WICE PROFILE BUILDER TAXONOMY 11/05/2025

I. Welcome Screen & Account Creation

1. **Welcome Screen**

- Header: Welcome to WICE
- Sub text: Let us help you build a profile that reflects your expertise and connects you to meaningful opportunities.
- Primary Button: Create Profile
- Secondary Link: Already have a profile? Sign in

2. **Account Creation**

Fields:

- Email
- Create Password
- Confirm Password
- Terms of Use and Privacy Policy
    - o Full Message (scrollable if long)
    - o Checkbox: **By checking this box, you are agreeing to the Terms of Use and Privacy Policy**

Button: Create Account

II. Profile Builder _ Desktop UI Mockup

Purpose

This document provides the desktop UI layout and field types for the WICE Consultant Marketplace Profile Builder. It includes recommendations page by page for the structure, placement guidance, field types, and microcopy notes to support the Rutgers Team with app updates/refinements.

A. General UI Standards

- Structure: Two column layout for most form pages (if possible)
- Navigation: Back and Next buttons on all pages
- Fields to be set as Required (mandatory) are denoted by a *
- Photo fields or options to upload photos for consultant profiles should not be included.
- **Editing:** Each completed section must include a clear **Edit** button or link, allowing users to return and update that section at any time. Edit should take the user directly to the relevant section's form fields.
- **Experience:** The profile experience should guide consultants through two completion levels: first a **Light Profile (section B)** that collects only the essential required fields needed for a consultant to activate their profile and start matching/receiving new hire requests, and a **Full Profile (section C)** where they can complete additional sections at their own pace to strengthen their visibility. All sections of the profile should be shown in the **Progress Panel (section II**) from the start.

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B. UI Pages Specs _ Light Profile

Intro Page

Layout

- Header: Build your essential profile
- Sub text: This first step takes about seven to ten minutes. You can update your profile at any time.
- Primary Button: Start

Page 1: Identity Basics

Layout: Two columns (optimally, if possible)
Fields:

- **Full Name** (text input, left)*
- **Pronouns** (single- select drop down, left)
    - o Dropdown options: She / Her, He / Him, They / Them, Prefer not to say, Self describe
- **Time Zone** (single select drop down, right) *
    - o ***Microcopy:*** Tell us where you are based so we can support time zone friendly matching and to ease client coordination.

Buttons: Back (left), Next (right)

Page 2: Professional Identity

Layout: Two columns (if possible)
Fields:

- **Professional Headline** (Text input, 120 characters max) *
    - o Microcopy under headline: Example: Global Health Advisor with 12 years supporting Latin America programs.
- **Short Bio** (text area, full width, 250-600 characters) *
- **Total Years Professional Experience** (single-select drop down, left) *
    - o Dropdown options: Less than 2, 2-4, 5-7, 8-10, 11-14, 15-20, 20+
- **LinkedIn URL** (URL input, left)

Page 3: Expertise Snapshot

Layout: Two columns (optimally, if possible)
Fields:

- **Industries and Sectors -** Dropdown options
    - o Tiered multi-select with dependency logic
        - ▪ Industry (multi-select dropdown, left)
        - ▪ Sectors (multi-select dropdown, filtered by selected Industry)

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- Subsectors (multi-select dropdown, filtered by selected Sector)
  - *Optional Toggle:* "Show All Sectors"- Displays the full sector list across all industries. On/Off button (Off as default).
  - ***Rules:***
- User must select at least 1 industry and 1 sector at this stage.
- User may select up to 3 industries.
- Subsector selection is optional at this stage.
- Users can add more Industries, Sectors, and Subsectors later
  - ***Dependency logic:*** User selects one or more Industries. Show only Sectors that belong to the selected Industry. If Show All Skills is turned ON, display full skill list across all areas. When a Sector is selected, show only its Subsectors. If an Industry is removed, remove its Sectors and Subsectors from selection. If a Sector is removed, remove its Subsectors from selection
  - ***Microcopy:*** Select at least one Industry and one related Sector to begin. You may add more now or return later to expand your profile. Use Show All Sectors if you want to view the full list.

