



Scholarship Management System
Training Guide
Module 7 – Testing Your Application
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Module 7 – Testing Your Application

This module covers how to review and test your application form prior to going live and turning it over to your applicants to begin applying.

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1. Review and Test

Did you forget something?

Making adjustments and changes to a live application can become challenging for your staff, and also frustrating to the applicants. Therefore, it is **best practice** to always **thoroughly** review and test the application form prior to making it a live application and allowing your applicants to begin applying.

You will **not want to publish** any application until it has been reviewed and tested.

2. Confirm Build of the Application form

The following sections will cover how to review the various areas of the application and funding source set up to assure that you have properly set up the application.

When reviewing you will want to, again, look at the funding sources, your review process, and awarding process to reconfirm that you have built into your application all the items needed to pull eligibility for those areas.

- Did you include all necessary items in drop down listing, etc., so that the data can be mined efficiently?
- What about your review process, are there items that are discussed in the review committees to determine eligibility, or tie breakers? Were those included in the application and can you easily pull the date if needed?
- What about after the initial applying, are there additional sections that should be included to capture additional information from your applicants or staff members during review or after the awarding process. Are those sections created to appear during the appropriate stages?
- What types of reports are you needing to run, and have you set up the questions items in a manner that allows you to be able to easily pull that data and reported on?
- Required attachments – did you include all the upload questions to be able to capture all your required attachments needed for your applicants to apply.
- Communication – are all the appropriate email templates created that are needed to communicate with your applicants during the application process? Do they relay your message or are they still set on the default messages?

You will want to go through each section of the application form and confirm that the correct settings have been set on all your sections, all the correct questions are in the right sections and formatted correctly, and you have provided sufficient instructions to the applicants on how to complete this application form.

2.1 General Information Setup

- 1) **Sponsoring Organization**, if you have multiple organizations, did you make sure to select all that can access the application form?

- 2) Confirm your **deadline date and time** is correct (did you include a note in the instructions to the applicant that this is set on the EST zone not their local time zone) **Note:** when ready to test, the Begin accepting applications date, will need to be the current date, so that the testers can access it.
- 3) Ensure the **Logout URL** is set to the correct location that you want the applicant to land when they log out.
- 4) **Reply Sent from** – if you have included this in your email templates did you remember to change this to the correct staff’s email address, so that the applicants know who to reply to.
- 5) If your application requires payment did you include the amount in the **Application form cost?**
- 6) **Enable Prequalification during applicant Sign-up** - If using prequalification questions – did you remember to set this to yes?
- 7) **Enable View Matching Scholarships** – If using this function did you remember to set this to yes?
- 8) **Enable Opt In/Apply Options** – If using this along with the view matching scholarships (used mainly in 1 application per 1 fund relationship) – Did you remember to set this to yes?
- 9) If allowing multiple submissions did you say yes to **Enable Multiple Submissions?**
- 10) If allowing **proxy or collaborators** did you say yes to enable those areas.
- 11) **Nomination type** – If using request sections did you select the correct type.
- 12) **Enable Editing after Submitting** - Do you want the applicant to edit after submitting? Did you select yes or No?
- 13) **Confirm the selections for the committee review process are selected correctly**
 - a. **Show Applicant to Committee**
 - b. **Show Application to Committee**
- 14) **Acknowledgement** – Used only if setting as Applicant Minimum Age – is the message to the applicant correct and understandable. (If not using, this should be left blank.)
- 15) **Instructions** – These are the applicants dashboard instructions
 - a. Are you explaining to the applicant clearly how to fill out the application form?
 - b. Are you displaying the deadline date and time as EST?
 - c. Are there grammatical errors or typos?
 - d. Are there sections they should fill out first that they need to know about?
- 16) **Contacts** – did you remember to include the staff member that is maintaining this application in the Contacts section?

