

Open Space Authority Urban Grant Program 2022-2023

Wizhive-Zengine Tutorial



Wizhive-Zengine (Wizehive) is an online grant management tool used for the Urban Grant Program. Below are instructions with screenshots to help you navigate the system.

Grants Program Coordinator, Jackie Latham, will be your primary contact for Grant and Software questions. Please contact her at jlatham@openspaceauthority.org for questions. You may also contact Megan Dreger, Grants Program Manager, at mdreger@openspaceauthority.org. The Santa Clara Valley Open Space Authority phone number is (408) 224-7476.

General tips:

Preferred Browser: Wizehive can be used on any internet-enabled device using a recent version of any browser. Wizehive recommends using Chrome or Safari.

Text Entry: You are welcome to compose your answers in a word processor outside of the Wizehive application and then copy and paste your responses into the answer fields in the online version. However, please note that Wizehive fields will not save the formatting (bold, italics, bullets, etc). Wizehive recommends using unformatted text only.

Auto-Save: Wizehive automatically saves your progress every 5 minutes, and there is an option to save your draft work. You do not need to complete your application in one sitting.

Accessing Wizehive

The Urban Grant Program application is available at: [Apply for an Urban Grant \(openspaceauthority.org\)](https://webportalapp.com/sp/login/santaclaravalleyopenspaceauthority-homepage). You may also access Wizehive at: [\(https://webportalapp.com/sp/login/santaclaravalleyopenspaceauthority-homepage\)](https://webportalapp.com/sp/login/santaclaravalleyopenspaceauthority-homepage)

The first time you use Wizehive, you'll need to create a new account for your organization. Please note that each organization will have **one account** for all grant application and management within the system. If awarded, this is the same account that will manage all required reports, payment requests, and other details.

For returning users, log in using the existing email address for your organization. For questions regarding the primary email address for your organization, please contact Jackie Latham at jlatham@openspaceauthority.org.

Wizehive Overview

- The Wizehive Homepage includes the Organizational Profile and any projects that are in various stages such as Pre-Application, Under Review, Full Application, Active Grant, Completed Grants, etc.
- Each organization's account is managed by one single login credentials (email address and password). If more than one user will be working within the grant management system, organizations will need to share login credentials.
- Autosave and Save Draft: Wizehive will automatically save any work in a form after 5 minutes, and users can use the "Save Draft" button to save progress while in any part of the software.

Organizational Profile Section

Applicants will need to fill out the Organization Profile before completing any steps in the application. To begin, click "Create a Profile to Get Started". To make any changes to the Profile, please click "edit" on the right of this section. You may make updates and click the blue "Save Changes" button once completed.

Please click "Create a Profile to Get Started" to begin. You can always edit your Profile by clicking "Edit".
You cannot move forward until you have completed your Profile.

