



community<sup>force</sup><sup>TM</sup>  
SOFTWARE & SERVICES

**Scholarship Management System**  
**Training Guide**  
**Module 1 – Getting Started - Accessing Your System**  
**Ver 7.5**  
**Updated: 7/2015**

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### Module 1: Getting Started – Accessing Your CommunityForce System

This module covers how to access your new CommunityForce site. Topics include: Changing your Passwords; Learning the Navigation and Getting Acquainted with your Home Dashboard.

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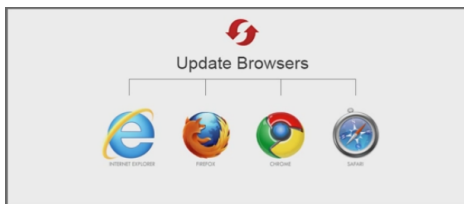
## 1. GETTING STARTED

Congratulations, you have a brand new CommunityForce Management System. Let's get started by learning your way around the site. When you first receive your CommunityForce Product there are a few set up steps you will want to address prior to starting the design of your applications in CommunityForce.

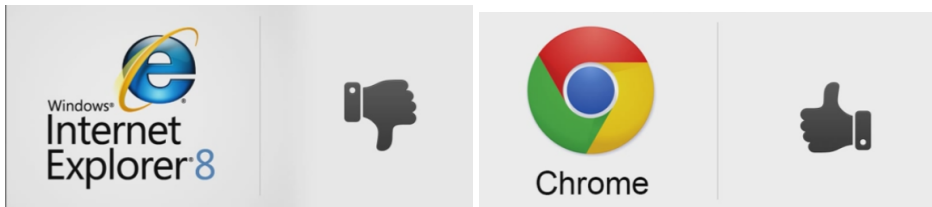
### 1.1 Logging into CommunityForce scholarship system

#### Exercise 1:

- **Step 1:** We recommend that you use the newest version of your browser. It is a good idea to maintain your browser by keeping it up to date.



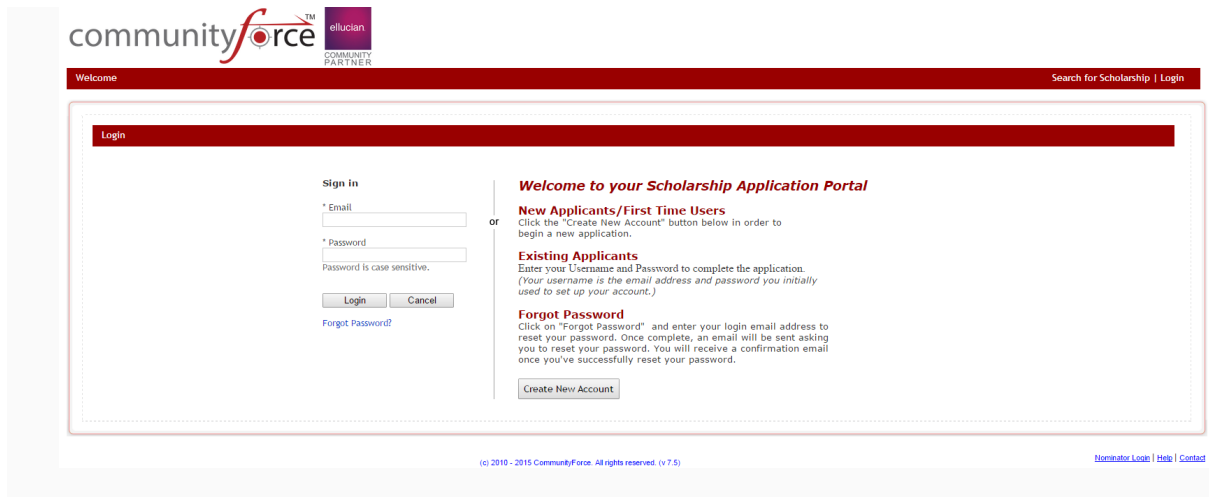
*\*Microsoft IE 8 is no longer supported by Microsoft – if using this browser, we highly recommend you download the most recent version of IE if that is your preferred browser. The team at CommunityForce prefers Google Chrome.*



- **Step 2:** Enter the URL given by CommunityForce in any Internet browser. Add the URL to your favorites list for quicker access.
- **Step 3:** Click on the Login link present on the top right hand corner of the screen.



