eCIMPACT

Community Impact Management

Volunteer Training Manual

United Way of Dubuque Area Tri-States

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Dubuque, IA 52001

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Accessing e-CImpact

All you need for e-CImpact Volunteer Site access is a computer with a connection to the internet, and an updated version of a supported browser type.
Tip=supported browser types include Internet Explorer 9.0 and up, Mozilla Firefox, Google Chrome and Apple Safari– if you utilize another browser exclusively please contact your e-CImpact administrator.

The e-CImpact Volunteer site URL is:

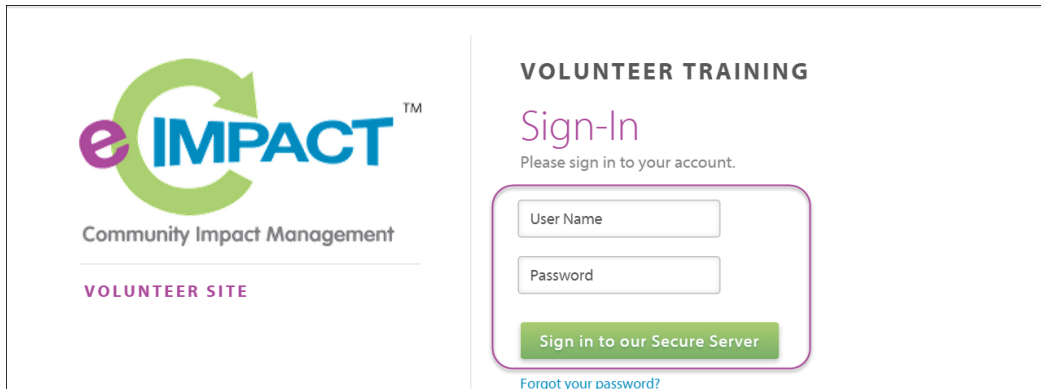https://volunteer.e-cimpact.com/login.aspx?org=17175U

In the event you land on the generic volunteer site login and are prompted to enter an Org Code it is 17175U

To avoid the generic login page, and go directly to United Way of Dubuque Area Tri-States volunteer site, please bookmark the direct link listed above.

Logging In

Once you have arrived, it's time to login! Enter your username and password. Then, click the 'Sign in to our Secure Server button/link:
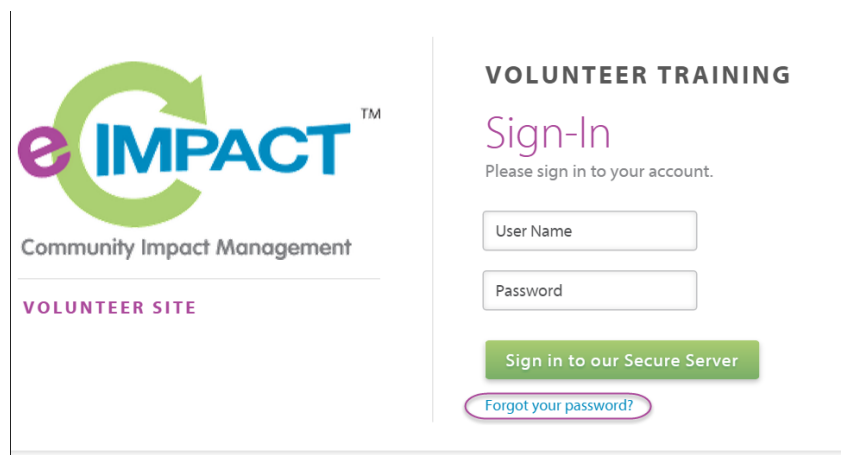

Utilizing the 'Forgot Password' feature

If you forgot your password and your email address is on file, you may choose to have a temporary password automatically generated and emailed to you.