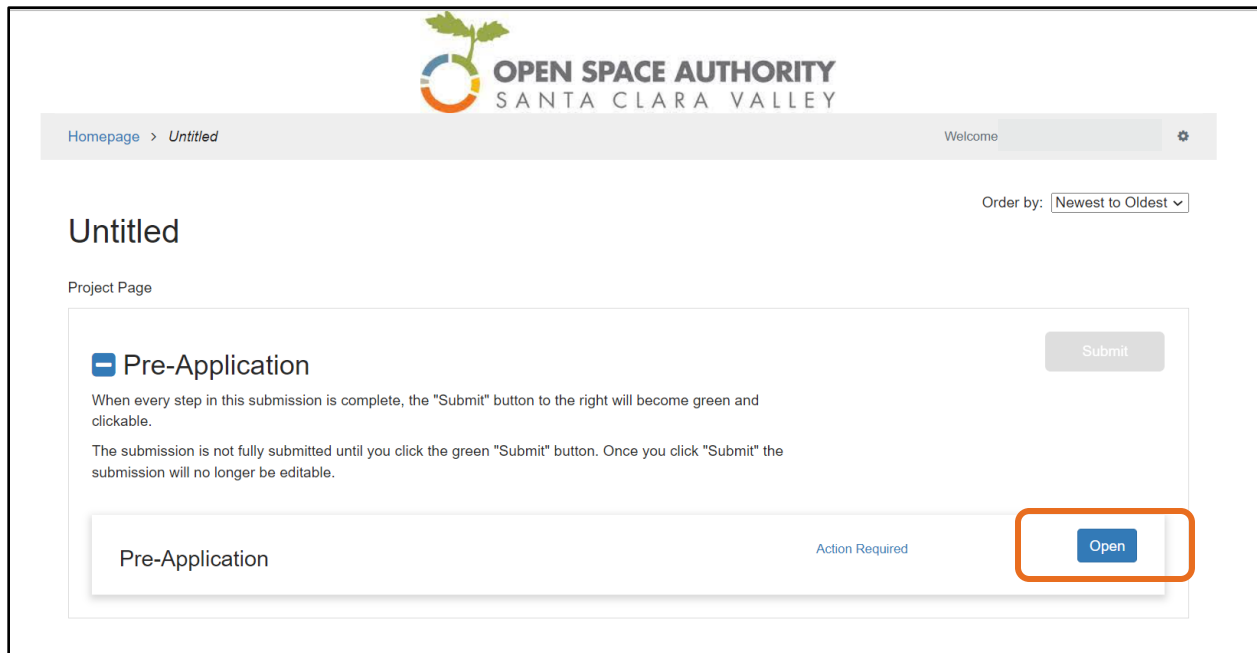
Profile Complete Edit

Pre-Application Step

This page includes the Pre-Application questions. Please answer all required questions. If a question does not apply, please enter "N/A" or "0". If the question is required, the system will not allow you to submit the application until that question has a response.

To begin, click "Get Started". To work on a Pre-Application that is in draft form, please click on that existing project. To start a new application, please click "+ Add Another"

Once you have started a new Pre-Application, please click the blue "Open" button to continue.



Homepage > Untitled

Welcome

Order by: Newest to Oldest

Untitled

Project Page

Pre-Application

Submit

When every step in this submission is complete, the "Submit" button to the right will become green and clickable.

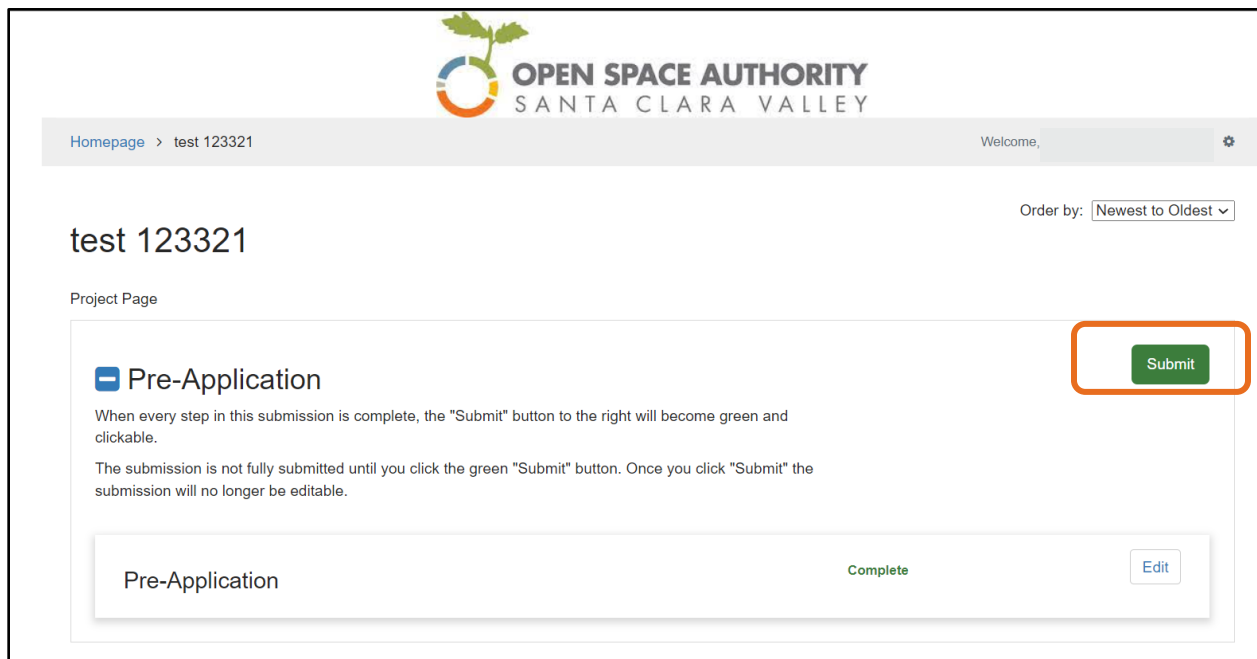
The submission is not fully submitted until you click the green "Submit" button. Once you click "Submit" the submission will no longer be editable.

Pre-Application

Action Required

Open

From there, you may either choose to Save Draft and come back later, or click the blue “Mark Complete” button. To Submit the Pre-Application, please click the green “Submit” button. Once submitted, the application will be Under Review until eligibility for a Full Application is determined. For more information about the questions and documentation required, please see the Urban Grant Program Guidelines.