- **Languages (multi- select drop down) -** Dropdown options

Page 4: Work Preferences

Layout: Two columns (optimally, if possible)
Fields:

- **Daily Rate** (numeric field with currency selector) *
- **Availability Status** (radio buttons, left) *
  - "Available now", "Not currently available". If we can a "not available on" with a text input type or something similar that would be great.
  - ***Rules:*** Users must select
- **Open to Travel** (radio buttons) *
  - Yes, No
  - ***Rules:*** Users must select.
- **Microcopy under header:** You can update preferences at any time.

Page 5: Light Profile Completion Summary

Purpose: Confirm completion of the Light Profile, show a summary for quick review, and guide the user to either continue with the Full Profile or exit.

Layout:

- The Progress Panel must remain visible on this page, showing the sections the user has completed.
- Main Content Area:

* - This means the user is required to complete this field to proceed and should be set as a required field in the profile builder.

- Display a summary table or card-style list of all information entered in the Light Profile.
- Each section should include an Edit link so users can make changes before moving on.

- **Sub-text :** Your profile is now active at a basic level. You are discoverable and can receive client inquiries for relevant opportunities. Completing your full profile now improves your visibility and the quality of opportunities you receive.

Primary Action Button: Complete Full Profile Now

Secondary Action Button: Save and Return to Home Page

C. UI Specs - Full Profile, Expanded

Page 1: Experience Snapshot

Layout: Two columns (optimally if possible)
Fields:

- **Geographic Work Experience** – Dropdown options
  - Region (multi select dropdown or checkboxes, left) *
  - Country (multi select, filtered by selected regions, right)
- If assistive UI is possible, it would be great to have type ahead for countries.
  - ***Rules:*** User must select at least 1 Region. If a Region is deselected, remove its Countries from selection.
  - ***Dependency Logic:*** User selects Region(s). Only Countries belonging to those Region(s) are shown. User selects Country/Countries.
  - ***Microcopy:*** Select at least one Region. You can add more Regions and Countries later.
- **Donor Experience** (multi select checkboxes) – Dropdown options

Page 2: Professional Capabilities

Layout: Two columns (Optimally, if possible)
Fields:

- **Technical Skills**
  - Functional Expertise (Multi-select dropdown, left) – Dropdown options
  - Technical Skills (Multi-select, filtered by selected functional expertise, right) Dropdown options
  - ***Optional Toggle:*** "Show All Skills"- Displays the full skills list across all Functional Expertise. On/Off button (Off as default).
  - ***Rules:***
- User is not required to complete.
- User may select none, some, or many.
- User can edit or add more later.

* - This means the user is required to complete this field to proceed and should be set as a required field in the profile builder.

  - ***Dependency Logic:*** User selects one or more Functional Expertise areas. Only Technical Skills linked to selected Expertise areas are shown. If Show All Skills is turned ON, display full skill list across all areas. If an Expertise area is removed, remove its associated selected Skills.

- **Software and Tools** (dropdown multi-select) – Dropdown options
- ***Microcopy for entire:*** Add your skills and expertise to strengthen your profile and improve matching. Choose the ones that best reflect the work you want to be known for. This section is optional and you can update it anytime.

Page 3: Education and Credentials

Layout: One column (stacked fields optimally)
Fields:

- **Highest Degree and Institution**
  - Highest Degree Earned (Single select dropdown) * - Dropdown option
  - Institution (text input) *
  - "Add another education" button (repeatable block)
  - ***Rules:***
    - User must select one Highest Degree and provide the Institution
    - Additional education entries are optional
  - ***Microcopy:*** Share your highest degree and where you earned it. You can add more if you'd like.
- **Certifications** (multi-select dropdown) – dropdown options
  - "Other (add your own)" - text input appears if selected
  - ***Rules:*** Completion is optional User may select none, some, or many.
- **Security Clearances** (multi-select dropdown) – dropdown options

Page 4: Portfolio and Proof of Work

Fields:

- **CV or Resume** (file upload) *
  - PDF preferred but DOC/DOCX acceptable
  - Required for this section to show as Complete
  - Should be viewable by clients in a document viewer without requiring download
- **Other Documents** (file upload)
  - File upload (optional)
  - Up to 3 additional files allowed (PDF, DOC/DOCX, PPT)
  - Examples: work samples, writing samples, portfolios, project deliverables, capability statement
  - Should be viewable by clients in a preview viewer

* - This means the user is required to complete this field to proceed and should be set as a required field in the profile builder.