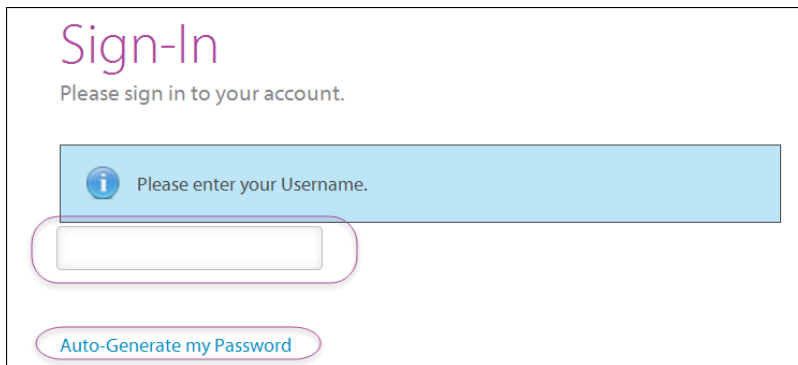To do this, click the 'Forgot your password?' link:

Upon clicking this link, you will be prompted to enter your username.

Enter your username into the username field, and then click the 'Auto-Generate my Password' link:

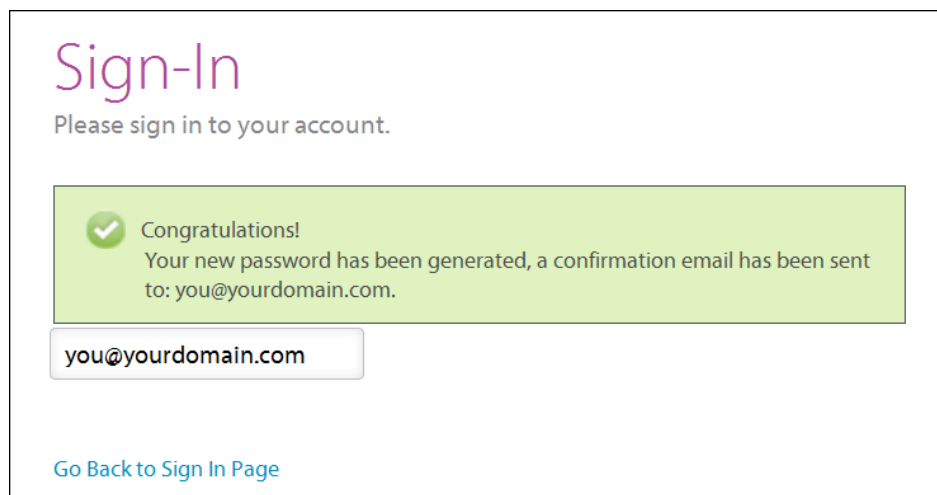**Tip=your username may be your email address.**

Sign-In
Please sign in to your account.

> ⓘ Please enter your Username.

Auto-Generate my Password

After your password has been generated, you will be presented with a message indicating it has been emailed to you:

Sign-In
Please sign in to your account.

> ✓ Congratulations!
> Your new password has been generated, a confirmation email has been sent to: you@yourdomain.com.

you@yourdomain.com

Go Back to Sign In Page

Access your email to retrieve your temporary password, and then use this password to log in. Upon logging in, you'll be asked to change your password.

Your new password must be between 6-15 characters in length, and contain at least one special character.
Tip= a special character refers to a number or symbol. The system will not accept quotation marks, (" "), percent symbols (%), or blank spaces. See the complete illustration of requirements in the 'Editing Your Account Information section of this manual on page 8.

After entering the desired password in both fields, click the 'Change Password' button/link:

Attention!

You are required to change your user account password.

New Password:*

Confirm New Password:*

Change Password

Editing your Account Information & Changing Your Password

To modify your account information, (such as your name, job title, address and phone number) access the account management area by selecting the 'My Account' link on the left hand side of the page:

From the 'My Account' page, you may view and edit your personal information.

Be sure to save any changes via the Save/Update link:
Tip=the 'Has a Conflict of Interest' checkbox should be enabled (checked) if you have indicated a conflict of interest exists. The 'Staff Liaison' field should accurately reflect the name of your e-CImpact administrator.

