Scholarship Management System
Training Guide
Module 3 – Application Form Setup
Ver 7.5
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Module 3 – Application Form Setup

Module 3 will guide you through the complete process of creating your application form, adding sections in the form, and how to add the questions in the sections.

1. Understanding the Application Form

If you're doing your own implementation or working with the Implementation Team we suggest that you collect the following information together before designing and creating your form. The following list is not all-inclusive it's just a recommendation based on our experience. The Implementation Team will require the majority of this information prior to your Process Review and prior to them getting started with your Implementation.

1. Written Documentation of your Process (whether it is one application or multiple applications)
   a. Process Map
   b. Written Procedures
   c. Timeline
2. Documentation could include the following items:
   a. Who needs to update and review your Form before publication
   b. Current process on how you distribute your Form to potential applicants
   c. How you communicate with the Applicant during the process
   d. Applicant process – list of supplemental materials and resources they may need to complete your Form.
   e. Staff Intake Process
   f. Review Process
   g. Rubric
   h. Committee Structure
      i. How they currently review
      ii. Are they ready to read online?
   i. Award Process
   j. Notification Process
   k. External Database - load data into external system/pushing data into CF System

Before you begin to build your Form online be sure that you have the following for each Form
- Funding Source Information, including eligibility requirements
- Reports
- Committee Members
- Progress/Final Report Process
- Donor Interaction

After reviewing all the information, develop a new process and a new timeline to follow. Keep in mind that with your new timeline; you may be eliminating certain steps that free your time up. However account for the fact that you're using a new process and technology that you are not familiar with. To be on the safe side, allot yourself, and your reviewer's time to get used to the new process and new technology. You should plan and anticipate that you may have roadblocks due to the learning curve.

1.1 Creating an Effective Form

Let's face it: No one likes spending a long time filling out a form. Most people hate to do a lot of typing. Keeping your form short and simple, eliminating unnecessary elements that no one needs is a good start. Ask yourself: "Can I do without that information?" If the answer is "yes", don't use it.

1.2   User's Perspective

When creating your application form, think about it from the User's Perspective.   A good design is a simple design. Keep in mind that people read from top to bottom and left to right. Your design should reflect a natural placement of elements. A scattered application will just drive a user to become confused and typically they will not complete filling out the form. Before starting to build your application in our software we suggest you take a good look at your existing form whether it is a paper application or an online form. Think outside the box. Think about the user experience.

1.3   Design with a Purpose

A good way to create an effective form is to use as many presets as possible. To ensure consistency in responses from applicants, try your best to eliminate text fields and replace them with check boxes, radio buttons and dropdown menus wherever you can. That way you control the data that is brought in. Running reports will be easier and the data analytics will stay consistent. Fund criteria mapping will be more effective and less confusing for the system to find the match.

Think of the form as a method of communication. Your application may be asking for quite a bit of information, but you don't have to throw it all at your users in one section.

- **Organize your Sections:**
   - Divide long sections into smaller sections. Using multiple sections for a longer form looks less intimidating to a user then having to scroll down a long page of fields to fill out.
   - Use conditional logic to show and hide sections that are relevant to the user.
   - Where necessary provide clear and specific instructions. This helps reduce user confusion, but also ensures that the data is accurate and what you are looking for.

   - **Organize your Questions:**
   - Group similar relevant data fields together. Set a logical question sequence. There is a natural flow in the way the user expects to answer questions.

   For example: The user's personal details like Title, Name/Last Name, Gender, and Date of Birth should be grouped together.
   - Highlight questions that conditional logic could be used to show and hide fields that are relevant to the user. Providing only relevant questions makes a form easier to fill out and ensures maximum conversion.
   - Simple input, look for common entry questions and define defaults in dropdown lists, radio buttons and checkboxes. This makes data entry quick and easy, reducing the time a user is required to complete the form.

   For example: When asking what state they live in, provide all the states in a dropdown list for the user to pick from the list.
   - Be sure to format requirements for fields such as phone number, dates or emails.
   - Only make fields mandatory where information is specifically required for your objective.
   - Make sure that you have questions that match to your review criteria. To be able to match your criteria to a fund in the system, make sure you asked the question. Again this works most effectively when the questions are asked using preset radio buttons, checkboxes and dropdowns.

- Don't forget to review your decision making criteria or scoring rubric. Make sure that the information your reviewers need to score on is actually present in your application.

1.4   Online Forms are larger than Paper Form

An effective online form that you will create in CommunityForce system will be larger than your previous paper form. The following reason are why this is the case:

- **Attachments -** you might have an instruction sheet that mentions required attachments however those now need to be questions in respective sections on the online form. (Ex: transcripts, recommendation letters etc.)
- **Funding Source criteria** - One of the features available with CommunityForce is the ability to pull applicants based on funds criteria. A lot of times we have noticed that the customer forget to add the criteria questions on the form, there by resulting in them using heuristic approach to identify matches.
- **Review Score sheet** - At times reviewers need certain data points to make a determination on the best applicant for the award.   In those situation asking questions on the form that can help reviewers easily determine the better of the two applicants is valuable information to add to the form.

1.5   Build and Review your Online Form

After you have taken a good look at your application form make sure that you have broken the application down in to manageable sections and they contain all the appropriate questions.   The application also should be highlighted for required fields, conditional logic and criteria.

Now you are ready to starting building your application.

Make sure that you test your application form before you publish it. (See the Training Guide: Testing Your Application before Going Live)

Review your instructions to make sure they are clear and precise, fields are correctly formatted and everything is working the way you expected it to. Don't forget to check your spelling and grammar.

1.6   Understanding your application type

The CommunityForce system allows for a variety of different application processing scenarios. These scenarios are based on how many funds an organization has and the relationship between the application and the funds that an organization has. Below are a few of the most commonly used processes by our clients:

A) **One Application with multiple funds connected to that one application** *(referred to in this guide as 1:Many)* – If you have one application process that allows the applicant to apply to multiple funds using that one application or you may only have a few active funds concurrently. (Used most often by Colleges, Universities, Community Foundations and Individual Foundations)

B) **One Application per each individual fund** *(referred to in this guide as 1:1)* – You have multiple funds and each individual fund has a separate application process or is processed by separate departments within your organization. With this process ***multiple*** applications are active concurrently with each other. (Used by Individual Foundations.)

C) **Common Application** – (*used if you have a 1: Many relationship, but have 100's of funds that have totally different review processes, with several stages on each and need an application process for each separate fund)* ***Note: this is a very complex setup and recommend on an "as needed" basis only.*** You have one application process that allows the applicant to apply to multiple funds. However, you need to have separate child applications for each fund's process but do not want the applicant to have to apply to every single funds application. You create a common application that contains all the questions for all your applications. Then when the applicant applies and selects the funds they want to apply to, all the information for each individual fund's application that was in the common application is automatically pushed down to that separate child application and submitted for the applicant.

D) **Two Stage-Two Application Process –** Applicants complete a pre-approval application form. Then staff or committee reviews and determines if applicant is eligible to continue with applying for that specific funding source. Applicant is then notified and invited to apply to the next stage's application form. In the two Stage application process, you would have one application for the pre-approval and then in that application have an additional approval section appear to those that were determined eligible. In that section there would be a question, for all the applicant's moving forward, that directed them to the next stage's application form.

There are important settings and setup functionality within the CommunityForce site that affect the way your application process flows. Before setting up your application's general information setup, administrative setup, and site settings you will need to determine which process/processes applies to your organization.   The following are the various process scenarios that many of our clients have needed to perform for their specific application process:

- Applicant needs to be able to search for funding sources by the funds criteria or by a specific department or organization outside of the application process
- Maintain applications for multiple departments or organizations and need to be able to separate out each application and funding source by those departments and organizations.
- Applicant may have multiple applications that are similar to complete so would need the option to be able import replies from other applications.
- I want the applicant to choose what they are applying for.
- I want the system to choose which funding source they are eligible for and then return those results to the applicant to choose or automatically apply them to that funding source
- I have multiple stages to the review process and need to be able to track the applicant throughout that process and filter those moving to the next stage of the review.
- Each funding source has its own review process separate from the other funding sources.

- There are multiple applying stages that the applicant may need to perform that require staff to determine if they move forward from stage to stage
  - They do an initial application or only specific sections in that application, then depending on that application
    - they are then invited to apply to another applications, or;
    - Other sections within the same application need to appear to them to complete the other stages.
- I need a pre-qualification process, outside of the application, where they answer yes or no questions and the *system determines* if eligible to apply to that application. They don't have access to begin the application process if they do not meet the Pre-Qualification.
- Multiple individuals need to be able to access the application and complete various sections:
  - Collaboration - Applicant needs to be able to collaborate with existing applicants, or create additional applicant user accounts, that can help them complete the form, the applicant needs to be able to see the completed sections and monitor what has been completed.
  - Request Section – Applicant needs to have a section completed by a nominated individual without having to create a user account for that nominee. The section needs to be private and not viewable by the applicant. (I.e. Letters of Recommendation, Request for Transcripts, etc.)
  - Proxy - Applicant can have another individual apply or start the application on their behalf as a Proxy.
- Applicant can apply multiple times to the same application.
- Application is private and applicants have to be invited to apply.
- Application has a fee requirement.

1.7   How the Application Form is Organized

The Application Form including questions and responses, uploads, downloads, links, and requests for references, etc. may be completed by the applicant online. The overall objective for the system is to provide robust functionality that is flexible, customizable, and optional.

➢ Questions are organized into sections (typically topics like Applicant Information, College Information, Financial Information, etc.) that appear as sections or folder to the applicant. There are a broad variety of question types for the applicant responses and to provide information to the applicant.

➢ Sections are organized into Section Types (Application, Award Acceptance, Post Acceptance, Requests, and Admin). Section Types determine how a section deadline is treated - Application sections must all be completed prior to submitting the application.

Sections are also associated with the applicant status. Statuses that are pre-loaded into the system are:

- **Pending Submission** – Application has not been submitted yet
- **Request(s) Pending** – Application was submitted but is missing Request Sections
- **Submitted** – application has been submitted
- **Additional Info Requested** – Application has been submitted and released back to applicant
- **Withdrawn** – Applicant has withdrawn application

- **Under Committee Review** – Application has been assigned to a reviewer
- **Not Selected for Awarded** – Application has been marked not selected for award
- **Awarded** – Application has been awarded
- **Award Accepted** – Applicant has accepted the award
- **Award Declined** – Applicant has declined the award

➢ When a section is based on a status, the status determines at which point the section appears on the applicant's dashboard.

➢ Within the application, the sections and the questions each have separate setup options. Each needs to be completed intentionally in order to achieve the desired result.

➢ Sections and questions are determined by the Admin within a best practice framework (some sections and questions are mandatory). This ensures reporting consistency across all Schools, Departments, Programs, Institutes, and Councils that have Funding Sources.

➢ The question the applicant sees may be phrased with as many words as desired. In addition to what the applicant sees, there is an abbreviated version of the question as the column title for reports and exports to Excel (the report name) and as a database reference (the XML name). Typically, the report name and the XML name are the same except the XML name does not allow spaces.

➢ Applications are specific to an academic year. They may be copied to create the application for the new academic year. In addition, sections from one application may be copied to another application.

➢ Applications can be assigned a Sponsoring Organization. Only those users assigned to that Sponsoring Organization may view the applications for their organization.

➢ Application Items marked with an asterisk (*) denotes a required field.

1.8   How the Application Form appears to an Applicant using CommunityForce (Applicant View)

Below is an example of the applicant's view of the 'application' on the applicant dashboard.

Additional sections for award acceptance, post acceptance etc. will be displayed if the applicant is offered an award and accepts it.

Deadline for Submission: 12:00 AM, May 28, 2016

Preview Application | Import Responses from Existing Applications | Final Review and Submit

Instructions

Please click on each icon below and answer each of the questions in each section.

General Information
0%
05/28/2016 12:00AM

Essays
0%
05/28/2016 12:00AM

Family Information
0%
05/28/2016 12:00AM

Education Information
0%
05/28/2016 12:00AM

Financial Information
0%
05/28/2016 12:00AM

School and Community Activities
0%
05/28/2016 12:00AM

Academic Honors
0%
05/28/2016 12:00AM

Work Experience
0%
05/28/2016 12:00AM

Additional Information
0%
05/28/2016 12:00AM

Student Signature
0%
05/28/2016 12:00AM

Available Scholarships
0%
05/28/2016 12:00AM

Request

Requested
0%
Received
0%

2. Application Setup

In this section we will walk you through step-by-step instructions for building your application form.

2.1 Accessing Application Form Set up

➢ The Setup Application Forms is where you create new applications forms as well as modify or edit your existing application forms.

Exercise 1

➢ When you login to the System the first screen you view is the Home Screen.

➢ **Step 1:** Click on the Setup Application Forms Icon to view the Applications List.

➢ This will open the Applications table listing all the applications currenlty on your site, provided you have already created some applications. If you have not created any applications the listing will be empty.

- ➢ From this screen you can click on an existing application to modify its setup or create a new application.

- ➢ This listing will give you the name of the Application Form, the funding source that is linked to it, the sponsoring organization responsible for it, the start date that the application begins, the deadline (if applicable) and if it has been published.

- ➢ The **red X** on the far right is a delete application feature. Applications should only be deleted when there are no applicants.

- ➢ **Search By:** To find a specific application you can use the Search By: feature at the top of the page by entering all or part of the Application Form Name, Funding Source Name that it is linked to, or search for a listing of all applications for a specific Sponsoring Organization.

- ➢ – Allows you to export the listing to an Excel format

- ➢ – Allows you to mark an application as archived by selecting the box next to the application and clicking the Archive button. Archiving removes the application from the active listing so that the listing in not extremely long.

- ➢ - **Active/Archive** sets the view listing to view only the *active* applications or to see only *archived* applications; the default for this setting is Active.

2.2   Creating an Application Form

➢ There are two functions available to create a new application. **Create New Application** and **Clone Existing Applications.**

2.2.1　　　Creating a New Form

Exercise 1

➢ **Step 1:** While in the Set up Application Form/Applications Listing you will notice two buttons **Create New Application** and **Clone Existing Application.**
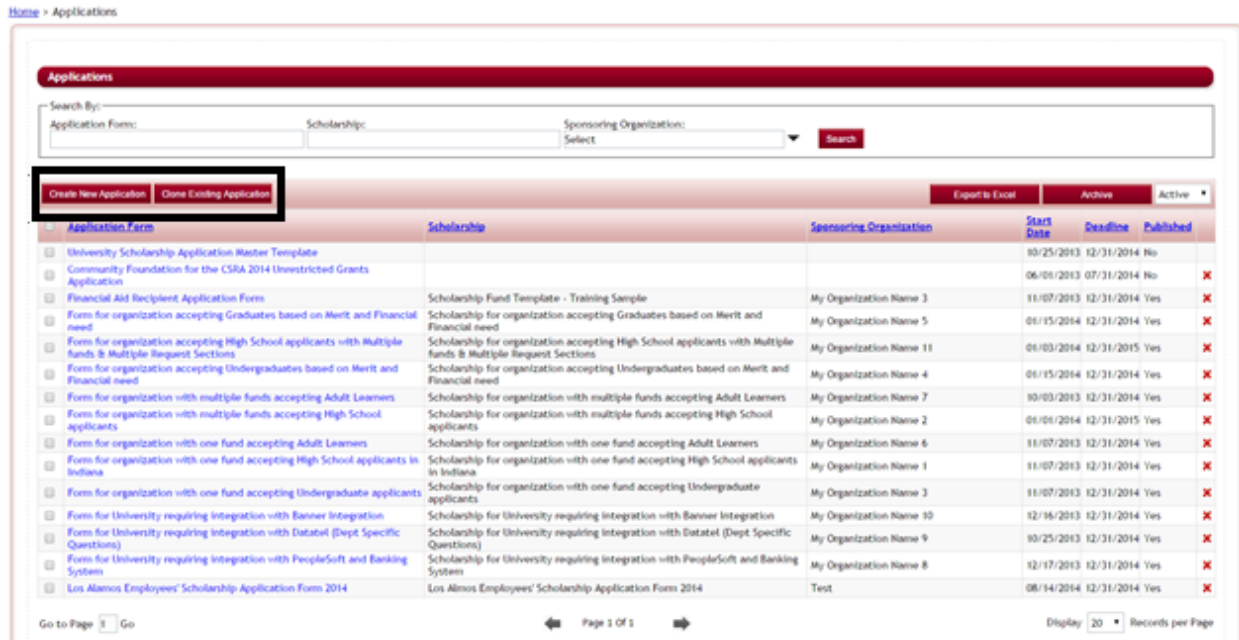
➢ **Create New Application** - Create New application button creates a new application.

➢ **Step 2:** Click on this button to see how the **General Information** page appears when creating a new application.

➢ **Step 3**: Enter the Scholarship Application Name that you want to call your application

➢ **Step 4:** Enter the Description of this application.

➤ Refer to the **General Information** section for a detailed explanation of the remaining functions.

2.2.2   Cloning an Existing Application

➤ Cloning the application will create an exact replica of the application you choose, including all the application's general information setup settings, sections, questions, pre-qualification questions, request instructions, submit message, and the evaluation setup for that application.

Exercise 1

➤ **Step 1:** from the Application Setup Applications listing, select the Clone Existing Application button.

➤ **Clone Existing Application** - If you do not want to create a completely new application, you can clone an existing application that you have previously made.

➤ **Step 4:** Click the Clone Existing Application button to see how the General Information page appears when cloning an existing application.

➤ Notice it has the **Select the template for an application.**

➤ **Step 5:** Select the application you are wanting to clone. Only active applications will appear in this listing. Archived applications will not appear.

Clone Existing Applications

| | Save ▶ | Save & Exit ▶ | Exit ▶ |

Select the template for an application: Select Template ▼

*Scholarship Application Name: ✳

*Description:

➤ **Step 6**: Enter the Scholarship Application Name that you want to call your application

➤ **Step 7:** Enter the Description of this application.

➤ Once you select the template application all the data below will populate with the data from the template application.

Note: if cloning an application to create a new application it is very important that you go in and make the necessary setting and form changes to the new application so that they meet the needs of the new application (i.e. deadline dates will reflect the dates from the cloned application, committees may be different, task may different, etc.)

➤ Refer to the **General Information** section for a detailed explanation of the remaining functions.

2.2.3   General Information Setup

Once you select an application setup option (Creating a New Application or Cloning an Existing Application) the Application's General Information Section will appear. Once you have created an application form and you want to return to this screen you will select the application from the Application Listing screen and once you are in the Application's Setup Dashboard, select the **General Information** icon and make any changes to your set up features from this screen.

General Information

Create New Application

| Save ▶ | Save & Exit ▶ | Exit ▶ |

*Scholarship Application Name:	✳
*Description:	
*Sponsoring Organization:	Test ▼
Does this Application have a Deadline:	● Yes ○ No
*Begin Accepting Applications Date:	05/28/2015
*Deadline Date:	05/28/2015
*Deadline Time (EST Time Zone): (The time application goes offline.)	12:00 AM
Academic Year: (This will be updated when the application is saved.)	
Logout URL:	Ex: http://www.yourdomain.com
Reply Sent from:	Ex: noreply@yourdomain.com

2.2.3.1 Application Form Name

Enter the name of the application. This name will display to the Applicants exactly the same way it is entered here.

2.2.3.2 Description

Enter a brief description to describe the use of this application, or you can re-enter the application name. This is currently only viewable to the admin.

2.2.3.3 Sponsoring Organization

Select the organization(s) that is responsible for maintaining the Funding Source. If you only have one organization/department, then select that organization and click Ok to save the selection. This is used to connect applications to specific organization / departments. If you have more than one organization that you are setting up applications for then you can select the organization that owns this application process. Then you can filter applications by sponsoring organization so that only those users that are assigned to that sponsoring organization can access the specific application. Multiple sponsoring organizations may be selected.

2.2.3.4   Does This application have a Deadline

Yes – select if your application has a deadline. Once you select, yes the Deadline Date field will open to enter the Deadline Date.
No – select if this is a rolling application and there is no deadline associated with it.

2.2.3.5   Begin Accepting Applications Date

This is the date the application will be available for applicants to apply. This date must be converted to EST (Eastern Standard Time).

Note: The application will not be visible to applicants until the scholarship is published and the begin accepting applications date is current or in the past. If the scholarship is published but the application begin date is not yet current, the applicant will be able to view the scholarship/fund details and add to their interest cart. For testing purposes, you will use the 'Applicant Invitation' functionality.

2.2.3.6   Deadline Date and Time

Deadline Date: This is the date the application closed. This date must be greater than or equal to the current date and converted to EST (Eastern Standard Time). The application will lock out on this date at the time specified in the *Deadline Time.*

Deadline Time: The last time of day on the *Deadline Date* an application will be accepted. (Note this is set per Eastern Standard/Daylight Time)

2.2.3.7   Academic Year

 (This will be updated when the application is saved.) The academic year calculated from the application start and deadline date and per settings in the Administration Site Settings - Enable Academic Year setting.

2.2.3.8   Logout URL

Redirects the user to this URL when they log out. Enter the URL for the landing page you want the applicant to go to when they log out of their application.

2.2.3.9   Reply Sent from

When setting up emails in the Notification Center, if the merge field **Reply-To-Email** is available for use in a template, this is the item that the merge field would be linking to.

When emails are sent out from the site, they automatically are sent from the CommunityForce server. If an applicant replies to the email using the reply button in their email, then the email will be returned to CommunityForce. If you do not want the email returned to CommunityForce, you must enter the email of the individual you want to receive those replies for the email recipients. It is good practice to add to your email templates the **Reply-To-Email** merge field. That way applicants know who they need to contact for information.

That merge field will link to this "**Reply Sent From**" item. Therefore, you would want to add the email address of the key contact person you would want to receive replies from emails that are sent from this application. If you leave this field blank it will default to admin@communityforce.com and all replies will be returned to CommunityForce.com.

Important Note: this is not the **Contact field's** information that is available in email templates. That is a separate Contact that is entered in this same General Information section, but does not appear until after the application setup has been saved. You will need to then access that contact setup by clicking on the General Information Icon in the Application Forms Setup Dashboard. See below in the section Contact Information.

2.2.3.10 Applicant Minimum Age

 The minimum age to apply for this application, if applicable. Enter 0 (zero) if no minimum age is required. If the applicant's age is below the specified age, he/she is directed to a screen which gives them an explanation as to why they cannot apply. This message is entered in the *Acknowledgement* section of this setup screen.

The minimum age is based on the user's date of birth entered when they first create their account. If their age is less than that for the application, the applicant will be directed to a new page where the acknowledgement statement will display.

2.2.3.11 Application Form Cost

If your application form requires an application fee you would enter the amount of the application fee that the applicant must pay prior to submitting their completed application.

This setting will appear only if it has been enabled in the Administration/Site Settings and you have purchased the integration functionality to accept payments using a third party payment software.

(For more details on the Application Form Cost functionality see: **Additional Application Setup Features, Application Payment Form**)

2.2.3.12 Enable Prequalification during applicant Sign-up

Enables the feature to allow you to create Pre-Qualification yes/no questions for an applicant to answer prior to having access to the application. These questions must be arranged in a combination format,

meaning if the applicant answers the specific combination of yes/no questions they have access or are denied access. (For more details please see Pre-Qualification Question Setup).

> **Yes -** Activates the Pre-Qualification questions to appear and applicant will not be allowed access until they answer the correct combination.
>
> **No -** The Pre-Qualification questions **will not** appear to the applicant and they will have immediate access to apply.

2.2.3.13 Enable View Matching Scholarships

Used if you have multiple funding sources with separate applications for each. If you want the applicant to be able to see additional applications for funding sources similar to the one they just applied to, based on similar criteria, you would set this to yes. The other funding opportunities available would then appear after they submitted with the option to Opt/In and apply to those additional applications. This will require additional set up in the *Manage Application Funds, and the Manage Funds Criteria Information* sections of the application setup. Both applications would need to have the same xml on the criteria questions that are used to determine the match.

> **Yes –** Activates this feature and the applicant sees a list of funds they are matched to.
>
> **No –** The applicant would not be able to see the listing, and/or this is not an option you want to set up for your applicants.

2.2.3.14 Enable Opt In/Apply Options

If using the Enable View Matching Scholarship feature an applicant can opt in to apply to other applications or if it is disabled and is being used with the View Matching Scholarships the applicant can view fund details.

> **Yes –** Activates this feature and the applicant sees a list of funds they are matched to and given the option to opt in and apply to those additional applications. They would then appear in their "My applications" tab and they would click on each matched application to completed and submit.
>
> **No –** The applicant would not be able to see the listing, and/or this is not an option you want to set up for your applicants.

2.2.3.15 Enable Multiple Submissions

This allows an applicant to apply multiple times to a specific application without having to create two accounts. To apply to the application after the first, the user returns to the scholarship list and there would then be an option to start a new application. Select **'Yes'** to enable.

(For more details on the Multiple Submission Functionality see: **Additional Application Setup Features, Multiple Submissions**)

2.2.3.16 Enable Proxy

This enables an applicant to apply on behalf of someone. To activate this functionality, 'Multiple Submissions' must be enabled.

(For more details on the Proxy Functionality see: **Additional Application Setup Features, Proxy**)

2.2.3.17 Enable Collaborators

Collaboration allows an applicant to collaborate with other individuals to help complete specific sections, of their application. Select 'Yes' to enable.
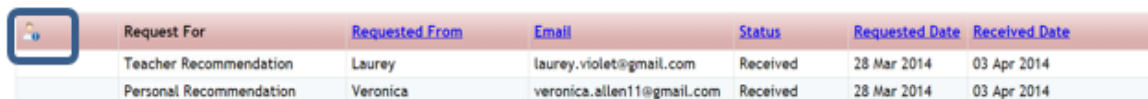
When "Enable Collaborators" is set to "Yes", an *Add Collaborators* button will display on the applicant dashboard for that specific application, where the applicant can click on and assign specific sections to other individuals to complete. The completed sections will be viewable by the applicant.

(For more details on the Collaborators Functionality see: **Additional Application Setup Features, Collaboration**)
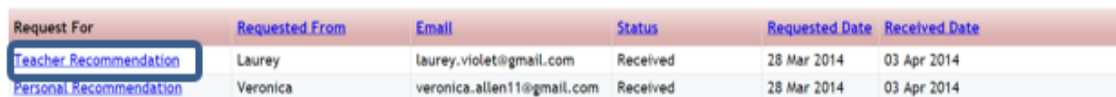
2.2.3.18 Nomination Type

If there are request section in your application this will allow the ability to have the applicant select **one nominator** to complete **all the request sections** in an application or have the ability to select **multiple nominators**, **one per each request section**, in an application.

> **Single –** All request sections go to a single nominee. Applicant will click a single icon on their dashboard and enter the contact data for one nominee to complete all the required request sections.

	Request For	Requested From	Email	Status	Requested Date	Received Date
	Teacher Recommendation	Laurey	laurey.violet@gmail.com	Received	28 Mar 2014	03 Apr 2014
	Personal Recommendation	Veronica	veronica.allen11@gmail.com	Received	28 Mar 2014	03 Apr 2014

> **Multiple –** Each separate request section can go to a different nominee. Applicant selects each separate request section and enters the nominee's contact information just for that one specific request section.

Request For	Requested From	Email	Status	Requested Date	Received Date
Teacher Recommendation	Laurey	laurey.violet@gmail.com	Received	28 Mar 2014	03 Apr 2014
Personal Recommendation	Veronica	veronica.allen11@gmail.com	Received	28 Mar 2014	03 Apr 2014

2.2.3.19 Enable Editing after Submitting Application

Determines if an applicant can re-enter/change data on their application after they have clicked the Submit button and submitted their application.

> **Yes** - The applicant can go back in to their application after it has been submitted and make changes to the application

No- The applicant is unable to change any information once their application is *submitted* and the section must be released back to the applicant by the Admin if a correction/addition is to be made. **(See Release a Section to Applicant)**

2.2.3.20 Show Applicant to Committee

Allows you to perform a blind process review of the applicants determining if the Applicants identifying information will be shown on the evaluation committee reviewer's dashboards when reviewing their applications.

Yes – Allows the committee reviewers to see the identifying information of an applicant
No – Allows for a blind process review in which the committee reviewers are not able to see the names of the applicants they are reviewing in their review dashboard or any application pdf's created specifically for Reviewers.

2.2.3.21 Show Application to Committee

Allows the committee reviewers to see the applicant's application. However, sections and/or questions can be hidden from their view when setting up that section and/or question in the application. (See Section Setup and Question Setup)

Yes – The committee reviewers can view all allowable fields of the application.
No – The committee reviewers cannot view any part of the application.

2.2.3.22 Acknowledgement

The message displayed to an applicant if they do not meet the *Applicant Minimum Age* as set above.

2.2.3.23 Instructions

These instructions are displayed on the Applicant's application dashboard once he/she enters the application to begin completing the various sections.

Example of an Instruction message for the applicant dashboard:
▪▪
Once the application has been submitted, no additions or corrections to the application will be allowed. Each section below must read 100% in order to submit your application. If a section does not read 100%, you have missed a required question(s) in that section.
IMPORTANT: Click on the Request Section Icon to send an email to your Guidance Counselor to provide your transcript. This should be done **immediately** so that your Guidance Counselor can complete this section by the January 17th deadline. You will not be able to submit your application if this information is not attached.

▪▪

2.2.3.24 Application Contacts

This will not appear in the initial setup when first creating or cloning your application. This will only appear after you have save the application setup and clicked the General Information Icon in the Application Setup Dashboard.

This allows you to select a key contact for the application process. If your Global Admin selected in the **Administration/Site Settings -** General Settings, "yes" to the *"Send an email to Application Contact, when an Application is Submitted",* this is the contact that would receive that notification email. If you do not enter a contact here, then the emails will not be sent. (Please see your Global Admin to confirm if this has been selected or not)

This is also the Contact information that is used if you select any of the "Contact***" fields in your email templates. If you do not enter a contact, then those fields will return as blank in the email that you send.

An application Contact must already have a user account set up in order to be added as a contact.
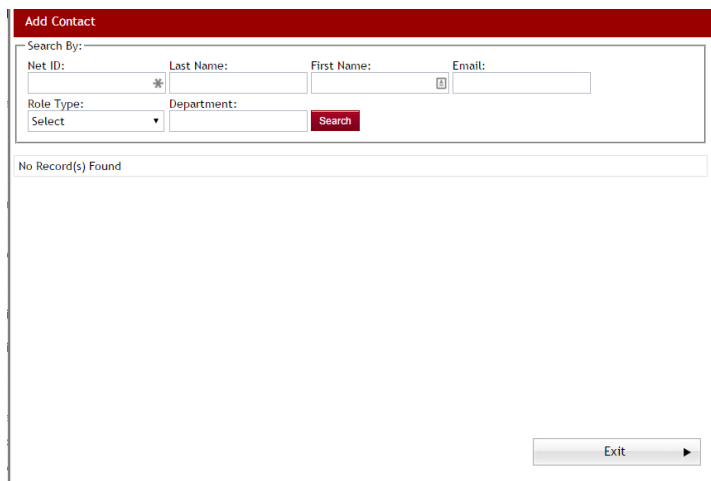
Exercise 1

➢ **Step 1:** Select the Add a Contact button

➢ The following screen will appear for you to search for the contacts name in the listing of users.

➢ **Step 2:** Enter the contacts information into any of the fields to search for their information and click the search button.

➢ A listing of all the users that match the search will appear at the bottom of the screen

> **Step 3:** Click the **Add** next to the user that is your contact. You will get a message that they have been added, click Ok.

> The contacts information will now appear at the bottom of the General Information Screen

2.2.3.25 Application Link

> This will not appear in the initial setup when first creating or cloning your application. This will only appear after you have save the initial application general information setup and clicked the General Information Icon in the Applications Setup Dashboard.

> This is the URL link that can be used to post to a web page or in an email to invite someone to apply to that application.

2.3   Accessing the Applications Dashboard

> After you have created the initial application using the Create A New Application or Clone an Existing Application button you will be returned to the Application Listing table. This is also the same listing you see when clicking on the Setup Applications Form in your Home Dashboard or clicking on the Applications Navigation link at the bottom of each page.