2.2 Section Setup

- 1) Are all your sections named correctly?
- 2) Do you have the correct **Section Type** selected for the section
- 3) Are the sections for your staff only – marked as a “Staff Section” – are they hidden from the applicant?
- 4) Are the Sections that are **Request Sections** marked as “Request Section” – are they hidden from the applicant?
- 5) If using Request Sections did you set the correct email notification template for this section?
- 6) Are the sections you don’t want reviewers to view marked to “**Hide from Reviewer**”?
- 7) Is the Display Order correct to how you expect the application to flow?
- 8) Is the correct image showing for the section?
- 9) Did you select the correct Status

- 10) Do you have the correct **deadline date and time** for that section?
 - a. Is it a separate date from the application or does it have its own deadline?
- 11) Did you make sure you remove the submit button from appearing on sections that do not require a submit button?
- 12) Did you confirm the “Lock After Submit” is set correctly?
 - a. Does it carry a separate submittal from the application, if it does, do you want it to lock after they submit this section or allow them to continue editing after the section has been submitted.
- 13) **Section Specific Instructions** –
 - a. Does the section need specific instructions entered so that the applicant understands how to complete the section (or requested individual if this is a request section?
 - b. If this is a Request Section – are the instructions to the requested individual filling out this section clear so they know how to complete the section? Do they know how to submit the form or deny the form?
 - c. Are there grammatical errors, typos?
- 14) Did you remember to “Activate” the sections so that they appear on the application?
- 15) Did you de-activate the sections you do not want to appear in your application?
 - a. Are there section that need to be de-activated now but activated later on in the process? Are they set correctly?
- 16) Do you have **conditional logic** set on sections you only want to show if an applicant answers a question in another part of the application a specific way? Did you test this logic?

2.3 Question Setup

- 1) Are all the **necessary questions present** in your application for data mining and decision making:
 - a. Are you including all the required questions needed to pull on for your **scoring process** (i.e. if needing a GPA score-do you have a question asking for a GPA score somewhere in your application?)
 - b. Are all questions included to be able to retrieve data needed for selection of **Funding Source fund eligibility**?
 - c. Do you have all the required questions needed for **the committee reviewers and award committees** to make their decisions?
- 2) Are the questions in the right sections?
- 3) Are there typos in any of the Question Names to be corrected?
- 4) Are the questions **formatted correctly** with the correct question type?
 - a. **Numeric fields** set correctly for data you need to be able to run calculations on.
 - b. Are you using **drop downs and check boxes** efficiently (i.e. you need to know the college the applicant is attending – do you want them to type this – risking spelling errors or abbreviations – or do you want them to pick from a dropdown listing so that you get an **exact** match to be able to pull and filter that data into criteria reports or automated scoring?)
 - c. For **File upload**, are all the accepted file types entered so that they can upload needed documents?

- d. If entering **text** are you using the appropriate types for Text or **Essay** so that the applicant has plenty of space to enter their required answer? Do you have the word count minimum and maximums, set if needed?
- 5) If using one application for multiple funds, did you included the **Matching Fund Eligibility** question, so that the applicants can be matched to the funds using the eligibility questions?
- 6) If you have a payment associated with this application form, did the **Payment Gateway** question get added?
- 7) **Required** - If the question is required, did you remember to mark it as “required” so that the question is not missed?
- 8) **Hidden From Reviewer** - If the question is not to be seen by the review committee did you remember to mark it as “**Hidden From Reviewer**”?
- 9) Do you want this question on your **Award screen**, did you mark it yes so that it appears when awarding?
- 10) **Display Order** - Is the question in the right Display order for easy flow of the application?
- 11) **If you have a document to load** to this question, did your remember to upload it?
- 8) **Conditional Logic** - Did you set all the necessary conditional logic so that the appropriate questions hide or appear depending on how other questions are answered? Did you test your logic?
- 9) If there is a question you do not want to appear on the application – did you remember to mark it as “**Excluded**”?
- 10) Did you include all your questions to capture your required attachments needed from the applicants?

2.4 Pre-Qualification Questions setup - If using pre-qualification questions

- 1) Did you include all your pre-qualification questions?
- 2) Are these set with the correct combination?
- 3) Is the Denial Message set up?
- 4) Check for grammatical errors or typos.

2.5 Request Instructions setup – message to the applicant on how to use this section.

- 1) Does the message explain to the applicant how to use this section and how to recommend an individual to fill out a section on their behalf?
- 2) If you have multiple request section, do you explain to the applicant the purpose of each, so that they know who to recommend to complete that section?
- 3) Are there grammatical errors or typos?

2.6 Submit Message setup– online message to applicants when the submit their application

- 1) Is the message clear on their next steps?
- 2) Are their grammatical errors or typos?

2.7 Manage Text Tabs Setup– (if using)

- 1) Did you remember to mark them as published?
- 2) Are there grammatical errors or typos?