Below your basic information on this same 'My Account' page, you'll find links to add or edit your contact information:

Addresses			
Type	**Address**	**Primary?**	**Actions**
⊕ Add New Address			

Phone Numbers			
Type	**Phone Number**	**Primary?**	**Actions**
⊕ Add New Phone Number			

Email Addresses			
Type	**Email Address**	**Primary?**	**Actions**
Main	you@yourdomain.com	Yes	Edit Delete
⊕ Add New Email Address			

To change your password, click the 'Change Password' link atop the Volunteer Site:

Hello, **Super Volunteer In Training!**   Home | Change Password | Signout   (Session time remaining: 1:59:57)

The criteria for a valid password is listed conveniently for you above the Username and Password fields:

Change Password

Enter a password and then retype the password to ensure that it has been entered correctly. Your new password must be between 6 and 15 characters in length and contain at least 1 character from 2 of the groups of alpha, numeric, or special characters. Your Password may not contain the following characters: ", %, or any white-space.

Password Examples:
- abcdefg2 (valid, contains letters and numbers)
- pa$$word (valid, contains letters and numbers)
- 1234567# (valid, contains letters and a special character)
- abcdefgh (invalid, contains only letters)
- abc23 (invalid, less than 6 characters)

Username: you@yourdomain.com

Old Password:*   [   ]

New Password:*   [   ]

Confirm New Password:* [   ]

💾 Save/Update

After deciding what your new password will be, enter your old password (for your security), then enter your new password in both the 'New Password' and 'Confirm New Password' fields.

Then, click the 'Save/Update' button/link.

Volunteer Site Navigation

Many areas throughout the Volunteer Site landscape have quick links to them found on what is called your 'Navigation Tree'.

The Navigation Tree refers to the collection of links on along the left hand side of the page – you'll want to keep this in mind as you make your way around:

Super Volunteer In Training!
Home
My Account
Conflict of Interest
Evaluations
Application Process
Grant Application
Letter of Intent
Resource Center
Resource Center Item (1)

On the top of the page, in addition to the 'Change Password' link, you'll see a **'Home'** link which will re-direct you to your homepage, and a **'Signout'** link which will sign you out of your e-CImpact account:

Hello, **Super Volunteer In Training!** Home | Change Password | Signout (Session time remaining: 1:59:57)
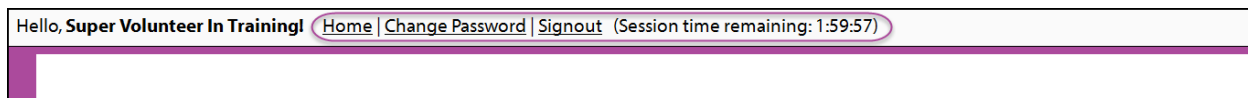
Note the 'Session time remaining' counter alongside the links.

To keep your data safe, you will be **automatically signed out of the Volunteer Site after 2hrs of inactivity.**

This counter will display the time remaining until this automatic sign out will occur.

If you're getting low on time, be sure to save your work to reset your session time remaining:

Hello, **Super Volunteer In Training!** Home | Change Password | Signout (Session time remaining: 1:59:47)

On the top right hand side of the page to the right of the session timer, you'll see the ability to choose a small or large font size. Click on the little A or big A to change the font size respectively:

(Session time remaining: 1:59:51)   Font Size: A A

Committed to Excellence
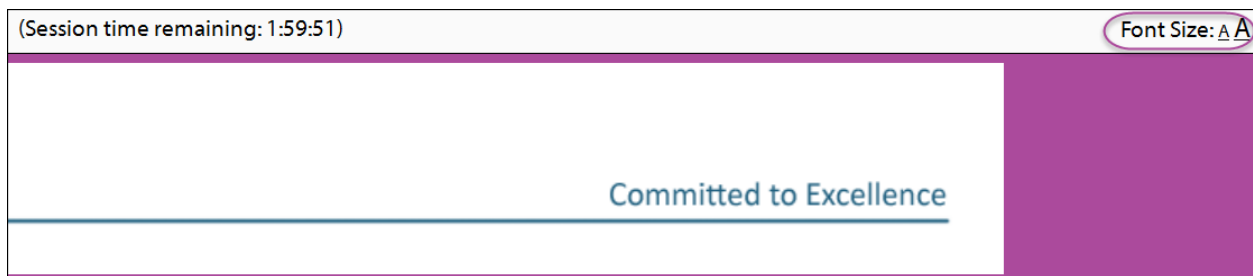
If there are any existing Resource Center Items, you'll find a link to the Resource Center in your Navigation Tree:

Super Volunteer In Training!

