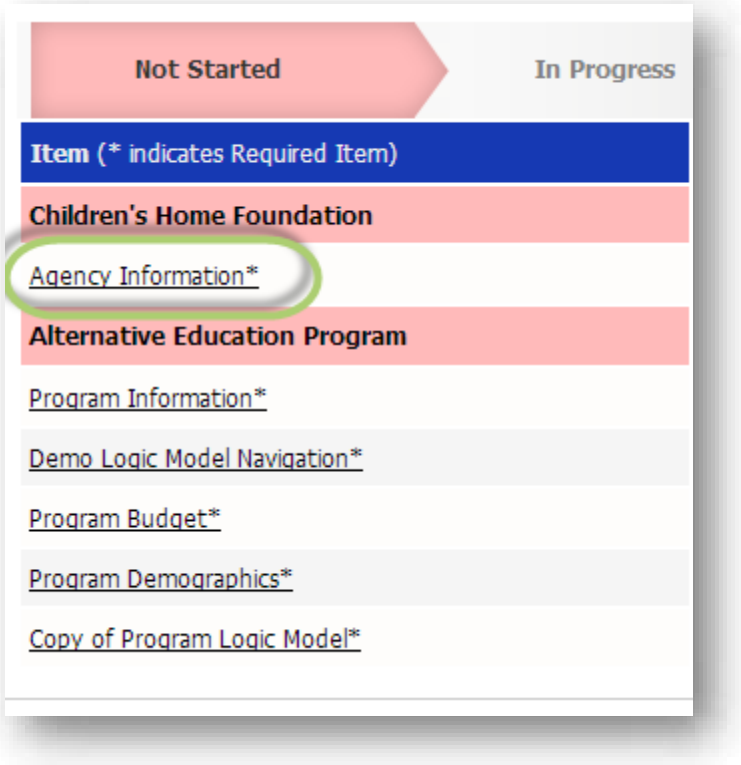
In Progress: If you form is set to 'In Progress', then the form has been started, and saved. The form has not been marked completed. The top bar will remain at 'In Progress' until all forms are marked completed.

Ready to Submit: Once all forms are marked "Completed', your top bar should move to 'Ready to Submit'. At this stage you should review any information entered, then move on to submit your application.

Submitted: When an application is in the 'Submitted' status, you will no longer be able to make changes to the information on the forms. If you submit, and realize you need to edit or submitted in error; you will need to contact your staff liaison.

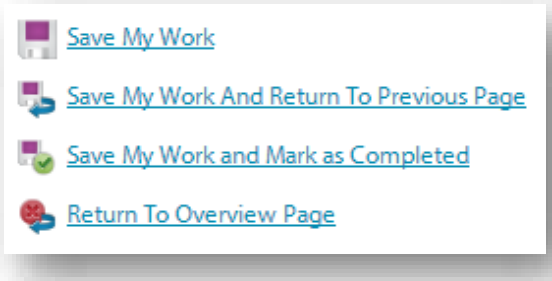
Entering Information

To begin filling out your application, click on the desired form:



Save Options

After entering information on your forms, you have multiple save options.



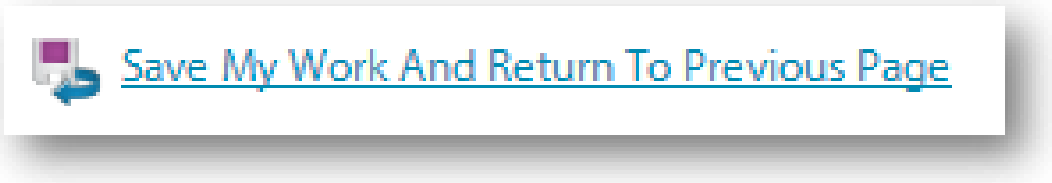
Save My Work / Save My Work and Return to Previous Page: These options are for when you need to save, or move on to something else, and are not finished entering information.

Save My Work and Mark as Completed: This option is for when you have entered and reviewed your information and are ready to submit.

Switching Forms

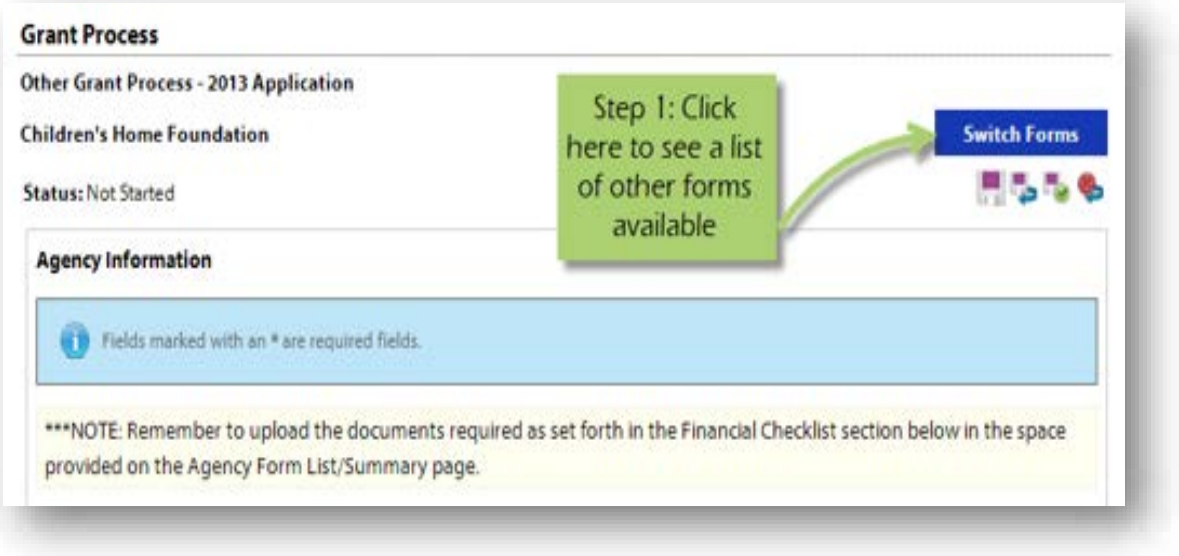
There are two ways to switch forms within an application:

First option: When you are finished with one form, click on 'Save My Work and Return to Previous Page', and then select the next form.