- **Step 4:** The following screen will open:



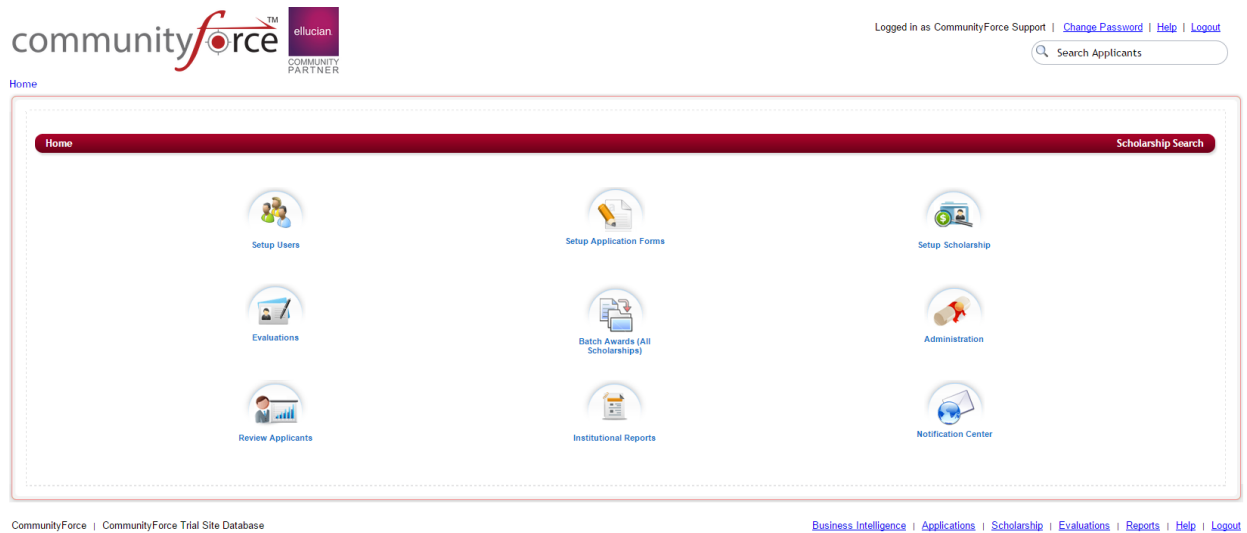
- **Step 5:** Enter the admin credentials (**Email ID and Password**) given by CommunityForce and click on the Login button. Email ID and Passwords are case sensitive. Please type in exactly how it was given to you.

## 1.2 Changing your password

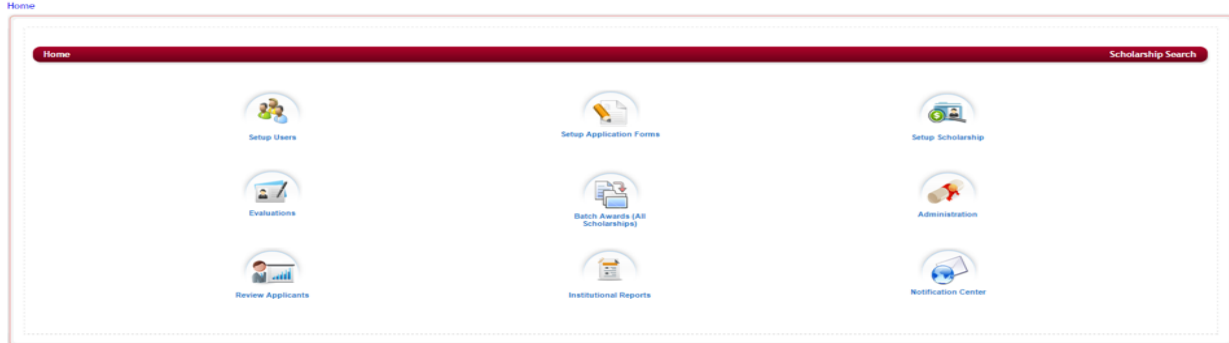
We recommend when you first receive your site URL credentials from CommunityForce that you login and change your password.