Home

My Account

Conflict of Interest

Evaluations

Application Process

Grant Application

Letter of Intent

Resource Center

Resource Center Item (1)
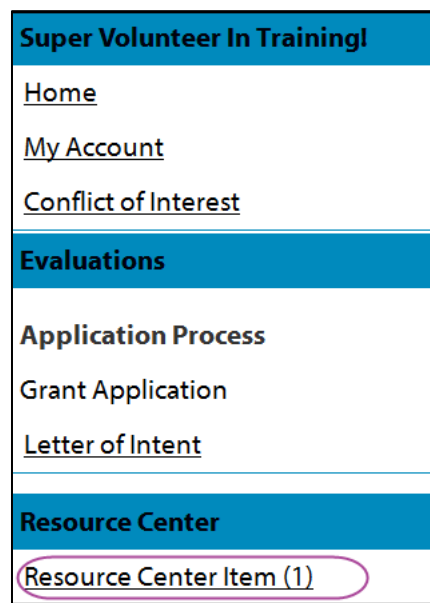
Click the link to the Resource Center, and you'll be brought to the area in which resource center items are housed.

Select the link w/FileName to access the file:

Resource Center > Resource Center Item

Resource!

Please access the attached for additional scoring criterial

Volunteer_Training_Manual.docx

Return to Home Page

Accessing Evaluations

The Navigation Tree contains the link(s) to your evaluation(s). Click on the appropriate evaluation's link to access it:

Super Volunteer In Training!

Home

My Account

Conflict of Interest

Evaluations

Application Process

Grant Application

Letter of Intent

After doing so, each Agency/Program you have been assigned to review will display in a list along with the 'Status' bar at the top, which reflects your completion status thus far.
Tip= note the ability to search agencies/programs via the search field on the top right.

Click on the Agency/Program link(s) in the list, or the 'Evaluate' link to the right hand side of the record to access the completed forms as well as the evaluation form:

Upon clicking one of the links to view the evaluation, you'll see the completed Agency/Program forms displayed, overlaid by the Evaluation Pane.

The Evaluation Pane contains the Evaluation Form you will be completing.

It may be conveniently expanded or collapsed as you complete the review process by clicking the 'Evaluation' tab found along the left hand side of the Evaluation Form.

Clicking this tab will expand and collapse the pane:

Collapsed view:

The **'My Assigned Evaluations'** link (top left) will re-direct you back to the page which lists the agencies and/or programs you are assigned to evaluate.

The **'Jump To'** feature allows you to select one of the agency/program's forms and quickly 'jump to' that particular form to view the data for review.

Also, the arrows found on the top right hand side of the page will take you quickly from one Agency/Program to the next:

Larger View:

If you should have any Agencies/Programs which have **not** been assigned to you to evaluate, yet **are** available to you to view, you'll see an 'Available For Review' tab:
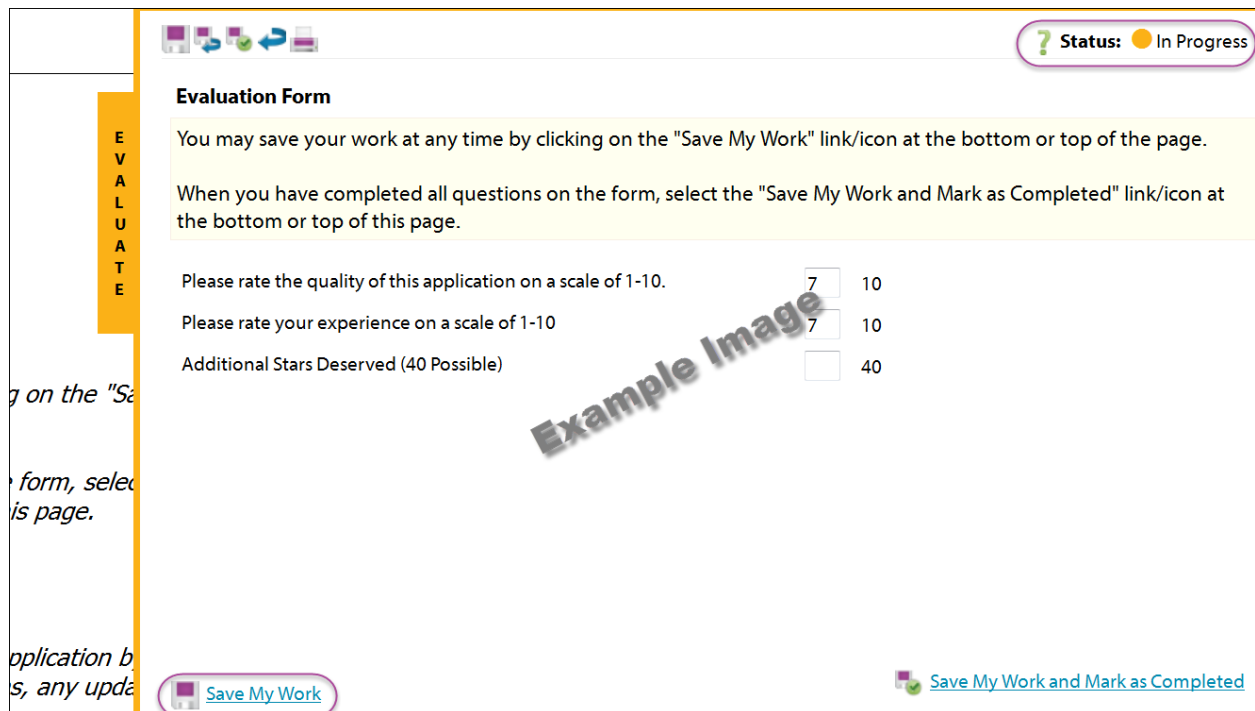
Accessing this tab will reveal a 'View' link much like the 'Evaluate' link on the previous 'My Assigned Evaluations' page.

The view link will display the forms available for review, without the Evaluation Form & Pane.

As you complete the evaluation process, the 'Status' display will update dynamically. Upon saving your work, the status will change to 'In Progress':

After you have clicked the 'Save My Work and Mark as Completed' link, the Status will change to 'Ready to Submit':

n > Lett

E V A L U A T E	**Evaluation Form**

You may save your work at any time by clicking on the "Save My Work" link/icon at the bottom or top of the page.

When you have completed all questions on the form, select the "Save My Work and Mark as Completed" link/icon at the bottom or top of this page. |

? Status: ⬤ Ready To Submit

Please rate the quality of this application on a scale of 1-10.   `7` 10

Please rate your experience on a scale of 1-10   `7` 10

Additional Stars Deserved (40 Possible)   `33` 40

Example Image

💾 Save My Work   ✅ Save My Work and Mark as Completed

Did you notice the color change of the evaluation pane border and status indicator with each different status?

The progress status is color coded, and this color convention is adhered to anywhere the status is displayed:

Not Started	In Progress	Ready To Submit	Submitted
Not Started	In Progress	Ready To Submit	Submitted
Not Started	**In Progress**	Ready To Submit	Submitted
Not Started	In Progress	**Ready To Submit**	Submitted
Not Started	In Progress	Ready To Submit	**Submitted**
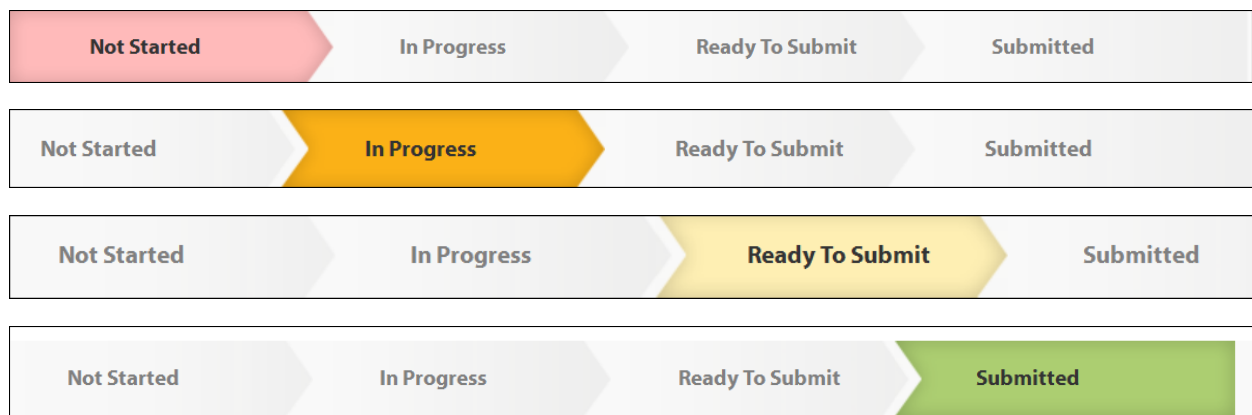
Accessing Supporting Documents

The Agency or Program you are evaluating may have been asked to upload supporting documents as attachments during the submission process.

To view any such supporting documents, click the link directly above and 'behind' the evaluation pane from within an evaluation. This link will refer to 'Supporting Documents', 'Attachments', 'Uploads', or otherwise appropriately named:

Clicking this link will open a new window where the uploaded file(s) will be listed:

Click on the attachment name or icon to view the attachment.

Print & Save Options
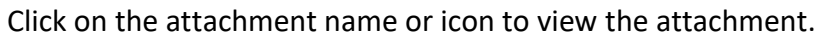
You may have noticed a few options to 'Print' during your journey of the Volunteer Site. One is via a 'Print' link displayed along with the Evaluate link on the 'My Assigned Evaluations' page:

Choosing this link will reveal a new page with a printable version of the Agency's forms.

At the top left of this printable versions are icons which provide additional options: (from left to right) – Output to printer, download as PDF, and open in a new browser window:

Application Process

Grant Application - Letter of Intent

Evolving Hearts

Application Status: Submitted

Evolving Hearts

Performance Excellence 1234

You may save your work at any time by clicking on the "Save My Work" link/icon or top of the page.

When you have completed all questions on the form, select the "Save My Work a Completed" link/icon at the bottom or top of this page.

You may also SWITCH between forms in this application by using the SWITCH F in the upper right corner. When switching forms, any updates to the existing for automatically be saved.

Senior Management Compensation Measurement

Total compensation including salary and benefits

Chief Executive Officer (or

After you've selected the 'Evaluate' link for an Agency/Program, you'll see an additional icon/link to print their forms.

This icon/link is found directly above and 'behind' the evaluation pane and provides the option to 'View Printable Version':

Within an evaluation form, you'll find some print and save icons at the top left corner of the evaluation pane:

From left to right, these options are 'Save My Work', 'Save My Work and Return to My Assigned Evaluations', 'Save My Work and Mark as Completed', 'Return to My Assigned Evaluations', and finally 'View Printable Version of Evaluation Form'.

At the bottom of the evaluation form you'll find additional links to 'Save My Work' and 'Save My Work and Mark as Completed' link.

Keep in mind the session timeout of 2hrs. If the evaluation form is taking a long time to complete, be sure to 'Save My Work' so the system will know you're still working.

Atop the printable version of the evaluation form you'll find some now familiar icons:

Education Evaluation - Victorious Volunteer Nearly Trained!
Evolving Hearts - Walking Wisdom

Evaluation Form

You may save your work at any time by clicking on the "Save My Work" link/icon at the bottom or top of the page.

When you have completed all questions on the form, select the "Save My Work and Mark as Completed" link/icon at the bottom or top of this page.

Please rate the quality of this application on a scale of 1-10.	9 / 10
Please rate your experience on a scale of 1-10	10 / 10
Additional Stars Deserved (40 Possible)	33 / 40

From left to right, just as we discovered atop the printable version of the Agency/Program forms, these options are: Output to printer, download as PDF, and open in a new browser window.