Second option: You can use the 'Switch Forms' option, located in the upper right-hand corner. To use the second option, follow the steps below.

Step 1: Click 'Switch Forms' to view the list of available forms.



Step 2: Click on the form you would like to move to.

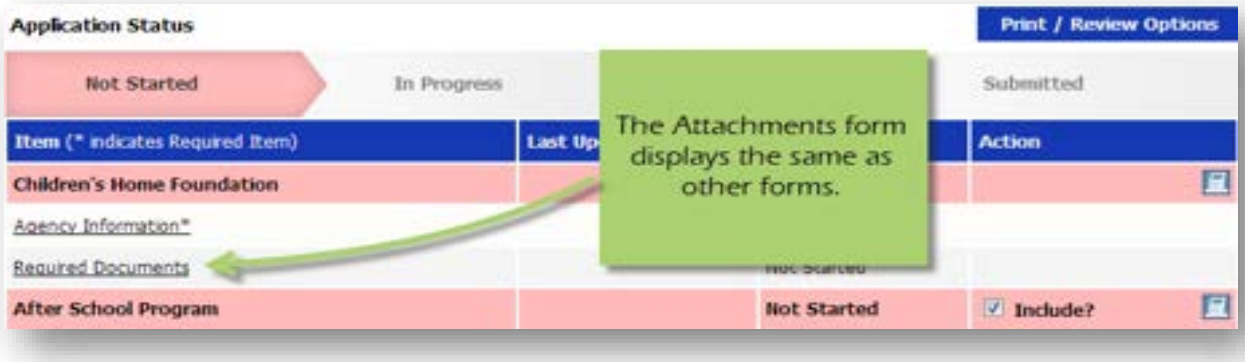
Attachments

Uploading Attachments

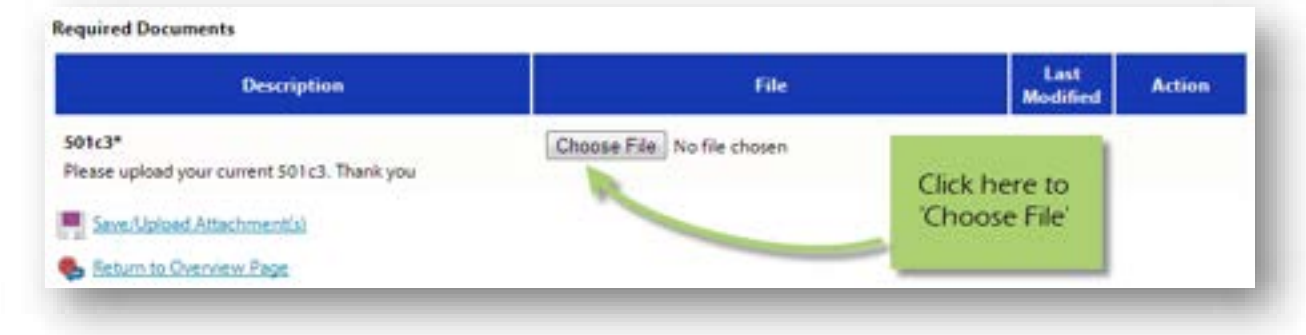
If you are uploading attachments, the following file types and file size are acceptable:

- Accepted file types: pdf, doc, docx, ppt, pptx, xls, xlsx, gif, jpg, jpeg, bmp, tif, rtf, and txt.
- Combined maximum file size is 8MB.

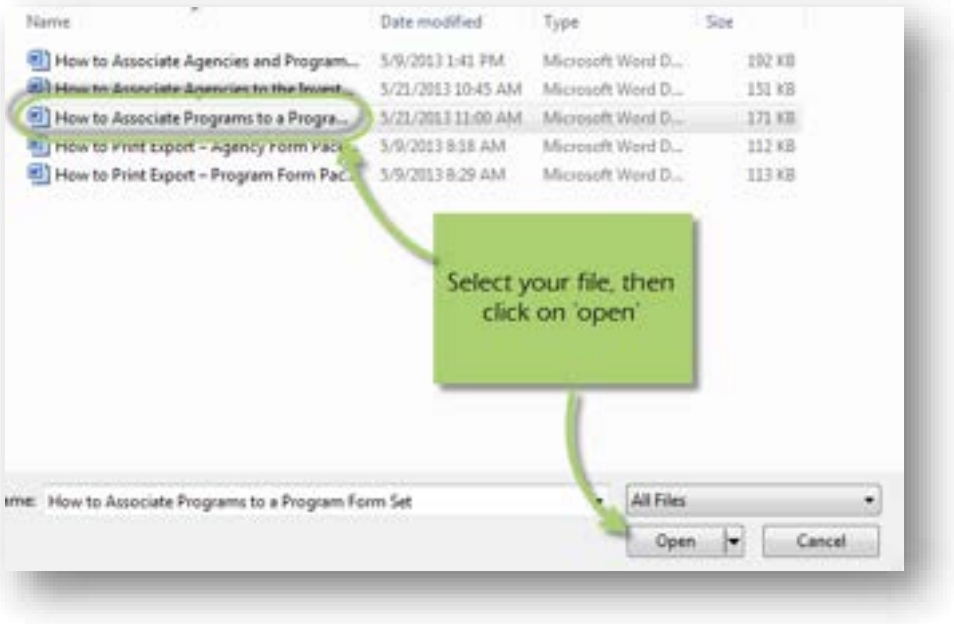
Step 1: Click on the 'Required Documents' form.