### Exercise 1:

- **Step 1:** The Home Page will be the first screen that will open every time you login:



- **Step 2:** In the upper right hand corner of the screen you will see a link: Change Password.
- **Step 3:** Click on the Change Password link to open a new window:



- **Step 4:** In the new window, Enter your old password followed by a new password and confirm the new password.

- **Step 5:** Click on the *Submit* button to save your changes or the *Cancel* button to return back to the previous screen.
- **Step 6:** If you selected *Submit* to change your password a new window will appear: Are you sure you want to change your password?

- **Step 7:** Click Yes to proceed or No to cancel the change.
- **Step 8:** To confirm that your password has been changed, the following screen will open. Click OK to be redirected to the Login Screen.

System Alert 236

Your password has been changed. You may now log in using your new password.

\*Confirm Password :

- **Step 9:** You will be directed back to the Login Page to sign into the system using your new password.
- **Step 10:** Sign in to the system using your new password.

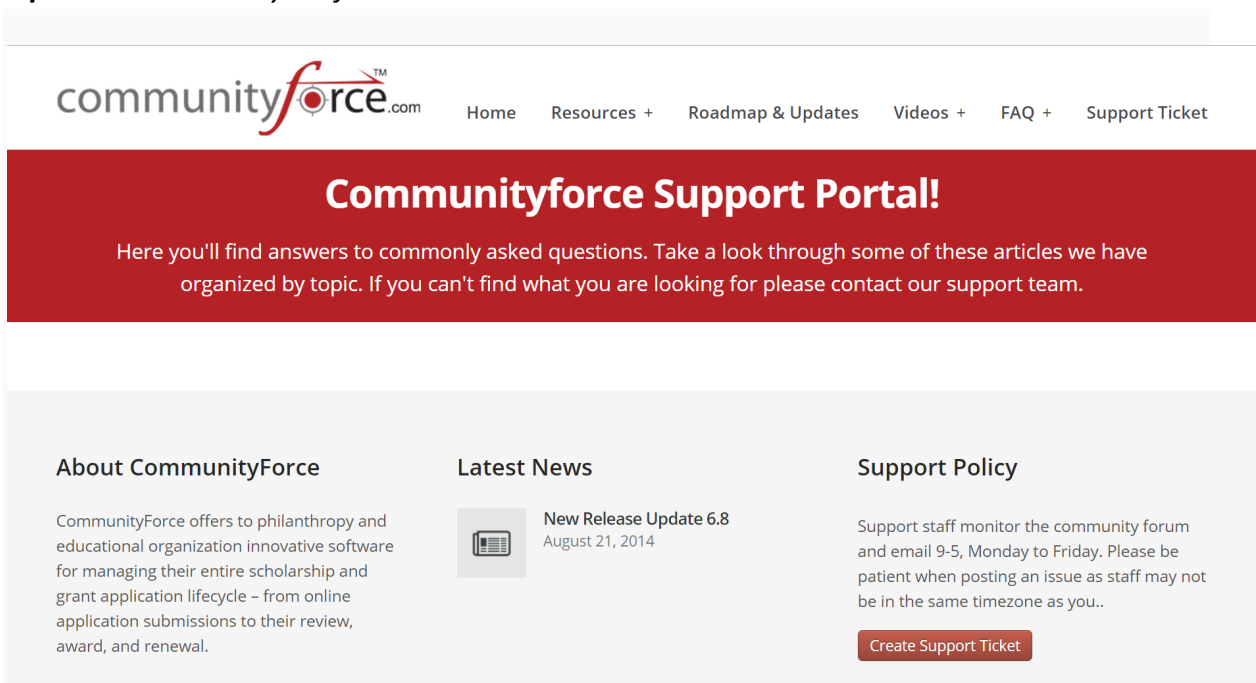
### 1.3 Accessing the Online Help Guides

#### Exercise 3:

- **Step 1:** Once you are signed in with your login credentials. You should be at the Home Dashboard. The Home Dashboard will be the first screen that will open after you login.