Q&A Forum

In some cases, there will be a Q&A (Question and Answer) forum available for use. This will allow you to pose a question to an Agency/Program as you are performing your review.

If this forum is available for the particular process you're evaluating, you'll see a 'View/Ask Questions' link on the top right hand side of the page behind the evaluation pane:

In addition to posing a question for the Agency/Program, this area may also be used to provide any feedback you wish to pass along if you are particularly impressed with an element of their submission, or perhaps would like to provide some constructive criticism.

After clicking the 'Questions and Answers' link, a new window will open containing an area to enter your subject and the content of your question or feedback. Enter your question and/or feedback and 'Save My Work':
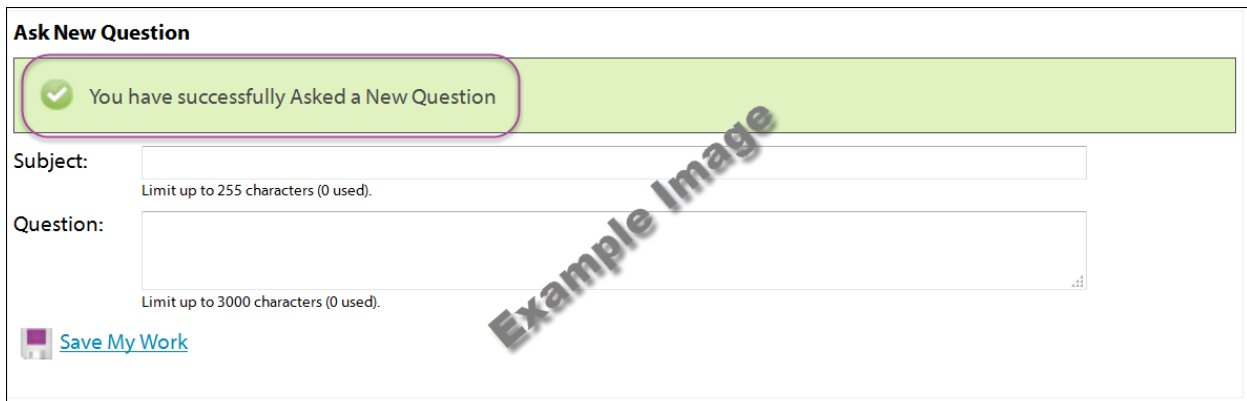
Thereafter, you'll receive confirmation you have submitted your question:

Ask New Question

✓ You have successfully Asked a New Question

Subject: [   ]
Limit up to 255 characters (0 used).

Question: [   ]
Limit up to 3000 characters (0 used).

💾 Save My Work

Your e-CImpact administrator needs to approve a question for display to the agency. Your administrator will receive a notification when a new question is submitted.

Once the question has been approved, the Question and/or Answer will be available via the 'Questions and Answers' link, and also be accessible via a 'Questions and Answers' tab on your 'My Assigned Evaluations' page.

There will also be a 'Questions and Answers' link in your Navigation Tree. Once a question has been answered, the answer will display to you via these areas as well.

Question and Answer view via tab and link:

Evaluation Submission

You've completed the evaluation process and are now ready to submit!

As you save and mark each evaluation as complete the status will reflect 'Ready to Submit':

Your e-CImpact administrator may require each of your assigned agencies/programs to be Marked Completed and Ready to Submit before you submit your evaluation scores/remarks. If this is true, when all of your assigned Agencies/Programs are in a 'Ready to Submit' status, you will then have the ability to submit.

Alternatively, you may be able to submit them one at a time.

When submission becomes available, a 'Big Red Submit Button' will display along with the prompt for your email address for submission confirmation:
Tip=if your e-CImpact administrator has your email address already in the system, it will automatically be populated in the email address field.

To submit, verify the email address is correct and/or enter a new one, and click the 'Big Red Submit Button':

And you're all done! You'll see confirmation after submission, and your evaluation submission status color will change to green:

Be sure to check for your email submission confirmation.

Saved in: S:\Jessica Bleile\Agency Master File\2017-2018 Grant Process\Investment Review Panel Training