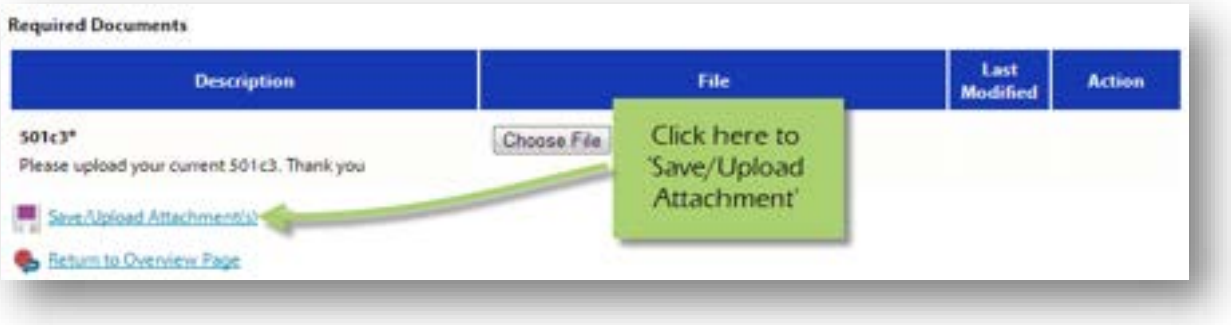
Step 2: Once you have confirmed your document meets the upload requirements, click 'Choose File'.



Step 3: Browse your computer and select the desired document.

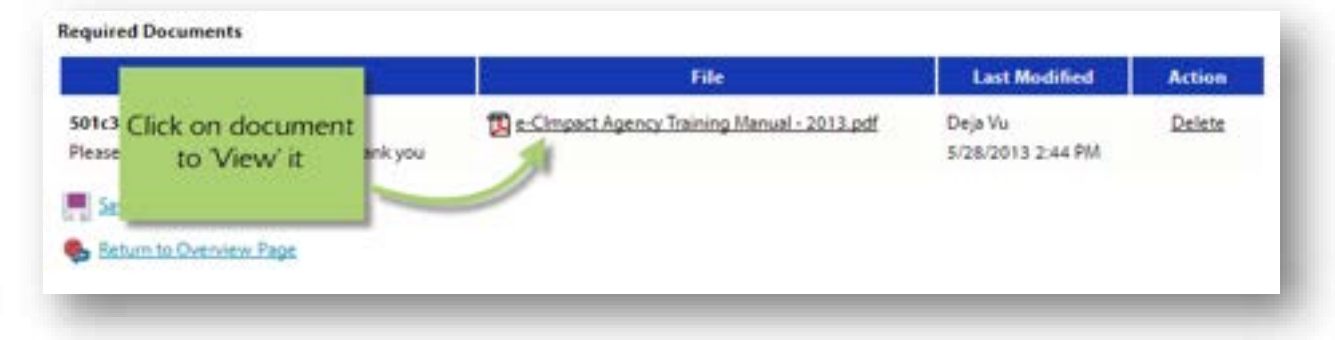


Step 4: Click on 'Save/Upload Attachment(s)'.



Viewing Attachments

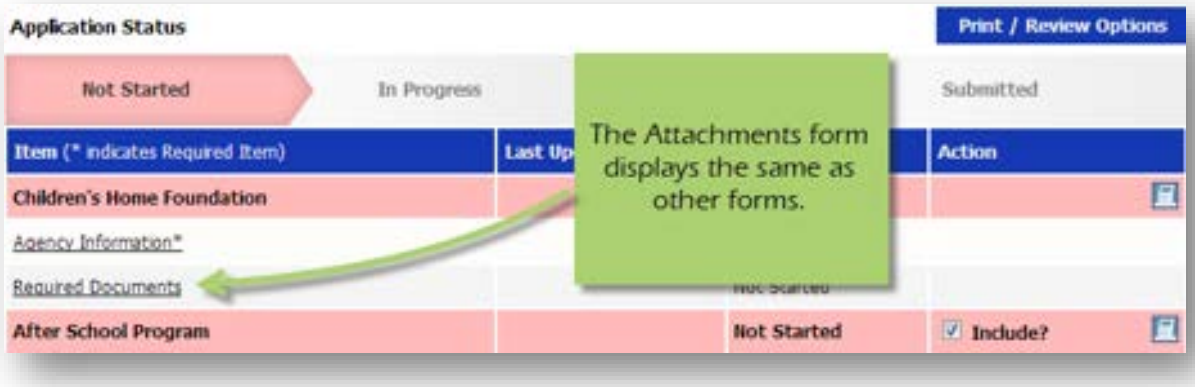
Step 1: Click on the document name to download and open it.



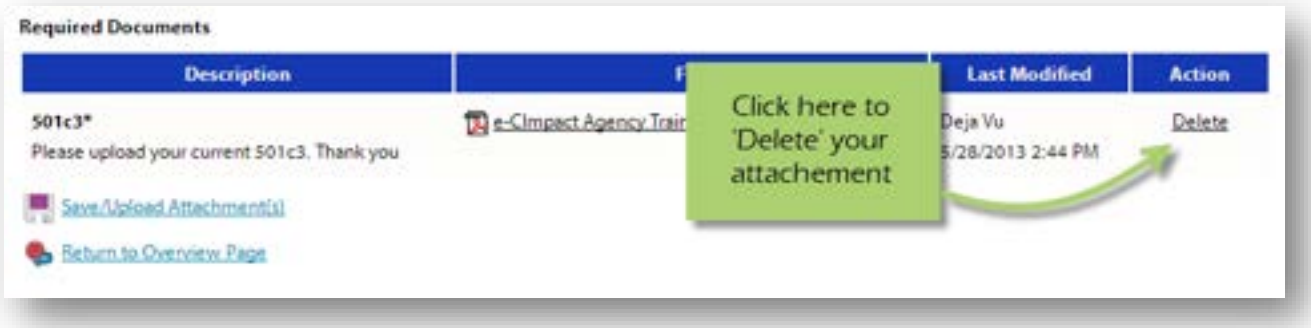
Deleting Attachments

In the event the wrong document was uploaded you may need to delete your attachment.