Application Form	Scholarship	Sponsoring Organization	Start Date	Deadline	Published	
University Scholarship Application Master Template			10/25/2013	12/31/2014	No	
Community Foundation for the CSRA 2014 Unrestricted Grants Application			06/01/2013	07/31/2014	No	✖
Financial Aid Recipient Application Form	Scholarship Fund Template - Training Sample	My Organization Name 3	11/07/2013	12/31/2014	Yes	✖
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	✖
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	✖
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	✖
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	✖
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	✖
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	✖
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	✖
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	✖
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	✖
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	✖
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	✖
Los Alamos Employees' Scholarship Application Form 2014	Los Almos Employees' Scholarship Application Form 2014	Test	08/14/2014	12/31/2014	Yes	✖

Exercise 1

➢ **Step 1:** Locate your new application in the listing and click on the name in the Application Form column.

➢ The Applications Dashboard for the application you selected will appear.

Testing Form applicants with Multiple funds & Multiple Request Sections

Pre-Qualification Questions

Sections and Questions

Request Instructions

General Information

Submit Application Message

Manage Text Tabs

Manage Application Funds

Manage Funds Criteria Information

Manage Common Application Grants

2.4   Setting up Pre-Qualification or Prescreening Questions

This section will pre-qualify the applicants before they can apply to an application.
This is an optional feature that you can choose to add if pre-qualification is required.

When using Pre-qualifying questions in an Application, you can create yes or no pre-qualification questions along with different answer combinations for those questions that allow the applicant to login to the application. Depending on how the applicants answer the combination of those questions, will

determine if they qualify to proceed with filling out the application or if they are redirected to a denial message.

To assign pre-qualification questions to an application you must first go into the **Application Form** in the General Information setup and select "yes" to *Enable Prequalification during applicant Sign-up* if this was not already done when creating the application or form.

If *Enable Prequalification during applicant Sign-up* is set as "yes" the pre-qualifications section will be assigned to an application and if it is set to "no" then the pre-qualification questions will not be assigned to the Application.

Once the *Enable Prequalification during applicant Sign-up* has been selected you can open this section in the Application Dashboard and set your pre-qualification questions.

Exercise 1

➢ **Step 1:** From the Application Dashboard, click the Pre-Qualification Questions Icon

Pre-Qualification Questions

➢ The pre-Qualification Questions page will open:

➢ **Step 2:** Locate the Questions section at the top of the page:

Pre-Qualification Questions

| Save ▶ | Save & Exit ▶ | Cancel & Exit ▶ |

Questions		Add Question
	Question	
📝 ✖	Are you a citizen of the United States?	

➢ **Step 3:** Click on the [Add Question] button to add a new question. The following screen will appear:

Manage Pre-Qualification Questions

Add a Question

Question : [_____]

| Save ▶ | Cancel ▶ |

➢ **Step 4:** Enter the question in the Question field and click on the **Save** button to save the question entered.

➢ There are no limitations on how many questions you may add. You can click the Add Question button again to continuing adding additional questions.

➢ **Tip Best Practice:** Keep it simple. Reports or any tracking are not done on these questions. If you go back in and edit, add, or delete a question. Remove the combination and reset it.

➢ **Step 5:** After you have entered all your questions, in the Questions section you're ready to set the reply combinations for your questions. Locate The Proceed Combinations Section in the middle of the screen

➢ There should be a column for each question that you have created along with a Yes/No box. You will enter the appropriate Yes/No reply that will allow

➢ **Step 6:** Locate your questions column, then under that question enter the Yes or No reply that is the correct eligibility reply that the applicant would need to answer to continue with the application. Do this for each question.

Proceed Combinations		
Are you a citizen of the United States?		
✖ Yes ▾		
➕		

➢ **Step 7:** Locate the **Pre-Qualification Denial Message** at the bottom to the screen
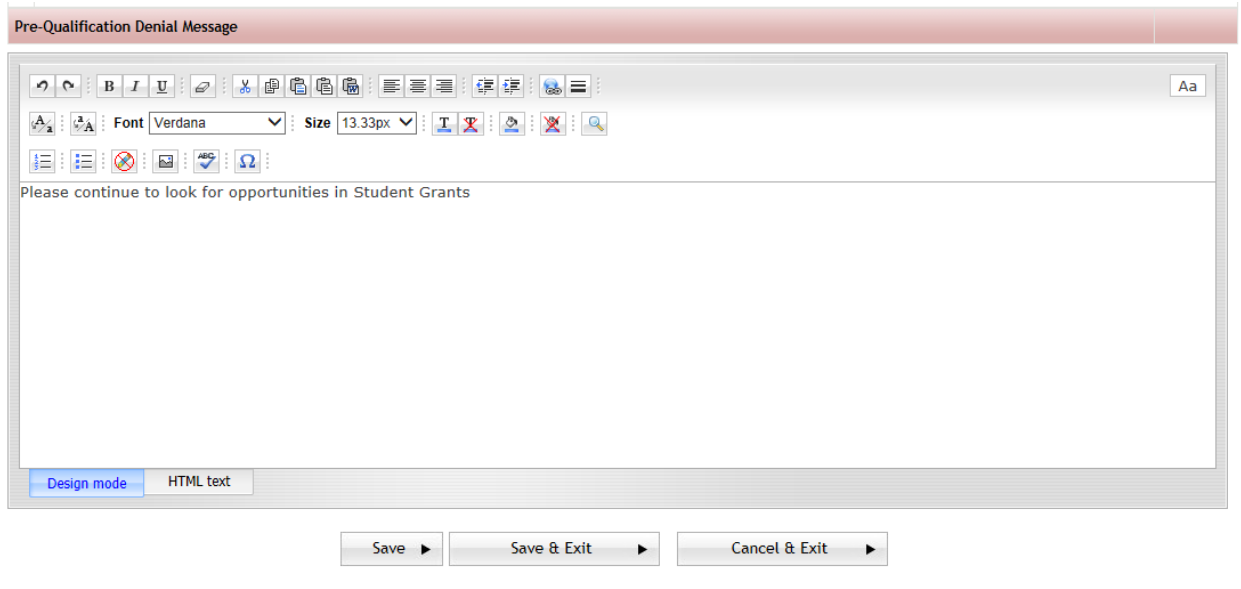
> ➤ This is the message that appears for the applicants who don't meet the required qualifications set in the Pre-Qualification Questions.

> ➤ **Step 8:** Enter the Message in the editor box that you want to appear to applicants that are denied access to apply.

Design Mode: The HTML editor works exactly the same way as Microsoft Word works. Type the information into the body of the editor as you would be typing and formatting it in a Microsoft Word document. You can also copy and paste the formatted text from other documents.

HTML Text: You can create the Message page using html tags by clicking on the HTML Text tab present beside the Design Mode tab. Enter the html tags with the content and it will display all the content as formatted.

> ➤ **Step 9:** Once you have entered all your questions, the combination replies, and the Denial Message Click Save or Save & Exit to save your changes and return to the Applications Dashboard.

2.5   Adding Sections

Once you have created your application you will need to create the individual sections and questions within the application.

The questions are categorized into various sections for the applicant to navigate easily through the process. Each section will be identified with a separate icon on the applicant's dashboard that they see when they login to the application.

Sections and Questions is where you will create these sections and their individual questions for your application. Below is an example of the applicant's dashboard and how these sections are viewed by him/her. Notice that each icon represents a separate section in the application.

Note if you clone an application from a previously existing application these questions and sections will be cloned as well and will show those cloned sections when you come to this section.

2.5.1 Navigating to Section and Questions Setup

Exercise 1

➢ **Step 1:** Select from the **Home Page** – **Application Setup**

➤ **Step 2:** Select from the listing of applications the application you want to setup the sections and questions for by clicking on the name in the Application Form column.

➤ This will bring you to the Applications Dashboard.

➤ **Step 3:** Select the **Sections and Questions** Icon.

Sections and Questions

➢ This will open the Sections page, listing all the available sections in your application.

2.5.2   Overview of the Sections Listing:

Menu Buttons:
- **Add Conditions(s):** Allows you to add conditions to multiple sections
- **Create Section:** Allows you to create new sections within your application form.
- **Clone Existing Section:** Allows you to clone a section from another application or within the same application.

Section Listing Columns
- **Selection Box:** used to select specific sections when adding conditions.
- **Edit Icon:** Allows you to edit the section setup information
- **Red X:** Allows you to delete sections within your application form.
- **Preview Icon:** Allows you to see a preview of what the complete section will look like on the applicant's dashboard.
- **Display Order:** The order sequence the section will appear on the applicant's dashboard.
- **Up and Down Arrows:** Allows you to move a section upwards or downwards to adjust the display order.
- **Activate Section:** Makes a section active and visible on the applicant's dashboard
- **Staff Section:** If checked this will be a staff section only visible to staff
- **Request Section:** This is a request section and not viewable by the applicant, applicant will assign a designated individual to complete this section.
- **Hidden from Applicant:** This is a section that is not viewable by the applicant
- **Section Name:** The name of the section
- **Section XML Name:** The XML mapping name given to the section for linking data to external databases or other applications for report pulling and data export/import.
- **Section Type:** The type of section
- **Deadline:** The deadline date given to the specific section
- **Conditions: Add/Edit:** Used to set specific logic conditions to allow the section to appear on the applicant's dashboard based on how the applicant answers specific questions elsewhere in the application. If green then there are conditions set on this section.

2.5.3 Creating a New Section for Your Application Form

There is no limit to the number of sections you can create.
A section must be marked as **Activate Section** in order for it to be visible on the application.

Exercise 1

➢ **Step 1:** From the Application Dashboard click on the **Sections and Questions** icon. This will open the table view of the application Sections.

➢ **Step 2:** To create a new section Select the **Create Section** button.

➢ A new screen will open up

> **Note:** As you're completing this form, items marked with an ***** are required and must be completed.

2.5.3.1   Section Name and Display Name

> **Step 3:** Fill in the **Section Name**

This is used for reporting purposes and won't be visible to the applicant. The user should refrain from using any spaces or other special characters other than alphanumeric. **If you enter a Section Name with spaces or special characters other than alphanumeric it will remove them when you tab to the next field.**

> **Step 4:** Fill in the **Section Display Name**

This is the title name that **is displayed** to the applicant on the applicant dashboard.

2.5.3.2   Importance of Section XML Name

➢ **Step 5:** Fill in the **Section XML Name**

When importing/exporting data from the CommunityForce system and integrating this same data with another database system, the Section XML name is the most important factor in accomplishing this task successfully. XML names must be created as the same XML name of your integrated database item in order to be able to map the data effectively. Once an XML name is created and mapped to your database, it is important to never change this name. Doing so will break the mapping of data between the two systems.

2.5.3.3   Section Type

➢ **Step 6:** Enter the **Section Type**

Sections are organized into Section Types. Section Types describe the type of section it is and helps determine what part of the process this section is used in. Some types are necessary in order to cause other triggers in the system.

- **Admin -** Sections that are created for use by staff to be completed only by them. If using this type you will want to select that it is also a **staff section** so that it is not visible to the applicant.

- **Application -** These are the main sections of the application and are what the applicants see when they first begin to apply for an application. An applicant must complete all of the Application sections prior to submitting their initial application.

- **Acceptance -** Sections that an applicant can see and complete if offered an award to acknowledge their acceptance or denial of an award. You would also want to use a **status** of *Selected For Award* when using this section type. This will allow an applicant to accept or deny an award, and will cause two buttons to appear in this section, Accept Award and Deny Award. Depending on which button they click their status will automatically move to either Award Accepted or Award Declined.

- **Post Acceptance -** Sections that an Applicant can see and complete regarding how they are to receive the award, i.e. payment information, travel arrangements for a formal awarding event, etc. You would also want to use a **status** of **Award Accepted** when using this section type. Using this section type is important in running Post Acceptance reports. Only sections marked as Post Acceptance will appear in those reports.
- **Requests -** Sections created that must be filled out by an outside source, not the applicant, via an on-line form. Only the person who receives the request via email (and the authorized staff) sees the questions in these sections, *(i.e. letters of recommendations, sections to be filled out by school counselors, etc.)*

2.5.3.4   What a Staff Section Is and How You Could Use It

➤ **Step 7:** If you want this section to be viewable only to staff or reviewers, select "Yes" otherwise select "No".

Sections marked as **Staff Sections** are only view-able by authorized staff and not the applicant and can be used to create questions to be filled out for internal purposes. You can mark a section as a staff section by selecting "yes" for the **Staff Section**. *These sections can be used for internal purposes including uploading additional information to the applicant's application used for internal review, tracking colleges that applicants chose, staff interview notes, site visit notes, etc.*

2.5.3.5   What a Request Section Is and How You Could Use It

➤ **Step 8:** If you want this section to be a Request Section, select "Yes" otherwise select "No".

Request Sections require the applicant to assign a designated person to fill out a specific section on their behalf.

This section is private and *not viewable by the applicants*, but the applicant can see when the designee has completed this section or if the designee has rejected their request. Questions can be created by the Admin that the designee can answer regarding the applicant as well as upload any documents that may be requested of them.

When the applicant enters the designated persons information in the request section, an email will go out to that individual with a link and access code that they can click on to be directed to the section they are to complete.

This is useful for requesting applicant *transcripts, entrance exam scores, letters of recommendations, parent signatures, etc.*

If you are using Request sections in your application, it is important that you selected the correct **Nomination Type** when creating the initial application in the **General Information Setup.** Either Single or Multiple.

Important: If using a Request Section you will want to also enter the instructions to the Applicant under *The Request Instructions Icon* on the *Application Dashboard.*
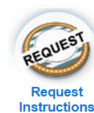
2.5.3.6   Request Section Email Template

When creating a Section and selecting "yes" for the Request Section, and additional Email Template Field will appear

➢ **Step 9**: If you did not already select "yes" for the Request Section, please do so now so that you can see how this appears.

In the Notification Center for your application, there is a default email template **Application: Request From Applicant** if you select the **Default Email Template** selection this is the email that will go out to the designated individual.

However there are times when you will have multiple request section in your application form, therefore you can create, in the Notification Center for each Application, separate Nomination templates with different messages for each separate request section. If you have created additional Nomination Templates those templates will appear in this field for you to select the correct template for the correct request section.

In this email template there is a link directing the indiviudal to the section they are to complete as well as an access code. If for some reason they are not able to click on the link and be directed to the section, they can also go to the site and click on the **Nominator Login** located in the bottom right hand corner of the Login screen and enter the access code that was given them. *(Important: If you create additional Nomination templates it is important to make sure you include the links and the access code fields).*
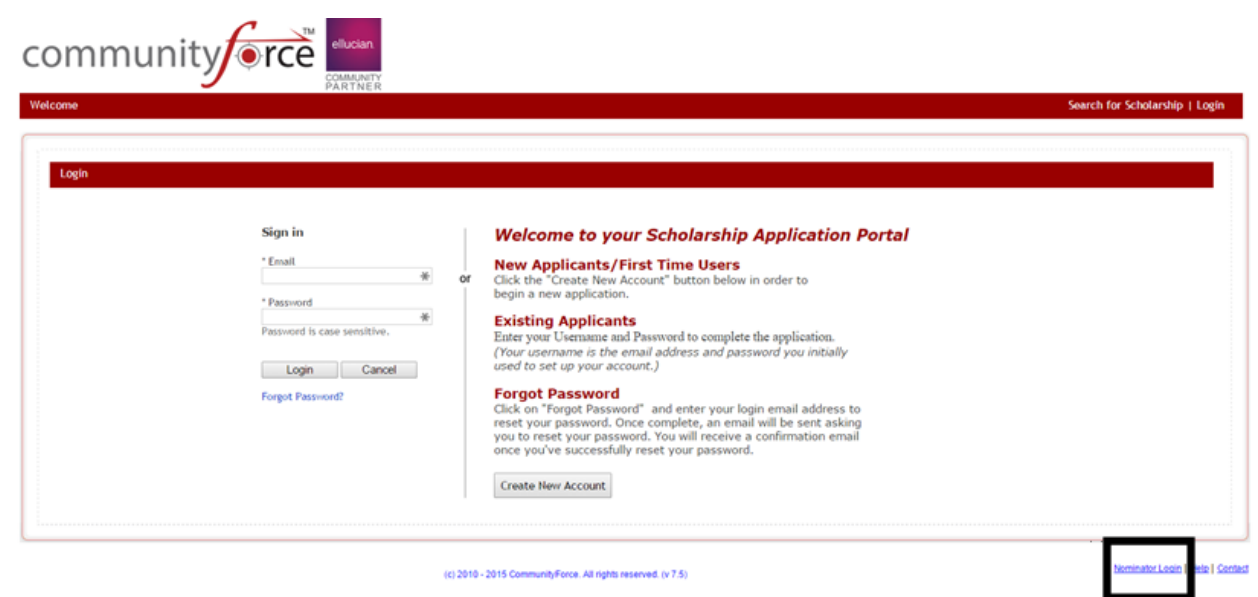
The nominee can then enter the access code received in their email to access the nominated request section.

Note: Once the section has been completed by the designated individual an email will be sent to the applicant notifying them that the section has been completed **(See Notification Center email template Application: Request Completed)**

If a designated person does not want to complete the section they will have the option to deny the request once they have opened their assigned section. If they deny it the applicant is sent an email notifying them of the denial **(See Notification Center: email template Application: Request Declined).**

These emails are application specific so you will want to go to the Notification Center for each of your applications and make the needed changes to each.

2.5.3.7   What the Function of 'Hide from Reviewer' Button Is and How You Could Use It

➢ **Step 10:** Select "Yes" if you don't want this section to be viewable by your Reviewers, otherwise select "No".

Hide from Reviewer allows an entire section to be hidden from all Reviewers so that they cannot see the section in their review process. This is helpful for staff sections, or section that contains personal information that you do not want the reviewers to have access to or may contain data that is not pertinent to the reviewer making their decisions and may cause the reviewers to be biased when scoring (Address Section, Personal Information Section, Demographic statistical sections, etc.)

Note: This will hide the complete section, however, if you do not want the entire section hidden there is also the option to hide just specific questions when you are creating the questions for the section.

2.5.3.8   Display Order

➢ **Step 11:** Enter the order number that you want this section to appear in the applicant's dashboard (i.e. 1 = this will be the first icon in the line of section, 2 = the second, etc.)

This defines the read order in which the applicant views the specific sections on their dashboard, the sections are viewed left to right and you can adjust the order of where the sections fall within the applicant's dashboard.

2.5.3.9   Choose a Section Display Image

➢ **Step 12:** Click on the drop down arrow and scroll through the listing of available images, select the image you want for this section. The image that you selected will appear to the right of the screen. If this icon is not want you want then you can select another one until you get the desired icon.

Every section on the applicant dashboard has an image assigned to it. In the Section Display Image, the Admin can select an image icon from a variety of images. Choose an image that is descriptive of the section the applicant is filling out.

2.5.3.10 Statuses and How You Could Use Them

➢ **Step 13:** Select the Status that you want the applicant to be at when they see this section in their dashboard.

Status(es) are automatic triggers that move an applicant through the application process depending on where the applicant is in the process, and are mainly driven by the by the Admin.

You can set a status on your section so that applicants will not see that section until they have been moved to a specific status in the process.

Each status is described below along with the trigger that moves the applicant to that status:

When creating sections by a Section type you would want to select only applicants with a specific status to see that specific Section type's sections.

Example: You create a section with a section type of **Post Award** and a Status of **Award Accepted** so that the applicant can fill out information pertaining to the award they received and how they have used it, like a final reporting. Only those applicants that have the status of **Award Accepted** would be able to go in and complete the additional sections. All other applicants would not be able to see this section.

Status Types:
- **All -** No specific Section type or Status Detail needed to be accessible. All applicants can view this section no matter what status they are in the process.
- **Pending Submission -** The applicant has started their application but has not yet submitted.
- **Submitted -** The applicant has clicked the submit button on their application and submitted their application and if present all request sections have been completed by the designee.
- **Withdrawn -** The applicant has chosen to withdraw their application for this application process by using the withdraw feature of the program.
- **Under Committee Review -** The applicant has been assigned to a committee anywhere within the application process.
- **Not Selected For Award -** The applicant has been marked as denied an award in the awards section
- **Selected For Award -** The applicant has been selected for an award in the awards section.
- **Award Accepted -** The applicant has accepted an award
- **Award Declined -** The applicant has declined an award
- **Request Pending –** Applicant has submitted their application form but the designated individual has not yet completed the request section on behalf of the applicant.

2.5.3.11 Setting a Section Deadline Options

➢ **Step 14:** Select the Deadline Type, as well as the Date and Time if applicable. If you want the same deadline information as the application select the Inherit from Application option.

Sections of the application can carry the same deadline information as the application or have deadlines specific to that section.

A Section's deadline determine when the section will no longer be available for the applicants to fill out and will be turned off according to the **Deadline Date** and **Deadline Time** selected.

Deadlines can be set according to the following options:

- **Inherit from Application -** Uses the same deadline date and time as the application deadline. The Deadline Date and Time will automatically be populated with the applications deadline information.
- **Section Deadline -** Has a separate deadline than the application and is section specific.
- **No Deadline -** There is not a deadline for this section.

Examples:
Application section types should inherit the deadline from the application.
Request section types may have a different deadline then the application so as to allot enough time for the requester to fill out their information.
Post Acceptance section types may not need a deadline because the Admin may just monitor that they have been completed and withhold payments if they have not.
Award Acceptance section types may have a deadline to accept or forfeit the award. This deadline would be later than the original applications deadline.

2.5.3.12   Adding a Section Submit Button

➢ **Step 15:** If you have more than one section in your application then click "no" for the Show Submit button.

If you are creating **only one section** for an applicant to go in and fill out, you can have the Submit button appear within that section instead of having the applicant return to their dashboard. **Yes –** Allows the submit button to be present within the section. **No –** Will only have submit on the applicant dashboard and the applicant will need to click out of the section to submit.

Best Practice: Only use the submit button on sections you are opening up to different status and deadlines.

2.5.3.13   Lock an Individual Section after Submit

➢ **Step 16:** Select the Inherit from application option if you want the same rule as you created for the application. However, if this is a section that you want the applicant to be able to modify even after they submit, select "No".

After the applicant has filled out their application or a separate additional section within the application they must submit their application/section information. Once they have submitted, you can determine if a section can be modified after it has been submitted or locked so that no modifications can be made to that section.

Inherit from Application – When creating a new application you have the option in the General Information setup to **Enable Editing after Submitting Application.** Depending on the selection on the application level the section would inherit the same option.

Yes – Overrides whatever the application selection was and ***will not allow*** the applicant to make edits after submittal on this section only.

No – Overrides the application selection and ***will allow*** the applicant to make edits after submittal to this section only.

2.5.3.14 Importance of Section Instructions and How to Create Them

➢ **Step 17:** Enter instructions regarding how to complete this section. If this is a request section the instructions would be directed to the designated individual not the applicant.

Section Specific Instructions are the instructions that will appear below the Section heading in the applicant dashboard when the Applicant clicks on that section. These will be instructions on how to appropriately fill out this section. Type your instructions in the instructions box, which has an html editor that can be used to create the instructional message or you can use the design mode to edit and format the instruction features similar to Microsoft Word.

➢ **Step 18:** Once you have created your sections, click the "Save and Exit" button to save your information and you will be returned to the Sections listing for the specific application.

Save ►	Save and Exit ►	Exit without Save ►	Reset Form ►

Reset Form – allows you to cancel and reset the form to start over.

2.5.4   Cloning an Existing Section

Cloning an existing section allows you to create a new section within you application that is an exact clone of a section that has already been created within another application you have previously set up, or can be used to copy a section that is currently within the application you are working on.

When you clone a section all the data from that section will be copied along with the questions that were included as part of that section.

Important Note: When cloning a single section any conditional logic that has been set on that section, as well as on any questions within that section will not be cloned. You will have to re-enter the logic.

Exercise 1

➢ **Step 1:** From the Section and Question Setup listing, click on the **Clone Existing Section** button.

➢ A new screen will open:

➢ **Note:** Cloning an Existing section screen is the same screen as Creating a New section with the exception of the following:

> **Step 2: Select Application -** Select the Application that you want to clone the section from. You can choose a section within this same application or you can select a section from another application. Only published Applications will appear in this listing.

> **Step 3: Select Section -** Select the Section from the application that you want to clone

> ℹ️ **Important:** The remaining information will be populated according to the cloned section. Please be sure to update the data accordingly, to fit the new section you are creating.

> **Step 4:** Be sure to click "Save" to save any changes you may have made to the section.

2.5.5   How to Change the Sections Display Order to Applicant

While in the Section display table you can click the up and down arrows ▲ ▼ on a specific section to move that sections display order to the next order level or to the prior order level depending on which direction you want to move the sections order. The display order is the read order in which the applicant views the sections on their dashboard. Sections display left to right in the applicant's dashboard.

2.5.6   How to Activate a Section

After a section is created you will need to activate that section for it to appear in the application.

While in the Sections listing, click on the Activate Section check box next to the section you want to include in the application and click "Save".

If there is not a check mark in the box the section will not appear on the applicant's dashboard.

When cloning applications and there are sections from the cloned application appearing that you do not want to include in the new application, to de-activate unclick the Activate Section check box and click "Save".

Best Practice: If you have sections that are set by a specific statuses, you may want to leave those sections without a check mark until you are ready to release those sections to the applicants.

<u>**For Example:**</u>
You have a section created for the applicant to provide you additional information prior to accepting the award. You created that section to trigger as soon as the applicant's status is **Selected for Award**. If you are awarding applicants in the awarding section, as soon as you award them, their status will automatically change to Selected for Award. Since you have not notified the applicant yet of the award you may not want that section to appear in their dashboard. Therefore by leaving not Activated you can notify the applicant's and then activate the section for them to complete.

2.5.7 Hiding a Section from Applicant and How to Use It
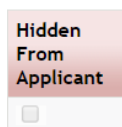
This is located in the Sections listing.

If you have a section that you need to be active on the application, but you **do not want** the applicant to have access to this section, you can hide that section from the applicant. This is used on Request Sections and Staff Sections that need to be completed by someone other than the applicant and the information is to be confidential.

On this section you will need to have check marks in both the **Staff Section and the Hidden From Applicant** or **Request Section and Hidden From Applicant.**

Note: To fully understand the functionality of these two areas, please be sure to refer to the training modules for "What a Staff Section is and How You Could Use it" and "What a Request Section Is and How you Could use it".

2.5.8   How to Edit an Existing Section

To edit an existing section within an application, while in the Sections listing select the Edit icon next to the section to be edited.

This will open the Add/Edit Section setup; edit the appropriate information and click "Save" to save any information you have updated.

2.5.9   How to Delete an Existing Section

To delete an existing section within an application, while in the Sections listing select the click on the red **X** next to the section to be deleted.

Use extreme caution when deleting a section as you will not be able to retrieve it once it has been deleted.

You will receive a confirmation stating that all the fields/questions associated with this section will also be deleted, if you are sure you want to delete, click yes to continue.

Note: If data has been entered by an applicant you will not be able to delete that section.

2.5.10   How to Set Conditional Logic on a Section

There may be instances in which you need an applicant to fill out different sections of an application that may not be necessary for all applicants to fill out that same section. Conditional Logic can be set on a section that will **trigger it to appear** depending on how the applicant answers questions within other sections of the application.

Conditions are set on the section that is going to be affected by the conditional logic and appear when the condition is met.

Exercise 1

➢ **Step 1:** While on Section and Question Setup Listing, set conditional logic on **one** specific section, by clicking on the **Add/Edit** in the Conditions column next to that section.

Note: The first section will not have conditions, as this is the first screen that the applicants will see and cannot be blocked with conditions. Sections that have conditions set on them will be have the Add/Edit under the conditions column highlighted in green.

➤ The Conditional pop-up is used to define when a section is **shown** to the applicant based on how the applicant answers specific questions within your application. These can be set on a single data value or a combination of data values. When creating conditions you are selecting the values that **will allow** the selected section to appear in the applicant's dashboard, if the condition is met. Sections that do not have conditions set on them will automatically appear and do not need conditions to be visible.

➤ **Step 2:** Try entering a condition on a section using the following guidelines. Once you enter your first condition, click the **Add Condition** button to enter additional lines of conditions. The red **X** will allow you to delete a condition you do not want.

To add a condition to show a section:

1. Section: What section has the question that will trigger this section to appear? Select that section.

2. Question Name: What question is the trigger for this section to appear? Select that question.

3. Condition Type: What is the condition of the answer/value that has to be met in order for the section to appear? Select that condition. Possible conditions are:
- Contains – the answer/value contains this value
- Starts With - the answer/value starts with this value
- Does Not Contain - the answer/value does not contains this value
- Is Not Empty - the answer/value is not empty (applicant has answered this question)
- Is Empty - the answer/value field is empty (applicant has not answered this question)
- Is Exactly – the answer/value must exactly match the value.
- Is Less Than - the answer/value is numeric and is less than the value amount
- Is Equal To - the answer/value is numeric and is equal to the value amount

- Is Greater Than - the answer/value is greater than the value amount
- Is Not Equal To - the answer/value is numeric and is not equal to the amount.

4. Value: What is the answer/value the applicant must answer in order for the section to appear? Enter the value. (The value must be entered exactly as it is in the question setup)

5. Operator: Used when entering multiple lines of condition values. **And** means all of the conditions in the listing need to be met in order to cause a section to appear. **Or** means either of the conditions needs to be met. This applies to the row that and/or is on, and the next condition row following. If you have groups of conditions, it applies to each line in the group and then on the last line of the group, how it relates to the next group of condition values.

6. Grouping: This column groups your conditions into sets of conditions. You may have several groups of condition where the first group is executed and then the second group is executed etc. Assign each of the conditions in a group the same number. The first group is 1, the second group is 2, etc.

➢ **Example 1:** You want the *Work Experience Section* to only appear for applicants that have completed the General Information Section and selected **"Yes"** to the question: "Are you currently employed?" *And* they selected **"yes"** to the question: "Do you have employment information to include?" You would enter the condition as follows on the Work Information Section:

The section would not appear unless the applicant answered exactly this way on **both** of the questions. If they answered "yes" on one and "no" on the other it would not appear. If you used "or" **then it would have appeared on just one of the questions answered as "yes".**

➢ **Example 2: The essay section is only necessary if you are a Male older than 25 or a Female older than 20.** So you want the *Essay Section* to only appear for applicants that have completed the General Information section and selected Gender: "Male" and answered Age: as any age greater than 25. **Or** Gender: "Female" and answered and answered Age: as any age greater than 20. The condition would be set as follows:

Configure Section Display Conditions on: Essays

Show the selected section when the following conditions are met.

Section	Question	Condition	Value	Operator	Grouping	
General Information ▾	Gender ▾	Is Exactly ▾	Male	AND ▾	1 ▾	✖
General Information ▾	Age ▾	Is Greater Than ▾	25	OR ▾	1 ▾	✖
General Information ▾	Gender ▾	Is Exactly ▾	Female	AND ▾	2 ▾	✖
General Information ▾	Age ▾	Is Greater Than ▾	20	AND ▾	2 ▾	✖

Add Condition	Save	Save and Exit	Exit without Save

The section would appear if the applicant answered he was a male and his age was above 25, both conditions would have to be met for group 1.

Or the other reason the section would appear would be if:

The applicant answered she was a female and her age was above 20, both of her conditions would have to be met for group 2.

➢ **Step 3:** after you have entered your conditions information, be sure to select Save to save any conditions you have added.

➢ **Step 4:** Once you return to the Section listing screen the Add/Edit in Condition column next to your section will now display as green, showing that conditions have been entered on that section. If it is not showing as green click "Save" on the Sections listing screen to refresh your information.