- **Step 2:** In the upper and lower right corner of the screen you see a link: **Help**. Click on that **Help** link to open a new window.
- **Step 3:** Our Client Support Portal: <https://support.communityforce.com> will open into a new window where you will be able to search the support portal for help guides on specific topics, print step by step instructions, open video links to watch informative videos, enter support tickets.
- **Tip:** Add this link to your favorites



- **Step 4:** Click on the **Resources** tab to view the knowledge base help guides on specific topics for your CommunityForce program.

## 1.4 Entering a Support Ticket

### Exercise 1

- **Step 1:** While in the Support Portal's *home* page you can click on the **Create Support Ticket** Button or click on the **Support Ticket Tab** at the top of any page in the support portal.

The screenshot shows the CommunityForce Support Portal home page. At the top right, there is a navigation menu with the following items: Home, Resources +, Roadmap & Updates, Videos +, FAQ +, and a 'Support Ticket' tab which is highlighted with a black rectangular box. Below the navigation menu is a large red banner with the text 'Communityforce Support Portal!' in white. Underneath the banner, there is a sub-header: 'Here you'll find answers to commonly asked questions. Take a look through some of these articles we have organized by topic. If you can't find what you are looking for please contact our support team.' The main content area is divided into three columns. The first column is titled 'About CommunityForce' and contains text about the software. The second column is titled 'Latest News' and features a 'New Release Update 6.8' dated August 21, 2014. The third column is titled 'Support Policy' and contains text about support hours and a 'Create Support Ticket' button, which is highlighted with a black rectangular box.

- **Step 2:** This will direct you to <https://communityforce.zendesk.com/> login in page.

**Note:** You must have an account with our Client Support Portal to access the Help Center and submit a ticket for assistance. When your Help Center account is generated you will receive an email asking to verify and set up your password. We set this up for you at the time of your site delivery. Please contact us if you have not received an email with access to the Zendesk Client Portal.



Sign in to CommunityForce

Email \*

Password \*

Stay signed in

**Sign in**

Your credentials will be sent over a secure connection

Cancel

[I am an Agent](#)

[Forgot my password](#)

➤ **Step 3:** Login in using your Zendesk account credentials.

➤ **Step 4:** Click on the Submit a Request (ticket) at the top of the page to add a new ticket.

**Note:** When entering your support ticket please include the following items in your ticket description:

- Site URL
- Application form or Funding source you are referring to
- The Section and Question you're inquiring about
- Who it is in your organization that is needing the assistance.
- Good detailed explanation of your question and what you need assistance on. If at all possible try to include screen shots of the area you need assistance on.

➤ **Step 5:** Enter your Subject and the Description of the request.

Subject

Description your comment is sent to the ticket requester

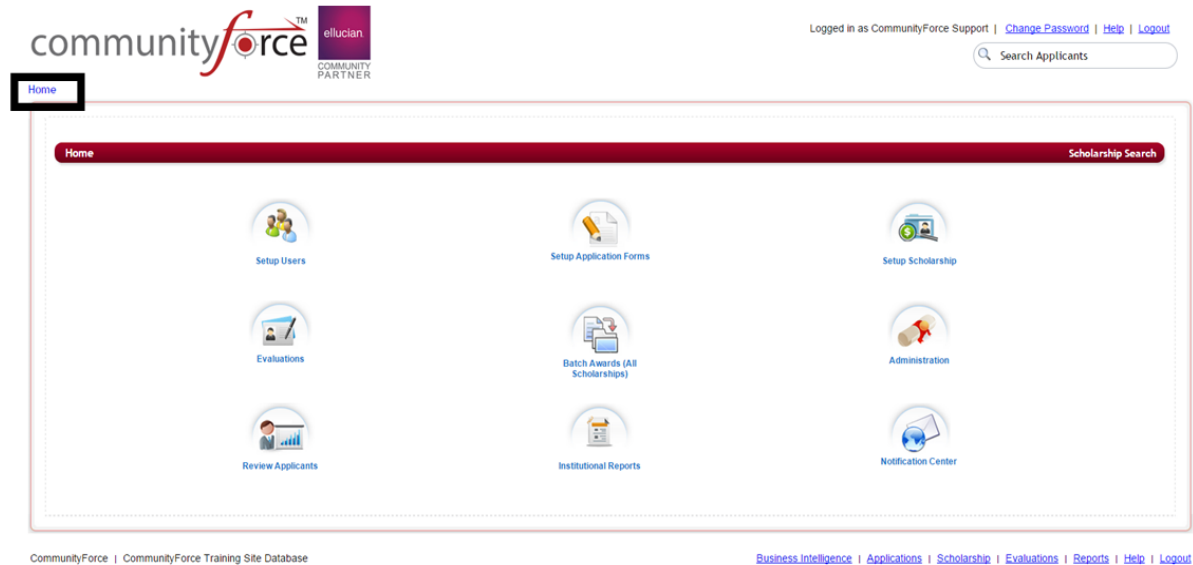
[Attach file](#)

