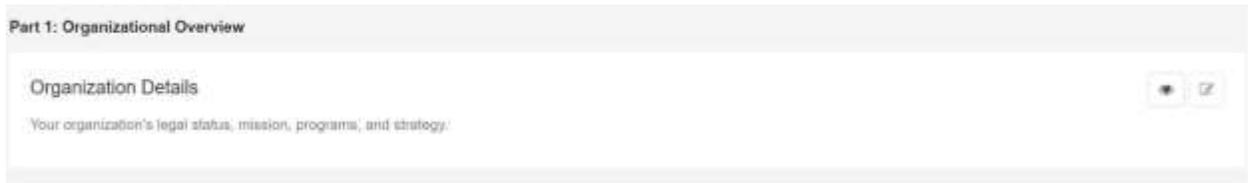


Key Buttons & Terminology

Edit and View Buttons: These buttons appear side-by-side on each of the forms within each part of the submission process.

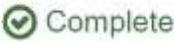


- The “eye” button allows users to view and print the information on each respective form. This button will remain active after submission.



- The “edit” button allows users to edit information on each respective form. This button will become inactive once the forms in a given part have been submitted.

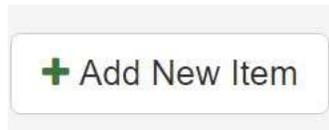
Save Draft versus Save Buttons: These buttons appear on the bottom of each form.

Save Draft	Save
<ul style="list-style-type: none">• Use when you have not completed all required questions• Use when you intend to continue editing a form later• When you return to the Home Screen, forms that have been “saved as draft” will be marked as “In Progress”• There is no auto-save feature built into the system so be sure to save often to avoid losing your work.	<ul style="list-style-type: none">• Use to easily track status on a form• Only able to use when all required fields have been answered• When you return to the Home Screen, forms that have been “saved” will be marked as “Complete”• All forms must be “saved” (e.g., marked as “complete” on Home Screen) in order to activate the Submit button• You can still edit forms that have been saved or marked as complete.
	

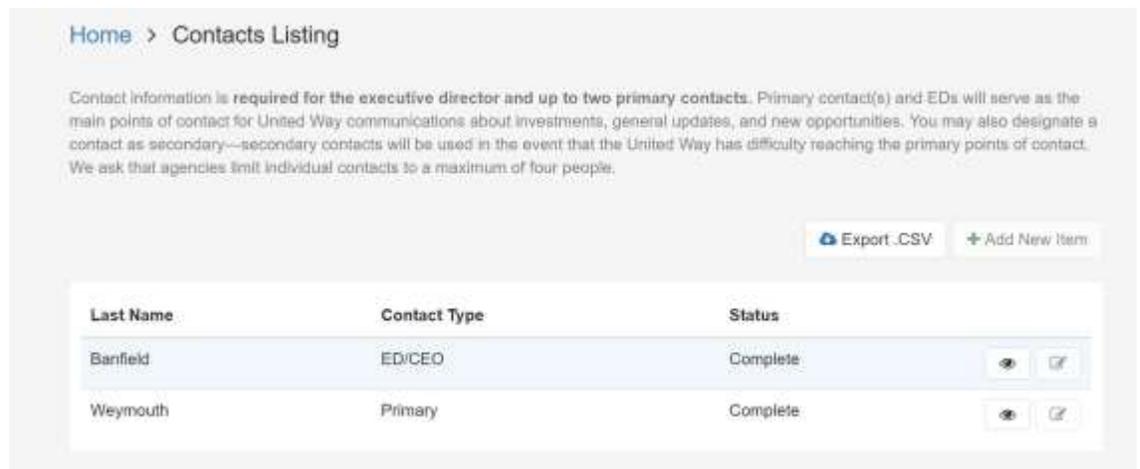
Has Many Form: Users will encounter two types of forms during the submission process:

- Regular forms: users will be taken directly to the form when clicking “Start Now” or “Edit.”
- Has Many forms: These types of forms allow users to enter multiple entries for similar types of information, such as addresses and contacts. When clicking “Start Now” or “Edit” on these forms, users will first be brought to a Listing Page. The “Add New Item” button appears here.
 - Note that users cannot delete an entry on the Has Many form once it has been created. You may contact United Way staff to request an entry be deleted, or you can save the form with a clear notation such as “Delete this entry” in the first text field on the form.