2.8 Manage Application Funds

(Used if you have one application for multiple funds- not used for a Common Application Process)

- 1) Did you assign all the correct funds to this application?

2.9 Manage Common Application Grants (Common Application Process only)

- 1) Did you enter the correct instructions for the correct sections
 - a. Did you check for grammatical errors and typos?
- 2) If having the system **automatically select associated funds**, did you remember to check the box so that it will automatically select for them.
- 3) Do you want the child applications to be marked as submitted automatically, once the applicant submits the common application and selects the additional applications? If so, did you select “Yes” for this question?
- 4) Did you assign all the correct funds to this common application and does each fund have its own application assigned to it in the Fund Setup?

2.10 Manage Funds Criteria Information

- 1) Did you remember to set all the criteria conditions for each fund that was assigned to this application using either the Manage Application Funds or the Manage Common Application Grants?

2.11 Notification Center Email Templates

- 1) Did you check all the System- Global messages for correct content, grammatical errors or typos?
- 2) Did you check all the Application specific System templates for correct content, grammatical errors or typos?
- 3) If you have multiple request sections in your application, that are different types of sections going to different types of people, did you remember to create separate nomination templates for each section, using the “Add New Nomination Template” in the Create a template?

3. Confirm the setup of your Funding Sources

- 1) **Annual Budget/Academic Year** – is this set with the correct amount for your current year?
- 2) **Associated application** – Is the correct application associated to the fund,
 - a. If using one application for multiple funds did you remember to create the mock fund and associate that fund to the application

- i. Did you remember to not associate any applications to the associated funds?
 - b. If using the Common Application Method did you create the mock fund and associate the Common application to that.
 - i. Did you remember to associate each individual fund to its individual application?
- 3) **Sponsoring Organizations** – are all the correct sponsoring organizations that need to view this fund selected?
- 4) **Allow Non-(org) Applicants/Allow (org) applicants** – are these selected correctly on the “yes” and “no” options?
- 5) **Email signature** – if you want to override the site settings default signature, did you enter a signature line here to be included in your email templates when selecting the Signature merge field?
- 6) **Brief Description and Description** – Did you include the correct information that you want the applicants to view. Check for grammatical errors and typos.
- 7) **Search filters** – (if using) did you include all the correct eligible search filters for the fund, so that the applicant can locate it correctly and apply to it.

4. Application Testing – Applicant testers

After you have confirmed the build of the application, it is always a good idea to test the application from the applicant’s perspective.

It’s suggested that you have at least two or three, if not more, individuals test your application. You will want your testers to test from the applicant’s perspective and therefore will need to have applicant user accounts to test. If your testers already have user accounts in the CommunityForce site, that are not applicant accounts, they will need to create their own, separate applicant accounts using a different email address than their other user account. It is best to use an email that is valid, so that they can retrieve the emails that are sent to them, as the test applicant, and be able to review the messages, follow any required instructions, and click the links that may be included.

Since you need to keep your application unpublished until it has been tested and ready to go live, you will need to have your Global Administrator set up the Application Invitation process for your application form and invite your test users to apply to the unpublished application. (**See Module 6 – Application Invitation Setup**). You will want you testers to test how to create a user account, so prior to setting up the Application Invitation have those user go in and create their applicant accounts. Once their accounts have been established, your Global Administrator can then go in and assign them to the Application using the Application Invitation Process.

Once your testers are invited to the application they will receive an email with a link to click on to apply, they must use this link to access the application. Therefore, remind them to watch for this email.

Once you have review and tested your application and feel confident that the application will suit the needs of the applicant and your application process, you can then publish the application for your applicants to start applying to it.

If your application is a private application, and will not be published to the public. When testing, only invite your test users to the application form. Then once it has been tested you can add the actual applicants to the application's invitation listing.

4.1 Test Application flow

The following section below will outline the steps needed to test the application flow from the applicant's perspective. You will want to test all aspects of the applicant's experience, starting with creating the applicant account, to actually applying to the application, completing the form, and then submitting the application.