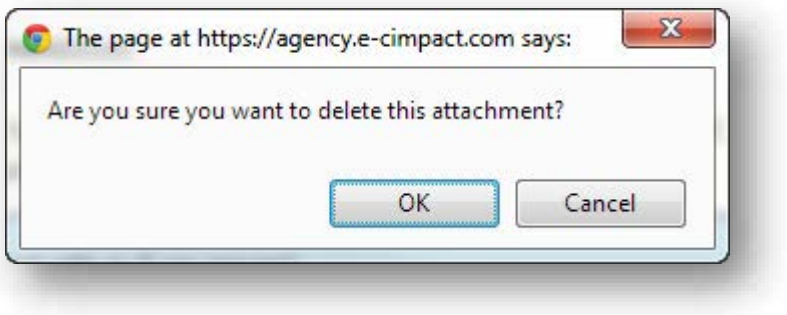
Step 1: Open documents form.



Step 2: Select 'Delete' next to the desired document.



Step 3: Confirm you would like to delete this attachment.



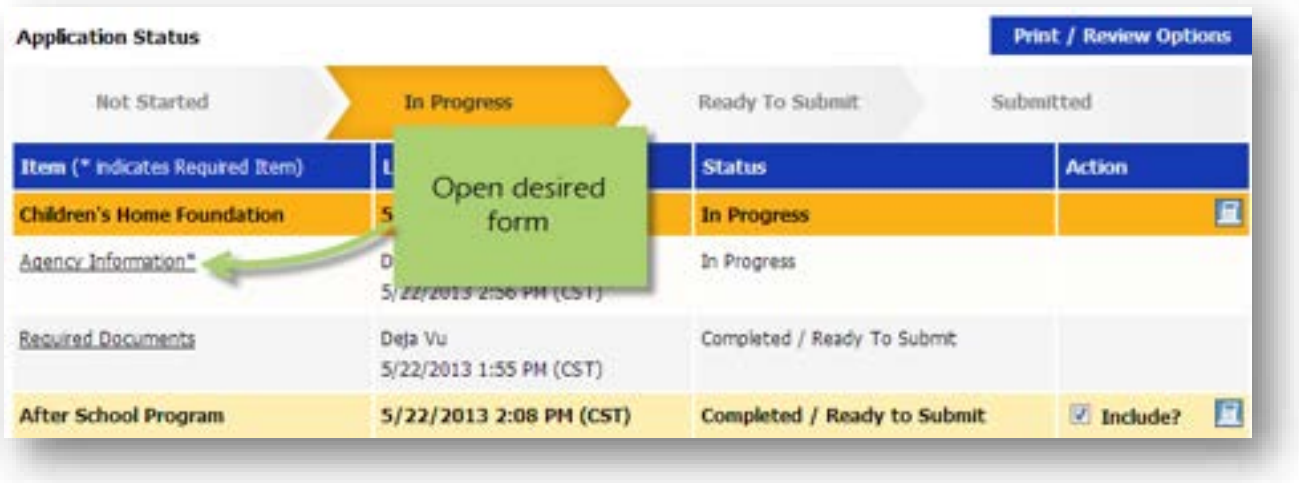
You are now able to upload the correct attachment.

Submitting the Application

Mark Forms 'Complete / Ready to Submit'

To submit your application, you must mark ALL forms 'Completed / Ready to Submit'

Step 1: Open form.

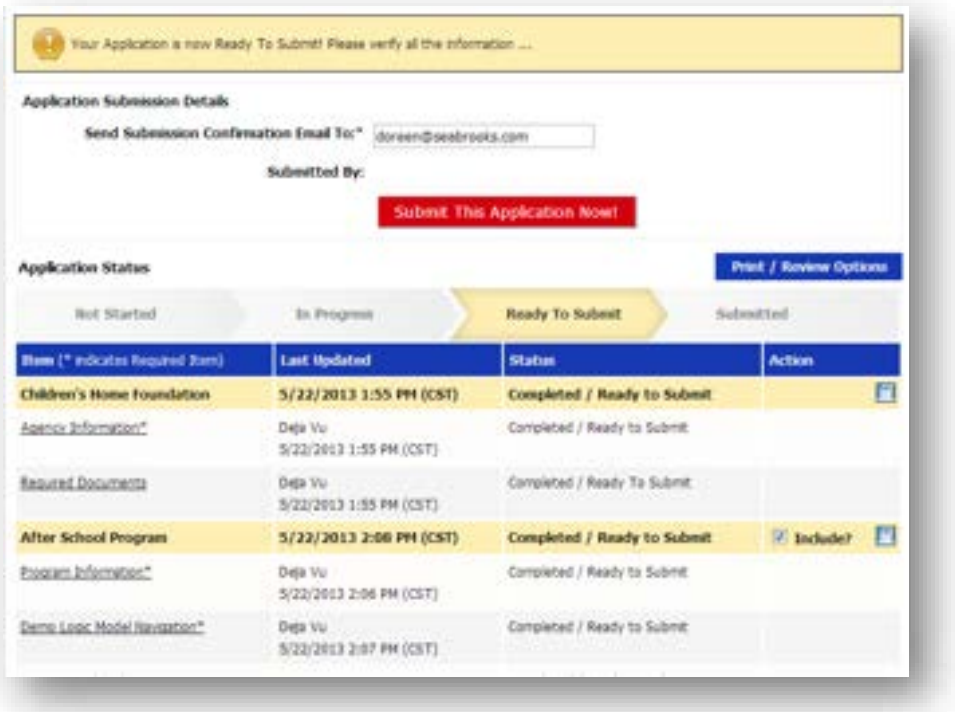


Step 2: Review information, then 'Save My Work and Mark as Completed'