Homepage > test 123321

Welcome,

Order by: Newest to Oldest

test 123321

Project Page

Pre-Application

Submit

When every step in this submission is complete, the "Submit" button to the right will become green and clickable.

The submission is not fully submitted until you click the green "Submit" button. Once you click "Submit" the submission will no longer be editable.

Pre-Application

Complete

Edit

Homepage

The Homepage will show all Projects in their various stages – such as Pre-Application, Under Review, Active Grant, etc.

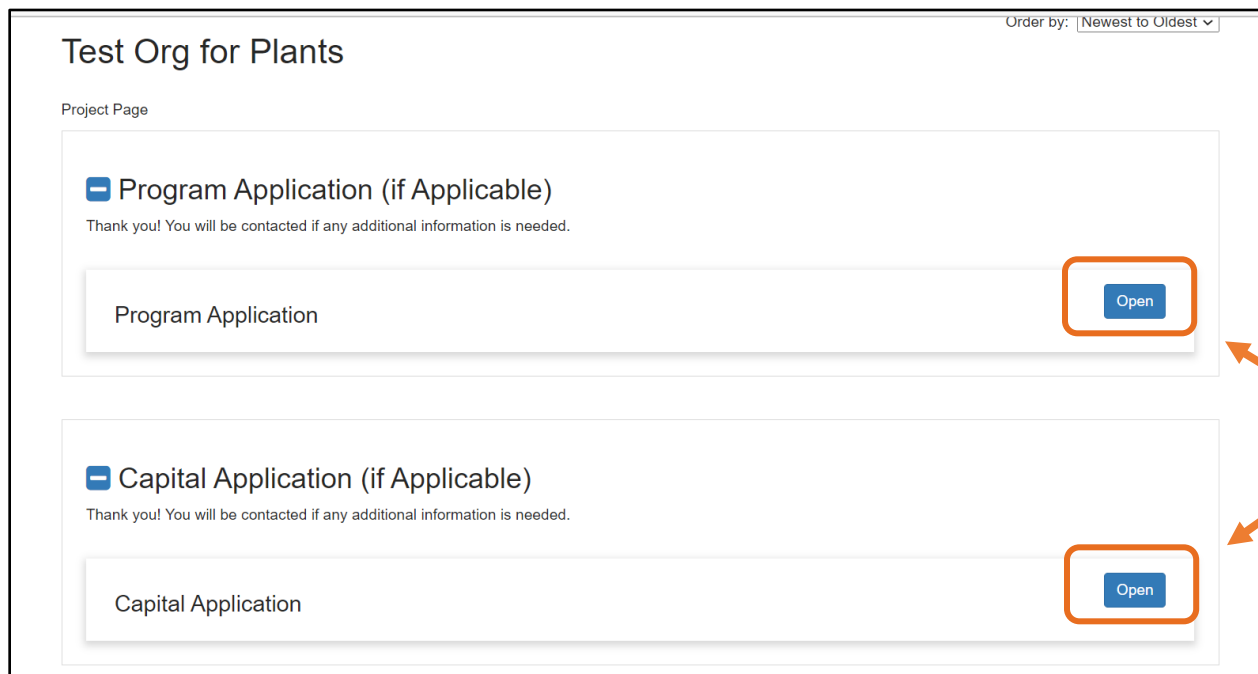
Once a grant is in Active Grant status, grantees will have access to Reimbursement Requests, Progress Reports and Match Documentation, Amendment Requests (optional), and Final Report (to be filled out at the end of the grant period).

Full Application

Once the project has been deemed eligible from the Pre-Application, you may proceed to the Full Application step. Please note that the due dates and questions are different for Programs and Capital/Planning projects.

To complete a Full Application, please click on the appropriate Project, and choose either the Capital Application **or** Program Application. Please note that both options may be available, even if your Pre-Application is only for one of these types of grants.

Click the blue “Open” button to proceed in the appropriate grant application.