Sections

		Add Condition(s)	Create Section	Clone Existing Section

			Display Order			Activate Section	Staff Section	Request Section	Hidden From Applicant	Section Name	Section XML Name	Section Type	Deadline	Conditions
☐	📝 ✖ 🔍	1	▲ ▼	☑	☐	☐	☐	General Information	GeneralInformation	Application	05/28/2016	
☐	📝 ✖ 🔍	2	▲ ▼	☑	☐	☐	☐	Essays	Essays	Application	05/28/2016	Add/Edit
☐	📝 ✖ 🔍	3	▲ ▼	☑	☐	☐	☐	Family Information	FamilyInformation	Application	05/28/2016	Add/Edit
☐	📝 ✖ 🔍	4	▲ ▼	☑	☐	☐	☐	Education Information	EducationInformation	Application	05/28/2016	Add/Edit
☐	📝 ✖ 🔍	5	▲ ▼	☑	☐	☐	☐	FASFA EFC Information	FASFAEFCInformation	Application	05/28/2016	Add/Edit
☐	📝 ✖ 🔍	6	▲ ▼	☑	☐	☐	☐	Financial Information	FinancialInformation	Application	05/28/2016	Add/Edit
☐	📝 ✖ 🔍	7	▲ ▼	☑	☐	☐	☐	School and Community Activities	SchoolandCommunityActivities	Application	05/28/2016	Add/Edit
☐	📝 ✖ 🔍	8	▲ ▼	☑	☐	☐	☐	Academic Honors	AcademicHonors	Application	05/28/2016	Add/Edit
☐	📝 ✖ 🔍	9	▲ ▼	☑	☐	☐	☐	Work Experience	WorkExperience	Application	05/28/2016	Add/Edit

Additional examples of Section Logic:

2.5.10.1 Setting Conditional Logic on Multiple Sections

If you have sections that have the exact same conditional logic on multiple sections you can set the logic for all the sections at the same time without having to go in on each separate section to set it.

Best Practice Tip: Once a section has logic set on it you will not be able to select it for the multiple selection option. Therefore, when setting logic on multiple sections, set that multiple logic first. Then go back in on the individual sections and add the additional conditions that apply only to that single section.

+

➤ **Step 1:** While in the Section and Question Setup Listing, select the all the sections you want to enter the logic on, by entering a check mark in the box next to that section.

➤ **Step 2:** Click the Add Condition(s) button.

➢ This will open the Add condition box, notice that it list at the top of the box all the sections it will be adding that condition to:

➢ **Step 3:** Enter the conditions, as you would if it was just for one section, that apply to all the sections and click the Save and Exit to return to the Section Display. All the sections will now have the condition set on them.

➢ **Note:** If you need to add additional conditions on just one of the sections that you just updated in the group, you can click on the Add/Edit next to that section and add the additional conditions that apply only to that section.

2.6   Adding Questions to your Sections

Once you have created the sections of your application you can create questions under each section of your application for the applicant to answer. If you are not already in the Section and Questions set up you will need to navigate to that section as follows:

Exercise 1

➢ **Step 1:** Select from the **Home Page** – **Setup Application Forms**

➢ **Step 2:** Select from the listing of applications the application you want to setup the section's questions for by clicking on the name in the Application Form column.

➢ This will bring you to the Applications Dashboard.

- ➢ **Step 3:** Select the **Sections and Questions** Icon.

- ➢ This will bring you to the **Sections** listing, showing all the sections of your application.

- ➢ **Step 4:** To create questions for a specific section, you will need to click on that section's name under the column **"Section Name".**

- ➢ The Questions grid will appear listing all the questions already created in your section. If you have cloned this section from another section all the questions that were in the cloned section will appear in this section.

Questions

	Linked	Display Order			Question	XML Name	Type	Required	Excluded	Hidden From Applicant	Hidden From Reviewer	Default Value	Conditions
☐		1	▲	▼	First Name:	FirstName	Text	Yes			Yes		Add/Edit
☐		2	▲	▼	Middle Initial	MiddleInitial	Text				Yes		Add/Edit
☐		3	▲	▼	Last Name:	LastName	Text	Yes			Yes		Add/Edit
☐		4	▲	▼	Date of Birth:	DateofBirth	Date	Yes					Add/Edit
☐		5	▲	▼	Gender:	Gender	RadioButton	Yes					Add/Edit
☐		6	▲	▼	Home/Mailing address:	HomeMailingaddress	Message				Yes		Add/Edit

Buttons: Add Condition(s) | Preview Section | Hide/Un-Hide Custom Question(s) from Reviewer | Delete Custom Question(s)* | Custom Question

> **Note:** If this is a new section and you have not created any questions this screen will show as follows:

Questions

Buttons: Add Condition(s) | Preview Section | Hide/Un-Hide Custom Question(s) from Reviewer | Delete Custom Question(s)* | Custom Question

No Custom Questions are configured for this Section!

*Question cannot be deleted if data has been collected for an applicant using this section. Alternatively you can exclude this question.

> The questions grid will show all the questions currently set up for the section.

2.6.1   Overview of the Questions Grid

Questions

	Linked	Display Order			Question	XML Name	Type	Required	Excluded	Hidden From Applicant	Hidden From Reviewer	Default Value	Conditions
☐		1	▲	▼	First Name:	FirstName	Text	Yes			Yes		Add/Edit
☐		2	▲	▼	Middle Initial	MiddleInitial	Text				Yes		Add/Edit
☐		3	▲	▼	Last Name:	LastName	Text	Yes			Yes		Add/Edit
☐		4	▲	▼	Date of Birth:	DateofBirth	Date	Yes					Add/Edit
☐		5	▲	▼	Gender:	Gender	RadioButton	Yes					Add/Edit
☐		6	▲	▼	Home/Mailing address:	HomeMailingaddress	Message				Yes		Add/Edit

Buttons: Add Condition(s) | Preview Section | Hide/Un-Hide Custom Question(s) from Reviewer | Delete Custom Question(s)* | Custom Question

Menu Buttons:
- **Add Conditions(s):** allows you to add conditions to multiple questions
- *Preview Section:* Previews the section layout
- *Hide/Unhide Custom Question(s) from Reviewer:* Allows you to hide questions so that it does not display the selected question when the reviewer views the application.
- *Delete Custom Question(s)*: Deletes a selected question. A question that an applicant has responded to on any application cannot be deleted, but can be marked as Excluded so that it does not appear on the application.
- *Custom Question:* Adds a new question

Columns:
- **Linked:** Shows if this question is linked to another question within the application
- **Display Order :** The order in which the question is displayed on the application
- **Up down Arrows:** Allows you to adjust the display order by moving the question upwards or downwards in the listing.
- **Question:** The Question Name
- **XML Name:** The XML mapping name given to the question for linking data to external databases or other applications for report pulling and data export/import.
- **Type:** The question type
- **Required:** Is it required that the applicant responded to this question
- **Excluded:** This question has been excluded from the application, but cannot be deleted
- **Hidden from Applicant:** This question is not viewable to the applicant.
- **Hidden from Reviewer:** This question is not viewable by the reviewer.
- **Default Value:** The response that the question automatically defaults to if not answered
- **Conditions: Add/Edit:** Used to set conditional logic for the specific question. If green than there are conditions set on this question.

2.6.2   What is the Preview Section button

The Preview Section is extremely helpful when setting up your application. You can click on the Preview Section as you create questions within the section to view how they will be visible to the applicant on their dashboard as well as enter data as if you were an applicant to test how the application flows. You can also use the Preview Section to test conditional logic that has been set on a specific question to confirm that the question is hiding or appearing as desired.

2.6.3 How to Create a New Question

Exercise 1

➢ **Step 1:** While in the Question Grid of a specific Section, click on the **Custom Question** button.

➢ This will open the Add/Edit Question information screen.

> ➤ **Step 2:** Fill in the data as detailed in the following sections.
> ➤ **Step 3:** Be sure to save your work when you are finished editing.
>   • **Save** – Allows you to save your work without exiting the page.
>   • **Save and Exit** – Saves you work and exits you back to the Questions data grid.
>   • **Exit without Save** – Exits to the Questions data grid and cancels any updates you may have made.
>   • **Reset Form** – Allows you to reset the form back to the default parameters

2.6.3.1   Creating a question Caption using question editor box

The Question: Editor Box is where you enter the question that will be viewable by the applicant. If you desire to enter this text using HTML, you can do so by clicking on the HTML text tab at the bottom of the editor box.

Question: Enter the question that will appear in the applicant's application.

Note: This formatting is how the question will appear in the applicant's application.
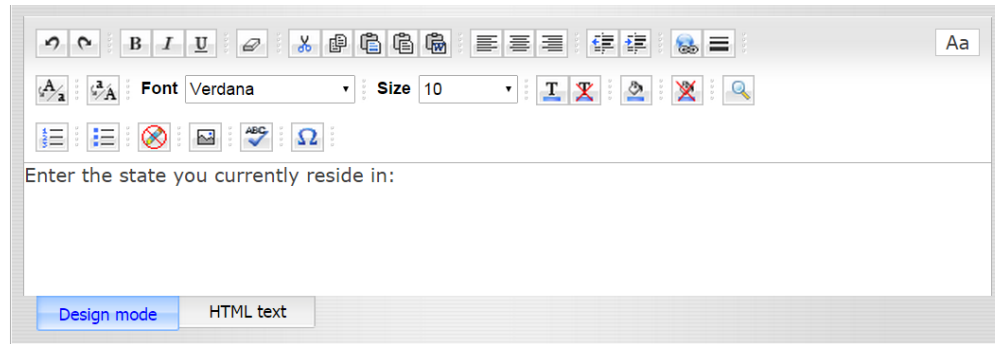
Design Mode - This editor will allow you to format text similar to how you would do so in Microsoft Word. Using this feature you can change the font-size, color, style, etc., as well as add additional formatting features to your question as needed.

HTML text - If you desire to enter this text using HTML you can do so by clicking on the HTML text tab at the bottom of the editor box.

2.6.3.2   Creating Linked Questions

Linked Question: A linked question is a read-only display of a question that is linked to another question in the application that is the same question located in another portion of the application that the applicant will respond to.

You may need to see this data in another area of the application; therefore, this keeps the applicant from entering the information multiple times.

The linked question will automatically default to the response value of the question it is linked to. This is especially useful in Request sections where you may need to show the requester how certain questions were answered by the applicant, but don't want them to have to answer them.

Note: If using linked questions in request section, the linked questions must be answered by the applicant prior to the applicant assigning a request section to an individual.

Exercise 1

➢ **Step 1:** To link questions together click on the **Add** link next to Linked Question: in the Question setup.

➢ **NOTE:** The linked to question will need to be added to your application prior to linking additional questions to it.

➢ The "Select the Question to link to:" box will appear. This listing will show all the questions within your application by the section XML Name and Question XML Name.

Select the Question to link to:

Select	Section XML Name	Question XML Name	Type
Link	GeneralInformation	FirstName	Text
Link	GeneralInformation	MiddleInitial	Text
Link	GeneralInformation	LastName	Text
Link	GeneralInformation	DateofBirth	Date
Link	GeneralInformation	Gender	Radic
Link	GeneralInformation	HomeMailingaddress	Mess:
Link	GeneralInformation	Address	Text
Link	GeneralInformation	CityorCounty	Text
Link	GeneralInformation	County	Drop
Link	GeneralInformation	State	Drop
Link	GeneralInformation	ZipCode	Num
Link	GeneralInformation	Homephone	Phon Numl
Link	GeneralInformation	Studentcellphone	Phon Numl
Link	GeneralInformation	Secondaryemail	Emai
Link	GeneralInformation	Age	Num

➢ **Step 3:** Scroll through the listing until you find the question you want to link to and click the **Link** button next to that question.

➢ Once linked, you will see in the top left the words **"This is a linked Question"** and the remaining data in the question setup will default to the same setup data as the "linked to" question. You will to still need to list the display order you would like this question to fall in on the page you are entering it for.

| Save | ▶ | Save and Exit | ▶ | Exit without Save | ▶ | Reset Form | ▶ |

Linked Question :   Add Link this question to an existing question in this application.

* Question :

First Name:

➢ **Step 4:** Be sure to click **Save** or Save and Exit to save your data before exiting.

➢ When you return to the Question Data Grid under the Linked Column next to that question you will see a **Linked Icon** showing that it has been linked to another question within the application.

Questions

| | | Add Condition(s) | Preview Section | Hide/Un-Hide Custom Question(s) from Reviewer | Delete Custom Question(s)* | Custom Question |

Linked	Display Order		Question	XML Name	Type	Required	Excluded	Hidden From Applicant	Hidden From Reviewer	Default Value	Conditions
☐ 🔗		▲ ▼ First Name:		FirstName.Linked	Text	Yes			Yes		Add/Edit

2.6.4   Adding a Report/Excel Column Name (Best Practice tip)

This is the name that appears as your column headings in Excel exports and reports created in the CommunityForce system. Therefore, it is important to keep this name as a **short descriptive version** of your question so that you do not make your column headers in your reports so long that you have to scroll through multiple pages to be able to view. The Report Display Name and the XML Name should be the same except the XML Name eliminates spaces between words. *(See example below)*

* Question :

Please enter your Last Name Only:

Design mode   HTML text

* Report/Excel Column Name :   Last Name
* Question XML Name :   LastName

2.6.5 Adding a Question XML Name (Importance with data migration and integration)

Question XML Name: This is the abbreviated name that the database uses to refer to the question.

➢ The XML Name is very important when importing applicant data from one application to another or when integrating data from CommunityForce to another database.

➢ In order for this data extraction (mapping) to be successful, the source application's task question and the destination application's task question **must have** the same XML names.

➢ Once an application has been created, and data is being exported/imported, it is very important to **never change** this name in your application. When creating additional tasks that the reviewer can export/import scores from one task to the other task, so as not to have to reenter data, the Fields within the one task **must have** the same XML names as the fields of the new task they are importing data to be populated with.

➢ The XML Name and the Report Display Name should usually be the same except the XML Name eliminates spaces between words. **(See example below)**

* Question :

Please enter your Last Name Only:

Design mode   HTML text

* Report/Excel Column Name :   Last Name
* Question XML Name :   LastName

2.6.6 Adding Bubble Instruction (Best practice tip)

Bubble Instruction: These instructions are *brief* helpful hints displayed to the applicant regarding the information requested on this question.

➤ A blue icon will appear next to the question in the application. When the applicant places their cursor on this icon the information will be displayed to them. Enter any instruction for the question that will be helpful to the applicant.

➤ If you have important detailed instructions regarding how to answer a question, it may be better to include that explanation as part of the Question itself or to add an additional "message type" question prior to this question. This will insure that the instructions are not missed by the applicant.

Example of Bubble Instructions:

2.6.7   Overview of Question Data Types

The question Type is used to describe the type of answer field appropriate for the desired response from the applicant.

- **Checkbox -** The applicant is presented with predetermined values to select from via a checkbox. All values are displayed on the application. Applicant can check multiple values.

- **Currency -** A numeric field formatted with a dollar sign. Currency fields when displayed in the application will only align left when viewing.

- **Date - Allows** for a date format of: mm/dd/yyyy

- **Date Day Validation –** Same as the date field, however, the system will look at the minimum and maximum numbers of days and allow the applicant to apply if they fall within the allowable

number of days. For example an applicant has 30 days to enter an application for a specific event. That date must be within the last 30 days.

- **DropDown -** The applicant is presented with predetermined values to select from a dropdown listing. Applicant can only select one value from the list.

  State: | Select ▾ |

- **Dependent DropDown –** Allows you to build dropdowns dependent on selections in another dropdown selection. If they choose a value in one dropdown then in the dependent question the dropdown would only be a listing for specific items that apply to just that value in the originating question.

  For example: if applicant selects the state of Virginia you can then have the City question appear with just a listing of all the cities in Virginia for the applicant to select from. That one city question can carry all the dependent cities depending on each separate state, but only show the cities for the state selected.

- **Electronic Signature -** The applicant is prompted to provide an electronic signature in the required format. The required signature has to match the First Name and Last Name the applicant entered when creating their user login profile.

  Electronic Signature *Signature:
  Enter your name as "CommunityForce Support" to Confirm your Electronic Signature.

- **Email - Allows** for an email format: xxxxxx@ccc.com

- **Encrypted Field -** Creates a text field that only the **Global Administrator** can view. For example you want the applicant to enter their SSN but not allow all other role types to be able to view it. If you create the question as an Encryptedfield only the Global Administrator can view the applicant's reply.

- **EssayBox -** A large data entry area that allows text entry. May have a minimum and maximum number of words.

  *Please provide an essay of up to 900 words on the following topic:
  Tell a story about how your involvement in athletic activities helped you overcome personal challenges. Please include your high school sports participation, what you learned from it and your plans for the future.

- **Extended Checkbox -** The applicant is presented with predetermined values to select from via a checkbox. Similar to a dropdown where the values are only displayed when the applicant clicks on the checkbox dropdown. However, multiple values can be selected.

Did you participate in any of the following activities:

☐ Sports
☐ Band
☐ Clubs

Select: All | None   [Ok]

- **File -** Allows the applicant to upload a document to the

  Upload the Summary of your SAR [Browse...]

  question.

- **Matching Fund Eligibility** – Used when you have one application, and that one application is used to apply to multiple scholarships. The Matching Fund Eligibility matches applicants to the funds they are eligible for based on their replies to eligibility questions within the application. Depending on how the applicant answers those questions, they are given a list of Scholarships they can apply to. They then select or unselect the scholarships they want to apply to from that listing.

  Listing of eligible funds, select all that you want to apply to:

  ☐ Aaron C. Kesler Future Firefighters Scholarship
  ☐ Arvin-McCord Scholarship
  ☐ Bob J. Tandy Scholarship

  Select: All | None   [Ok]

- **Numeric -** Exact numeric numbers. Best for using arithmetic calculations for exact results. Numeric fields when displayed in the application will only align left when viewing.

- **Payment Gateway -** Used to collect payment for an application form. Requires integration with a third party payment software.

  There is a $50 fee associated with this application. [Make Payment]
  Click here to make your payment:

- **Phone Number -** Allows for a phone number format of: xxx-xxx-xxxx, (xxx) xxx-xxxx, or (xxx)-xxx-xxxx. This does not allow for international formatting and therefore a text box must be used if needing international numbers.

  *Home phone: ___-___-____

- **RadioButton -** The applicant is presented with predetermined values to select via a radio button. Only one value can be selected. All values are visible on the application.

  'Gender: ○ Male ○ Female

- **Text -** A short data entry text field.

  *First Name: [   ] ✳

- **Organization Validation –** Requires integration setup with your organization's software program or a subscription requirement purchased through GuideStar and an additional plugin through CommunityForce. Creates a dropdown listing of pre-approved organizations information from your organization's program that has been integrated with CommunityForce (i.e., Grants Edge) or with Guide Star

  *Guide Star Field | CommunityForce | [Validate]

- **Application Link -** Allows you to create a question that allows the applicant to click a link and directs them to another application to apply to. Select the application that they are to be directed to, once they click on the link.

  <u>Note</u>: the application they are linking to, must have a future begin date in order to show in the listing of available applications.

  Click Here to be directed to the new application: Click here

- **Awarded Scholarship –** If selected this question type will automatically populate the scholarships that were awarded to the applicant in this application process. If there was more than one award given to the applicant all the names of the awards will appear. This can be used as a question in the staff question for the staff to review or in a post acceptance section that shows the applicant the awards they have been awarded.

  Awarded Scholarships: Scholarship for organization with multiple funds accepting High School applicants *Awarded On Date* 04-01-2014

- **Calculation -** Read only field in which the value of the question equals the calculated sum of other numeric or currency question within the application. This question type allows you to create a formula that adds questions together to get a final total. (i.e. you have multiple question fields that are numeric that you need to add together for a final total) **Note:** you cannot create a formula that is calculating on another calculation question.

  *Total of Awards: | 0 | [Calculate]

- **Float -** Numeric with special characters. Approximate numeric numbers.

- **Message -** Allows you to enter a read only message statement, instead of a value related question. Text only. Does not require the applicant to respond.

  Please name your top three college/university choices. Also indicate your admission status (accepted, pending, denied admittance). Please share your SAT or ACT scores.

2.6.7.1 Adding a Checkbox, Extended Checkbox, Dropdown, or Radio Button Question Type

Checkbox, Extended Checkbox, Dropdown, and Radio Buttons all allow you to create a listing of values for the applicant to choose from.

Checkbox – allows for multiple selection from a listing of values (used when you only have few items to select from.

*Grade Level Participated ☐ Grade 9 ☐ Grade 10 ☐ Grade 11
☐ Grade 12

Extended Checkbox – allows for multiple selection from a listing of values (used when there is a long listing of items to select from.

*Did you participate in any of the following activities:
☐ Sports
☐ Band
☐ Clubs

Select: All | None   Ok

Radio Button – Allows for a single selection from a listing of values (used when you only have a few items)

*Gender: ○ Male ○ Female

DropDown – Allows for a single selection from a listing of values (used when you have a long listing of items to select from. (i.e. Listing of States). Once the applicant clicks on the arrow in the dropdown field a listing with the available selections will appear.

*State: Select   ▼

*State: Select   ▼
        Select
        Alabama
        Alaska
        Arizona
        Arkansas
        California
        Colorado
        Connecticut
        Delaware
        District of Columbia
        Florida
        Georgia
        Hawaii
        Idaho
        Illinois
        Indiana
        Iowa
        Kansas
        Kentucky
        Louisiana

Exercise 1

➢ **Step 1:** Create a new custom question and select one of the listing type question types listed above.

Type :   DropDown   ▼   Add Value(s)

➢ Once you select the question type an **Add Value(s)** button will appear to the right**.**

➢ **Step 2:** Click on the Add Value(s) button

➢ The Display Values table will appear. This is the table where you will enter the listing of the possible reply values for this question

Display Values ⊠

Label	Value	
Florida	FL	✖
	*		*	➕

Editor | Save & Close | Cancel
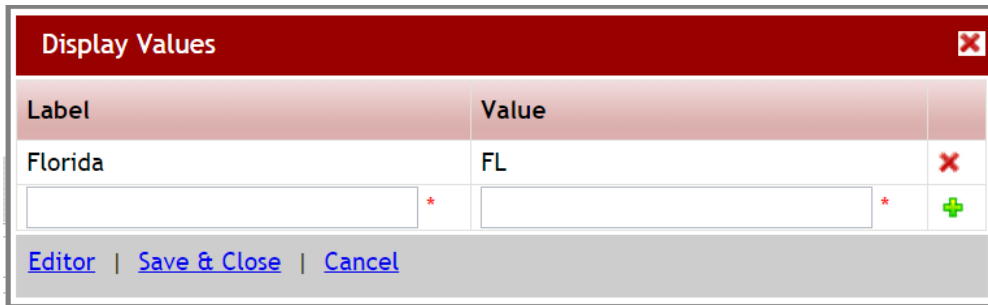
➤ **Step 3:** To enter the values enter the label name and click on the Green plus sign at the end of that row to save the data in that row. The Value field will be auto populated with the same value that you entered as the Label. If you want a different Label then your Value, enter the label name then tab to the Value and enter the Value name, and click the green plus sign to save your data.

➤ *Important:* When using Checkbox and Radio buttons enter only the items for selection. However when using the Dropdown always start your list with Select~Select so that this is the first field in the listing and what is populated in the questions before the applicant answers.

➤ <u>*Note:*</u> Clicking on the green plus sign will save each line of values that are entered. Your information will not be saved for that row until the green plus sign has been selected and a new line appears.

Label - The value that the applicant sees in the listing of values to choose from.
Value - This is the actual value result given to the selected value. Not viewable by the applicant, this can contain additional data regarding this value that you may only want viewable by staff. This is the value that will show in reports, as well. (Useful for internal coding of values that you may not want the applicant to see the code.)

➤ **Editor –** If you have a long listing of selection items, the editor box allows you to make changes to the values you have entered so far. The editor can also be used to copy and paste long listings of values. In the Editor each label and value must be separated by a "~" and no spaces between. The item to the left of the ~ is the label and the item to the right is the Value.

➤ **Step 4:** Click on the Editor listed at the bottom left of the Display Values and enter a listing of value items such as states: (list one item per line)

Display Values ⊠

```
Select~Select
Alabama~AL
Alaska~AK
Arizona~AZ
Arkansas~AR
California~CA
Colorado~CO
Connecticut~CT
Delaware~DE
District of Columbia~DC
Florida~FL
Georgia~GA
Hawaii~HI
Idaho~ID
```

Cancel | Save
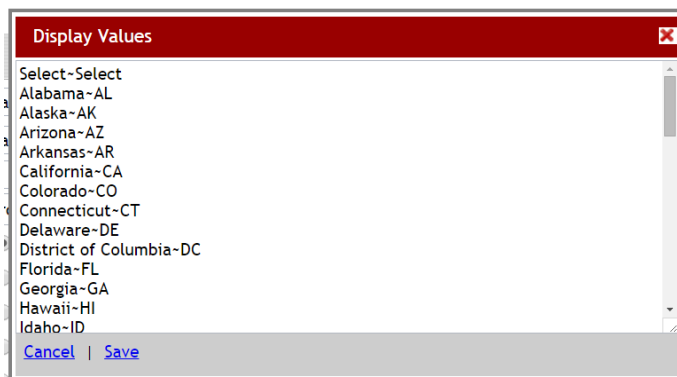
➢ **Step 5:** Click Save to return to the Display Values Table, each item should now be listed as a separate row in the table.

➢ **To Delete** Items in the Table: Click on the Red X next to the row you want to delete.

➢ **Step 6:** On the Display Values click the Save & Close to save the values you just entered.

   Important: *Make sure that you have a blank line of text with a green plus sign before exiting or the last item will not be saved.*

2.6.7.2   Adding a Dependent Dropdown

Allows you to build dropdowns *dependent on selections in another dropdown selection*. If they choose a value in one dropdown then in the dependent question, the dropdown would only be a listing for specific items that apply to just that value in the originating question.

For example: if applicant selects the state of Virginia you can then have the City question (if created as a Dependent Dropdown questions) appear with just a listing of all the cities in Virginia for the applicant to select from. That one city question can carry all the dependent cities depending on each separate state, but only show the cities for the state selected in the State question.

Exercise 1
➢ Step 1: Create a custom question and select the Dependent DropDown for the question type.
➢ Step 2: Click on the Add Values button to set up the values.

* Question :

* Report/Excel Column Name :   City
* Question XML Name :   City
Bubble Instruction :
Type :   Dependent DropDown   Add Value(s)

➢ A new Dependent Display Values box will open.

Dependent Display Values

Select Section: Testing New Section
Select Question: State1
Select Option: Virginia

Select~Select
Virginia Beach~Virginia Beach
Chesapeake~Chesapeake
Newport News~Newport News
Portsmouth~Portsmouth
Roanoke~Roanoke

Cancel | Save | Save & Exit

➢ **Step 3:** *Select Section:* Select the Section that has the original question that this question is dependent on.

➢ **Step 4:** *Select Question:* Select the actual dependent question that contains the trigger value
➢ **Step 5:** *Select Option:* Select the trigger value from that question that the new list is dependent on.

➢ **Step 6:** Add the new values that are to appear in the new question, if that trigger value was selected in the dependent question.

➢ Each possible value will need to be added twice on a separate line with the "~" separating each duplicate no spaces between. i.e. Richmond~Richmond (this is the same as if using the editor section in adding values for a regular dropdown.) Important, be sure to add the Select~Select at the beginning of each listing.

➢ **Step 7:** Click Save but **do not click save and exit**. You still need to add the additional values for all the other possible replies in the dependent question. Be sure to click Save on each option after you have entered its values.

➢ **Step 8:** To add another Options values, click the Select Option dropdown again and select the next value from that dependent question. The screen will clear where you will enter the possible values for that new option. Save and Repeat this for all the values in the dependent question.

➢ **Step 8:** Once all the options have values added to them and Saved. Click the Save & Exit, to complete the question set up.

For Example: You want a listing of cities to appear for just the state that was selected in the State Question.

The State question was created as a DropDown question type with a listing of states for the applicant to choose.

The City question would then be created as a ***Dependent*** DropDown question type.

The dependent city values would be set on each individual state value that was set in the original State Question.

You would select the state in the Select Option, then in the listing put all the cities for that state. Save it but don't exit And then click the Select Option again choosing the next state in the dropdown and listing all of its cities, repeating for each state.

Once you entered all the cities for all the states you would Save & Exit to return to the question set up.

Dependent Display Values		Dependent Display Values	
Select Section:	Testing New Section ▼	Select Section:	Testing New Section ▼
Select Question:	State1 ▼	Select Question:	State1 ▼
Select Option:	Virginia ▼	Select Option:	Florida ▼
Select~Select Virginia Beach~Virginia Beach Chesapeake~Chesapeake Newport News~Newport News Portsmouth~Portsmouth Roanoke~Roanoke		Select~Select Daytona Beach~Daytona Beach Jacksonville~Jacksonville Miami~Miami Sarasota~Sarasota Tampa~Tampa	
Cancel | Save | Save & Exit		Cancel | Save | Save & Exit	

2.6.7.3 Adding a Currency Question Type

When a required value is a numeric currency value it is suggested that you use the Currency question type to allow for the formatting of the value into a currency format.

Once the value is entered by the applicant a Currency symbol will appear on their reply.

Prior to setting up the application the Global Admin should have already preset the main currency type of your organization, in the Administration/Site Settings (i.e. Dollar $ or Euro €, etc.)

To create a currency question select the question type of "Currency" when creating your question in the custom question setup.

2.6.7.4 Adding a Date Question Type and Setting Parameters.

The Date Question Type allows you to set the question type as a date field in which the applicant enters a date as the value. A calendar will also appear that the applicant can select the date from.

Important: when cloning applications with date type questions, you will need to make sure that the new application's date ranges have been moved forward appropriately, the system will not do this for you.

When you select the Date question type you will be required to enter a minimum date and maximum date range so that the selection calendar can be created.

Min Date - Enter the minimum date that the applicant can enter.
Max Date - Enter the maximum date the applicant can enter.
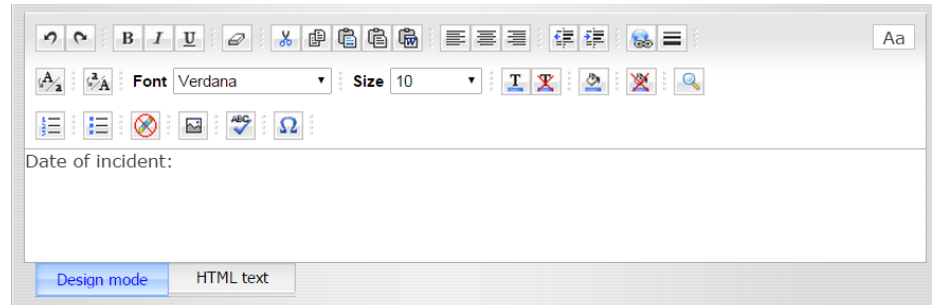
2.6.7.5 Adding a Date Day Validation Question Type

When using the Date Day Validation question type the system will look at the minimum and maximum numbers of days and allow the applicant to apply if they fall within the allowable number of days.

For example an applicant has 30 days to enter an application for a specific event that occurred. The date of that event must have been within the last 30 days in order to proceed with completing the application.

When you select the Date Day Validation Question Type the Minimum and Maximum fields will appear. Enter a minimum and maximum number of days of 0 to 30.

The applicant will have to enter a date that is no older than 30 days. If it has been past the 30 days the applicant will not be able to enter the date.

2.6.7.6   Adding an Electronic Signature Question Type

The Electronic Signature Question type creates a predesigned format in which the applicant must enter their name to mark the application as signed by them and it will create a date stamp marking the date and time the applicant signed their application.

This is usually entered on the last section of the application along with some kind of acknowledgement certification questions and serves as the applicant's signature for the application process.

The required signature has to match the First Name and Last Name the applicant entered when creating their user login profile.

Note: *Electronic Signature can only be used for the signature of the applicant only.*

The applicant will be required to type in the field their name as it appears in the User Setup.

Electronic Signature   *Signature:
Enter your name as **"Christine Smith"** to Confirm your Electronic
Signature.

Once the applicant types his/her name, it will be considered signed and a date stamp will appear to the right of the applicant's signature.

Electronic Signature   *Signature:
Enter your name as **"Christine Smith"** to Confirm your Electronic
Signature.
Christine Smith   6/2/2015 01:03:50 PM

2.6.7.7   Adding an Email Type Question

The Email question type is used only when the required value is an email address.