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Microcopy under section header: Upload your CV or resume so clients can quickly understand your background. You can also share up to three additional documents or samples of your work. These extras are optional.

Note: Client Viewing Requirement

- Clients must be able to open and view documents directly in the platform (PDF-style viewer) without downloading
- Downloads may be allowed for CVs

Page 5: Final Review and Submit

Layout:

- Progress Panel: Remains visible on the right side of the page, showing all sections and completion status.
- Main Content Area:
    - Display all profile sections in expandable summary blocks or a clean stacked layout.
    - Each section must include a clear Edit link or button that takes the user directly to that section's form fields for updating.
- Primary Action Button (bottom right): Submit Full Profile
- Secondary Action Button (bottom left): Back
- ***Microcopy (below header):*** Review your full profile below. You can edit any section before submitting. Once submitted, your full profile becomes visible to clients.

Post-Submit Behavior:

- After submission, show a short confirmation message that the full profile has been successfully completed and saved.

D. Completion Screen

Header: Your Full Profile is Complete

Sub-text: Well done! You've unlocked full visibility across the platform and will now appear in more client searches for your expertise. You can update it anytime as you grow.

Primary Button: Go to Home Page

III. Profile Completion Progress Panel

Purpose: Show users their progress as they complete profile sections, from Light Profile to Full Profile. Each key section displays a checkmark when completed.

Title: Title: Profile Completion Progress

Visibility & Location: Sticky sidebar, always visible on the right side of all profile edit pages

What It Shows:
A list of profile sections with a status icon for each:

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- Not completed: empty circle icon "○"
- Completed: checkmark icon "✔"

Sections to include:

- Identity Basics
- Professional Identity
- Expertise Snapshot
- Work Preferences
- Geographic Experience
- Donor Experience
- Professional Capabilities
- Education and Credentials
- Portfolio and Proof of Work
- Final Review and Submit

Rules:

- A section counts as "Completed" only when all **required** fields in that section are filled.
- When the user completes all required fields in a section, show a checkmark next to that section. When a section is not completed, show a circle or empty checkbox.
- Optional fields do not affect completion status.
- The progress panel updates instantly after saving changes.
- Once the first four are checked, the consultant can "Go Active" and start receiving new opportunity requests.
- All other sections are optional to complete later, but still visible to encourage them.

Interactions

- Each row is a button
- Click takes user to the first incomplete field in that section

Microcopy to display at the top of the panel: Complete your profile to unlock more visibility and better matches. You can update your profile anytime.

Microcopy (Optional tip at bottom): You only need the first four sections to go active. Add the rest when you are ready.

IV. "Consultant Card" Preview Fields (what clients see before clicking into a profile)

Purpose: We want just enough information for a client to quickly scan, filter, and shortlist, without overwhelming them.

Required to show:

- Name
- Professional Headline
- Industry (up to 1)

* - This means the user is required to complete this field to proceed and should be set as a required field in the profile builder.

  - Given that users may select multiple Industries, to keep it simple either only show the first selected OR the industry with the most sectors selected (i.e., a smart auto-primary feature if possible.)
- Sectors (up to 2)
  - Display up to 2 Sectors associated with the Industry (above)
- Functional Expertise (Up to 3)
  - Given that users may select multiple Expertise, display the first 3 areas selected.
- Years of Professional Experience
- Time Zone
- Daily Rate
- Availability Status

<u>Note:</u> Do not show any indicator that additional industries or sectors exist. Client must click "View Profile" to see all industries/sectors & functional expertise.

V. Compare Consultants Feature

Microcopy: Select up to three consultants to compare side by side. Review their strengths, experience, and fit for your project in one view.

Field	Display Rule for Compare View
Name	Full name displayed
Professional Headline	Full headline displayed
Years of Professional Experience	Display years selected (e.g. 5-7 years)
Functional Expertise	Show up to 3 items, then "+X more" if applicable
Industries	Show up to 2 industries, then "+X more" if applicable
Sectors	Show up to 3 sectors, then "+X more" if applicable
Donor Experience	Show up to 5 donors, then "+X more" if applicable
Time Zone	Show time zone abbreviation (e.g., EST)
Rate	Show daily or hourly rate

* - This means the user is required to complete this field to proceed and should be set as a required field in the profile builder.