➤ **Step 6:** Click on the Attach file to attach any documentation or screen shots regarding the request.

➤ **Step 7:** Click **Submit** to submit the request.

## 1.5 Overview of the Home Dashboard

- The Home Dashboard page is the first screen that will open after you login. You can also navigate to the Home dashboard from anywhere in the site, by clicking on the *Home* link located at the top left of the screen under your logo.



- Depending on your role type, your Home dashboard may contain all or only some of the icons shown in this example. Labels for the icons may vary somewhat from yours as these can be changed by your Global Administrator. However each icon is the same and will take you to the same locations when clicked on. Please contact your Global Administrator if you would like to have any of these icons turned on for your use. The initial setup features for this function are located under the Administration icon on the Global Administrator’s Home Dashboard.
- Now let’s take a look at each icon on the Home dashboard. As the items in the dashboard are highlighted, please feel free to click on the icon to open it and take a look. We will be discussing each in further detail as we move through the training modules.

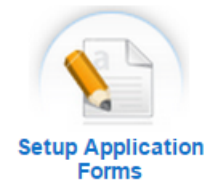
### 1.5.1 Setup Users

- In this Section you can:
- Create Users (Dept. Admin, Applicants, Reviewers, etc.)
  - Edit and Change User Access or Role
  - Reset Passwords



### 1.5.2 Setup Application Forms

- In this Section you can:
- Create and Clone your Application Form
  - Archive Closed Applications
  - Add Pre-Qualification Questions to your application
  - Create Sections and Questions for your application
  - Customize Request Instructions to the Applicant
  - Manage General Information of the application.
  - Create the Submit Message that is seen by your applicants after they submit their application.
  - Manage Custom Text Tabs for the Applicant Dashboard
  - Manage Application funds that are linked to this application (if applicable to your application process)
  - Manage the fund criteria (eligibility) for the funds linked to this application (if applicable to your application process)
  - Manage the Common Application process (if applicable to your application process)



### 1.5.3 Setup Scholarship

- In this Section you can:
  - Create and Edit Funding Sources
  - Manage Specific Information that pertains to the Fund Source



Setup Scholarship

**Note:** This section may be called Setup Grants/Fellowship/Award/Competition or be known by another name depending on your process. Going forward in your training we will refer to these sections as **Funding Source**.

### 1.5.4 Evaluations

- In this Section you can:
  - View the status of your applicants
  - Set up your evaluation/review process
    - Set up your Committees
    - Assign tasks for your Committees
    - Assign Applicants to Committees
    - Manage Automated Scoring
  - Evaluate applicants
    - Review Status
    - Review Results
    - Manage Awards
    - Batch Awards
    - Manage renewal applicants
    - Review Automated Scoring Report
  - View reports specific to the application
    - Create and Run Ad Hoc Reports and Queries
    - Section Status Report
    - Post Award Section Complete
  - Release a Section Back to an Applicant
  - Manage the notification Center for that specific application