Using the Email question type will force the applicant to enter a correct email format in the field. (i.e. jones@communityforce.com)

2.6.7.8   Adding an EncryptedField Question type

Using the EncryptedField question type allows you to create a text field that only the **Global Administrator** can view. This is useful if you have sensitive secure questions that you do not want everyone in your organization to be able to view.

For example you want the applicant to enter their SSN but not allow all other role types to be able to view it. If you create the question as an EncryptedField only the Global Administrator can view the applicant's reply.

This will not be viewable to anyone else when viewing the Applicant's application dashboard, in the Preview Application-Application Summary.

2.6.7.9   Setting an EssayBox Text Field and Setting Word Count

The EssayBox question type is used when a question's reply requires a lengthy text statement to be typed (i.e. essay questions).

When using the EssayBox question type you can control the length of the reply value entered by the applicant by setting the minimum and maximum word count. (i.e. 500 words or less).

When you select the EssayBox question Type the Min Word Count and Max Word Count Fields will appear.

Min Word Count - Enter the minimum number of words you require for a reply to the specific question. If you have a maximum word count but do not require a minimum you can enter "0".

Note: An applicant will not be able to hit save until the minimum word count is met.

Max Word Count - Enter the maximum number of words you require for a reply to the specific question (i.e. max words = 500 will only allow the applicant to enter 500 words).

A dialogue box will appear on the applicant's dashboard next to the question, where they can type their reply to the essay question.

2.6.7.10 Adding a File Question

File Question types are used when you require that a document be uploaded and attached to the applicant's application. (I.e. transcript forms, FAFSA, photos, letters, budgets, etc.). The applicant would see this question and a Browse button next to the question that they can click on and select the document to be uploaded.

Example:
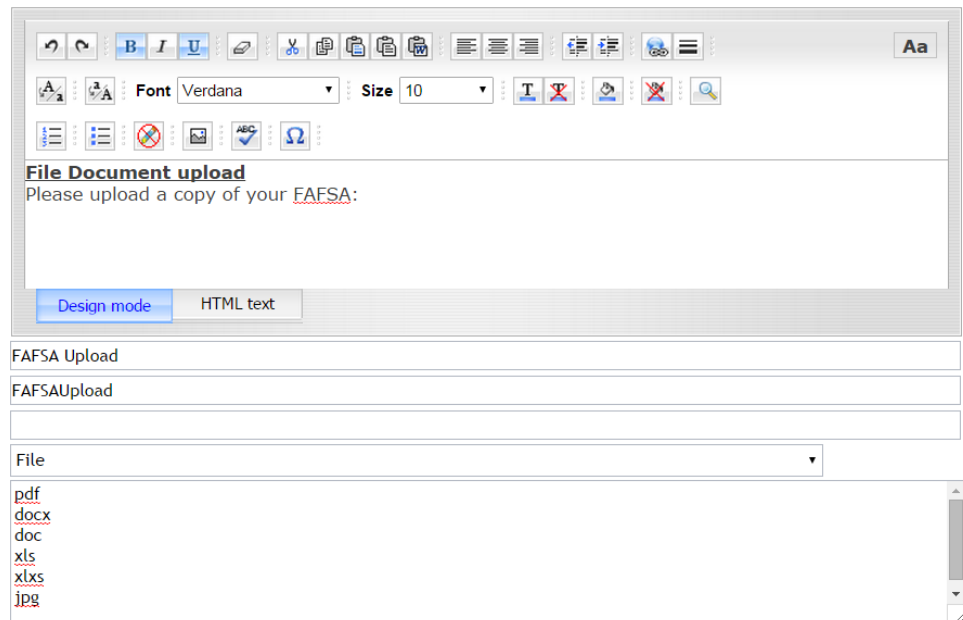
When you select the File Question Type a text box will appear. Provide the list of allowed file extension for the types of documents you will accept for this upload.

Suggested file types: pdf, xls, xlsx, doc, docx, html, jpg, gif, tif, wmv

When listing the file type extensions **do not enter a period** before the file extension and enter one type per line. When listing them enter one extension per line.

Note: Although the above file types are accepted, if you are using the **PDF** feature it is recommended that all uploads be formatted in Portrait mode, sized to 8-1/2" x 11". Only files less than 20mb can be uploaded to the program.

2.6.7.11 Adding the Matching Fund Eligibility Question
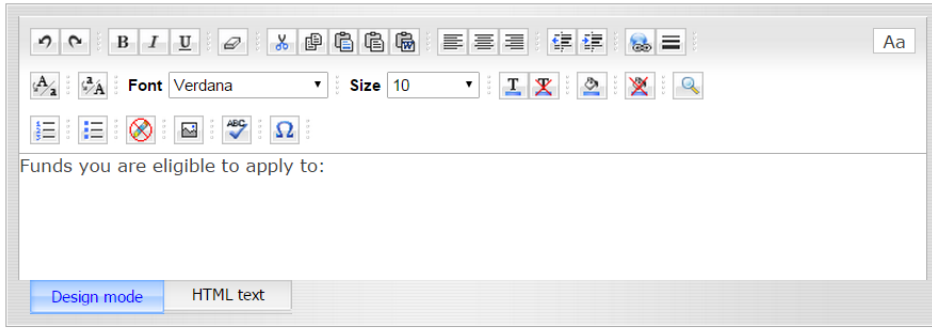
The Matching Fund Eligibility question type is used when you have one application, and that one application is used to apply to multiple scholarships. _This question must be present in those application forms in order for applicants to see the funding sources they have been matched to._

The Matching Fund Eligibility question shows applicants the funds they are eligible for based on their replies to eligibility questions within the application. Depending on how the applicant answers those questions, they are given a list of Scholarships they can apply to. They then select or unselect the scholarships they want to apply to from that listing.

Note: Before this question can be used you must first assign the funds to this application in the **Mange Application Funds** setup (or **Manage Common Application Grants** if using common application process) and set the individual criteria for each fund under the **Manage Funds Critieria Information** setup. Please refer to those guides for additional setup information.

When creating your question and selecting the Matching Fund Eligibility question type, the List Funds will appear.

* Question :

* Report/Excel Column Name :	Eligible funds
* Question XML Name :	Eligiblefunds
Bubble Instruction :	
Type :	Matching Fund Eligibility
List Funds :	○ All ● Eligible for

There are two options available for the listing that you can select from:

- **All –** Shows a listing of all the scholarship funds available for that application and has only the funds selected that the applicant matched to. However, since all the funds appear, they have the option to select additional funds if they want to apply to those as well.

- **Eligible for –** Shows a listing of "only" the scholarship funds that that applicant has been matched to. The applicant can unselect any funds they do not want to apply to.

Best Practice Tip 1: Make this a separate **Eligible Funds Section** and the end of all the question sections. Give the applicant clear instructions to complete all prior sections before selecting their funds. If the applicant clicks on this section prior to answering all of the appropriate eligibility questions, they will need to continue clicking back to this section to see additional funds they are approved for. If you choose, you also can set conditional logic to have this section only appear once those specific questions have all been answered, but know this can get quite lengthy if you have multiple question that apply.

Best Practice Tip 2: If using this question type, you also can set conditional logic on questions specific to a fund.   If a fund requires additional questions for just that fund, (i.e. Essay Question specific to fund) you can set conditional logic on the additional question, to appear only if the specific fund is selected
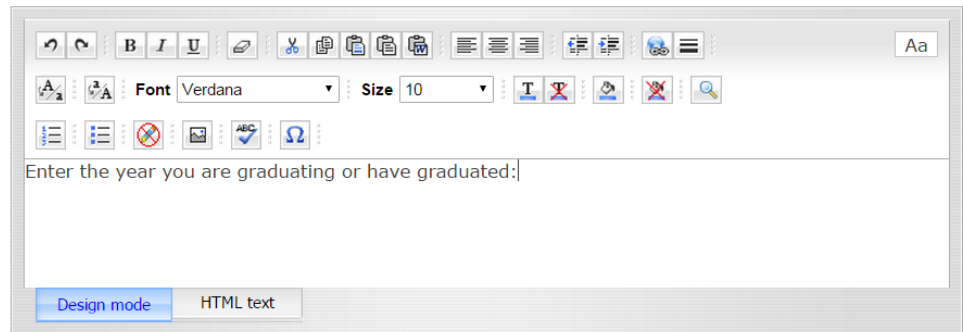
2.6.7.12   Using the Numeric Field and Set Parameters

Numeric fields are used when numeric values are required or you need to run exact calculations on the numeric values entered by the applicant. The only separator characters allowed in numeric question types are decimals.

When using the Numeric question type you have the option to control the length of the reply value as well as the number range that the value falls between.

When you select the Numeric question type the Maximum Length, Min Value, and Max Value fields will appear. If your do not require any of these, you can leave them blank.

- **Maximum Length -** Sets the number of numeric characters allowed when replying to this question. (i.e. 4.00 = Max. length of 4 characters. The applicant will not be able to enter a numeric value longer than 4 characters long including the decimal).
- **Min Value -** Allows you to set the minimum (lowest) numeric range amount that will be allowed when replying to this question (i.e. you require a year between 2000 and 2015. The min value = 2000).
- **Max Value -** Allows you to set the maximum (highest) numeric range amount that will be allowed when replying to this question (i.e. you require a year between 2000 and 2015. The Max Value = 2015).

2.6.7.13 Adding the Payment Gateway Question

The Payment Gateway question type is used when requiring the applicant to pay a fee for the application form. Integration with your payment software is required to use this question type. If you are not sure if this has been integrated, please see your Global Admin or your account representative to have this functionality added to your system.

Prior to using this question you should already have entered the amount for the application form in the **General Information** setup for this application, and your Global Admin should have already enabled **Application Payments** in the Administration>Site Settings/General Settings.

Once integration has been completed with your payment software, this question will appear in your application and should require no further setup by you.

The question that is the Payment Gateway Question will have the Question Type of Payment Gateway. This question will have coding connected to it to direct the applicant to the Payment Software.

This question will give the applicant a button they will click on to be directed to the payment software that has been integrated with your site.

*Pay the Application Fees: [Make Payment]

(See: **Additional Application Setup Features: Application Payment Form** for additional information regarding set up of this functionality)

2.6.7.14 Adding a Phone Number and Force Format

When a required value is a phone number you can use the Phone Number question type to force a specific format to be used when the applicant enters their phone numbers.

When you select the Phone Number question type the Select the format field will open. Select the format you want the applicant's to use when entering phone numbers.

| Type : | Phone Number ▼ |
| * Select the format : | (XXX) XXX XXXX ▼ |

The following format selections are available:
(XXX) XXX-XXXX
XXX-XXX-XXXX
(XXX)-XXX-XXXX

2.6.7.15 Adding a Text Field and Maximum length

The *Text* question type is used when a brief text and/or numeric value is required. (I.e. entering a street address such as: 1234 Jones Street, or requesting the applicants last name)

 Note: You cannot run numeric calculations on text fields.

When you select the "Text" question Type, the Maximum Length field will appear.

Maximum Length: When using the Text question type you can control the length of the text entered by setting the maximum length of characters allowed. The applicant will not be able to enter any more characters then the maximum length allotted. (I.e. Maximum Length = 15, will only allow the applicant to type 15 characters). If you do not want to limit the length you can leave this blank.

* Question :

Text Field:

Design mode   HTML text

* Report/Excel Column Name :   Text
* Question XML Name :   Text
Bubble Instruction :
Type :   Text
Maximum Length :   15

2.6.7.16 Adding the Organization Validation Question

This requires integration to be set up with your internal organization's database or with GuideStar. If using GuideStar you must already have purchased a subscription requirement through GuideStar and an additional plugin through CommunityForce.

The purpose of this question is to not allow the applicant to type in a selection, but to give them a dropdown listing of preapproved items to select from.

Once you have the integration setup completed, this question will appear in your application and should require no further setup by you.

When this question is created and the Organization Validation question type is selected a field will appear to select what you are using to validate with.

* Question :

Organization Validation

Design mode   HTML text

* Report/Excel Column Name :   Organization Validation
* Question XML Name :   OrganizationValidation
Bubble Instruction :
Type :   Organization Validation
* Validate With   GuideStar

Depending on what was decided on in the integration, this will validate with a field in GuideStar or your organization's database and create a dropdown question with a prepopulated selection from your database.

> *Example:*

> **Validate with: Grants Edge (Schools),** the question will automatically populate with the approved organization listing of schools from your GE program (schools field) for the applicant to select from that dropdown listing.

> **Validate with: GuideStar**: A validate button will appear next to the text field. The applicant enters their organization name and clicks the validate button. The moment they click on validate it goes to GuideStar and pulls data from GuideStar to populate data fields that have been pre-mapped to GuideStar fields within the application.

2.6.7.17 Adding the Application Link Question

Creating the Application Link question allows you to create a question where the applicant can click a link to be directed to another application.

➢   **Step 1:** When creating your question select the Application Link question type:

➢   The Selected Application and the Use Link To fields will appear

➢   **Step 2:** In the Selected Application field click on the dropdown arrow to see a listing of available applications. Select the application you want the applicant to be directed to.

* Selected Application : --Select-- ▾

> **Note**: the application they are linking to, must have a future begin date in order to show in the listing of available applications.

> **Step 3:** In the **Use Link To** select the option that you want to occur when the applicant clicks the link

Use Link To : ⦿ Link ○ Apply ○ Apply and Import

- **Link:** The applicant clicks on the link and a pop up appears giving them the option to apply to the application. If they click the apply button, they are then directed to the dashboard for that new application.

- **Apply:** The applicant clicks on the link and is automatically directed to the dashboard for the new application, no option to apply is available it is automatic.

- **Apply and Import:** The applicant clicks on the link and is automatically direct to the dashboard for the new application. Any questions that were in the original application that carry the *same xml name* that are present in the second linked application, will automatically be pushed down and populated with the replies in the initial application. Applicant will not be required to re-answer those questions.

Once you have selected the application and the option to link to the application the link will appear in the question for the applicant to click on.

Best Practice Tip: Since this is more likely a question that you want to appear after the initial application process, it's recommended that you create this question in a separate section. Create that section with a Section Type of *"Acceptance"* and a Status(es) of *"Selected for Award"*. That way you can control what applicant's receive this section in their dashboard. Only applicants that you have moved to the status of "Selected for An Award" will see this section in their dashboard and be able to click on it. Set the deadline as either the deadline of the new application or with "No" deadline. Mark the lock after submit as "No" for this section.

2.6.7.18 Adding the Awarded Scholarships Question

If selected this question type will automatically populate the scholarships that were awarded to the applicant in this application process.

Exercise 1

> **Step 1:** When creating the question, select the Awarded Scholarship question type.

Once this question is created the applicant will see the question in their dashboard as follows:

Awarded Scholarships: Scholarship for organization with multiple funds accepting High School applicants *Awarded On Date* 04-01-2014

If there was more than one award given to the applicant all the names of the awards will appear.

If this question is present, it can also be used to set conditional logic on other sections or questions that can hide or appear if a specific fund was awarded. (i.e., if awarded a specific fund then they need to send a thank you. If the Awarded Scholarship Question shows that specific fund was awarded, then the question to provide an uploaded thank you note will appear)

Best Practice Tip: When using this question type for the applicant to view, it is best to create a separate section for this specific question and any additional award questions that may apply. That way you can control where in the process the applicant will see this section in their applicant dashboard. Create the Section as a section type of "Acceptance" and a Status(es) as either "Selected for Award". Only when the applicant is moved to a status of "Selected for Award" will the applicant see this section automatically in their dashboard. You will want to set a deadline separate from the application as this section will more than likely be completed after the original application deadline.

Best Practice Tip 2: If you awarding applicants and *do not* want them to see what they have been awarded prior to an official announcement, you will want to create the section for this question, but **DO NOT MARK the Section ACTIVE** in the application. Award your applicants first, change their status to the appropriate trigger status, notify the applicants of the award, and let them know in the notification that you will be activating a section for them to complete. *Then* go in and activate the section by putting a check in the Activate Section column of the Section listing. *All applicants* at that point that have the specific status that you selected when creating the section will have that section appear in their dashboard, but only when you activated it. So do not activate until you are ready for those applicants to see it.

2.6.7.19 Adding a Calculation Field and How To Set the Formula

Calculation question types are used to create a read only calculation field in which the value of the question equals the calculated sum of other numeric, currency, or float question types within the application. You can create a Calculation Field question type that will return the results of the calculated

fields. (I.e. you have multiple question fields that are numeric that you need to add together for a final sum total)

Exercise 1

➢ **Step 1:** Select the Calculation question type

➢ The Formula field will appear above it.

Formula :

Add a Formula

Type :   Calculation   ▾

➢ **Step 2:** To add a Formula click the **Add A Formula.**

➢ A box will appear where you will select the fields that are to be calculated together.

Add a Field ▶	Save ▶	Save & Exit ▶	Exit ▶
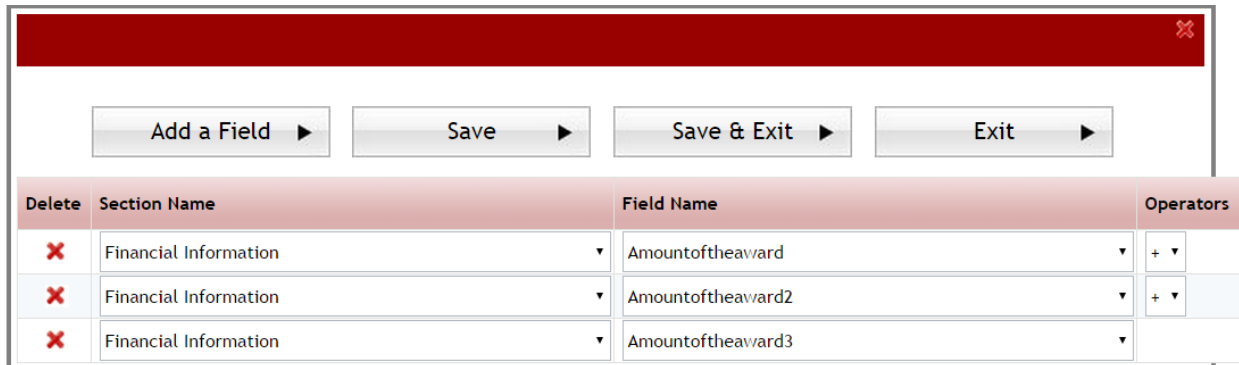
➢ Step **3:** Click on the **Add A Field** button to begin selecting the fields to be calculated.

➢ The first line will appear to enter the Section Name and the Field Name of the first field in your calculation.

Delete	Section Name	Field Name	Operators
✗	Financial Information ▾	Amountoftheaward ▾	+ ▾

➢ **Step 4:** Select the dropdown arrow in the Section Name and locate the section the field is located in and select it.

➢ **Step 5:** Select the dropdown arrow in the Field Name and locate the field you want to run the calculation on.

➢ As you add fields you will be required to select the appropriate Operator for the calculation you wish to calculate. The available operators are: +, -, *, /

➢ **Step 6:** Select the dropdown arrow in the Operators and select the operator for the calculation you wish to calculate. This is the operator that controls how you are going to calculate this line with the next line below it.

➢ Once you have completed this calculation line, click on the Add a Field again to add each additional field to be included in this calculation.

➢ **Note:** The operator will not appear in this second line until you hit the Add A Field button again. The reason this happens is, is because when you only have two fields to calculate it is not necessary to add the operator on the second field. This is also the case for the last line in your calculation you will not have an operator on that line as it is the last line and there are no other items to be calculated in this formula. After completing your last line do not add an operator or hit the Add A Field button again or this will cause an error in your formula.

➢ You can delete a row in the calculation by selecting the Red **X** next to that row.

<u>Note:</u> you cannot create calculation formulas using other calculation questions or mix calculations where you are adding two fields and then subtracting another.

Tip: If you are using calculations, and you click on your preview screen and nothing is showing, check to see if your formula is correct. A bad formula can cause the preview screen not to show.

➢ **Step 7:** After you have entered all the fields to be calculated, click on the Save or Save & Exit to return to the question's setup screen.

➢ The Formula field of your question will now be populated with the formula fields you selected.

* Question :

* Report/Excel Column Name :	Total of Awards
* Question XML Name :	TotalofAwards
Bubble Instruction :	
Formula :	Financial Information,Amountoftheaward +Financial Information,Amountoftheaward2 +Financial Information,Amountofthe
	Add a Formula
Type :	Calculation

Once the applicant fills in the data and answers all the questions required for the calculation. The applicant will need to click the **Calculate** button on their dashboard that is present on this question.

*Total of Awards: [0] [Calculate]

The result of the calculation will then appear to the applicant on their application.

Note: When creating this question it is important to inform the applicant of the fields being calculated so that they can make sure they have answered those prior questions correctly so that the returned result is accurate.

2.6.7.20 Adding a Float Type and Setting Parameters

Float question type values are used in the same manner as numeric but are for more complex scientific equations that require calculations ran on figures containing non-numeric mathematical symbols such as negative positive symbols or fractional dividers as well as figures containing a floating decimal value.

When using a float question type you can set a minimum and maximum value to force the applicant to enter figures within a specific range of numbers.

When you select the Float question type the Min Value and Max Value fields will appear. However, if you do require a min or max value you can leave these fields blank.

Type :	Float
Min Value	
Max Value	

- **Min Value -** Allows you to set the minimum (lowest) numeric range amount that will be allowed when replying to this question
- **Max Value -** Allows you to set the maximum (highest) numeric range amount that will be allowed when replying to this question

2.6.7.21 Adding a Message Question in Application

Message question types are used to create a message statement to the applicant, instead of creating a question for the applicant to reply to. Message questions are useful in creating a header titles to separate multiple parts of a section.

Example:

When selecting Message question type, you will type the message in the Question box and format it to how you would like it to visible by the applicant.

2.6.8   Making a Question Required

In the **Question Setup** for each individual question there is an option **"Required".** If a question on the application is required and must be answered by the applicant, you must mark that question as required and the applicant will not be able to submit their application until the question has been answered.

Important: The section that contains the required question will not show 100% complete in the applicant's dashboard, until the applicant has answered all the "required" questions within that section. Therefore, ***each section must contain at least one required question*** in order for the section percentage to show. If there is not a required question on a section, the section will not show a percentage of completion and the applicant will not be able to submit.

When creating a new question this question will automatically ***default to No.***

Required: ○ Yes ○ No

Yes: The question *is required* and the applicant will not be able to submit the application until he/she replies to this question.

No: The question is not required and the applicant can skip this question, and not answer it.

In the question listing for each section, the column "Required" will show as "Yes", if you selected "Yes" or it will be blank if you selected "No" for each question. You can use this to double check all your questions to make sure you marked them correctly.

			Questions									
						Add Condition(s)	Preview Section	Hide/Un-Hide Custom Question(s) from Reviewer		Delete Custom Question(s)*		Custom Question
Linked	Display Order		Question	XML Name	Type	Required	Excluded	Hidden From Applicant	Hidden From Reviewer	Default Value	Conditions
☐	1	▲ ▼	Date of Qualifying Event:	EventDate	Date Day Validation	Yes					Add/Edit
☐	2	▲ ▼	State:	State1	DropDown	Yes					Add/Edit
☐	3	▲ ▼	City:	City	Dependent DropDown	Yes					Add/Edit
☐	4	▲ ▼	Listing of eligible funds, select all that you want to apply to:	EligibleFunds	Matching Fund Eligibility						Add/Edit

2.6.9   Excluding Questions that you do not want to delete

A question that was previously created in an application may no longer be necessary. Once a question has been included as part of an application and applicants have replied to those questions, the question can no longer be deleted from the application.

Therefore, in order to keep the past data, there is the option to **"Exclude"** that question from the application.

This will allow the question, along with any data that may be stored on that question, to remain in the database.

Once a question is "excluded", applicants will no longer see this question and the question will not appear in the application dashboard.

When creating a new question this question will automatically *default to No.*

Exclude : ○ Yes ● No

Yes: The question is excluded from the application and no longer visible to the applicants.

No: The question is visible and included as part of the application. All questions that are active in an application should be marked No.

In the question listing for each section, the column "Excluded" will show as "Yes", if you selected "Yes" or it will be blank if you selected "No" for each question. You can use this to double check all your questions to make sure you marked them correctly.

Questions

	Linked	Display Order			Question	XML Name	Type	Required	Excluded	Hidden From Applicant	Hidden From Reviewer	Default Value	Conditions
	☐	1	▲	▼	Date of Qualifying Event:	EventDate	Date Day Validation				Yes		Add/Edit
	☐	2	▲	▼	State:	State1	DropDown	Yes				VA	Add/Edit
	☐	3	▲	▼	City:	City	Dependent DropDown	Yes					Add/Edit
	☐	4	▲	▼	Listing of eligible funds, select all that you want to apply to:	EligibleFunds	Matching Fund Eligibility			Yes			Add/Edit
	☐	5	▲	▼	Did you participate in any of the following activities:	Activities	Extended CheckBox		Yes				Add/Edit

Above table buttons: Add Condition(s) | Preview Section | Hide/Un-Hide Custom Question(s) from Reviewer | Delete Custom Question(s)* | Custom Question

2.6.10 Setting Hide from Reviewer as Active on a Question

There may be questions within the application that you do not want to be visible to the *review committee* during the review process. (I.e. hiding the applicant's contact information).

"Hide from Reviewer" allows you to hide the question from the reviewers and they will not be able to see the information when they view the applicant's application.

When creating a new question this question will automatically *default to No.*

Hidden from Reviewer : ○ Yes ● No

Yes: The question is **hidden** and the reviewers cannot see the replies to this question.

No: The question **is viewable** to the reviewers and *not hidden*.

In the question listing for each section, the column "Hidden From Reviewer" will show as "Yes", if it is hidden and you selected "Yes, or it will be blank if you selected "No" for each question. You can use this to double check all your questions to make sure you marked them correctly

2.6.11 Setting Hidden from Applicant as Active on a Question

There may be questions within the application that you do not want to be visible to the applicant but that can be answered by the Admin and viewable to the reviewers. (I.e. score results, calculated questions, document uploads by the Admin, etc.)

When creating a new question this question will automatically **default to No.**

Yes: The question is **hidden** and the applicant cannot see the question in their dashboard.

No: The question is viewable to the applicant and the applicant can reply to the question.

In the question listing for each section, the column "Hidden From Applicant" will show as "Yes", if it is hidden and you selected "Yes" or it will be blank if you selected "No" for each question. You can use this to double check all your questions to make sure you marked them correctly

2.6.12 Showing a Question on the Manage Award Screen

When awarding applicants using the Manage Awards (used for awarding multiple scholarships in one application) you can have the replies to specific questions appear from the applicant's application. (**Note:** this will only display in the Manage Award Section and will not be viewable if using the Batch Awards to award applicants.)

When creating the question in the Sections and Question setup select "Yes" for the **Show on Award Screen** in the Add/Edit Question:

> Note: When creating new questions in your application the default for this question is *No.*

Yes: The question's values will appear in the Manage Awards

No: The question's values will not appear in the Manage Awards

To view the question in **Manage Awards**, you must first select the scholarship you are awarding to view the listing of all eligible applicants for that specific scholarship. The question and its reply will appear when you click in the Award Questions column for each applicant and when you click the Award Applicant to award the applicant.

2.6.13 Setting Read Only as Active on a Question

When a question is marked as **"Read Only"** the applicant can view the question, but will not be able to enter any data for this question.

Message question types and questions that have been linked to another question in the application are examples of Read Only questions. (These two question types will automatically default as read only therefore you will not need to select them as "read only" when creating them).

When creating a new question this question will automatically **_default to No._**

Note: you would not want to mark a read only question as "required".

Yes: The question is a **read only** question and the applicant does not reply to this question.

No: The question is **not read only** and the applicant can reply to this question.

2.6.14 Adding a Default Display Value to a Question

"Default Display" allows you to enter a "default" value reply to the question. The question will default to this value, and will not be required by the applicant to answer, however the applicant has the option to change the reply.

When creating a new question, enter the actual value that is to show as the default answer to this question.

Note: This value must match exactly as the value you entered in the Add Values table to appear correctly to the applicant.

Example:

The majority of your applicants live in the State of Virginia. Therefore, to make it easier on your applicants you create your application question "State" and add a default value of VA. This question will show in the applicant's dashboard as completed.

*State:	Virginia ▼

In the question listing for each section, the column "Default Value" will show with the default you have entered. If there is no default set, this column will be blank. You can use this to double check all your questions that you want to add a default, to make sure you set them correctly.

Questions

| Add Condition(s) | Preview Section | Hide/Un-Hide Custom Question(s) from Reviewer | Delete Custom Question(s)* | Custom Question |

	Linked	Display Order			Question	XML Name	Type	Required	Excluded	Hidden From Applicant	Hidden From Reviewer	Default Value	Conditions
	☐	1	▲	▼	Date of Qualifying Event:	EventDate	Date Day Validation				Yes		Add/Edit
	☐	2	▲	▼	State:	State1	DropDown	Yes				VA	Add/Edit
	☐	3	▲	▼	City:	City	Dependent DropDown	Yes					Add/Edit
	☐	4	▲	▼	Listing of eligible funds, select all that you want to apply to:	EligibleFunds	Matching Fund Eligibility			Yes			Add/Edit
	☐	5	▲	▼	Did you participate in any of the following activities:	Activities	Extended CheckBox		Yes				Add/Edit

2.6.15   Setting Hide/UnHide from Reviewer on Questions - Batch Action

When you have *multiple* questions in a section to Hide or Un-Hide from your Review Committee you can do so without having to go in to each separate question.

From the Questions listing for each section you will notice a button at the top called Hide/Un-Hide Custom Questions(s) from Reviewer.

Exercise 1

➢ **Step 1:** Select all the question that you want to Hide/Un-Hide in the grid by clicking in the **checkbox** next to the question you want to hide.

➢ **Step 2:** Click the Hide/Un-hide Custom Question(s) from Reviewer button.

➢ You will receive a confirmation confirming the action you are wanting to perform.

➢ **Step 3:** Click yes to the confirmation

➢ **Step 4**: Next you will receive a status update, click ok to return to the Question(s) grid.

➢ When you return the column marked Hidden from Reviewer will now reflect the selected status.

- ➢ If you selected questions that were blank and not Hidden, they will now show with "yes" in the Hidden from Reviewer Column. However, if you selected question that were marked already as "yes" in the Hidden from Reviewer column, these will now show as blank for not Hidden.

- ➢ If you want to reverse this option, select the same questions again and repeat. If they were hidden they will then show as blank for not hidden.

2.6.16 Deleting Custom Question(s)

Only questions that have not been responded to by applicants can be deleted.

Once data has been entered on a question it can no longer be deleted from the application or section. Questions that have data entered will have to be marked as excluded.

You can delete a single question or multiple questions in batch.

Exercise 1

- ➢ **Step 1:** From the Sections setup Question data grid, select the question(s) you want to delete by clicking in the **checkbox** next to the question.

➢ **Step 2:** Click the Delete Custom Question(s) button

➢ **Step 3:** You will receive a Delete Confirmation, click "Yes" to continue or "No" if you do not want to delete.

System Message	225

Are you sure you want to delete the selected question(s)?

Yes	No

Note: If data has been entered on the question you will receive a System Alert, and the question will not be able to be deleted. Otherwise you will receive a status update letting you know the question has been deleted.

➢ **Step 4:** Click ok on the Status Update to return to the Question's data grid.

Status Update	227

The selected question(s) has been deleted.

Ok

2.6.17 Setting the Display Order for a Question

"Display Order" is the sort order sequence number of the question as it appears on the page as the applicant is reading the questions. If you enter a number that is already being used by another question in that section, the new question will take that number in the sequence and move the prior question after it the next number in the sequence and all other questions below will be moved down one count. *This is a required field when creating questions and cannot be left blank.*

When creating your question enter the number that you want the question to fall in sequence on the page as the applicant is filling out the application.

* Display Order

Once you return to the Question data grid you can also adjust the sort order by clicking on the up and down arrows in the grid:

2.6.18 Adding a Document to a Question

If you have a document that may be informational to the applicant in order to answer a specific question, or a template that the applicant can fill out and upload to a question, when creating your question you can attach that document directly to a question. Then when the applicant views that question, they can click on a download link to access it, (i.e. Policy and Procedures. Rules and Regulations, forms to complete, etc.).