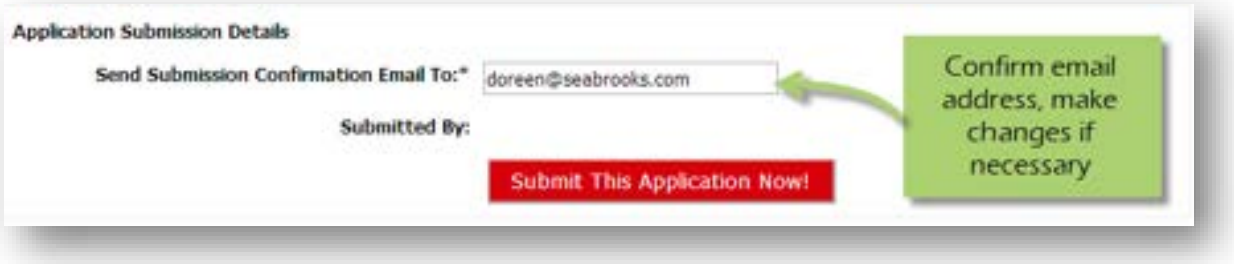
Complete these steps for each form until you have completed the entire application.

Submit!

Once all forms are 'Completed / Ready to Submit'; the 'Submit this application now' option will appear at the top of the page.

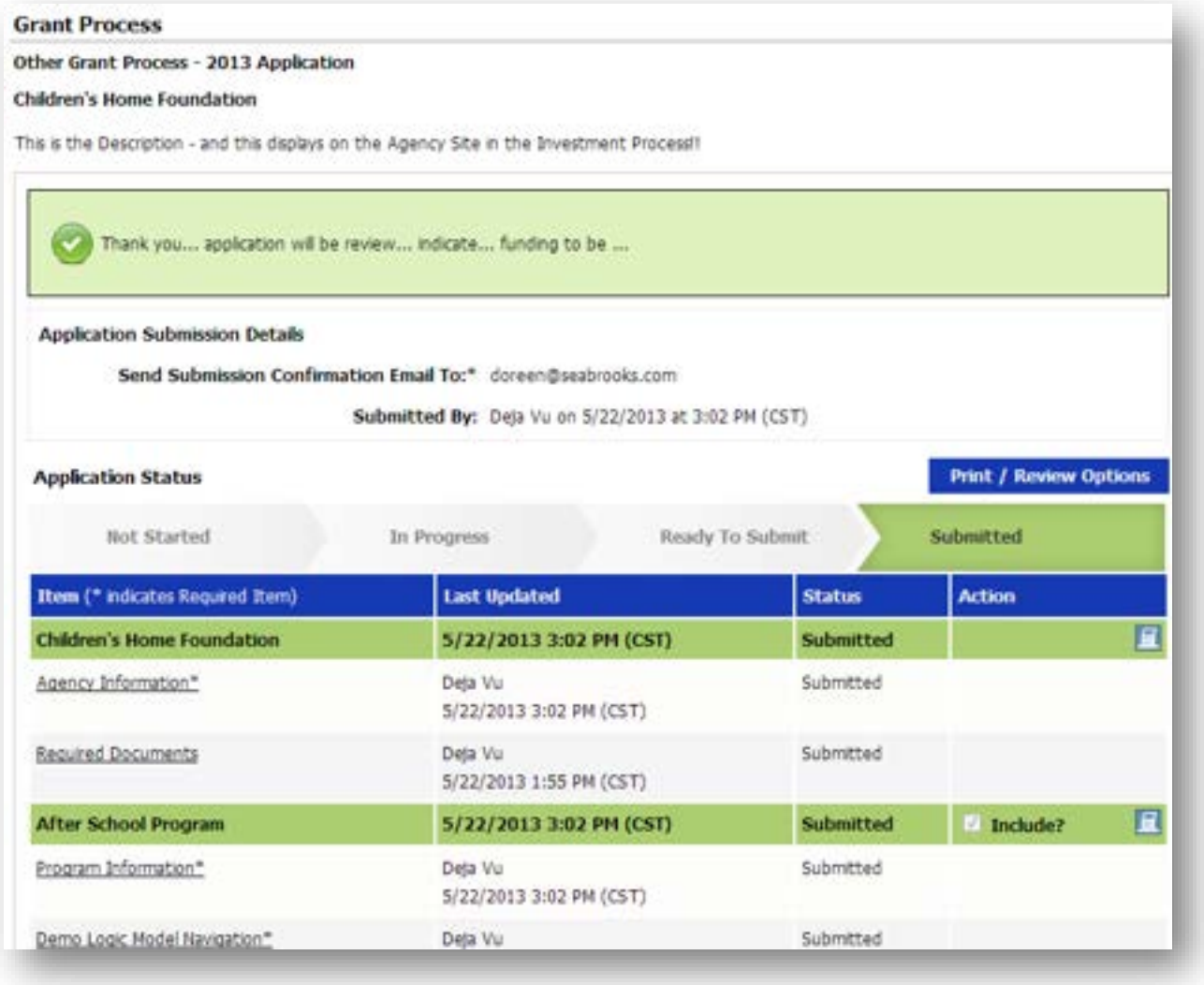


Step 1: Confirm the email address to send the confirmation message.