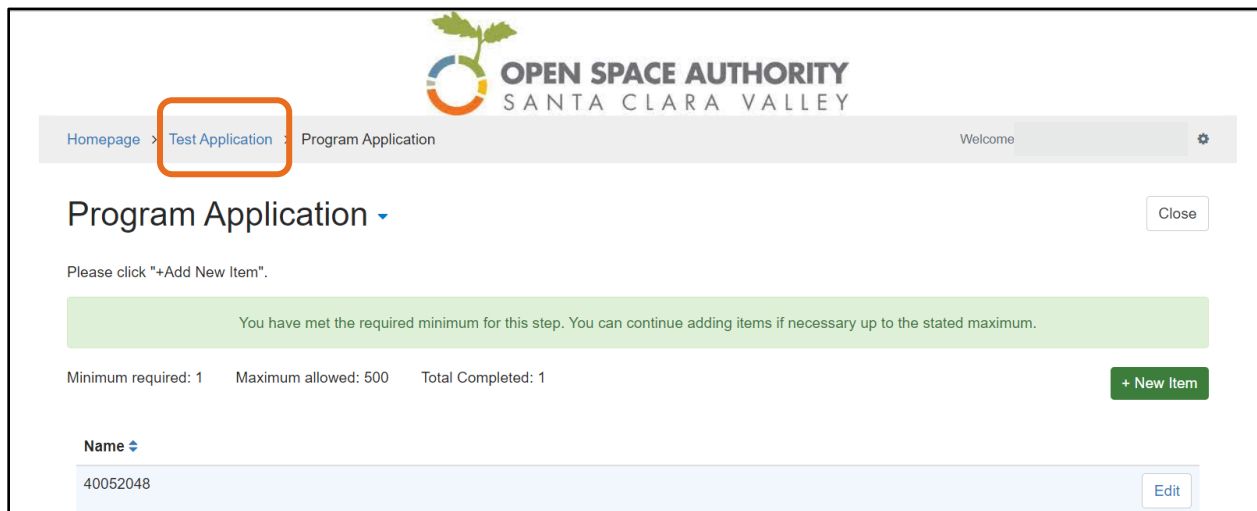
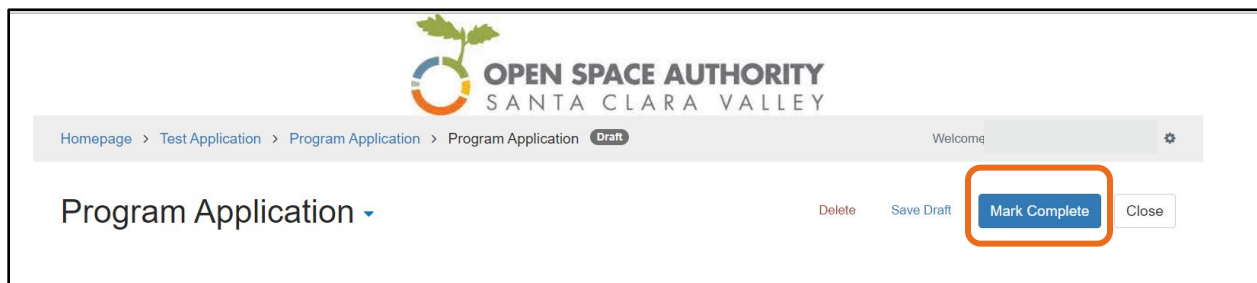
From there, please click the green “+ New Item” to start a new application. Once the application has been started, you may click the blue “Open” button to edit the draft.

Documents Upload Section

We recommend that applicants combine all files of the same type (.doc, .pdf, .jpeg, etc.) documents into one document before uploading. There is an option to upload multiple file types, such as an excel document for the Project Budget, and a PDF of additional documents. If your application requires more upload fields than is available, please contact jlatham@openspaceauthority.org.

Submitting the Application

Once you have answered all questions and uploaded the required documents, click on “Mark Complete”, **then go to the Project Page, then hit the green “Submit” button**. Once submitted, you may view your application by clicking the white “View” button.



Open Space Authority
SANTA CLARA VALLEY

Homepage > Test Application

Welcome, [user]

Order by: Newest to Oldest

Test Application

Project Page

☐ Program Application (if Applicable)

Submit

Program Application Complete Edit

Please note that you must click the green “Submit” button to submit your application.

The system will check to ensure you have answered every required question and uploaded the required documents. Any skipped questions or missing documents that are required will be flagged.

Accessing an Application in Progress

Once you’ve started an application, it can be saved by clicking “Save Draft”, or will automatically save after 5 minutes. You can return any time before the deadline to continue working on your application, as long as it has not yet been **Submitted**. To access an application, return to the Wizehive login page: <https://webportalapp.com/sp/login/santaclaravalleyopenspaceauthority-homepage>

Other Application and Awardee Information

Forms such as the Reimbursement Template, Match Documentation Template, Resolution, Grant Agreement, and more can be found at our website: <https://www.openspaceauthority.org/programs/grant>

For the Resolution, awardees that have an annual budget of \$10 million or more are required to provide 25% match. For organizations that have an annual revenue of less than \$10 million or more but will be providing match, these can be included in the Total Project Implementation Cost in the resolution.