Any question but a calculation question, can have a document uploaded to it.

To create a document upload question:

Exercise 1

➢ **Step 1:** Create your question in the Question Setup and select the question type you want this question to be, (i.e. Message, File, etc.)

➢ **Step 2:** Select the Upload File: Choose File button at the bottom of the Question setup.

➢ **Step 3:** Your Windows Explorer folder will appear, select the file you want to upload, and click the open button to add it to the question
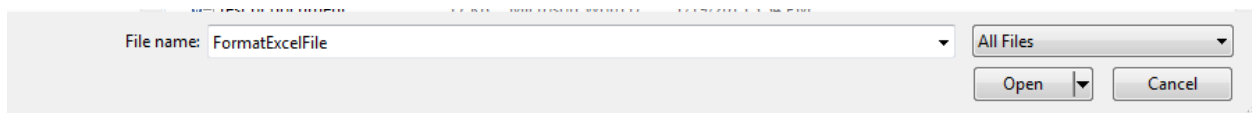
Once you have uploaded the file, the name of that file will now show next to the Choose File button

Add File to this Question

Upload File   Choose File   FormatExcelFile.xlsx

How to Remove a File

Once you Save and Exit the question and return you can remove the file by clicking on the Remove File that will now appear.

Upload File   Choose File   FormatExcelFile.xlsx

Remove File

Below are a couple of examples of how you can set this question up for your applicants:

Example 1

If you want the applicant to complete a form, you can have the document directly uploaded from the "File" question type that you created for them to upload it to:

*Please click on the attached form in blue next to this question   Browse...
to document your 4H Activities. Once you have completed this
form, please return to this question, click the **Browse** button   FormatExcelFile.xlsx
and upload the completed document here.

File Setup:

* Question :

* Report/Excel Column Name :	4H Documentation
* Question XML Name :	4HDocumentation
Bubble Instruction :	
Type :	File
* Text :	doc docx pdf xls xlxs

Provide the list of allowed file extensions above

Required :	◉ Yes ○ No
Exclude :	○ Yes ◉ No
Hidden from Reviewer :	○ Yes ◉ No
Hidden from Applicant :	○ Yes ◉ No
Show on Award Screen :	○ Yes ◉ No
Read Only :	○ Yes ◉ No
* Display Order :	12

Add File to this Question

Upload File   Choose File | No file chosen   FormatExcelFile.xlsx

Remove File

If you want to make this easier on the applicant this can also be separated into two separate questions, a message question where they can access the document, and then a second "file" question where they are to upload it:

Please click on the attached form in blue next to this question to document your 4H Activities. Once you have completed the document, please save it to your computer and and upload it to the question below.

FormatExcelFile.xlsx

*Please upload your completed 4h form: Browse...

Example 2

You have a document you want the applicant to be able to view. (I.e. rules and Regulations for a specific scholarship program) You can create just a single *message question type* with the document included in the question.

Please read the attached document outlining the Rules and Regulations for this specific scholarship program. Please click on the document to view it.

Scholarship Rules and Regulations.pdf

Message Setup:

* Question :	

Please read the attached document outlining the Rules and Regulations for this specific scholarship program. Please click on the document to view it.

Design mode   HTML text

* Report/Excel Column Name :	RulesReg document
* Question XML Name :	RulesRegdocument
Bubble Instruction :	
Type :	Message
Exclude :	○ Yes ◉ No
Hidden from Reviewer :	○ Yes ◉ No
Hidden from Applicant :	○ Yes ◉ No
Show on Award Screen :	○ Yes ◉ No
Read Only :	○ Yes ◉ No
* Display Order :	15

Add File to this Question

Upload File	Choose File Scholarship …ulations.pdf
	Remove File

2.6.19   Save and Cancel Option When Creating Questions

Once you have setup or made edits to a question be sure to **"Save"** your information prior to exiting the setup screen. The following options are available:

Save - Allows you to save any changes made without exiting the screen
Save and Exit - Saves your changes and exits the screen
Exit without Save - Exit the screen but will not save any changes
Reset Form - Clears all the information entered on the question.

2.6.20   Adding Conditional Logic on Questions

There may be instances that depending on how an applicant answers a specific question other questions may or may not need to be answered by the applicant.

Conditional Logic can be set on a question that will trigger it to appear depending on how the applicant answers questions before it.

Conditions are set on the question that is going to be affected by the conditional logic and hidden when the condition is met.

Exercise 1

➢ **Step 1:** While in the Question Setup Grid, set conditional logic on **one** specific question, by clicking on the **Add/Edit** in the Conditions column for that question

Note: Questions that already have conditions set on them will be have the Add/Edit under the conditions column highlighted in green.

Questions

		Linked	Display Order			Question	XML Name	Type	Required	Excluded	Hidden From Applicant	Hidden From Reviewer	Default Value	Conditions
	☐		1	▲	▼	Date of Qualifying Event:	EventDate	Date Day Validation				Yes		Add/Edit
	☐		2	▲	▼	State:	State1	DropDown	Yes			Yes	VA	Add/Edit
	☐		3	▲	▼	City:	City	Dependent DropDown	Yes			Yes		Add/Edit
	☐		4	▲	▼	Listing of eligible funds, select all that you want to apply to:	EligibleFunds	Matching Fund Eligibility			Yes			Add/Edit

Buttons: Add Condition(s) | Preview Section | Hide/Un-Hide Custom Question(s) from Reviewer | Delete Custom Question(s)* | Custom Question

➢ The Conditional pop-up is used to define when a question is **hidden** to the applicant based on how the applicant answers specific questions within your application. These can be set on a single data value or a combination of data values. When creating conditions you are selecting the values that **will allow** the selected question to **hide** in the applicant's dashboard, if the condition is met. Question that do not have conditions set on them will automatically appear and do not need conditions to be visible.

Configure Field Display Conditions: If none of the above, please explain:

Hide the field when the following conditions are met.

Section 1.	Question 2.	Condition 3.	Value 4.	Operator 5.	Grouping 6.	
Family Information ▼	Whodoyoulivewith ▼	Does Not Contain ▼	None of the above	AND ▼	1 ▼	✖

Buttons: Add Condition | Save | Save and Exit | Exit without Save

➢ **Step 2:** Try entering a condition on a question using the following guidelines. Once you enter your first condition, click the **Add Condition** button to enter additional lines of conditions. The red **X** will allow you to delete a condition you do not want.

To add a condition to hide a question:

1. Section: What section has the question that will trigger this question to hide? Select that section.

2. Question Name: What question in the selected section, is the trigger for this question to hide? Select that question.

3. Condition Type: What is the condition of the answer/value that has to be met in order for the question to be hidden? Select that condition. Possible conditions are:
- Contains – the answer/value contains this value
- Starts With - the answer/value starts with this value
- Does Not Contain - the answer/value does not contains this value
- Is Not Empty - the answer/value is not empty (applicant has answered this question)
- Is Empty - the answer/value field is empty (applicant has not answered this question)
- Is Exactly – the answer/value must exactly match the value.
- Is Less Than - the answer/value is numeric and is less than the value amount
- Is Equal To - the answer/value is numeric and is equal to the value amount
- Is Greater Than - the answer/value is greater than the value amount
- Is Not Equal To - the answer/value is numeric and is not equal to the amount.

4. Value: What is the answer/value the applicant must answer in order for the question to be hidden? Enter the value. (The value must be entered exactly as it is in the question setup)

5. Operator: Used when entering multiple lines of condition values. **And** means all of the conditions in the listing need to be met in order to cause a question to hide. **Or** means either of the conditions can be met. This applies to the row that and/or is on, and the next condition row following. If you have groups of conditions, it applies to each line in the group and then on the last line of the group, how it relates to the next group of condition values.

6. Grouping: This column groups your conditions into sets of conditions. You may have several groups of condition where the first group is executed and then the second group is executed etc. Assign each of the conditions in a group the same number. The first group is 1, the second group is 2, etc.

Examples of entering conditions:

Example 1: You want the *question "Please attach your employment resume"* to **only appear** for applicants that have selected **"Yes"** to the question: "***Do you have work experience?"*** If they selected "No", or have not answered the question yet, you do not want the question to appear.

You would enter the condition as follows on the question **"Please attach your employment resume**":

Configure Field Display Conditions: Please attach your employment resume:

Hide the field when the following conditions are met.

Section	Question	Condition	Value	Operator	Grouping	
Work Experience ▾	WorkQuestion ▾	Does Not Contain ▾	Yes	AND ▾	1 ▾	✖

| Add Condition | Save | Save and Exit | Exit without Save |

Example 2: You want the *question "Please attach your employment resume"* to **only appear** for applicants that have selected **"Yes"** to the question: "Are you currently employed?" and on the question "Gender" selected "**Male**". You must enter every possible scenario that it should be hidden for, and group each scenario as a separate group.

Use caution when using contains on values that could be included within another word in that question's values listing, (i.e. Male is part of Fe**male,** Other is part of M**other**, or br**other**).

Configure Field Display Conditions: Please attach your employment resume:

Hide the field when the following conditions are met.

Section	Question	Condition	Value	Operator	Grouping	
General Information ▾	Gender ▾	Is Exactly ▾	Female ✳	AND ▾	1 ▾	✖
Work Experience ▾	WorkQuestion ▾	Contains ▾	Yes	OR ▾	1 ▾	✖
Work Experience ▾	WorkQuestion ▾	Contains ▾	No	OR ▾	1 ▾	✖
General Information ▾	Gender ▾	Is Empty ▾		OR ▾	2 ▾	✖
Work Experience ▾	WorkQuestion ▾	Is Empty ▾		OR ▾	3 ▾	✖
General Information ▾	Gender ▾	Is Exactly ▾	Male	AND ▾	4 ▾	✖
Work Experience ▾	WorkQuestion ▾	Is Empty ▾		OR ▾	4 ▾	✖
General Information ▾	Gender ▾	Is Exactly ▾	Male	AND ▾	5 ▾	✖
Work Experience ▾	WorkQuestion ▾	Is Exactly ▾	No	AND ▾	5 ▾	✖

| Add Condition | Save | Save and Exit | Exit without Save |

➢ **Step 3:** after you have entered your conditions information, be sure to select Save to save any conditions you have added.

➢ **Step 4:** Once you return to the Question data grid listing screen the Add/Edit in Condition column next to your question will now display as green, showing that conditions have been entered on that question. If it is not showing as green, click "Save" on the Question data grid listing to refresh your information.

2.6.20.1 Setting Conditional Logic on Multiple Question

If you have multiple questions in the same section that have the exact same conditional logic, you can set the logic for all the questions at the same time without having to go in on each separate question to set it.

Best Practice Tip: Once a question has logic set on it you will not be able to select it for the multiple selection option. Therefore, when setting logic on multiple questions, set that multiple logic first. Then

go back in on the individual questions and add the additional conditions that apply only to that single question.

➢ **Step 1:** While in the Question Data Grid Listing, select the all the questions you want to enter the logic on, by entering a check mark in the box next to that question.

➢ **Step 2:** Click the Add Condition(s) button.

➢ This will open the Add condition box, notice that it list at the top of the box all the questions it will be adding that condition to:

➢ **Step 3:** Enter the conditions, as you would if it was just for one question, that apply to all the questions and click the Save and Exit to return to the Question Data Grid listing. All the questions will now have the condition set on them.

➢ **Note:** If you need to add additional conditions on just one of the questions that you just updated in the group, you can click on the Add/Edit next to that question and add the additional conditions that apply only to that question.

2.7   Creating Request (Nomination) Section Instructions to the Applicant

When you have created your application you can add Request Sections to the Application.

Request Sections are used if the applicant needs to have someone else fill out a portion of their application on their behalf. Request Section are not viewable by the applicant. It usually is used for Letters of Recommendation, for a Guidance Counselor to upload transcripts or other school records, or possibly to have a Parent to fill out information.

When you create the actual request section the Editor box in the section set up is used to enter the instructions to the individual requested to complete the section. However you also need to have instructions for the applicant.

You would enter the applicant's instructions under the **Request Instruction** icon in the Application's Setup Dashboard.

These instructions would be clear, detailed instructions to the applicant as to how to use this section and what each request section in the application is requesting, so they know who they are to request to complete that section.

Exercise 1

➤ **Step 1:** Select from the **Home Page – Setup Application Forms**
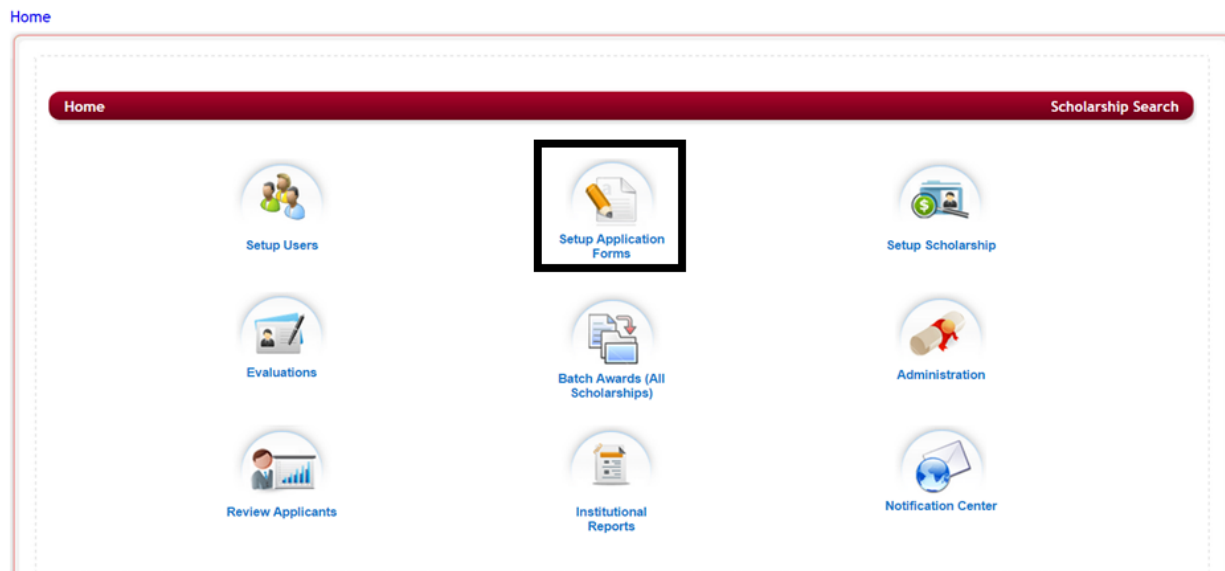
➤ **Step 2:** Select from the listing of applications the application you want to setup the Request Section Instructions for by clicking on the name in the Application Form column.

➢ This will bring you to the Application's Dashboard

➢ **Step 3:** From the Application's Dashboard, click on the **Request Instructions** icon.

Request Instructions

➢ The Request Instructions Editor box will appear:

Design Mode: The html editor works exactly the same way as Microsoft Word works. Type the information into the body of the editor as you would be typing and formatting it in a Microsoft Word document. You can also copy and paste the formatted text from other documents.

HTML Text: You can create this page using html tags by clicking on the HTML Text tab present beside the Design Mode tab. Enter the html tags with the content and it will display all the content as formatted.

➢ **Step 4:** type your instructions in the Editor box formatting them just as if you were typing a word document using the format icons provided at the top of the editor box.

The following is an example of instructions to the applicant:
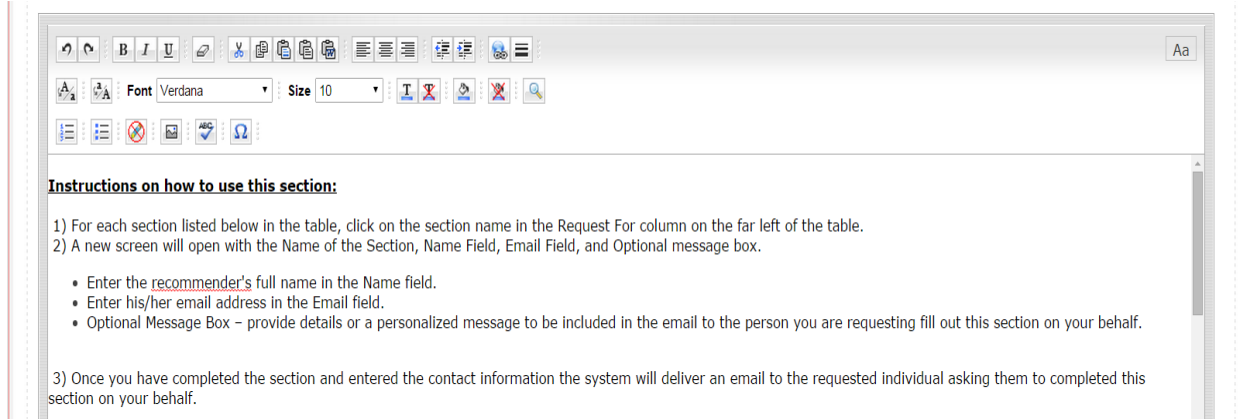
Note: When you have multiple request sections in your application it is important to also explain in your instructions what those section are for and who should be requested to complete:

For Example:
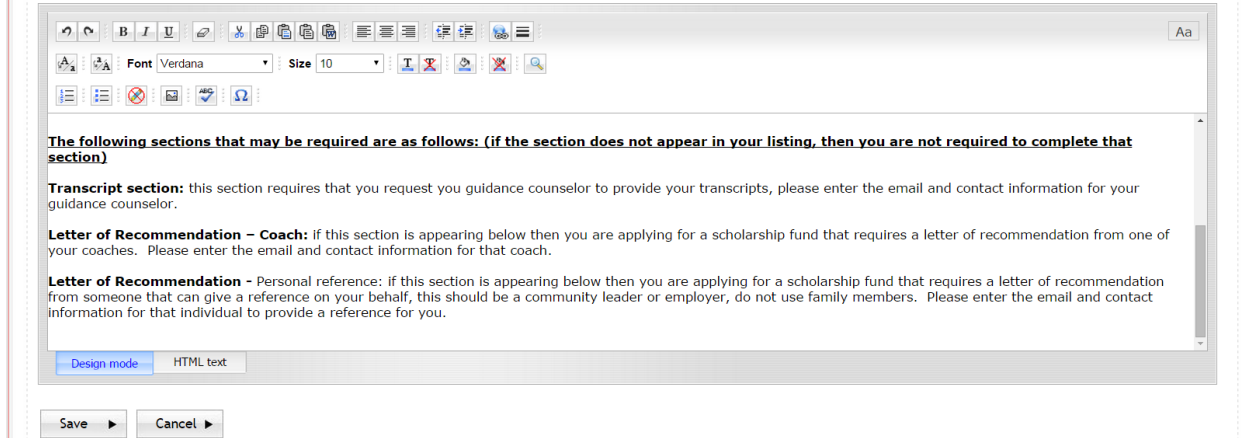
➢ **Step 5:** Once you have finished entering all your necessary instructions, hit Save to save your changes.

2.8   Manage Text Tabs

There are five sections of text tabs that can be used to add information/instruction pages and tabs for the Application of Form. The text tabs are viewed by the Applicants in the applicant's dashboard for the application they were activated on.
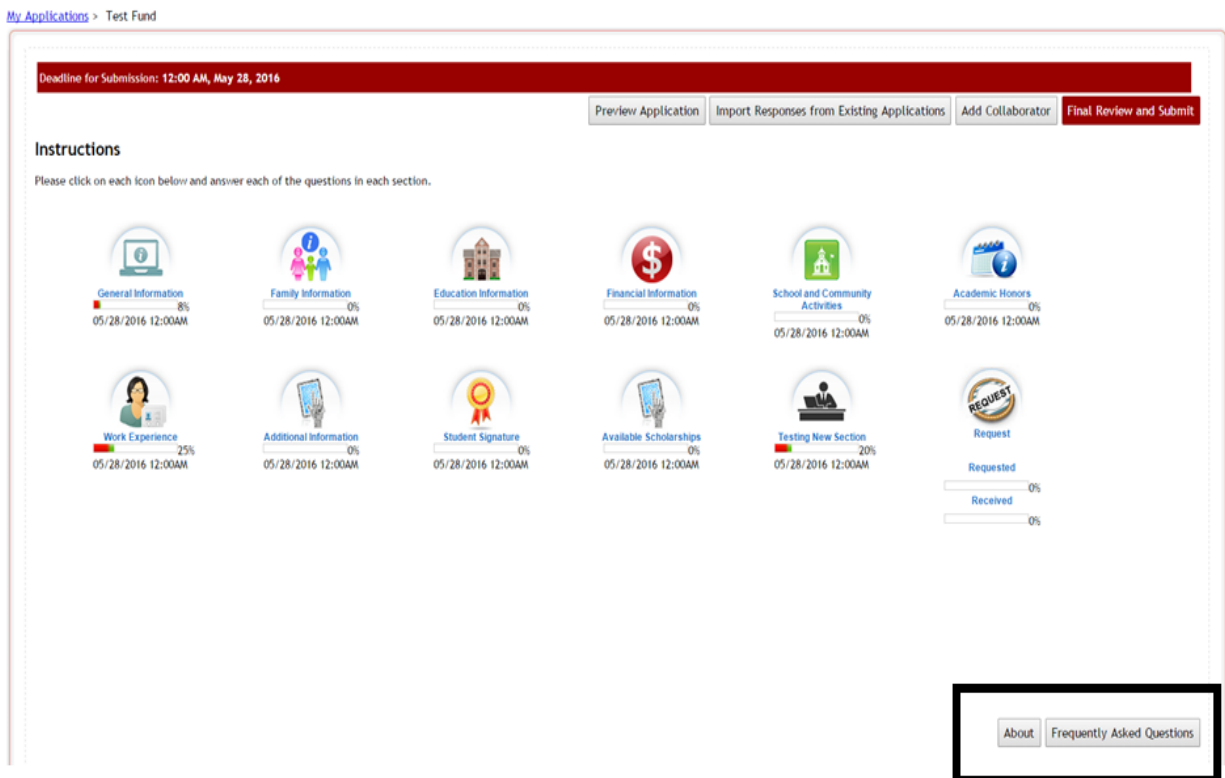
These are customized text pages and the display name can be changed to fit the needs of the application.

Some examples of use are:

Introduction: Introduction page introducing the Applicants to the Fund Source application process and giving a brief overview on how to apply.

Frequently Asked Questions: FAQ page for the Applicants to know about the frequently asked questions for the Fund Source they are applying for
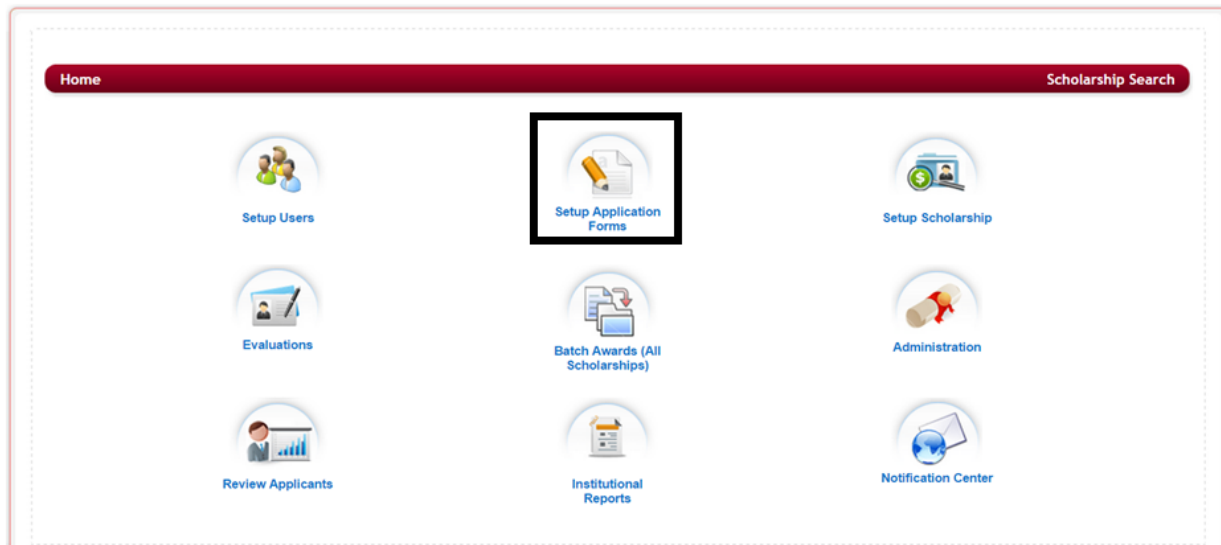
Contact Information: Contact Information page for the Applicants to know the contact information about the person to contact in case of any questions related with the Fund Source Application.

To add Text tabs to the application form:

Exercise 1

➢ **Step 1:** Select from the **Home Page – Setup Application Forms**

➢ **Step 2:** Select from the listing of applications the application you want to setup the Text Tabs for by clicking on the name in the Application Form column.

➢ This will bring you to the Application's Dashboard.

➢ **Step 3:** Select the Manage Text Tabs icon in the Application's Dashboard

Manage Text Tabs

➤ The following screen will appear and you have the ability to create 5 separate text tabs.

Manage Text Tabs

Text Tab 1   Text Tab 2   Text Tab 3
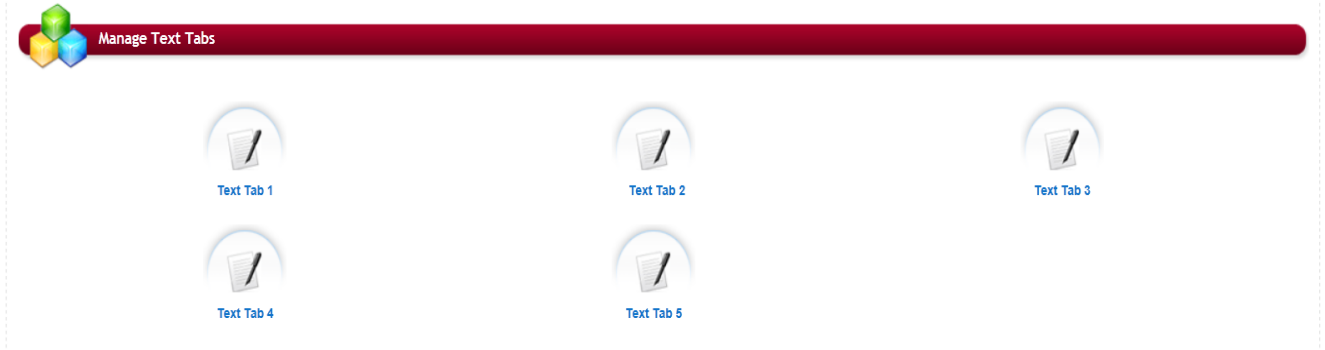
Text Tab 4   Text Tab 5

➤ **Step 4:** Select one of the Text Tab icons. If all selected, the tabs will appear to the applicants in the same order as the tabs are numbered. (Text Tab 1will be first, text tab 2 second, etc.)

➤ The following editor box will appear:

Display Name:

Design mode | HTML text

☐ Published

Save ▶   Cancel ▶
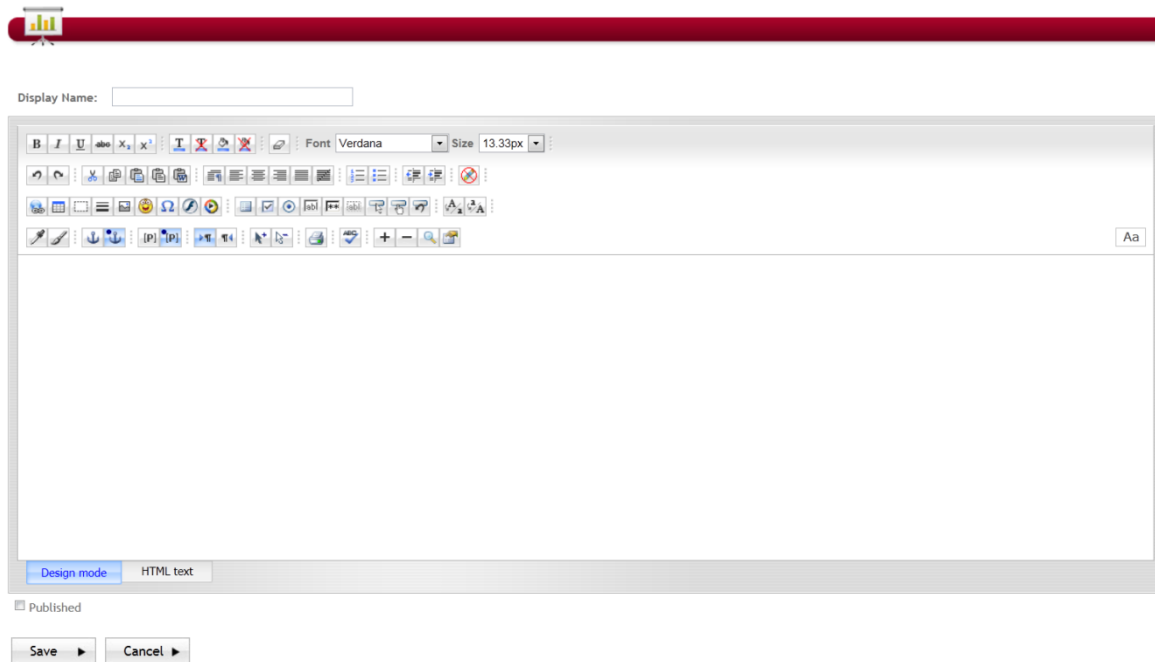
The Admin will enter the text information, check publish to have it display as part of the application and the click on Save to save it to the application.

Step 5: Enter the Display Name: This is the name you want to call this page. This is the name that will be displayed to the applicant and appear on the page button and page header.

Step 6: Enter your text information in the editor box.
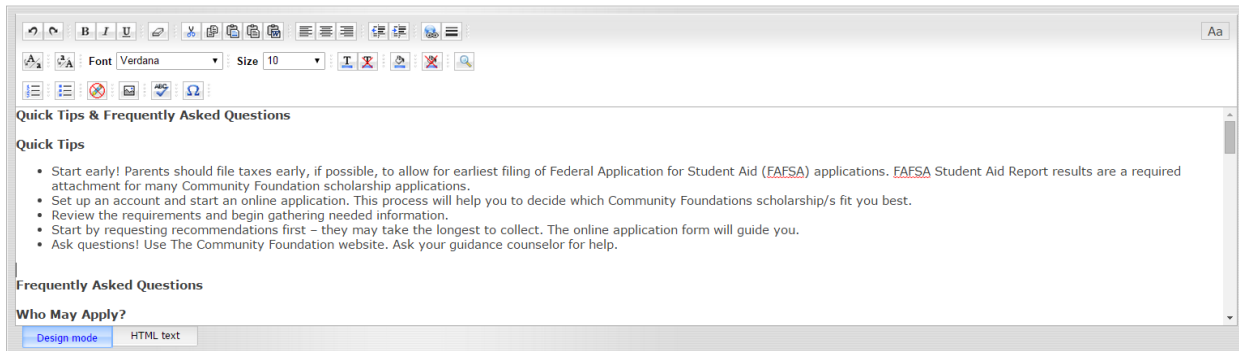
Design Mode: The html editor works exactly the same way as Microsoft Word works. Type the information into the body of the editor as you would be typing and formatting it in a Microsoft Word document. You can also copy and paste the formatted text from other documents.

HTML Text: You can create this page using html tags by clicking on the HTML Text tab present beside the Design Mode tab. Enter the html tags with the content and it will display all the content as formatted.