Complete the entire application, answering all questions and completing all sections as if you were the applicant applying:

- 1) **Create an applicant profile login** - using a different login email from your admin account.
 - a. Did you receive the new account confirmation email?
 - b. Check the message, does it make sense to the applicant?
- 2) After the **Application Invitation** has been set up, an email will be sent inviting you to login to the application. Click the link in the invitation email you received.
- 3) **Login** - using your Applicant user account
- 4) **Click the Apply to begin applying to the application**
- 5) **Pre-qualification questions** - If you have **pre-qualification questions**, did these appear and did the login combination work as expected?
 - a. Test this both ways to confirm the deny message is appearing as expected, you will need to test the wrong way first, then login and test the correct combination.
- 6) **Dashboard Instructions** - Are the application's **dashboard instructions** displaying correctly? Are they easy to read and understand?
- 7) **If using the Import Responses from Existing Applications** – After you complete the first application and are starting the second, click the import button and import from your first application, did the items import successfully.
- 8) **Sections** - Are the **section's appearing** as expected and in the order you wanted them to?
 - a. Are the sections that should be hidden until a specific question is answered showing or are they hidden as expect?
 - i. If they are hidden, then locate the trigger question and answer it, do they now appear as expected?
 - b. Are each sections' instructions appearing as expected?
- 9) **Questions** - Answer the questions and confirm all conditional logic.
 - a. Are the questions, appearing and disappearing according to the logic set?
 - b. Are numeric, date, phone, email and text questions taking the correct formats?
 - c. If you have calculations questions, are those calculations correct and adding the correct values?
 - d. Upload a document. Did it upload properly?
 - e. Are essay questions set for the correct word limit?
 - f. If you created bubble instructions – how are they appearing?

- g. If you have sections that are to appear according to how questions are answered. Answer those questions using all the appropriate scenarios, to confirm that logic is functioning properly.
- 10) **Click on the Request Section Icon** – are the instructions easy to follow? Do you understand how to complete the section below and recommend someone?
- 11) **Confirm Request Section** – (test all request sections, not just one of them) - Recommend yourself or another staff member in the request section so that you or they get the email and enter date in the comment field (Note: If using yourself, use a different email than the one you used to create the test applicant account – (i.e. you can use your admin account email for this option), and enter date in the comment field
 - a. Confirm the email is sent to your address as intended.
 - b. Click on the link in the email to be directed to the request section – is it going to the right section, are the instructions on the section clear so that the recommender understands what they are to do on that section?
 - c. Are you able to upload documents?
 - d. Are calculation fields calculating?
 - e. If essay/comment fields – word limit correct length?
 - f. Test if the recommender does not yet submit but saves for later. Can they still access later using the same email and link?
 - g. **Submit Request Section** – Does this submittal send an email to the applicant that it has been completed? Does this submittal show on the applicant dashboard request section as completed for that recommender?
 - h. Do the test again but this time deny the request. Confirm that if the recommender denies request. An email is going to be sent to applicant and if denied it will show on the applicants request section for that recommender.
 - i. If denied from the applicant’s dashboard, test the ability to re-assign a recommender.
- 12) **Confirm Text Tabs** - if using, are the tabs showing as expected?
- 13) **Matching Funds Eligibility question** - If using the Matching funds eligibility question – answer the eligibility questions within the application that apply specifically to those Funding Sources?
 - a. Are the correct eligible Funding Sources appearing as selected when the correct eligibility questions are answered?
- 14) **If using the Common Application process** –
 - a. Do the correct matched funding sources appear in the Funds Associated with this Common Application Icon
 - i. Are the instructions clear on this section
 - b. Test the Common Application submit process by submitting your completed application
 - i. Do you understand the instructions on the submit page.
 - ii. Are the applications showing in the My Application’s tab once you have completed the submittal of the Common Application?
- 15) **Preview & Submit** your completed application
 - a. Did you get both the online confirmation and the email confirmation?

5. Testing the Welcome Screen

This should be performed the ***first time you use your site***, right after your applications have been published but just before you notify your applicants that they are live.

- 1) **Site Welcome page:** Does the correct default page appear when you first hit the site, depending on how it was set by the Global Admin in the Administration>Site Settings: General Settings Default Page Before Login.
 - a. Search page
 - i. If using search filters are they displaying correctly in the Search by Scholarship Eligibility?
 - b. Login Page
 - c. Applications List page
- 2) Does the correct default page appear after you login in, depending on how it was set by the Global Admin in the Administration>Site Settings: General Settings Default Page After Login.
 - a. Applications List Page
 - b. Search Page
 - c. My Applications Tab
- 3) **View Funding Source Applications** - are your available Funding Source applications displaying as expected? With the correct detail descriptions, etc.