Step 2: Select 'Submit This Application Now!'

Now that you have successfully submitted your application, you will see everything is now in submitted status.



Please note: Once an application is in submitted status you will be able to view the information entered. You will not be able to make any changes to the information.

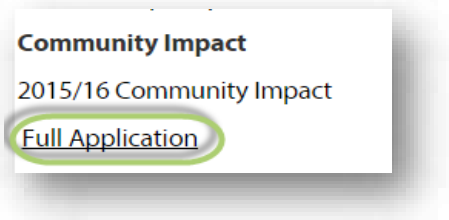
Printing Options

There are different options for printing:

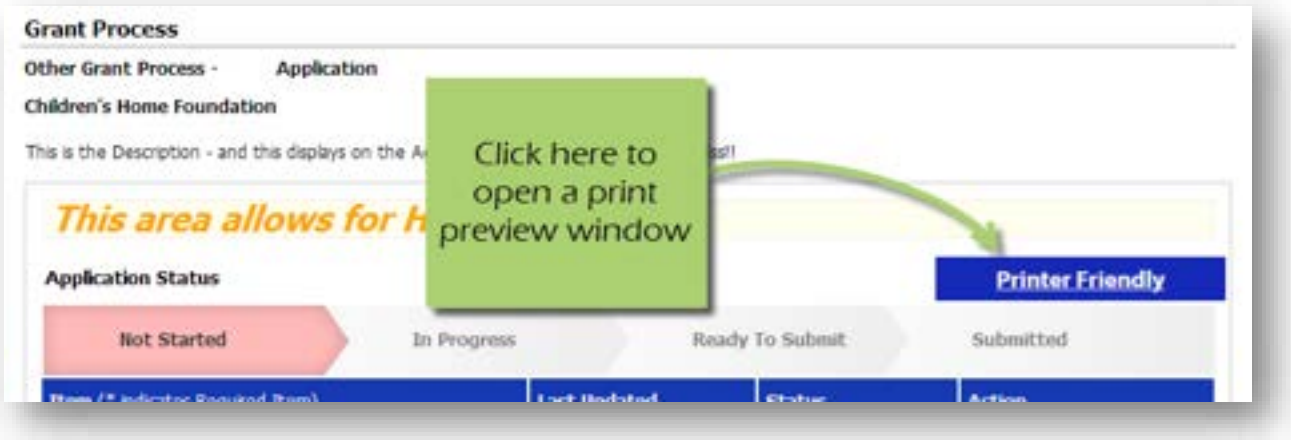
- The Entire Application – This will print or export all forms within this application.
- Agency Packet – This will print all forms that are agency specific.
- Program Packet– This will print all forms that are program specific.
- Individual Form – This will print the individual form.

The Entire Application

Step 1: Open the application by clicking on it in the left-hand navigation.



Step 2: Click on 'Print/Review Options' box in the upper right-hand corner of the application main page.



Step 3: Select the option you would like to use, continue to print.

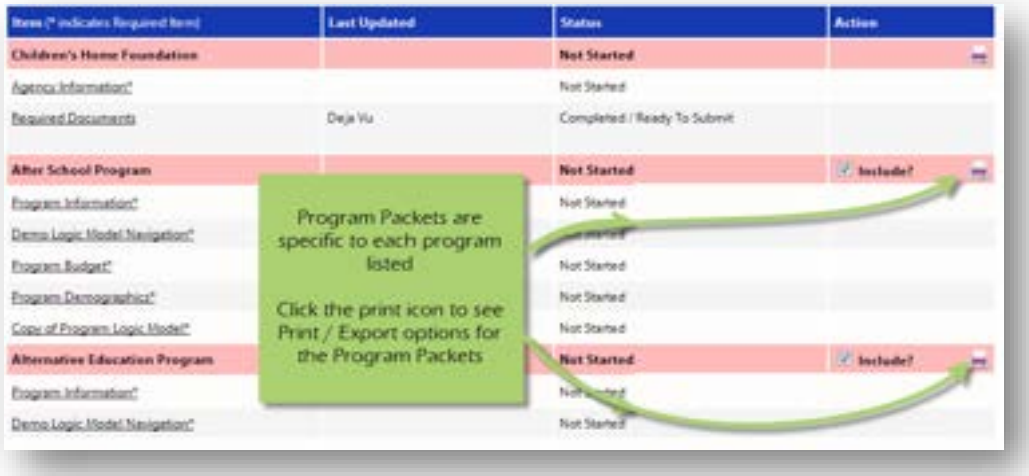
Agency Packet

Step 1: From the application main page, click on the 'Print' icon, in the agency section of the list grid under the action column.

Step 2: Select the 'Print' option you would like to use, continue to print.