Add New Item Button:



- Use this button to add a new entry on a Has Many form, such as a new address, contact, program, or board member.
- The Listing Page will list all relevant entries that have been added. For example, on the Contacts Listing Page, if the user has added 2 new items (e.g., 2 contacts), all two contacts will appear on the Listing Page.



Submit Button: Users will not be able to press the Submit Button until it is activated. To activate, all forms in the respective part must be marked as complete by using the “Save” button at the bottom of each form. Users will know the button is activated when it is bright green in color.



General User Tips

One Account per Organization: All automated emails sent through the system will only be sent to the email address that serves as the Username (e.g., the email linked to the account log-in). This includes submission confirmations and verifications notifying users that their agency has been moved onto the next stage.

- Changing your account email: If you need to change the email linked to the account, you must contact United Way staff.
- Changing passwords: If you need to change your password, click the “Forgot Password” link on the Submission Portal log-in page and follow the instructions.

Navigating Branch Logic of Forms: Most forms, especially those after Part 1, have a significant amount of logic built in, which allow users to respond to only those questions most applicable to them. Users will notice that responses to some questions will prompt additional fields to appear.

Follow these tips to avoid system errors or user confusion:

- Answer questions in the order they appear.
- Choose your responses carefully. Avoid changing your response to a question once you have answered any of the subsequent questions that appear because of that selection. This is most important when selecting what “pathway” you are pursuing (e.g., Re-Certification, New Agency Certification, or Non-Certified Agency Approval in Part 2; and Essential Services or Program Investments in Part 3).
- If you need to change an answer that clearly has logic connected to it, select the new response, click “save as draft,” return to the Home Screen, and then return to the form by clicking the edit button. Sometimes the data connected to your first response will remain, but generally users can back out of the form and re-enter to reset the form logic.

After Submission: Users will be able to view responses that are part of the submission but will not be able to make any edits. If there are critical edits that need to be made, please contact United Way staff.

Multiple Users: Initially, the United Way was informed that Zengine by Wizehive does not allow more than one user to log in and edit forms in the same account simultaneously. However, United Way staff tested this on multiple occasions and discovered that two users could successfully log in and edit content at the same time. Here is a summary of what we experienced:

- Two users could add/edit content that properly saved on the submission portal and on the administrative back-end **as long as they were NOT in the same exact form.**
- Both users were able to hit the refresh button in the browser in order to see new information entered by the other user on their respective screens in near real time.
- On Has Many forms, both users were able to add separate entries to the same form. For example, both users could add a new contact at the same exact time (as long as the two

contacts were different). For agencies applying for Part 3 funding for multiple programs, this means two users can add and edit content in separate programs at the same time.

- We did not test more than two users in one account simultaneously.

After reaching out to Wizehive, we learned that the multiple user functionality is not currently an intended feature of the system. In other words, it exists because it is the result of their development to date but they did not intentionally develop it. In order to provide a level of reassurance to users who choose to take advantage of the multiple users functionality, the United Way was informed that the current functionality should not change until Wizehive has team log-ins, which is not in the short term roadmap for development. Thus, the multiple users functionality is expected to remain throughout the 2017 submission process for Parts 1-3. Wizehive did advise against relying on this because it has not been officially vetted by them. However, based on our experience, we have opted to share this information with you. It is our belief that this functionality is a huge benefit that can be taken advantage of with careful planning and coordination as well as periodic verification of the content entered by multiple users at the time—we suggest occasionally logging out and back in to verify content is saved.