Evaluations

### 1.5.5 Batch Awards (All Scholarships)

- In this Section you can:
  - Batch Awards for any scholarship
  - View Award Applicant Report for any scholarship
  - View Overlap Report for any scholarship
  - View Recommender Report



Batch Awards (All Scholarships)

### 1.5.6 Administration

- The functions performed in the Administration Icon are mainly performed by the Global Administrator. Therefore, only those with the Global Admin role type will be able to see this icon.
- In this Section you can:
  - Add and Edit Funding Source Search Filters
  - Manage Sponsoring Organizations
  - Create Status Details
  - Change Control Mapping icon labels
  - Change Password Policy
  - Application Invitation
  - Manage External System Authentication Settings
  - Manage Site Settings
  - Manage System Messages
  - Set Master Application
  - Manage Application Funds
  - Manage Role Types
  - Manage Academic Years
  - Upload Applicant Credentials
  - Assign Scholarships to Role Types
  - Plug-in Mapping



Administration

### 1.5.7 Review Application

- In this Section you can:
  - Review Applicants that have been assigned to you for review in the evaluation review process.



Review Applicants

### 1.5.8 Institutional Reports

- In this Section you can:
  - Create and Run Institutional (global) Reports. These are reports across multiple applications.



Institutional Reports

### 1.5.9 Notification Center

- In this Section you can:
  - Create Email Templates for any application
  - Send Emails to Applicants for any application



Notification Center

\* **Note:** More detail information on the above screens, will be covered in additional modules.

## 1.6 Navigational Links

- When navigating through the system, there are navigational links available to navigate easily through the site. Please use the navigation links at the bottom of the screens or use the breadcrumb navigation located under your logo.
- Do not hit the back arrow in your browser to travel back to a screen; doing so may remove you from the system depending on what you are doing.

### 1.6.1 Bottom Navigational Links

- You will notice at the bottom right hand corner of any page a series of navigational links.  
[Business Intelligence](#) | [Applications](#) | [Scholarship](#) | [Evaluations](#) | [Reports](#) | [Help](#) | [Logout](#)
- These links will appear on every single page that opens in the system. Use these links to access those sections of the system without having to return to the Home Dashboard Page. This is useful when you're in another location of the site and you want to get to the target location in a quicker manner.

**Business Intelligence** – if you purchased the Business Intelligence feature this link will open the Business Intelligence tool dashboard.

**Applications** – this is the same as the Setup Applications icon on your home dashboard and will give you the listing of all the applications you have active so that you can modify their setup features

**Scholarship** – this is the same as the Setup Scholarship icon on your home dashboard and will give the listing of all the scholarships you have available so that you can modify their setup features.

**Evaluations** – this is the same as the Evaluations icon and will give you the listing of all the applications you have active so that you can view applicants that have applied and evaluate them.

**Reports** – this will link you to the Batch Awards (All Scholarships) report dashboard where you can view reports for all your applications.

**Help** – Our Knowledge Base will open into a new window where you will be able to search for help guides on specific topics, print step by step instructions and open video links to watch information videos.

**Logout** – logs you out of the site.

### 1.6.2 Breadcrumb Navigational Links

- As you move from page to page in the site you will notice at the top left hand side of your screen under your logo the *Breadcrumb Navigational* links.

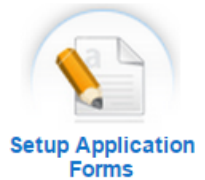


Home > [Evaluations](#) > [Form for organization with one fund accepting High School applicants in Indiana](#) > [Evaluate Applicants](#) > [Manage Awards](#)

- This are markers showing the path you have taken to reach the page you are currently on. If you want to go to a previous page, you would locate that item in the Breadcrumb Navigation and click on it to return to the previous destination. **It is important to use these links, instead of hitting the back arrow in your browser to travel back to a screen; clicking the back arrow may remove you from the system depending on what you are doing.**

### 1.7 Controlling how many entries display on a page in dashboard reports

- Across the entire application you will find three features that will assist you with navigating through your applicants, forms, or funds. For example click on the Applications Icon.
- The following screen will open up:



Home > Applications

Applications

Search By:

Application Form:  Scholarship:  Sponsoring Organization:  Search

Create New Application
Clone Existing Application
Export to Excel
Archive
Active ▾

<input type="checkbox"/>	Application Form	Scholarship	Sponsoring Organization	Start Date	Deadline	Published	
<input type="checkbox"/>	University Scholarship Application Master Template			10/25/2013	12/31/2014	No	
<input type="checkbox"/>	Community Foundation for the CSRA 2014 Unrestricted Grants Application			06/01/2013	07/31/2014	No	✘
<input type="checkbox"/>	Financial Aid Recipient Application Form	Scholarship Fund Template - Training Sample	My Organization Name 3	11/07/2013	12/31/2014	Yes	✘
<input type="checkbox"/>	Form for organization accepting Graduates based on Merit and Financial need	Scholarship for organization accepting Graduates based on Merit and Financial need	My Organization Name 5	01/15/2014	12/31/2014	Yes	✘
<input type="checkbox"/>	Form for organization accepting High School applicants with Multiple funds & Multiple Request Sections	Scholarship for organization accepting High School applicants with Multiple funds & Multiple Request Sections	My Organization Name 11	01/03/2014	12/31/2015	Yes	✘
<input type="checkbox"/>	Form for organization accepting Undergraduates based on Merit and Financial need	Scholarship for organization accepting Undergraduates based on Merit and Financial need	My Organization Name 4	01/15/2014	12/31/2014	Yes	✘
<input type="checkbox"/>	Form for organization with multiple funds accepting Adult Learners	Scholarship for organization with multiple funds accepting Adult Learners	My Organization Name 7	10/03/2013	12/31/2014	Yes	✘
<input type="checkbox"/>	Form for organization with multiple funds accepting High School applicants	Scholarship for organization with multiple funds accepting High School applicants	My Organization Name 2	01/01/2014	12/31/2015	Yes	✘
<input type="checkbox"/>	Form for organization with one fund accepting Adult Learners	Scholarship for organization with one fund accepting Adult Learners	My Organization Name 6	11/07/2013	12/31/2014	Yes	✘
<input type="checkbox"/>	Form for organization with one fund accepting High School applicants in Indiana	Scholarship for organization with one fund accepting High School applicants in Indiana	My Organization Name 1	11/07/2013	12/31/2014	Yes	✘
<input type="checkbox"/>	Form for organization with one fund accepting Undergraduate applicants	Scholarship for organization with one fund accepting Undergraduate applicants	My Organization Name 3	11/07/2013	12/31/2014	Yes	✘
<input type="checkbox"/>	Form for University requiring integration with Banner Integration	Scholarship for University requiring integration with Banner Integration	My Organization Name 10	12/16/2013	12/31/2014	Yes	✘
<input type="checkbox"/>	Form for University requiring integration with Datatel (Dept Specific Questions)	Scholarship for University requiring integration with Datatel (Dept Specific Questions)	My Organization Name 9	10/25/2013	12/31/2014	Yes	✘
<input type="checkbox"/>	Form for University requiring integration with PeopleSoft and Banking System	Scholarship for University requiring integration with PeopleSoft and Banking System	My Organization Name 8	12/17/2013	12/31/2014	Yes	✘
<input type="checkbox"/>	Los Alamos Employees' Scholarship Application Form 2014	Los Alamos Employees' Scholarship Application Form 2014	Test	08/14/2014	12/31/2014	Yes	✘

Go to Page  Go
Page 1 Of 1
Display  Records per Page

- Notice at the bottom of the table grid the following options are available:

The **Go to Page** feature will allow you to type a page number in the box. After typing a page number click on the **Go** link to go to that page.

Go to Page  Go

- To toggle between pages simply click on the gray arrows.

← Page 1 Of 1 →

- Display Records per Page. Simply click on the down arrow to display a certain number of Records on the page. Display Records are: 10, 20, 30, 40, 50, 100 or ALL.

Display   Records per Page

**Note:** *When displaying records 100 to page or ALL to a page it may take a few seconds or minutes to load depending on the screen. It may be running calculations or updating data. The more applicants you have in your system attached to that form the longer it may take to run.*