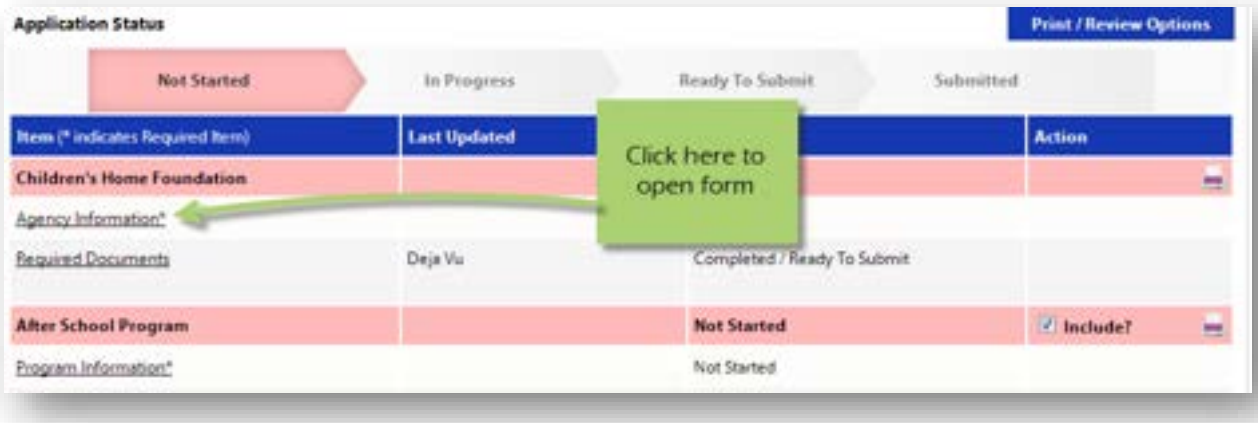
Program Packet

Step 1: From the application main page, click the 'print' icon next to the desired program you would like to print. Then choose which print option to use.



Individual Forms

Step 1: From the application main page, open the form you would like to print.

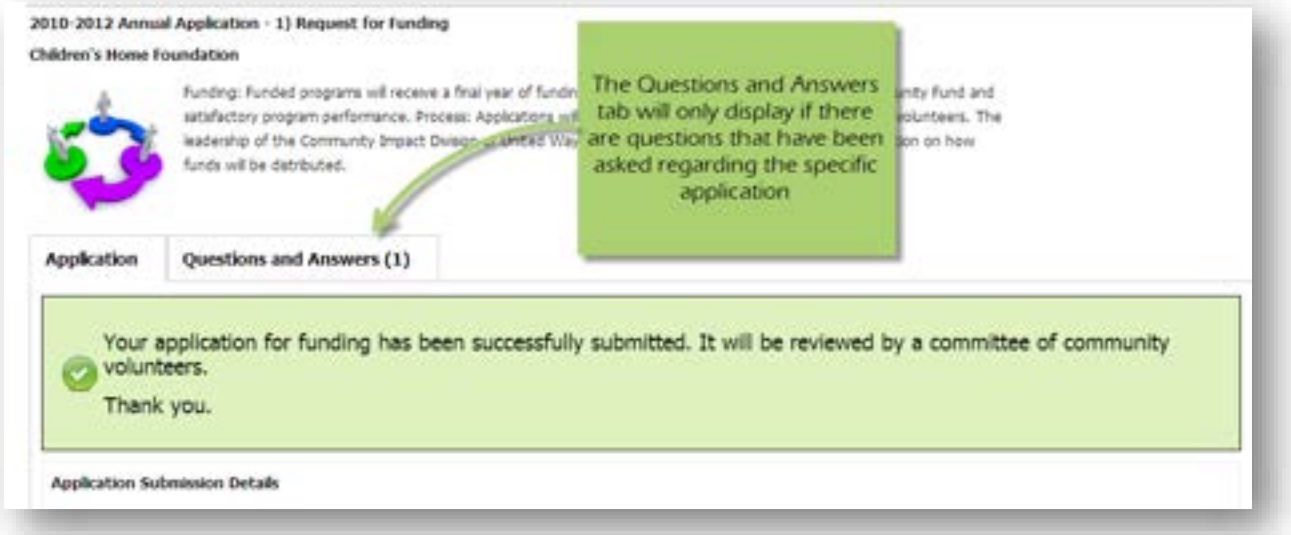


Step 2: In the lower right-hand corner of your form are the option for printing.

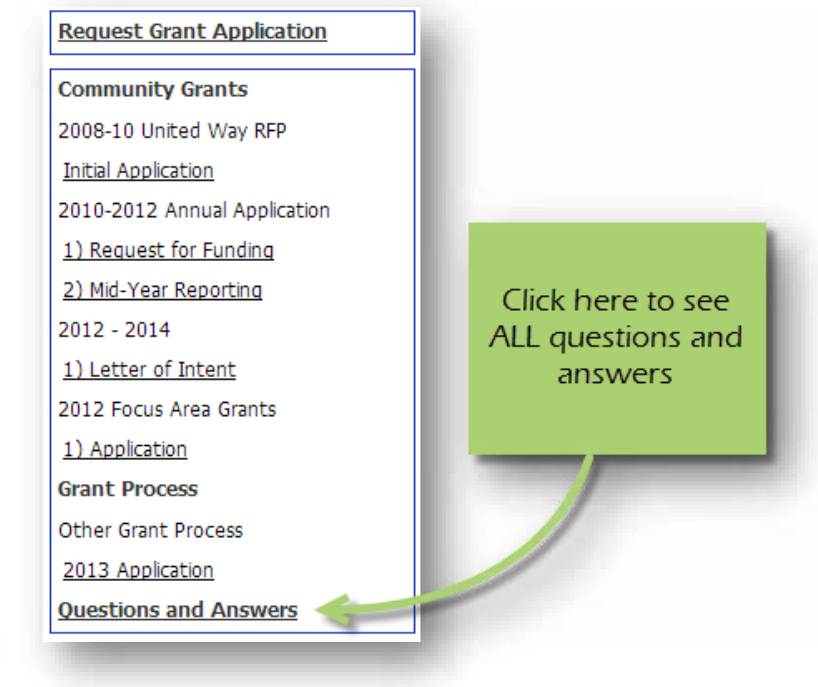
Questions and Answers

There are two ways to access 'Questions and Answers'.

In the Application – a new tab will be added to the application if a volunteer has a question regarding that specific application.