➢ At the bottom of the page you will notice a Published box. In order for the text tab to appear on the applicant's dashboard this must be checked. If you no longer want a text tab to appear then you can unselect this and it will not publish to the dashboard.
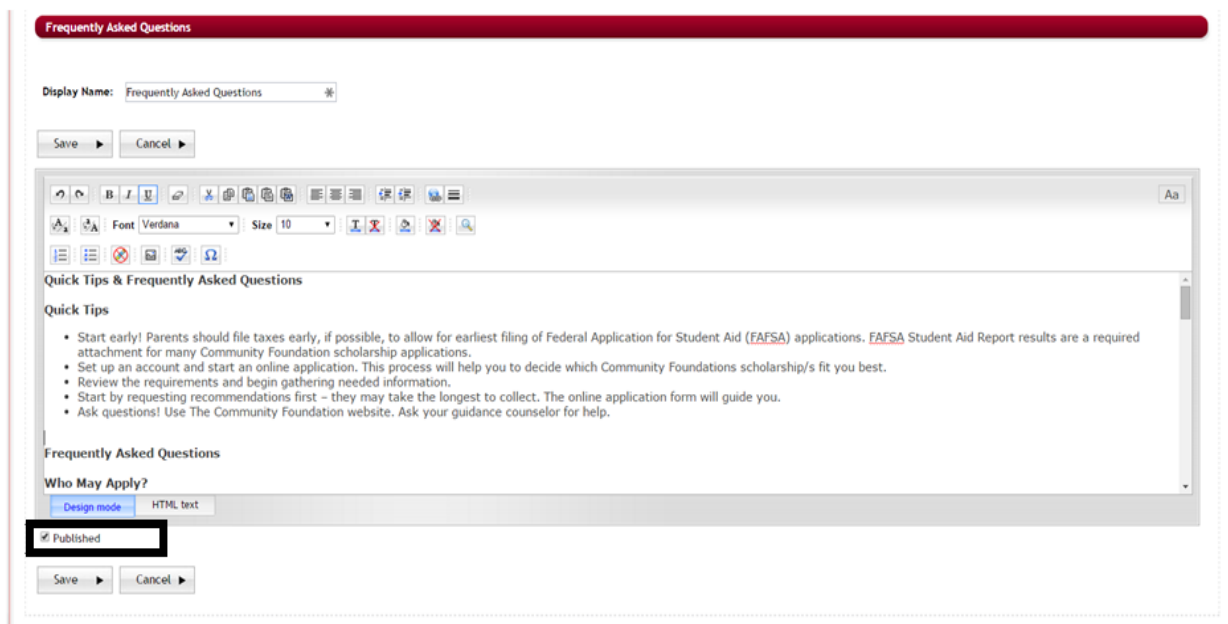
➢ **Step 7:** Select the Published box at the bottom of the page by putting a check in that box.

➢ **Step 8:** Click the save button after adding all the content to save the changes and go back to the Manage Text Tabs dashboard.

➢ Repeat these steps for each text tab that you want to publish.

2.9   Setting the Submit Application Message

When an applicant submits their application they receive an online submittal message that will appear on the screen after they have completed the submittal process.

Each application form has its own submittal message and will need to be updated for each.

Exercise 1

➢ **Step 1:** Select from the **Home Page – Setup Application Forms**
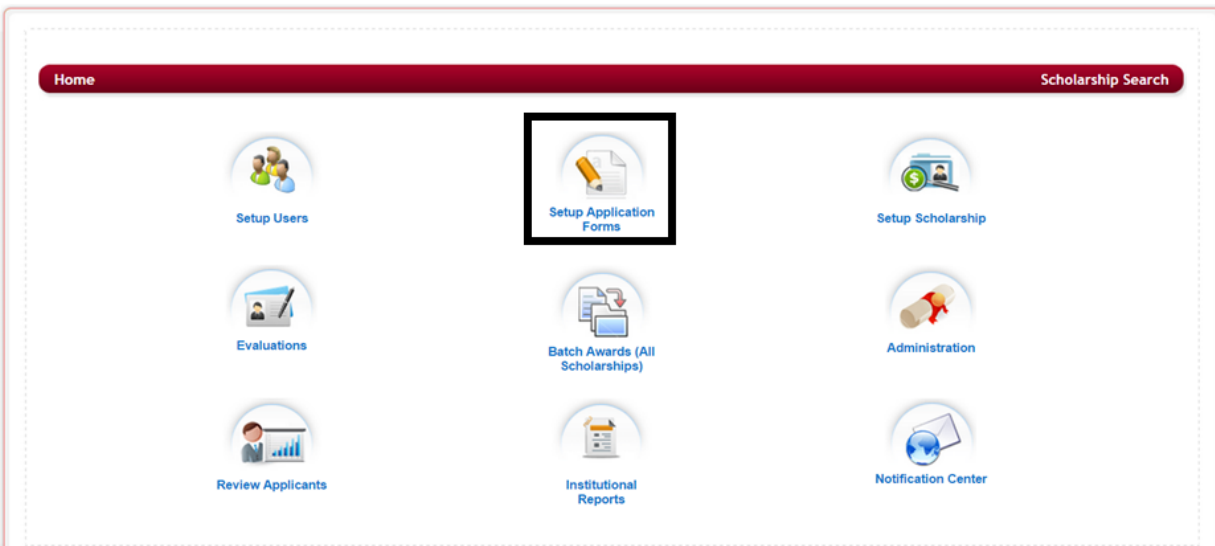
➢ **Step 2:** Select from the listing of applications the application you want to setup the Submittal Message for by clicking on the name in the Application Form column.

➢ This will bring you to the Application's Dashboard.

Home > Applications > Testing Form applicants with Multiple funds & Multiple Request Sections

➢ **Step 3:** Select the Submit Application Message icon
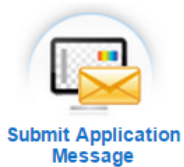
➢ This will open the Application Submit Message editor box

Design Mode: The html editor works exactly the same way as Microsoft Word works. Type the information into the body of the editor as you would be typing and formatting it in a Microsoft Word document. You can also copy and paste the formatted text from other documents.

HTML Text: You can create this page using html tags by clicking on the HTML Text tab present beside the Design Mode tab. Enter the html tags with the content and it will display all the content as formatted.

➢ **Step 4:** Enter, in the editor box, the online message that you want the applicants to see after they have submitted their application.

➢ **Step 5:** Click save to save your information and return to the Application's Dashboard.

Note: This should be a brief "Thank You" message. An email confirmation will also be sent to the applicants where you can include more details about the application process if necessary. The email template is located in the Notification Center for each individual application (**Evaluations>Notification Center>Application: Submit Confirmation).** Please see the Notification Center Training guides for more detailed information on editing those templates.

3.   Using a Master Application Template - Best Practice

There can only be one application designated as the Master Application.

The Master Template can then be used for cloning new applications going forward. Any changes that are made to the Master Application template can then be pushed down to any active applications that have been cloned from it.

A Master Application should be used with all External System Integrations.

If you have multiple applications that are similar in most sections, (i.e. General Information, Family Information, Financial Information, Letters of Recommendation, etc.), but a few minor changes in others, it is ***best practice*** to create a master application that contains all the necessary sections for all those applications.

You would also want to use a Master Application if you have multiple applications that are similar and you want the applicant's information to be able to be imported from one application to another.

If you have a Master Application Template and need to make an update to a section in your application that affects all your applications going forward, you can make that update to the Master Template and then push that change down to the appropriate applications. When you push changes to applications they must be *unpublished*, with a *future* deadline date in order to accept the change.

Exercise 1

➢ **Step 1:** Build your Master Template Application adding all the required sections and questions needed for your cloned applications. In the General Setup select the **No Deadline Option** as this will not require a deadline date.

   Note: When cloning your application all the email templates from the Master Template will clone as well as the evaluation process tasks. If all are similar for each application, you might find it beneficial to add those to the master template prior to cloning your applications to keep from having to re-create them again in the cloned applications. This is only beneficial for cloning the Applications, note though, that when pushing changes from the Master Application, the only changes that push are to the Application Form only, not other items can be updated.

➢ **Step 2:** Once you build your Master template application you will need to have your **Global Admin** set that Application as the Master Template. (This is only a Global Admin functionality, no other role type can perform this functionality) (See: **Setting the Master Template Application**)

➢ **Step 3:** Use the Master Template to clone your actual applications. When cloning select the Master Template in the "Select the Template for an Application".

Clone Existing Applications

| Save ▶ | Save & Exit ▶ | Exit ▶ |

Select the template for an application: Master Template ▾

*Scholarship Application Name: Fund Application ✱

*Description: 2014-2015 Fund Application

This will make an exact clone of the Master Template you have built, including all the sections and questions, email templates, messages, and evaluation setup that you have created in the Master Template. **Note:** Ad hoc reports and fund management will not clone.

➢ **Step 4:** When cloning make sure to adjust the General Information setup to fit the new application (i.e. application name, deadline dates, Instructions, etc.).

➢ **Step 5:** Make any needed adjustments to the Sections and Questions in your new application. You can add sections and questions, as well as delete sections and questions. You will also want to make the adjustments for this application in all the other setup items in the Application's Dashboard and the Evaluation Setup that are not required for this application.

   Important: Use extreme caution not to change xml names for items that you keep from the Master Template. (See: Importance of the XML name in the Master Template)

➢ **Step 6:** Once you have cloned the applications and made all the required adjustments to them, if they are active and you need to make a universal change to a question or section that was cloned down from the Master Template, you will always make the change in the Master Template and then push the changes down to the appropriate applications (**See: Pushing Changes from the Master Application**)   Remember though that only changes to the actual application form (Sections and Questions) will be pushed, all other items will have to be adjusted in each individual application.

3.1   Importance of the XML Name in the Master Template

Using the Master Template to clone other applications will keep all the XML Names consistent throughout all your sections and questions for all your cloned applications.

XML names are how the system maps one item to another.

When pushing changes from the master template, it will look for that same XML name in the cloned application. When if finds the match, it will make the appropriate change. Therefore, it is important to remember, if you change any XML name that originated from the Master Template, you have broken

the link to the Master Template for that specific item and the Master Template will not be able to make any changes to that item, as it will not be able to map to it.

To help keep consistency in your XML names. When creating your Master Template it is a **best practice** to add the MT in front of every XML Section Name and Question Name. That way when you are in a cloned application you will know exactly what was cloned down from the Master Template and what was added to the application later and not part of the Master Template.

For Example:
Section Names: for the General Information Section, use the XML name MTGeneralInformation.

Question Names; for the First Name, enter the xml name as MTFirstName,

Remember, XML names are not the name the applicant views, they are only for internal purposes only.

3.2 Setting the Master Application (Must Have Global Admin Access to Perform)

The **Set Master Application** feature allows you to set an *existing* application as the Master Template. There can only be one application designated as the Master Application. The Master Template can then be used for cloning new applications going forward.

A Master Application should be used with all External System Integrations.

Setting up a Master Template is only available to Global Admins. The setting for this located in the Manage Site Setting under the Administration Dashboard.

Exercise 1

➢ **Step 1:** Select from the **Home Page** – the Administration icon (If you do not see the Administration Icon on your dashboard you do not have authority to perform this function. Please see your Global Admin for assistance)
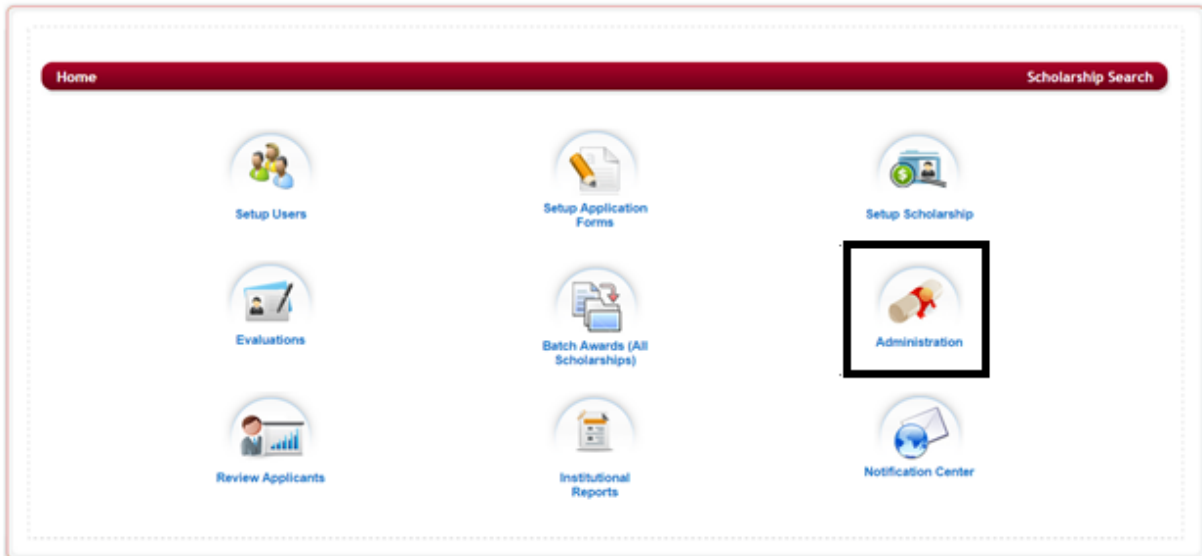
Administration

> ➤ This will open the Administration Dashboard
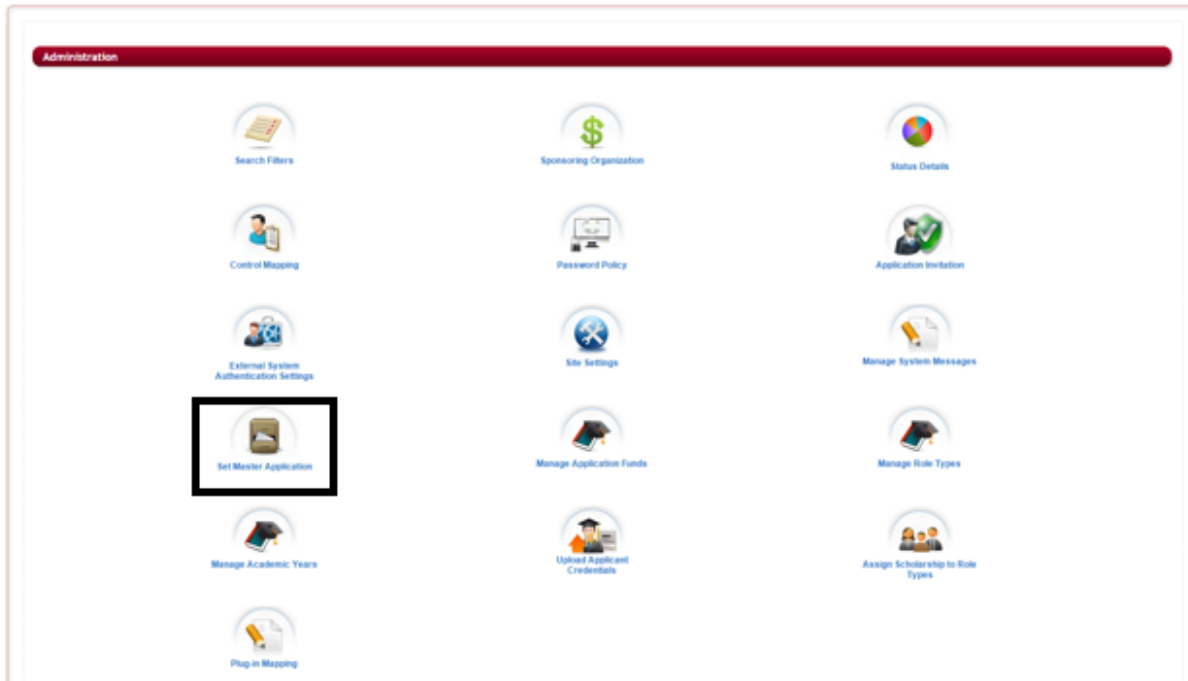
> ➤ **Step 2:** Select the Set Master Application Icon
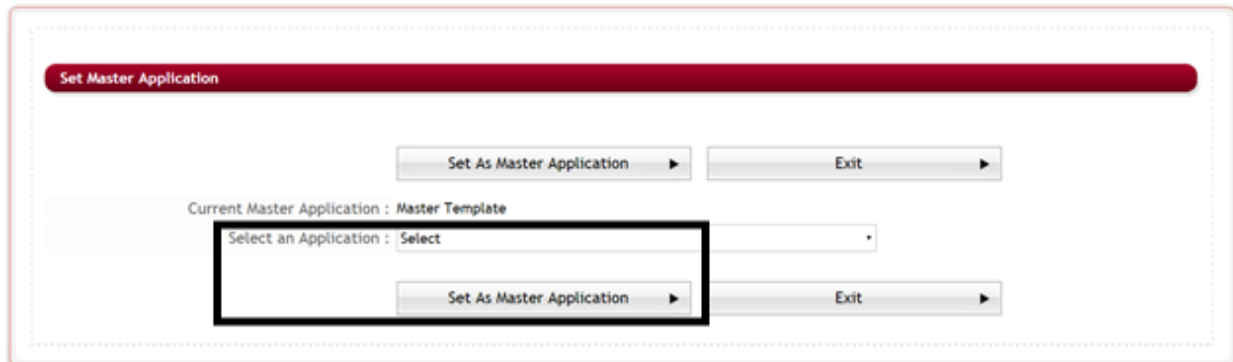
Set Master Application
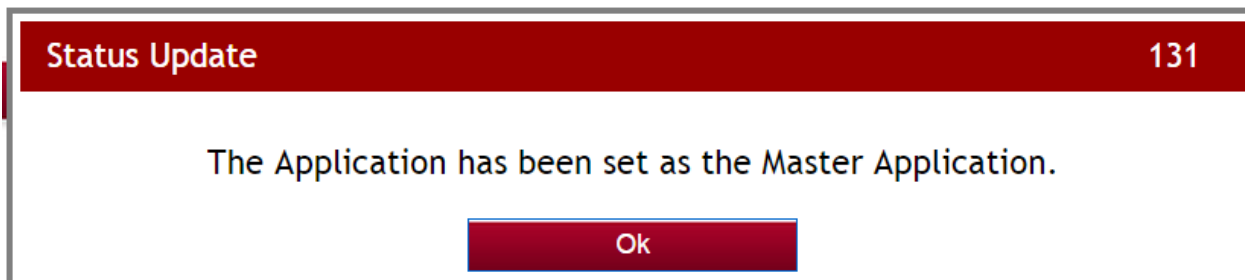
➢ This will open the Set Master Application setup screen. The Current Master Application should be blank if you have not set a Master application already.

Note: If there is a current Master Application, already, then changing it will only push any new changes down to applications that are then cloned from the *new* Master Application. Any applications that were previously cloned from the prior Master Application, will no longer have any new changes pushed down that are created in the new Master application.

➢ **Step 3:** Click the Drop down arrow in the "Select an Application" and select the Master Template that was created.

➢ **Step 4:** Click the **Set As Master Application** button

➢ **Step 5:** Click OK on the Status update.

➢ "The Current Master Application" should now show the name of your Master Template.

> ➢ **Step 6:** Click exit to complete the setup and return to the Administration Dashboard.

3.3   Pushing Changes from the Master Application

When you are using a Master Template to clone your applications, anytime that you need to make a universal change to all your active applications, you will want to make the change in the Master Template first and then push those changes down to your applications.

> **Important:** This will only push to applications that were cloned from the Master Template and in the following status: (in both scenarios the published column would need to show as NO for the application form.)
>
> 1. All **Active** Applications who **don't have a fund associated** and **have an End Date and time greater than the current date and time** (The published column in the application listing would show as No as no fund has been associated)
> 2. All **Active** applications who **have unpublished funds Associated** and **have an End Date and time greater than the current date and time.** (The published column in the application listing would show as No as the fund associated has not yet been marked as published)
>
> *It is recommended that once you start your application process that no additional questions be added to the application, therefore it is best to do this push prior to releasing your applications to the applicants.*

When pushing changes from the Master Application you can choose to push all the originating items from the Master Application down to the cloned applications, or just specific sections and/or questions.

Exercise 1

> ➢ **Step 1:** Select from the **Home Page – Setup Application Forms**
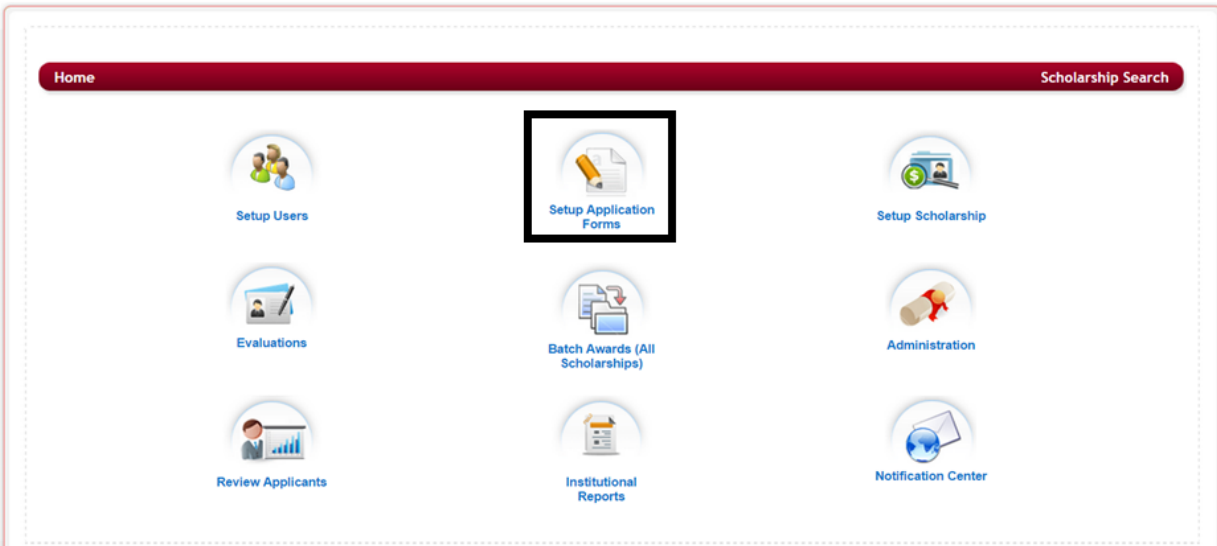
> **Step 2:** Select your **Master Template** application in the listing of applications by clicking on the name in the Application Form column.

> This will bring you to the Applications Dashboard.

➢ **Step 3:** Select the **Sections and Questions** Icon.

Sections and Questions

➢ This will open the Sections page, listing all the available sections in your Master Template application.

Sections

| Add Condition(s) | Create Section | Clone Existing Section |
| Copy Question Conditions from Master Application | | Push Changes From Master Application |

			Display Order			Activate Section	Staff Section	Request Section	Hidden From Applicant	Section Name	Section XML Name	Section Type	Deadline	Conditions
☐	📝	✖ 🔍	1	▲	▼	☑	☐	☐	☐	Student BIO Section	BIO	Application	06/09/2030	
☐	📝	✖ 🔍	2	▲	▼	☑	☐	☐	☐	Student Address	ADDRS	Application	06/09/2030	Add/Edit
☐	📝	✖ 🔍	3	▲	▼	☑	☐	☐	☐	Student	STUDENT	Application	06/09/2030	Add/Edit
☐	📝	✖ 🔍	4	▲	▼	☑	☐	☐	☐	Admit Info	ADMITINFO	Application	06/09/2030	Add/Edit
☐	📝	✖ 🔍	5	▲	▼	☑	☐	☐	☐	STNCS	STNCS	Application	06/09/2030	Add/Edit
☐	📝	✖ 🔍	6	▲	▼	☑	☐	☐	☐	Program Information	PROGRAMS	Application	06/09/2030	Add/Edit
☐	📝	✖ 🔍	7	▲	▼	☐	☑	☐	☑	STUDENT INFORMATION	STUDENTINFORMATION	Application	06/09/2030	
☐	📝	✖ 🔍	8	▲	▼	☑	☐	☐	☐	General Questions	GENERALQUESTIONS	Application	06/09/2030	Add/Edit
☐	📝	✖ 🔍	9	▲	▼	☐	☐	☐	☐	SPECIFIC DEPARTMENT QUESTIONS	MergedSection	Application	06/09/2030	
☐	📝	✖ 🔍	10	▲	▼	☑	☐	☐	☐	Ag and Bio	SAGBS	Application	06/09/2030	Add/Edit
☐	📝	✖ 🔍	11	▲	▼	☐	☐	☐	☐	Ag and Bio2	SAGBS2	Application	06/09/2030	

➢ **Step 4:** Make all your necessary changes to the Sections as well as to any Questions within your sections that need updated.

➢ **Step 5:** Once all your changes have been completed return to the Section listing page to begin the Push Changes process.

➢ Step 6: Click the **Push Changes From Master Application** button

➢ This will open the Push Changes From Master Application selection page:

➢ **Step 7a: Source: Master Template:** If you want **everything** that has been updated in the Master Template, from the beginning of its creation, not just the changes you made, to be pushed put a checkmark in the *Push All Sections, Questions and Conditions from Master Template.*

```
┌─ Source: Master Template ──────────────────────────────────────────────────┐
│                            ☑ Push all Sections, Questions and Conditions from Master Application │
│   All Sections of this Master Application: [Select            ▼]            │
│          All Questions from those Sections: [Select            ▼]            │
└────────────────────────────────────────────────────────────────────────────┘
```

➢ This will **push all the changes** to all the applications that have been cloned. (This is selected by default, you will need to uncheck it if you are only selecting specific changes be pushed.) The following scenarios will happen if you select the "Push all" feature:

    a. *All Active Sections* along with their questions from the master application will be pushed to the child applications. By push we mean that if the sections and questions are present, then they will be updated, or else they will be created in the target application.

    b. Sections and questions pushed from master application will appear in the same order in target applications as that of master application. The individual sections and questions belonging to target applications only (meaning after the application was cloned and you added additional sections) will appear after the sections and questions pushed from master application.

    c. Sections conditions and question conditions will be copied over to target applications. Only those conditions will be copied over to target applications that have the related sections and questions present in the target application. By related sections and questions we mean condition referring to section and question in master application has to be present in target application with the same sectionxmlname and questionxmlname.

    d. Existing conditions will remain there and the conditions from master application will be added at the end with new grouping than that of the conditions already present in child applications.

    e. Linked questions, DependentDropDown Condition, Calculation Question will be copied over to the target application, but their dependencies should relate section and questions present in target application same as conditions.

➢ **Step 7 b:** However, you may **not want to push** all of your changes. If that is the case **uncheck the box** and proceed with selecting the specific Sections and Questions that you want to push.

➢ **Step 8:** If not pushing all, click on the dropdown arrow in the **All Sections of this Master Application** and select all the Sections that contain the changes you are making. Selecting just the selected sections pushes using the following scenarios:

    a. All Selected Sections along with their questions from the master application will be pushed to the child applications. By push we mean that if the sections and questions are present, then they will be updated else they will be created in the target application.

    b. All Sections and questions relating to master application will appear in the same order in target applications as that of master application. The individual sections and questions belonging to target applications will appear after the sections and questions pushed from master application.

c. Sections conditions and question conditions will be copied over to target applications. Only those conditions will be copied over to target applications that have the related sections and questions present in the target application. By related sections and questions we mean condition referring to section and question in master application has to be present in target application by same sectionxmlname and questionxmlname.

d. Existing conditions will remain there and the conditions from master application will be added at the end with new grouping than that of the conditions already present in child applications.

e. Linked questions, DependentDropDown Condition, Calculation Question will be copied over to the target application, but their dependencies should relate section and questions present in target application same as conditions.

➢ **Step 9:** Click on the dropdown arrow in the **All Questions from those Sections** and select all the Questions that have the changes you are making for the sections you chose above. Selecting just the selected sections pushes using the following scenarios:

a. User will be able to select individual questions only if he selects a single section in the section drop down

b. Questions will be pushed to target applications only if their section exists in target applications.

c. Question conditions will be copied over to target applications. Only those conditions will be copied over to target applications that have the related sections and questions present in the target application. By related sections and questions we mean condition referring to section and question in master application has to be present in target application by same sectionxmlname and questionxmlname.

d. Existing conditions will remain there and the conditions from master application will be added at the end with new grouping than that of the conditions already present in child applications.

e. Linked questions, DependentDropDown Condition, Calculation Question will be copied over to the target application, but their dependencies should relate section and questions present in target application same as conditions.

➢ **Step 10: Select Applications:** If you want to *recreate* all the sections and questions that were originally removed from your cloned applications and have those added back into the cloned applications, then check the **Create Sections and Questions that have been deleted from Child Applications.**

➢ Otherwise **do not check it. If it is not checked, then sections and questions** *deleted from the child applications,* **after they were cloned, will not be** *recreated* **in the child applications.**

If this is not checked, only the **newly created** sections/questions in the Master template and existing sections/questions with the **same xml** in the child applications will be pushed down.

- ➢ **Step 11:** Click on the dropdown arrow in the Select Application(s) and select all the applications you want to push your changes to.

- ➢ Only the unpublished, active applications will appear.

- ➢ Step 12: Confirm that you have selected everything you want updated correctly as this cannot be undone.

- ➢ Step 13: Click the **Push** Button to push your changes.

3.4   Copying Question Conditions from Master Application to Child Application

When pushing data from the Master Application you also can choose to copy all the logic conditions that are set on questions in a specific section in the Master Template to it's child applications.

This is useful if you cloned just a single section from the Master template, when you initially clone just the single section the conditions will not clone, therefore if cloned from the master template, you can then go in and click the "Copy Question Conditions from Master Application" choose that section and then have all the conditions added to the section in your new application, as well.

- ➢ **Step 1:** While in the Section listing page for the Master Template Click on the "**Copy Question Conditions from Master Application**" button

➢ **Step 2:** This will open the Copy Question Conditions from Master Application to Child application selection page:

➢ **Step 3:** Select the Section that you want to copy the conditions on.

➢ **Step 4:** Select the Target Application you want the conditions to be copied to.

➢ **Step 5:** A message will appear stating all the existing conditions from the Master template will be overwritten to that section. Click **continue** to proceed.

All the conditions will then be pushed to the section in the Target Application.

4. Additional Application Setup Features
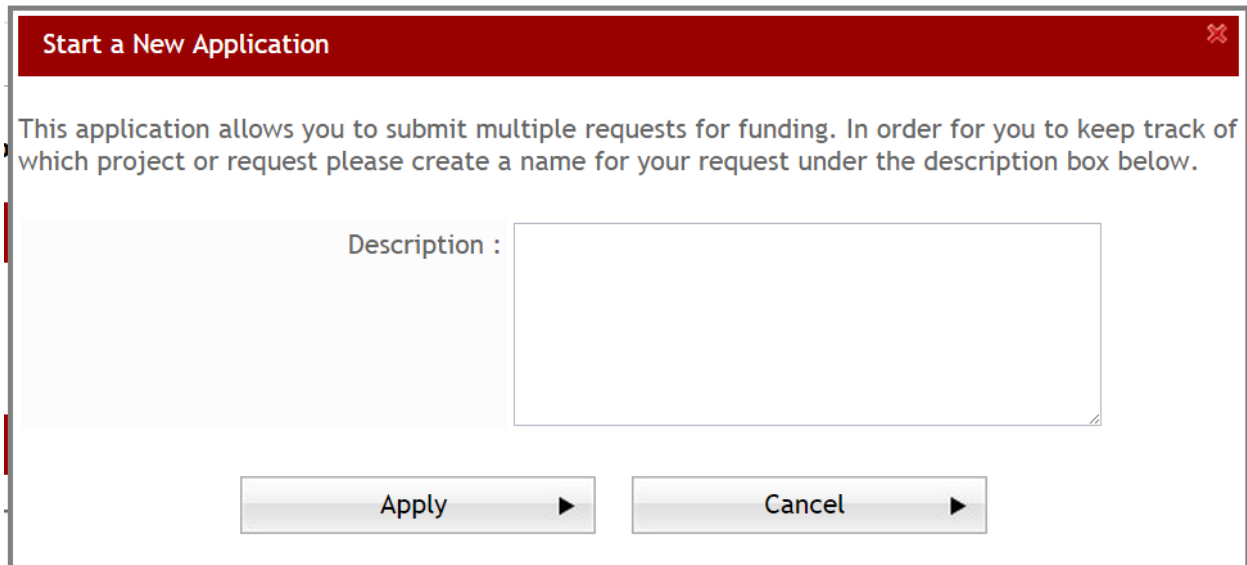
4.1   Multiple Submission

This allows an applicant to apply multiple times to the same application without having to create two accounts.