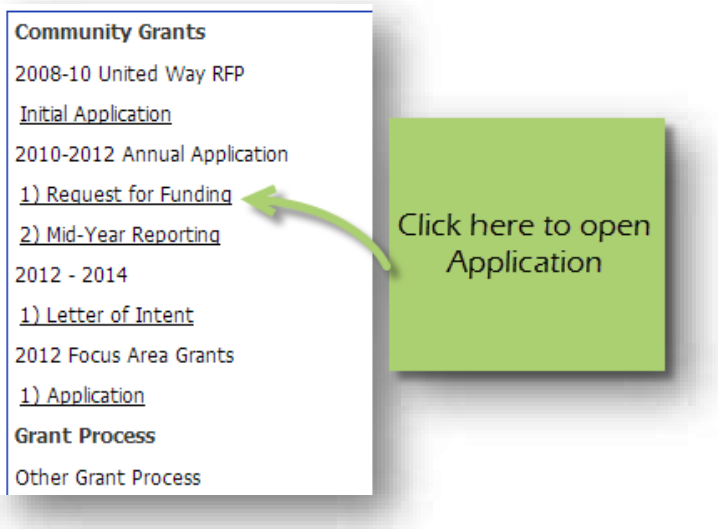


In the left-hand Navigation, at the bottom of the investment/application list – All questions and answers will be listed.

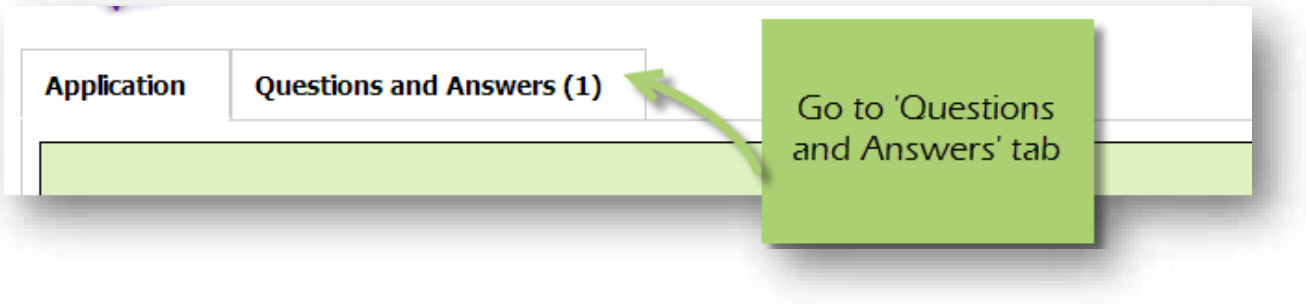


Responding to a Question – In the Application

Step 1: Open the application



Step 2: Go to ‘Questions and Answers’ tab.



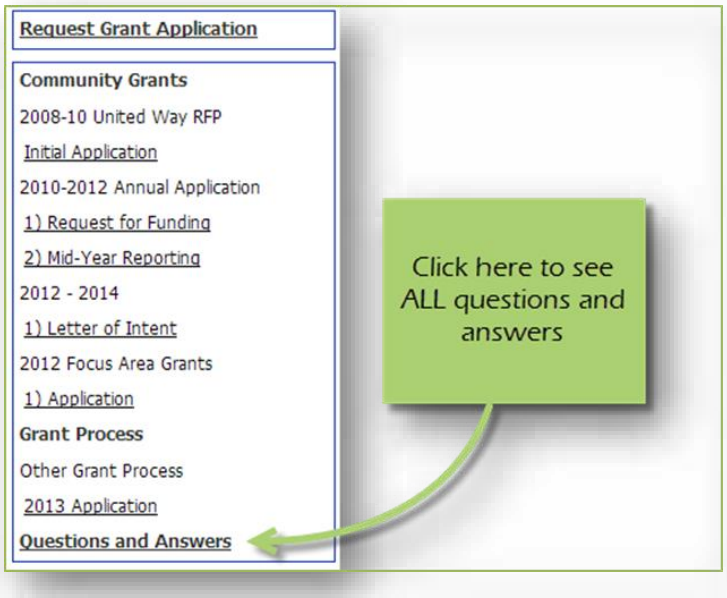
Steps 3: Select ‘Answer’ for desired question.

Step 4: Enter your answer to the question, then ‘Save and Return to Previous Page’.

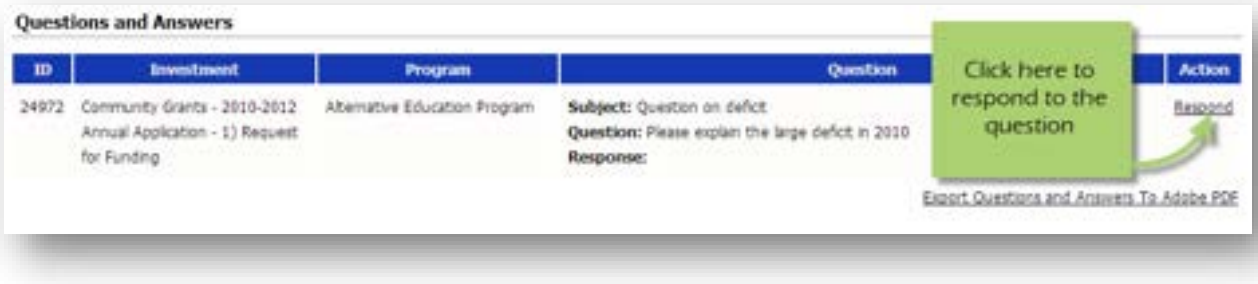
Once the answer is saved, it is approved by your BCUW staff liaison, and then displays to the volunteers reviewing your application.

Responding to a Question – From the overall 'Questions and Answers' list

Step 1: Click on 'Questions and Answers' in the left-hand navigation.



Step 2: Click 'Respond' next to desired question.



Step 3: Enter your answer to the question, then 'Save and Return to Previous Page'

Print / Export - Questions and Answers

Currently this can only be done through the overall 'Questions and Answers' area.