If you are going to allow your applicants to be able to apply multiple times to the same application form, you must enable the Multiple Submission feature by selecting "yes" to **Enable Multiple Submission** in the **General Information** setup for the application(s) you are allowing this on. This is done on an application basis, so you can have other applications that you may not allow this on, as well.

4.1.1   How does an applicant apply using Multiple Submission?
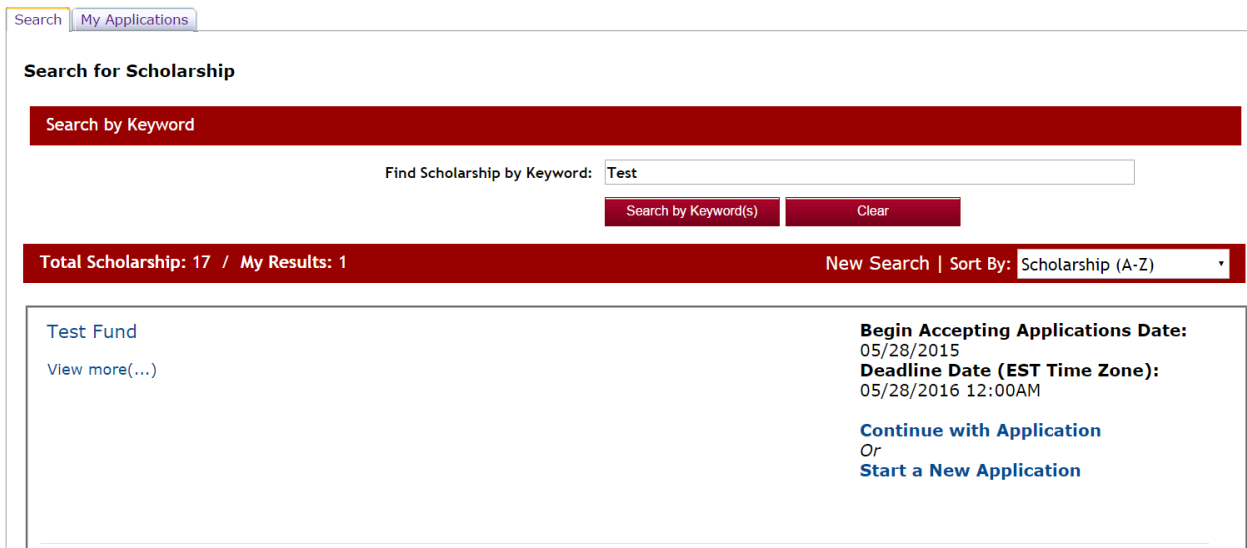
Once you have enabled the multiple submission on the application's General Information setup, when the applicant logs in and clicks the Apply for the first time on that application the following box will appear:

Start a New Application

This application allows you to submit multiple requests for funding. In order for you to keep track of which project or request please create a name for your request under the description box below.

Description :

Apply ▶   Cancel ▶

The applicant will need to give a description to each separate submission by entering an identifying description in the Description field.

This description will help them keep track of which submission is which in their My Applications Tab, so that when they return they know which one to click on.

Each time they want to start and additional submission, they will need to search for the application again in their search tab, and select the **Start a New Application.**

Search | My Applications

Search for Scholarship

Search by Keyword

Find Scholarship by Keyword: Test

Search by Keyword(s)   Clear

Total Scholarship: 17 / My Results: 1   New Search | Sort By: Scholarship (A-Z)

Test Fund

View more(...)

Begin Accepting Applications Date:
05/28/2015
Deadline Date (EST Time Zone):
05/28/2016 12:00AM

Continue with Application
Or
Start a New Application

Each time the applicant clicks the Start a New Application on the same application, the Request Description will appear for them to enter a new description for each submission.

When they want to continue with the same application they would click the **Continue with Application** and a box would appear for them to select which application they want to continue with:

Test Fund

Begin Accepting Applications Date: 05/28/2015
Deadline Date (EST Time Zone): 05/28/2016
12:00AM

Select an Application

#	Scholarship	Date Created	Tag Description
1	Test Fund	09 Jun 2015 18:11:45	App 1
2	Test Fund	09 Jun 2015 18:15:59	App 2

4.2   Proxy

The Proxy feature allows an applicant to apply on behalf of someone else. If the user they are applying on "behalf of" already has a user account they can proceed with completing the application for them. If they do not have an account, then they can create a new account for them. An email will go out to that individual notifying them that an account has been created.

Important Note: If you have login integration with your organization's software, and the Global Admin has set the *Enable user Creation using CF t*o "**no**" in the Administration>Site Settings: General Settings, you will not be able to create the user account. Only accounts that have already been created will be able to be selected.

To activate this functionality, when creating the application in the **General Information** setup you must first select **"yes"** for the **Enable Multiple Submissions,** then the **Enable Proxy** will appear below that, and then select **"yes"** to enable the proxy.

4.2.1   How does an applicant use the Proxy feature?

➢ **Step 1:** When an applicant logs in and selects and application to apply to, if the Proxy feature is activated the following box will appear on their screen:

Start a New Application

This application allows for a proxy to fill out the form on behalf of someone. Please select which option applies to you.

○ Apply for Self ○ Apply on behalf of Someone

➢ **Step 2 a: If they select the Apply for Self:** The submission description box will appear just like it does if using the multiple submission. They will need to enter a description in the box and click **Apply** to proceed with the application.

- ➢ **Step 2 b: If they select Apply on behalf of Someone:** A box will appear, where they will search to see if the applicant they are applying on behalf of currently has a user account.

- ➢ **Step 3:** The proxy applicant will then search for the individual they are applying for. The Search result screen will appear:

- ➢ **Step 4 a: If there is an account** for the individual they will see the name listed in the box below, and will click the **Select** next to that user's name: *(Skip the following steps and proceed to Step 7)*

Important Note: If you have login integration with your organization's software, and the Global Admin has set the *Enable user Creation using CF t*o "**no**" in the Administration>Site Settings: General Settings, you will not be able to create a new user account. Only accounts that have already been created will be able to be selected. *You will not be able to add this user at this time.*

➢ **Step 4 b: If there is not** an account for the individual they will see an **Add User** line that they can click on to create a user account for the individual.

Start a New Application   ✖

⬤ Apply for Self ⦿ Apply on behalf of Someone

Click on the Select link to select the appropriate applicant or Click on Add User to create a new applicant
┌─ Search By: ───
│ Last Name: First Name: Email:
│ [   ]   [   ] 🔲   [jones@cf.com   ]   [**Search**]
└──
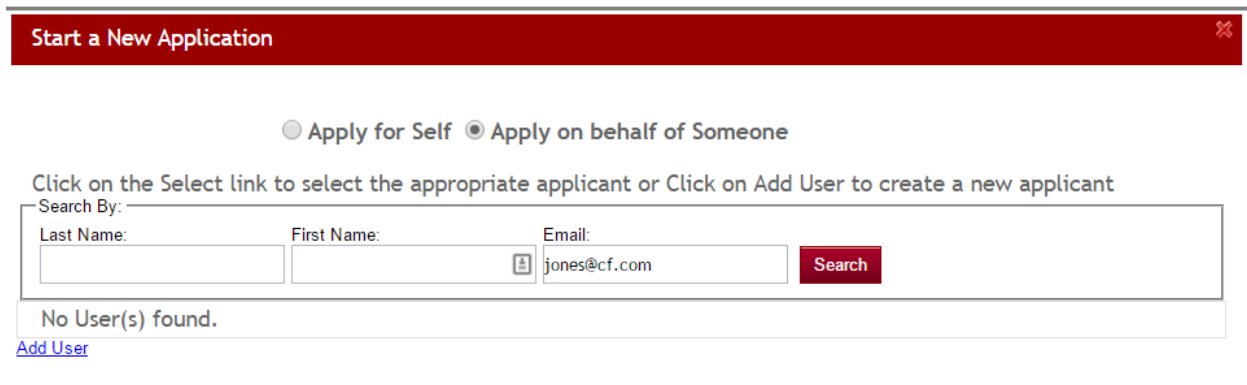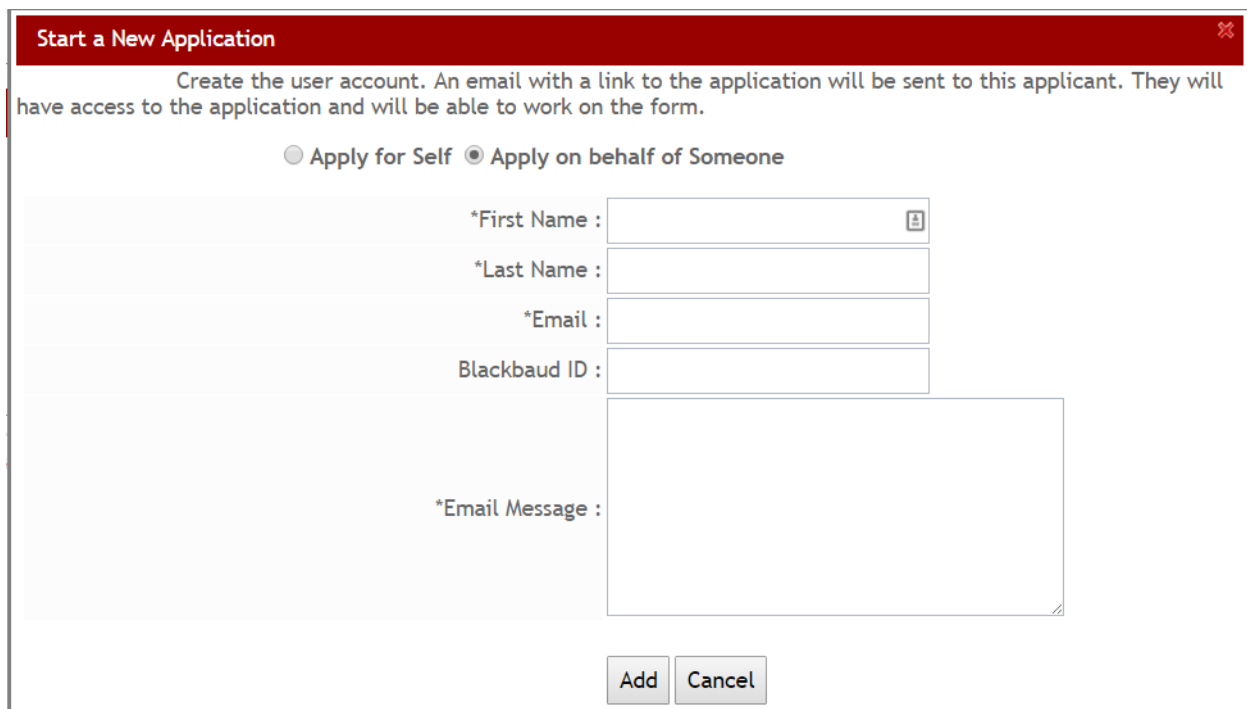
  No User(s) found.
Add User

➢ **Step 5:** Once they click the **Add User** the following box will appear where they will enter the information for the person they are **"applying on behalf of"** and click the Add button. They can use the email message box to enter a personalized message to that individual.

➢ This will create the login account for that individual they are applying on behalf of.

Start a New Application   ✖
        Create the user account. An email with a link to the application will be sent to this applicant. They will
have access to the application and will be able to work on the form.

⬤ Apply for Self ⦿ Apply on behalf of Someone

                    *First Name : [🔲]

                     *Last Name : [   ]

                         *Email : [   ]

                   Blackbaud ID : [   ]

                                  ┌────────────────────────────┐
                                  │   │
                                  │   │
                  *Email Message :│   │
                                  │   │
                                  │   │
                                  └────────────────────────────┘

                              [Add] [Cancel]

➢ **Step 6:** Once they click the **Add,** an email will go out to the email address that was entered, notifying the individual that an application has been started on their behalf and login information so that they can access the application, as well.

---

scholarships@commun | Add to Contacts
Today, Tuesday, Jun 9 07:02 PM | Show Details | View source

Your application is started.

I have created an account for you and started an application form in your behalf.
Click here to start filling the application.

Login Details:
EmailID:
Password:

The contents of this email are intended for the named addressee(s) only. It contains information that may be confidential. If you received this email in error please email Application Administrator immediately and then kindly delete it. Unless you are the named addressee or an authorized designee, you may not use, copy or reproduce this email in any form or disclose it to another party.

➢ **Step 7:** The following box will appear next. The proxy will need to assign a description to this submission.

Start a New Application   ✖

This application allows you to submit multiple requests for funding. You can choose to be included in email communications. In order for you to keep track of which project or request please create a name for your request under description box below.

○ Apply for Self   ● Apply on behalf of Someone

Applicant : jones@CF.com
Include Me In Communication : ☐
Description :

[Apply   ▶   ]   [Cancel   ▶   ]

➢ **Step 8:** The proxy then can proceed with applying for the application on behalf of that individual.

➢ **Step 9:** Once they start the application they will receive the following message that they can click OK on to proceed.

Important

You have successfully become a Proxy for Smith, Cosmo for the Test Fund. Please click 'Ok' to continue on to the Applicant Dashboard.

[Ok]
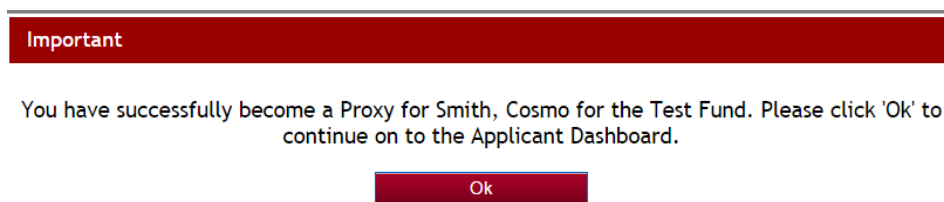
➢ **Step 10:** Once the proxy has started the application they can access it going forward, by logging in as theirself and clicking the **My Proxy Applications tab** in their dashboard:

When the actual applicant logs in they will see the started application in their **My Applications** tab. Just like as if they had started the application. Any of the application's section that were started by the proxy will show completed in the actual applicant's dashboard as if they completed it themselves.

4.3 Collaboration

Collaboration allows an applicant to collaborate with other individuals to help complete specific sections of their application. The collaborator must have a user account in the system in order to be used as a collaborator on an application. If the collaborator does not have an account the applicant can create an account for them, prior to adding them as the collaborator on their application. An email will go out to that individual notifying them that an account has been created.

Important Note: If you have login integration with your organization's software, and the Global Admin has set the *Enable user Creation using CF t*o "**no**" in the Administration>Site Settings: General Settings, you will not be able to create the user account. Only accounts that have already been created will be able to be selected.

Any section completed by the collaborator will be viewable by the applicant.

To activate this functionality, when creating the application in the **General Information** setup you must first select **"yes"** for the **Enable Collaborators.** Once this has been enable the *Add Collaborators* button will display in the top right corner of their dashboard.

4.3.1   How does an applicant use the Collaboration Feature?

➢ **Step 1:** When an applicant logs in and selects and application to apply to, once they are on the dashboard for that application they will click the *Add Collaborators* button that is located in the top right corner of that dashboard.
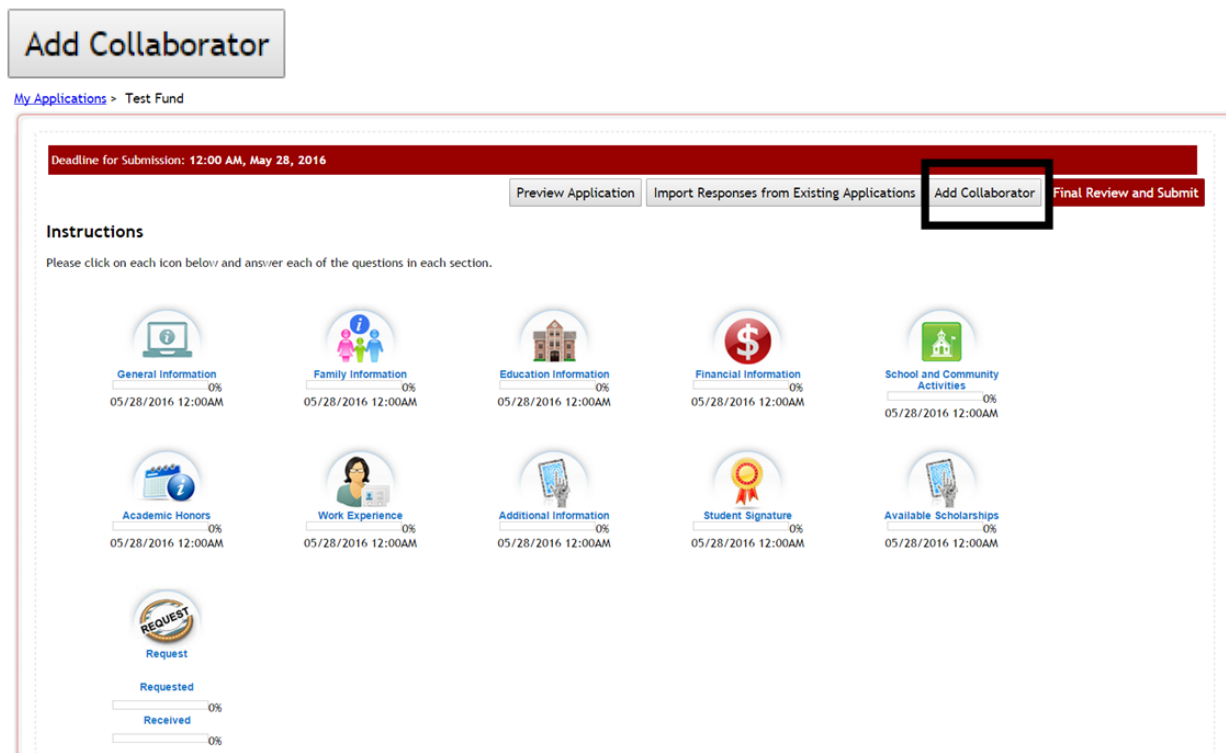
➢ **Step 2:** Once they click on that button, the "My Collaborators" screen will appear. If they have not added any collaborators the listing should be blank.

➤ **Step 3:** They will first need to add the collaborators by clicking on the Add Collaborator button.

➤ **Step 4:** A search box will appear where they will need to search to see if the collaborator already has a user account.

➤ **Step 5:** They will enter the collaborators information and click enter. They can search on all fields or just one.

➤ **Step 6 a: If there is an account** for the individual they will see the name listed in the box below, and will click the **Add** next to that user's name: *(Skip the following steps and proceed to Step 8)*

Important Note: If you have login integration with your organization's software, and the Global Admin has set the *Enable user Creation using CF t*o "**no**" in the Administration>Site Settings: General Settings, you will not be able to create the new user account. Only accounts that have already been created will be able to be selected. *You will not be able to add this user at this time.*

➢ **Step 6 b: If there is not** an account for the individual they will see an **Add User** button that they can click on to create a user account for the individual.

My Applications > Test Fund > Collaborations

➢ **Step 7:** Once they click the **Add User** the following box will appear will they will enter the information for the person they are needing to add as the collaborator and click the **Add** button. They can use the email message box to enter a personalized message to that individual notifying them why they create the account for them.

➢ This will create the collaborators login account for them.

My Applications > Test Fund > Collaborations

➢ **Step 8:** Once the applicant clicks the **Add,** they will receive a message notifying them that the invitation was sent. Click OK.

Message	324

Invitation successfully sent.

Ok
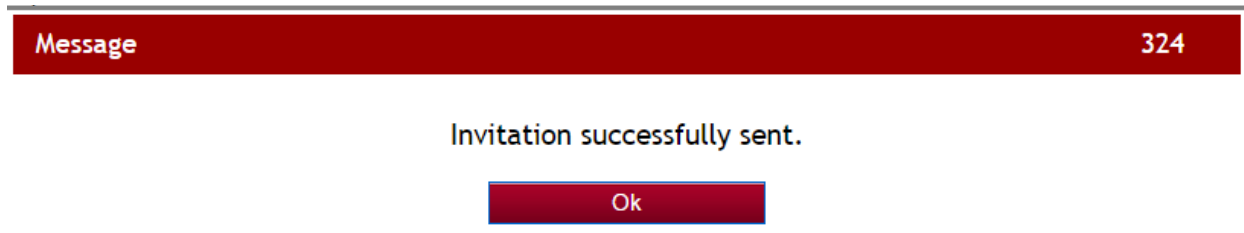
➢ **Step 9:** An email will go out to the email address that was entered, notifying the individual that they have been invited by the applicant to assist in filling out the application and the link to click on to access it. Once they click the link they will need to log in using their own log in information. (If they applicant created the account for them their login information will be included in the email, as well. This will not be included in the email, if the collaborator already had an account, because they should already know their login information.)

Invitation for filling the application.   ↑ ↓ x

scholarships@communityforce.com (scholarships@communityforce.com) Add to contacts 11:22 AM
To:

Christine Smith needs your assistance in filling out an application for Scholarship funding with a Scholarship provider using the CommunityForce Online Software.
Please Click here to access the online application form. If you think that you may have received this request in error, please contact the applicant to verify the request.

Please login with bellow details:
EmailID:
Password:

Thank You
CommunityForce Scholarship Application Portal

The contents of this email are intended for the named addressee(s) only. It contains information that may be confidential. If you received this email in error please email Application Administrator immediately and then kindly delete it. Unless you are the named addressee or an authorized designee, you may not use, copy or reproduce this email in any form or disclose it to another party.

➢ **Step 10:** Once they add the Collaborator, they will return to the "My Collaborators" screen and the new collaborator's name will appear in the Applicant Column. They can add additonal collaborators if needed.

Clicking the Name of the Collaborator will allow the applicant to remove the "Include in Communications" if they decide not to have them included. They can click the red "**X**" to remove a collaborator.

My Applications > Test Fund > Collaborations

My Collaborators			Add Collaborator
Applicant	Email	Include In Communication	Remove
Howard Tori	thoward@cf.com	Yes	✖

Sections associated to Collaborators			Assign Section

Nominator Login | Help | Contact | Logout

➢ **Step 11:** Once the Collaborators have been added, the applicant will then have to select the Sections in the application that they want to assign to them. Click the Assign Section button.

Assign Section

➤ **Step 12:** The Assign Sections screen will appear. Select the section(s) you want to assign to the collaborator by putting a check mark in that section(s) box.

Assign Section

Section	Collaborator
☐ General Information	
☐ Family Information	
☐ Education Information	
☐ Financial Information	
☐ School and Community Activities	
☐ Academic Honors	
☐ Work Experience	
☐ Additional Information	
☐ Student Signature	
☐ Available Scholarships	

Save **Cancel**

➤ **Step 13:** Once you select the section, a select box will open to the right of that section under the Collaborator column. Click on the Dropdown arror in that box and select the name of the Colaborator you want to assign to that section:

Assign Section

Section	Collaborator
☐ General Information	
☐ Family Information	
☐ Education Information	
☑ Financial Information	Howard Tori ▾
☐ School and Community Activities	
☐ Academic Honors	
☐ Work Experience	
☐ Additional Information	
☐ Student Signature	
☐ Available Scholarships	

Save **Cancel**

➤ **Step 14:** After you have assigned all the applicable sections. Click on **Save** to save the assignment

➤ **Step 15:** Once the applicant returns to the "My Collaborators" screen the Section assignment will show at the bottom. They can click the red "**X**" to remove a section assignment.

➢ **Step 16:** Once they are completed assigning all the sections they can click on the application name in the breadcrumb navigation at the top of their page.

Important: The applicant will not be able to submit their application until all sections are completed. The applicant will be responsible for communicating with the collaborator in regards to completing the section.

The applicant will still have access to the assigned section and be able to review those for completeness, as well as, answer any questions they would like to repy to within that same section. However, if they answer a question in that section, the collaborator can stil go in and change their replies.

4.3.2   How does the Collaborator access a Collaborated application

➢ **Step 1:** When the collaborator logs into their account they will see the "My Collaborations" tab in the dashboard.

➢ **Step 2:** When they click on that tab they will see the listing of applications they have been asked to collaborate on.

| Search | My Applications | My Collaborations |

Below is a list of applications that you have been asked to collaborate on with another applicant.

Scholarship	Date Submitted	Deadline	Status
Test Fund		05/28/2016	Pending Submission

> **Step 3:** They will click on the application name under the Scholarship Column and this will open the dashboard for that application showing the section icons for the sections they have been assigned in the collaboration.

Welcome Cosmo Smith   Application Status: Pending Submission   Change Password | View/ Edit Profile | Logout

Home > Collaboration Applications > Test Fund

Make Payment   Preview Application

Financial Information
0 %
05/28/2016 12:00AM

> **Step 4:** They can click on the icons and completed each section assigned.

Once they complete the required information the questions are automatically recorded on the applicant's dashboard for them to review. (**Note:** the collaborator is actually in that section on the applicant's dashboard, therefore any replies they enter and save on that section will automatically appear on the applicant's dashboard)

> **Step 5:** Once the collaborator has completed the section they will simple log out or go to their Home page in the breadcrumb navigation.

Important: Once the collaborator is completed with entering their information, they will need to communicate back to the applicant that they have completed. There is not an automatic notification notifying the applicant when they are completed. The only way the applicant will know is to log in and review the section that was assigned to see if it was completed.
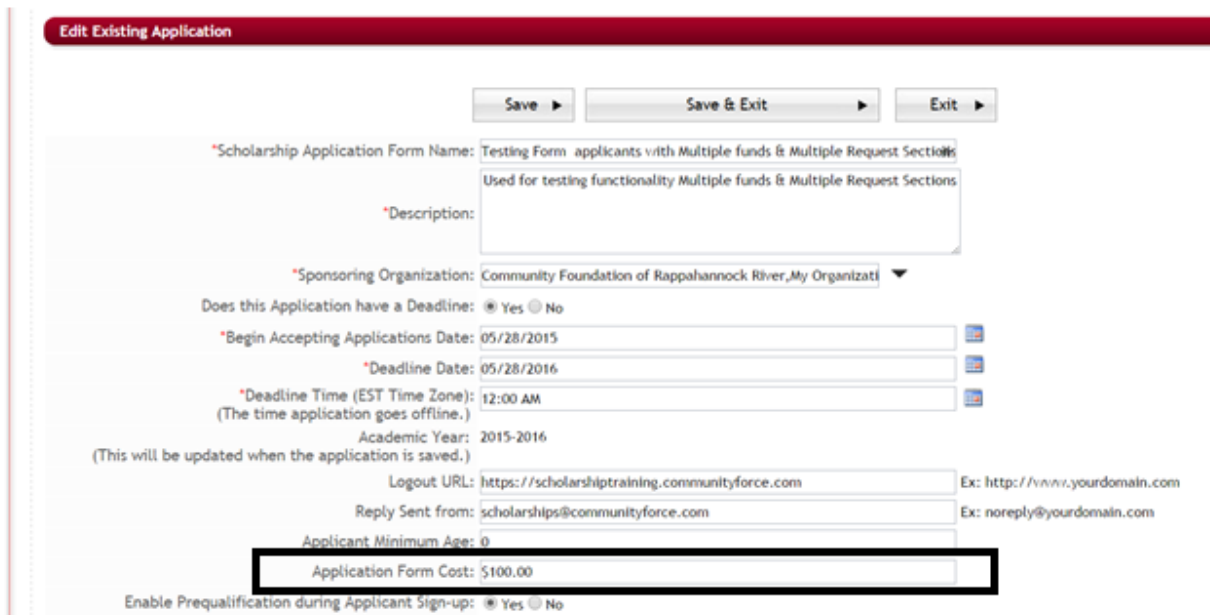
4.4   Application Payment Form

Application Payment Form allows you to accept a payment on an application if you have a fee requirement for filing of that application.

When using the Application Payment Form, the applicant will not be able to submit their application until the payment has been made.

Note: This feature requires integration with a third party payment software and will need to be set up by the CommunityForce Implementation team.

➢ **Step 1: Before using this feature the Global Admin will first have to Enable this feature in the Administration>Site Settings>General Settings, Enable Application Payments** and select **"yes"** for this feature to be enable.

➢ **Step 2:** Once it is turned on in the Site Settings, you will see in the General Information setup for your application the option **Application Form Cost**. Enter the amount required for the Application:

➢ **Step 3:** You will need to create a question in your application, and use the **Payment Gateway** question type when creating that question.

   Best Practice Tip: Create this question in a separate **Payment and Signature section** so the applicant views this on their dashboard and is aware it is a priority to complete their application process.

➢ When if using this functionality, the **Evaluation>Applicant Status** report will show this payment information in two separate columns. **Is Paid** – Yes/No and the **Payment Date.**

4.4.1 How does the applicant make a payment

➢ **Step 1:** A payment question with a button will appear to the applicant that they will click on to be directed to the payment gateway software that you are using.

*Pay the Application Fees: Make Payment

➢ **Step 2:** When the applicant clicks on the Make Payment button they will be directed to the following screen:

Proceed to Secure Payment Screen

You are paying for Testing Form applicants with Multiple funds & Multiple Request Sections. The total amount that will be charged on your card is $0.00

Click to proceed to Payment

➢ **Step 3:** Once they click to proceed, they will be directed to the payment software program to make the payment.

➢ **Step 4:** After the applicant makes the payment, the payment software program will communicate back that the payment has been made and the button on the payment question will change on the applicant's dashboard from Make Payment to Payment Made. The applicant can then proceed with submitting their application.

*Pay the Application Fees: Payment Made

4.5   View Matching Scholarships

The View Matching Scholarships, is used in a **one to one** application process and allows you to have the ability for your applicant's to be matched to additional applications that are similar based on the funding source's eligibility criteria.

When the applicant applies to one funding source and completes that application, they will have a button on their dashboard that allows them to view matched applications for additional funding sources they may want to apply to.

The matching will require that the same criteria questions are present in all the additional funding applications.

As the applicant answers the criteria questions in one application, if that question(s) criteria's reply is exactly the same as the reply needed to meet the criteria in another application, the applicant will be matched to that additional application.

4.5.1   Setting up the View Matching process

Exercise 1

➢ **Step 1:** Create each individual application form, cloning from the Master template application or create your first application and clone all the remaining using that same application. You want all the questions needed to match criteria, the same in all your individual application forms, meaning they "must" have the same sectionxml and questionxml names to match.

In the General Information setup for each application select "yes" for the **_Enable View Matching Scholarship_**, and select "yes" for the **Enable Opt In/Apply Options in View Matching Scholarship.**

➢ **Step 2:** For each application create your funding source in the **Funding Source Setup** and associate that funding source's application to that fund setup.
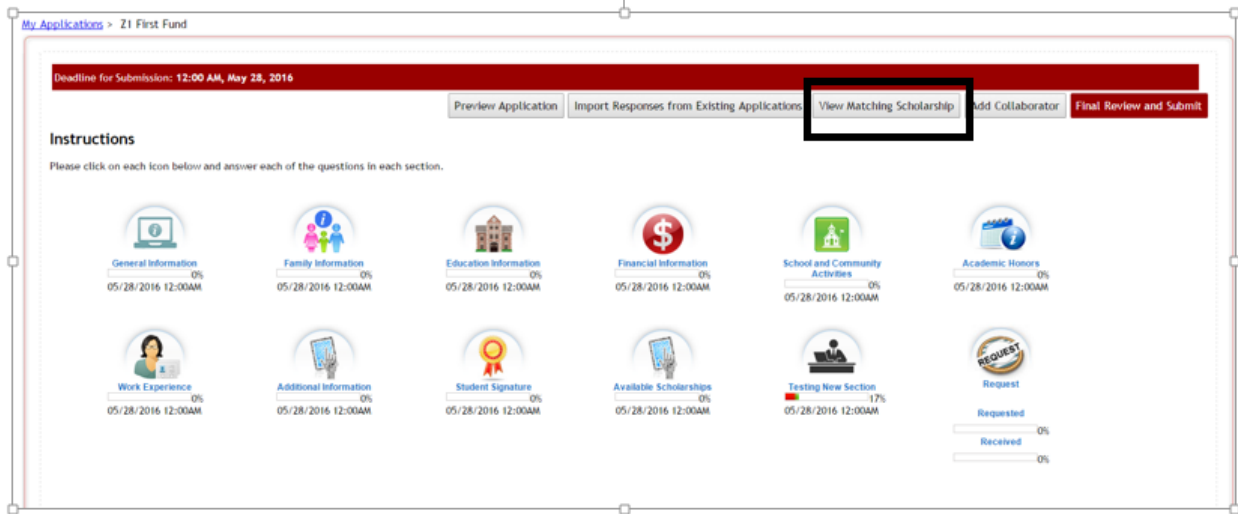

➢ **Step 3:** On each application form in the application's setup dashboard, open the **Manage Application Funds** section and select **all** the **other** funding sources that you want to match to using this process.

➤ **Step 4:** After you have set up the Manage Application Fund, you will need to set all the eligibility criteria filters for each of those addition funds only under the **Manage Funds Criteria Information** for that same application.

➤ **Step 5:** Repeat steps 3 and 4 for every fund's application setting all the eligibility criteria on every fund on every application.

➤ **Step 6:** Once all the funds' applications have had all the funds' criteria set, then the applicants can begin applying and start seeing the matched applications.

4.5.2   How does the applicant apply using the View Matching Process

➤ **Step 1:** Once an applicant selects an application and begins applying to that application, the application's dashboard will have a "View Matching Scholarship" button.

➢ **Step 2:** As the applicant completes the application and answers the common eligibility criteria questions that are present in all the applications, the system will start matching them to the other applications based on that criteria's reply. When the applicant clicks on that View Matching Scholarship button, and a match if found a listing of those matched applications will appear:
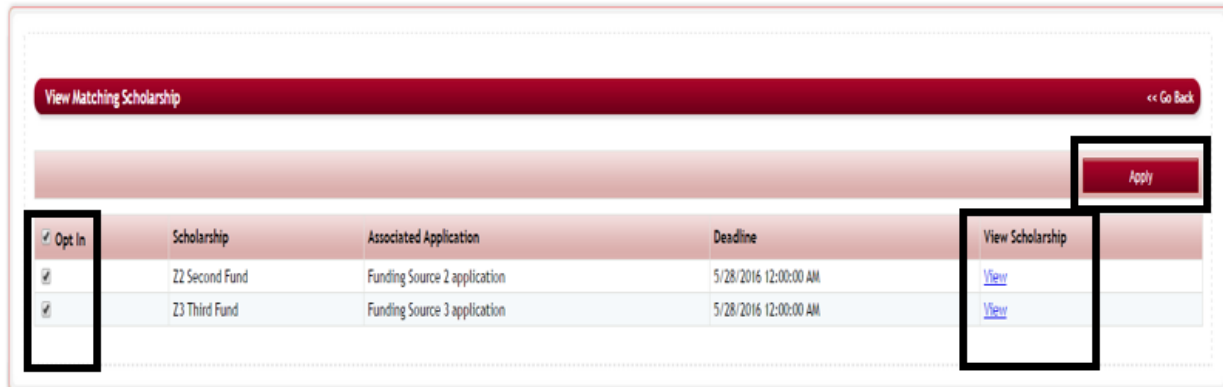

➢ **Step3:** Each application that they matched to will have the "Opt In" column checked. The applicant can unselect any application they do not want to apply to. They can click on the "View" to view details about that applications funding.

➢ **Step 4:** The applicant can then select the "Apply" button to apply to the selected applications.

➢ **Step 5:** They will receive a message confirming they want to apply, and will need to click Continue with Apply.
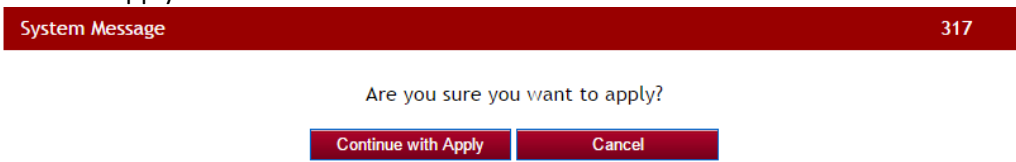
➢ **Step 6:** They will get the message that they have applied successfully, and can click OK.

Status Update	316
You have Applied successfully.	
Ok	
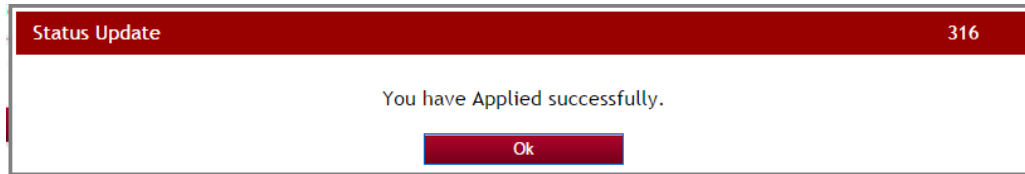
➢ **Step 7:** When the applicant clicks on their "My Applications" tab, those additional applications will now be listed. The applicant will need to click on each separate application to complete it and submit it, as well as complete and submit the originating application that they started.

Search | My Applications

Below is a list of your application(s) and their current status.

Preview and Submit | Print Application | Delete | Withdraw

Select	Scholarship	Academic Year	Date Submitted	Deadline	Status	Generate PDF
○	Common Application Form	N/A	06/23/2015	N/A	Submitted	📄
○	Common Fund 1	N/A	-	N/A	Pending Submission	📄
○	Common Fund 2	N/A	-	N/A	Pending Submission	📄
○	Scholarship for organization accepting High School applicants with Multiple funds & Multiple Request Sections	2015-2016 year	-	12/31/2015	Pending Submission	📄
○	Scholarship for organization with multiple funds accepting High School applicants	2015-2016 year	-	12/31/2015	Pending Submission	📄
○	Test Fund	2015-2016	-	05/28/2016	Pending Submission	📄
○	Z1 First Fund	2015-2016	-	05/28/2016	Pending Submission	📄
○	Z2 Second Fund	2015-2016	-	05/28/2016	Pending Submission	📄
○	Z3 Third Fund	2015-2016	-	05/28/2016	Pending Submission	📄

4.6   Common Application

The Common Application feature allows you to create one common application form that is used for the applicant to apply to multiple funding sources that have their own application process and require a separate application form for each of those funding sources.

Note: This is a very complex setup and recommend on an "as needed" basis only. It is recommended that you have the CommunityForce implementation assist with the setup of this feature.

When creating your Common Application you are creating "one" application and including all the sections and questions in that application that are applicable to all the funding sources and the applications that are for those funding sources.

Each funding source will required a separate application, "child" application, to be created containing only the Sections and Questions required for that funding source.

When an applicant completes the common application they hit the submit button. This will then show the applicant all the "child" fund applications that they are eligible to apply for.

Once the applicant selects all the applications they want to apply to, and clicks submit again, all the data contained in the Common application that is required for each funds separate application, is automatically pushed down to the funds "child" application.

Each separate application they selected will appear in the applicant's "My Applications" tab. If there was no additional information and you do not require the applicant to go in on each individual application and submit, the individual applications will all show as submitted for that applicant.

However, if there is additional information for the applicant to complete in only the "child" application, then the applicant must click on that application, complete the additional items and then submit the "child" application.

4.6.1   Setting up the Common Application process

When using the Common Application process for your organization, it is required that you use a Master Template to build and clone the application forms from.

> **Important:** Your Global admin will need to confirm that they have activated the **Enable Import Responses from Existing Application** by selecting "**Yes**" to that item in the Administration>Site Settings>General Settings. Items will not import to the additional applications unless this is selected.

➤ **Step 1:** Create your Master Template application with all the required common sections and questions needed for all your organization's applications.

> If your child application has questions that only pertain to that child application, do not add those to the Master Template, as you do not want to have to remove them in every single cloned copy you make from the Master. You will create those questions in the child application only.

> Make sure to include a section that contains the Matching Fund Eligibility Question. (See: Adding the Matching fund Eligibility Question).

(See: **Using a Master Application Template** for additional information on creating a Master Template)

➤ **Step 2:** Clone your Master Template and create your Common Application form. (See Creating an Application Form – Cloning an Existing Application for additional information on how to clone an application)

> The Common Application is the application the applicant's will be looking for when applying. Be sure to name the Common Application a name that the applicant's will understand.

> Make adjustments to the General Information setup to apply to the Common Applications process, (i.e. deadline dates, instructions, etc.)

➤ **Step 3:** Remove from the Common Application form, any sections and questions that do not pertain to this Common Application or the individual fund's "child" application. Keep only those items that are necessary for all the "child" funds and the common application process.

Important: Do not add any additional items to the Common Application if they are needed in the Common application to be pushed down to the child applications. Do those additions in your Master Template first. Do not change any of the XML names on items that came from the Master Template or you will lose any import mapping (pushing) capabilities for those items.

Note: if the common application process is the only application process you use. And you only have that one common application each cycle, then create your Master Template for that process and you will not need to remove any items when it is cloned.

➢ **Step 4:** After you have cleaned up the Common Application you will begin cloning the Common Application to create each one of your separate fund's child applications.

Make sure when cloning that you adjust the General Information to apply to each separate fund's application as those fund applications may have different deadline dates that are earlier then the Common Applications deadline.

Since the Common application has all the xml from the Master template and you did not change any of those names, when you clone the Common application, those XML names will clone with it keeping it intact with the Master Template.

➢ **Step 5:** In each of the child applications remove any items that were cloned from the Common Application, **that are not required** for that fund's application.

➢ **Step 6:** At this point, in the child application, if you have additional items that pertain only to that child application, that the applicant will have to complete in the child application only, add those to the application now.

➢ **Step 7:** In the Setup Scholarships (funding source), confirm that you have a fund setup for each separate fund that is part of the common application process. If the fund is not available you will need to set it up. Make sure that each fund is marked as "Published (Viewable to the Applicant – Yes)

➢ **Step 8:** In the Associated Application for each separate fund, select the child application you created for that fund. Repeat for each fund.

➢ **Step 9:** In the Setup Scholarships (funding source) create a posting fund for the actual Common application that the applicants will be applying to. For the Associated Application select the Common Application form. Make sure that this fund is marked as "Published" (Viewable to the Applicant – Yes)

➢ **Step 10:** Select from the **Home Page** – **Setup Application Forms**

➢ **Step 11:** Select from the listing of applications the Common Application clicking on the name in the Application Form column.

➢ This will bring you to the Application's Dashboard for the Common Application
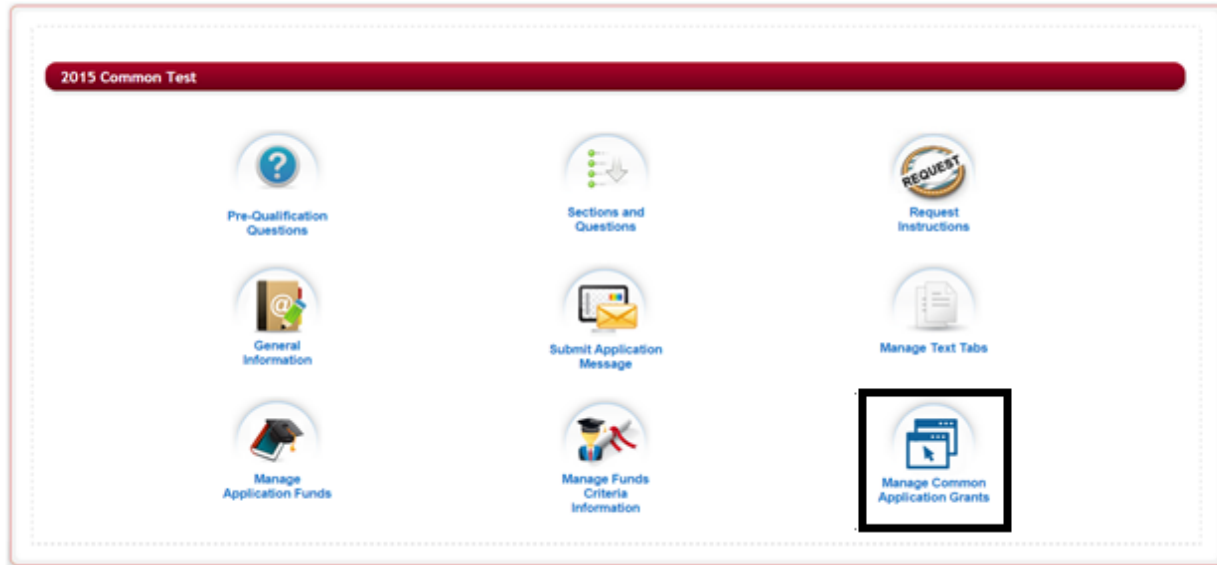
> **Step 12:** Select the Manage Common Application Icon

**Manage Common
Application Grants**

> The Mange Common Applicatin Grants setup will open:

➢ **Step 13:** The top two sections allow you to enter a message to the applicant so that they understand their instructions during the selection process. Enter your message using the editor box for each section.

Eligible Scholarship Information: This is the View Matching Scholarship Icon message to the applicant will see when they click on the "Scholarships Associated with this Common Application" icon on their dashboard. This message should give them instructions for that page.

Select Eligible Scholarship Instructions: This is the message that will appear on the screen the applicant sees after they submit the first Common Application:

> **Step 14:** In the bottom section you will see two questions:

- **Automatically select associated Scholarhip within this Common App:** check this box if you want the system to automatically select the funds for the applicant, instead of allowing them to select.

- **Mark Client As Submitted:**

  Yes - Select Yes if the child applications do not require any additional items to be completed on the child application level. The child application will then automatically be submitted and the applicant will not have to access the child application and submit.

  No – Select No if the child applications contain additional items to be completed by the applicant. The applicant will then click on the child application in their "My Applications" tab, complete the child application, and click submit in the child application to submit that application.

> **Step 15:** At the Bottom will be two boxes, Un-Assigned Scholarships and Assigned Scholarships.

The Un-Assigned will be a listing of all your funds that are currently published that you can assign to your Common Application. Data from the Common application will not push to any funds application that has not been assigned to it.

➢ **Step 16:** In the Un-Assigned column, select all the Funds you have created applications for that are to be added to this common application and click on the right directional arrorw to add it to the Assigned Scholarship column. You can click the left directional arrow to move it back to the Un-Assigned.

If you do not see a fund then it was not marked as published. You will need to return to the fund setup mark it published and then assign it on this section.

➢ **Step 17:** Once you have you funds assigned, click on the Save or Save and Exit to save the assignment and return to the Application's Dashboard.
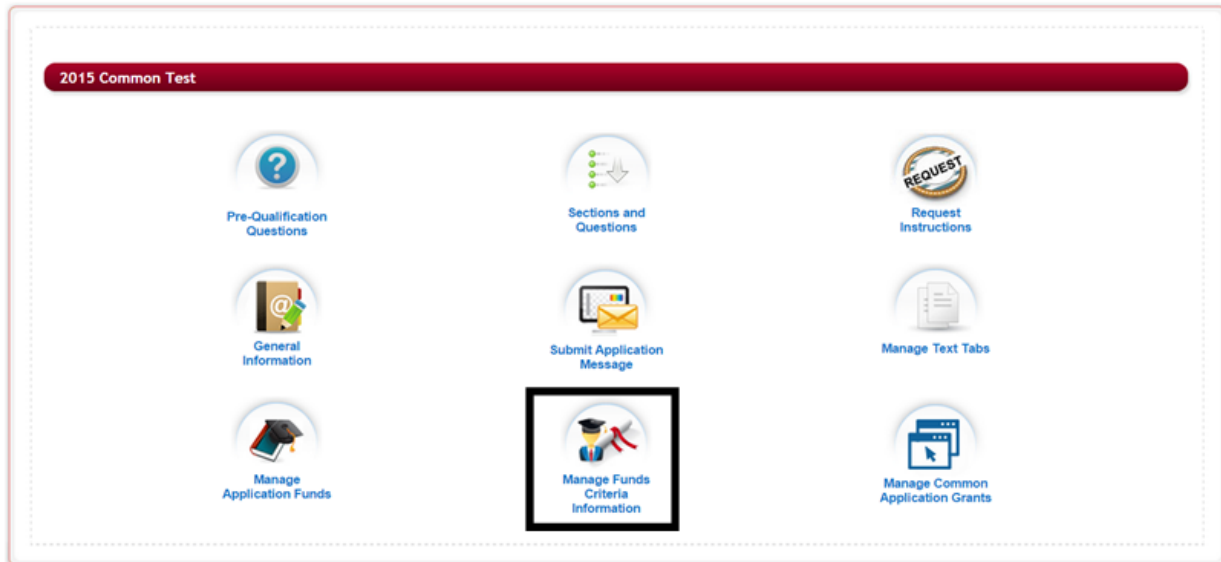
➢ **Step 18:** Select the Manage Funds Criteria Information icon. The Mange Scholarship Eligibility Criteria listing the funds you just assigned will appear.
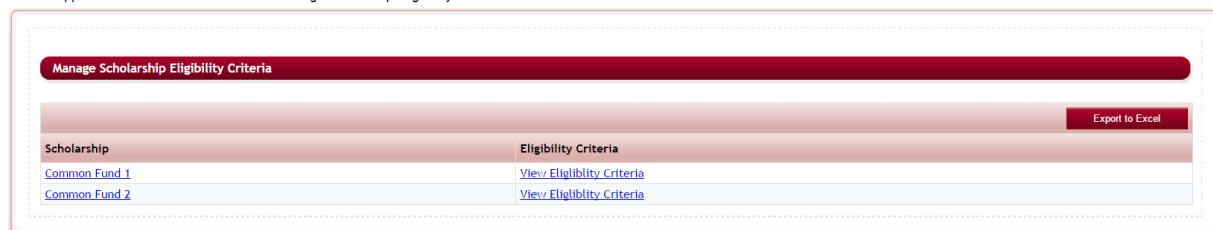
➢ **Step 19:** Click on the View Eligibility Criteria for each of the funds and set the Filter conditions based on the eligibility questions contained in your Common Application.

Once the applicant answer the question according to the correct eligibility they will be matched to that specific fund and that fund will show in the selection results.

(See: **Manage Funds Criteria setup for additional information on creating the criteria filters**)

4.6.2   How does an applicant apply using the Common Application

➢ **Step 1:** When the applicant searches for a fund that is linked to the Common Application form and clicks the "Apply" for that fund, they will directed to the Common Application form.

➢ **Step 2:** The applicant would then click the "Apply" for that form and be directed to the Common Application's dashboard to proceed with the application.
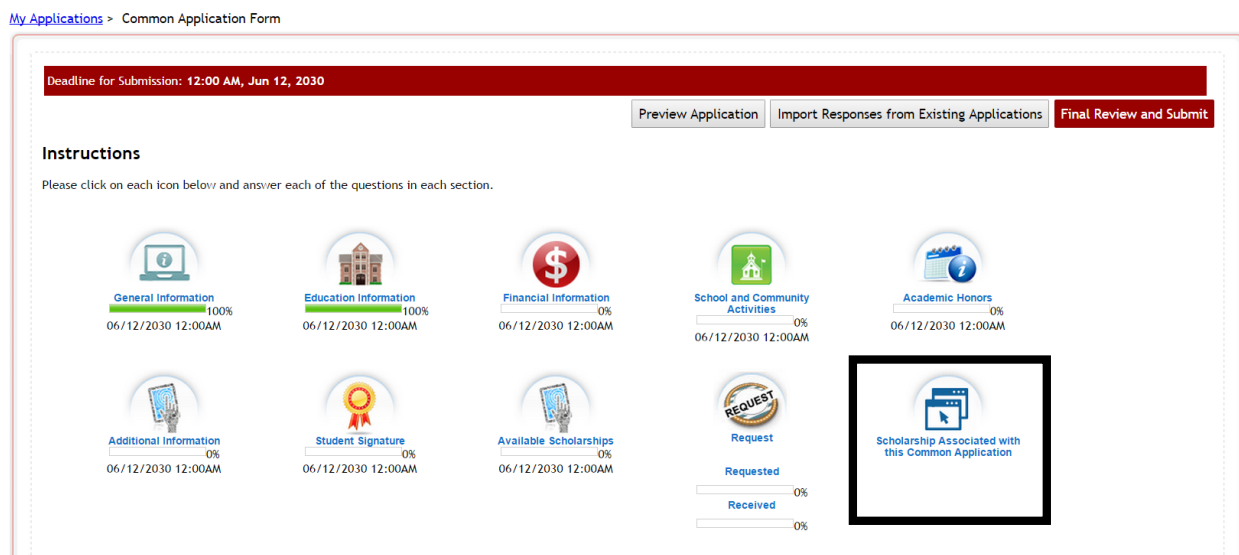
➢ **Step 3:** There will be an icon on their dashboard "Scholarship Associated with this Common Application"

➢ **Step 4:** When they click on that icon the View Matching Scholarship page will appear.

Eligible	Scholarship	View Scholarship
	Common Fund 1	
	Common Fund 2	

Return To Dashboard ▶

➢ **Step 5:** This page is a view only page to show them what they are being matched to.

From this page they can view details about all the funds that are available by clicking on the View Scholarship icon next to the fund they want to view. This will open a new tab in their browser displaying the detail's section for that fund that was set up in the Fund Setup.

Once an applicant completes all the questions that determine eligibility for a specific fund, if they are eligible for th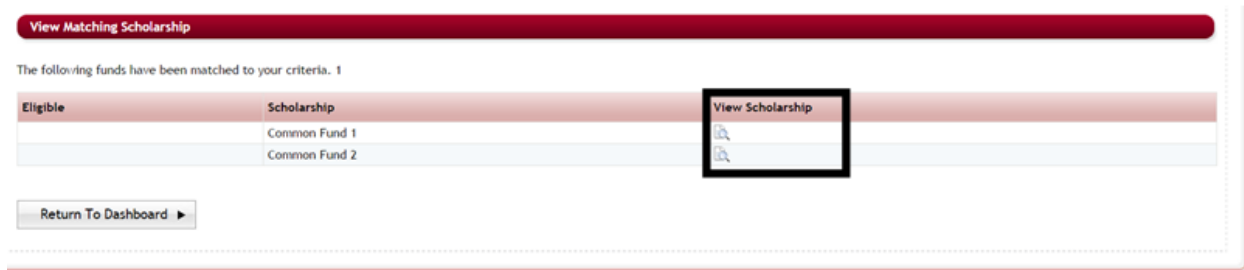at fund, a check mark will appear next to the fund in this display. If they are not eligible the check mark will not appear.

Eligible	Scholarship	View Scholarship
✓	Common Fund 1	
	Common Fund 2	

➢ **Step 6:** The applicant can click "Return to Dashboard" to continue completing the application. As they complete it and return to this section more funds will appear as the questions are answered.

Return To Dashboard ▶
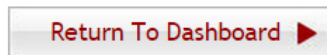
➢ **Step 7:** Once the applicant completes their application and clicks the Final Review And Submit on their dashboard

Final Review and Submit

➢ **Step 8:** They will receive the following System Alert message. They will need to click continue to proceed.

System Alert	323

In the next screen, confirm your selections for the grants you are eligible for

Continue   Cancel
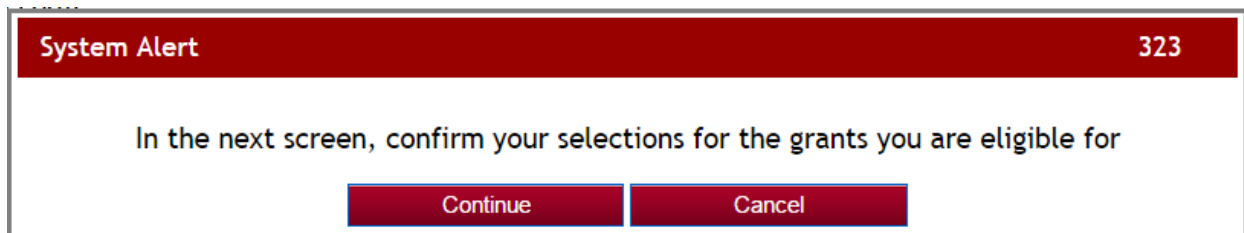
➢ **Step 9:** After they click Continue, the following screen will appear:

View Matching Scholarship

These are all the funds you have been matched to select the ones that you want to apply to. They will appear in you My Applications dashboard. If they do not show as submitted then there is additional information needed for that application you will need to open each fund and completed that application and submit.

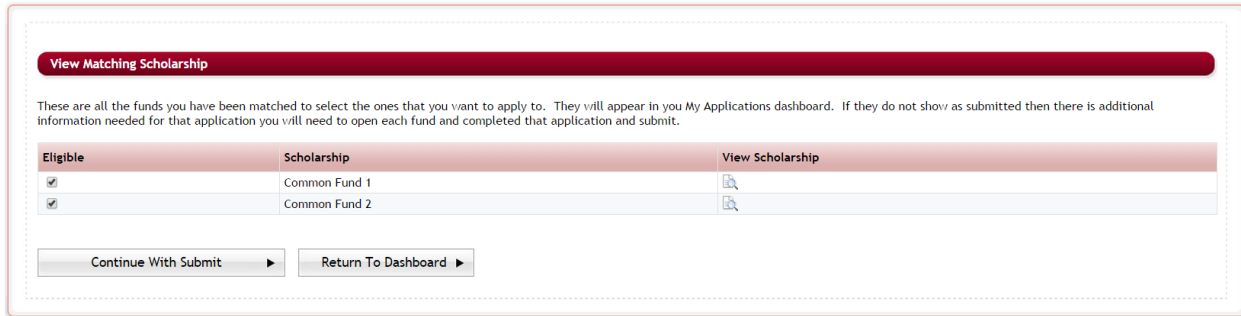| Eligible	Scholarship	View Scholarship
☑	Common Fund 1	📄
☑	Common Fund 2	📄

| Continue With Submit ▶ | Return To Dashboard ▶ |

➢ **Step 10:** This screen will show the applicant the actual scholarships they will be applying for. The scholarships that are marked with a check in the box next to the name are the applications the applicant will be applying to.

Note: When setting up the Manage Common Application section of the application setup, if you selected the box on the **Automatically select associated Scholarship within this Common App:** the applicant will not be allowed to unselect the box for the scholarship they matched to. Once they submit those funds will automatically appear in their My Applications" tab.

If you did not select this box, then the applicant will be able to unselect the box next to any scholarship they do not want to apply to.

➢ **Step 11:** Once the applicant selects (or is automatically selected), they will need to click the

Continue With Submit button to complete the submission, or

Return to Dashboard, to reconfirm replies they have made, if they feel a scholarship is not selected that should have been.

| Continue With Submit ▶ | Return To Dashboard ▶ |

➢ **Step 12:** Once the applicant clicks the **Continue With Submit**. They will directed to the preview of their application, where they can preview the application and check the box for the "Please Check the Check-box to confirm…" at the top of the page.

☐ Please check the check-box to confirm that you have reviewed your Common Application Form application, then click "Submit". You will not be able to update it after it is submitted.

| Submit ▶ | Cancel & Exit ▶ |

➢ **Step 13:** Once they have previewed their application they can click the "**Submit**" to finalize the submission and receive the online submittal message. (The confirmation email will go out at this time as well.)

Application Submit Message

Thank you for submitting your application! You will also receive an email message confirming our receipt of your application.

Community Foundation staff will be in touch if we have any questions about the information you have submitted.

Thank you.

Ok

➢ **Step 14:** When they click "Ok" on the message they will be directed to their "My Applications" tab. The separate scholarship applications will now appear in the applicant's dashboard, with either a status of "submitted" if you selected to automatically submit when setting up the Manage Common Application section, or they will show with Pending Submission. If they are not submitted, the the applicant will need to go in on each separate application and completed it before it is considered submitted.

Home > My Applications

Search | My Applications

Below is a list of your application(s) and their current status.

Preview and Submit | Print Application | Delete | Withdraw

Select	Scholarship	Academic Year	Date Submitted	Deadline	Status	Generate PDF
○	Common Application Form	N/A	06/15/2015	N/A	Request Pending	📄
○	Common Fund 1	N/A	-	N/A	Pending Submission	📄
○	Common Fund 2	N/A	-	N/A	Pending Submission	📄
○	Scholarship for organization accepting High School applicants with Multiple funds & Multiple Request Sections	2015-2016 year	-	12/31/2014	Pending Submission	📄
○	Scholarship for organization with multiple funds accepting High School applicants	2015-2016 year	-	12/31/2015	Pending Submission	📄
○	Test Fund	2015-2016	-	05/28/2016	Pending Submission	📄

5. Archiving Applications

Archiving is a means to reduce the listing of applications that appear when using dropdown listings for your application searches in certain areas of the admin dashboards and setup features where a search for a specific application is needed.

Archived applications will not appear in dropdown listings and will not be available to clone if in an "archived" status.

Archiving is not permanent and you can also search the listing of "Archived" applications and change an application back to "Active", if needed.

Once your application process is completed you can archive that application so that it's no longer in the "Active" application listing when viewing your application in the application listing for the Setup Application Forms and Evaluations.
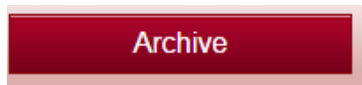
This should only be done once the application process for this application is completed closed, and you have cloned a new application for the following cycle.

Exercise 1

➢   **Step 1:** Select from the **Home Page – Setup Application Forms**
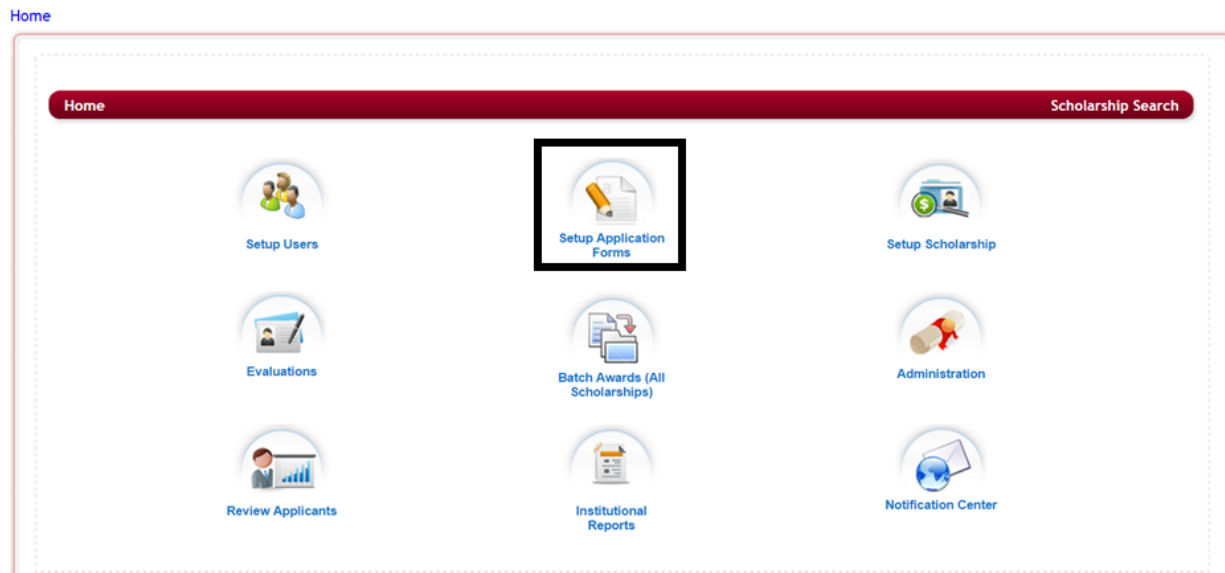
➢   When you first open the application listing it will be default to show only the "Active" applications.

➢   **Step 2:** Select from the listing of applications the application you want to "Archive" by checking the box next to the Application Form Name and click the Archive Button

➢ **Step 3:** Click the Archive button, the application will disappear from the "Active" listing.

➢ **Step 4:** To view the Archived applications click on the dropdown arrow in the "Active" box and select Archive.

➢ **Step 5:** This will change the listing from viewing your "Active" applications to viewing the "Archive" applications.

➢ **Step 6:** To Reactivate an archived application. Select the application in the Archive listing and click the "Active" button. This will move it back to the "Active" listing.