



## Scholarship Management System

### Training Guide

Module Pre – Administration Dashboard Section – Global Administrators Only

Ver 7.5

Updated: 7/2015

Prepared by:

## Table of Contents

### Module Pre – Administration Dashboard Section – for Global Administrators

This module will cover the sections that are reserved for the Role Type of Global Admin. This will cover the functionality of the Administration Dashboard and how the items in that dashboard are completed.

**Global Admin** role type has **full** administrative rights within the CommunityForce application program to view, make changes, and delete items.

The functionalities listed in this guide, are the main setup functions to begin using the CommunityForce system. However, some items in the Administration Dashboard apply to other setup features in the site and are covered in additional training modules and will not be included in this training. When addressing those items, we will direct to the appropriate training module for additional information on how to perform those functions.

1.	ADMINISTRATION DASHBOARD .....	4
2.	SEARCH FILTERS .....	6
2.1	SETTING UP THE SEARCH FILTERS .....	8
3.	SPONSORING ORGANIZATION .....	11
3.1	ADDING SPONSORING ORGANIZATIONS .....	11
3.2	EDITING A SPONSORING ORGANIZATION: .....	13
4.	STATUS DETAILS (OPTIONAL) .....	14
4.1	ADDING A NEW STATUS DETAIL .....	14
4.2	EDITING AN EXISTING STATUS: .....	17
4.3	DELETING AN EXISTING STATUS: .....	18
5.	CONTROL MAPPING .....	19
5.1	CHANGING A CONTROL NAME LABEL .....	19
6.	PASSWORD POLICY .....	22
7.	APPLICATION INVITATION .....	23
8.	EXTERNAL SYSTEM AUTHENTICATION SETTINGS.....	24
8.1	EXTERNAL SYSTEM AUTHENTICATION SETTINGS SETUP .....	24
9.	SITE SETTINGS .....	27
9.1	UPDATING YOUR ORGANIZATION INFORMATION (ORGANIZATION BRANDING - NAME, LOGO, DOMAIN) .....	30
9.2	GRANTS/FELLOWSHIP SETTINGS.....	31
9.3	EXTERNAL SYSTEM SETTINGS .....	35
9.4	MANAGE AWARD CUSTOM FIELDS .....	37
9.5	UPDATE GENERAL SITE SETTINGS .....	39
9.5.1	TITLE.....	39
9.5.2	SIGNATURE .....	39
9.5.3	DEFAULT PAGE OPTIONS IN GENERAL SETTINGS .....	40
9.5.3.1	Default Page before Login: .....	40
9.5.3.2	Default Page after Login: .....	42

9.5.4	RESTRICTED DOMAINS TO REGISTER WITH:	44
9.5.5	DATE FORMAT	45
9.5.6	CURRENCY SYMBOL	45
9.5.7	FOOTER NOTE:	45
9.5.8	ADMIN HELP URL	45
9.5.9	APPLICANT HELP URL	46
9.5.10	LOGOUT URL	46
9.5.11	CONTACT US	46
9.5.12	FUND LABEL	47
9.5.13	THEME	47
9.5.14	ENABLE USER CREATION USING CF (THIS WILL ALSO HAVE AN IMPACT ON PROXY/COLLABORATION)	48
9.5.15	CALL EXTERNAL SYSTEM TO UPDATE DATA	48
9.5.16	ENABLING SEARCH SCREEN ITEMS	49
9.5.16.1	Enable Search by Keyword	49
9.5.16.2	Enable Search by Eligibility Criteria:	49
9.5.16.3	Enable Search by Sponsor Organization	50
9.5.17	ENABLE GLOBAL SEARCH FOR APPLICANTS:	50
9.5.18	ENABLE APPLICATION PUBLISHING	50
9.5.19	DISABLE SECTION LOCKS FOR ADMINS:	51
9.5.20	DISPLAY SSO ID ON ALL SCREENS (MEMBER ID)	52
9.5.21	APPLICATION REVIEW SETTINGS:	53
9.5.21.1	Automatic Assignment of Applicants	53
9.5.21.2	Display Reviewer Comments on Application Summary	54
9.5.21.3	Show Application Summary As A Link	54
9.5.22	ENABLE INTERESTS CART	55
9.5.23	SEND AN EMAIL TO APPLICATION CONTACT, WHEN AN APPLICATION IS SUBMITTED:	56
9.5.24	ENABLE IMPORT RESPONSES FROM EXISTING APPLICATION	56
9.5.25	ENABLE FORMAT EXCEL FILE	58
9.5.26	PRE-QUALIFICATION QUESTIONS APPEAR:	58
9.5.27	SHOW VIEW ALL GRANTS	58
9.5.28	ENABLE APPLICATION PAYMENTS	60
9.5.29	ENABLE TERMS & CONDITIONS / CONSENT:	60
9.5.30	DISABLE REVIEW SCREEN BEFORE APPLICATION SUBMISSION	60
9.5.31	SHOW APPLY BUTTON BEFORE LOGIN:	61
9.5.32	ENABLE AUTOMATIC APPLICATION CREATION THROUGH APPLICATION INVITATION	62
9.5.33	ENABLE POST ACCEPTANCE SECTION SUBMIT NOTIFICATION	62
9.5.34	PUSH COMMITTEE SCORES	63
9.5.35	ENTER TERMS & CONDITIONS / CONSENT	63
9.5.36	SEARCH PAGE HEADER MESSAGE:	64
9.5.37	INTERESTS CART MESSAGE:	64
9.5.38	NON ELIGIBLE STUDENTS FUND MESSAGE	65
9.5.39	REGISTRATION INSTRUCTIONS:	66
9.5.40	LOGIN INSTRUCTIONS:	66
9.5.41	SAVING CHANGES TO GENERAL SETTINGS	67
10.	MANAGE SYSTEM MESSAGES	67
10.1	EDITING SYSTEM MESSAGES	69
11.	SET MASTER APPLICATION	70
12.	MANAGE APPLICATION FUNDS	70
13.	MANAGE ROLE TYPES	72
14.	MANAGE ACADEMIC YEARS	72
15.	UPLOAD APPLICANT CREDENTIALS:	74
16.	ASSIGN SCHOLARSHIP TO ROLE TYPES	75
17.	PLUG-IN MAPPING	78

## 1. Administration Dashboard

The Administration dashboard is only accessible to the Global Admin role type. The Administration dashboard contains the administrative items used in setting up and getting started with using your CommunityForce site.


The Administration dashboard is accessed from your **Home page**, by clicking on the **Administration** icon.




Administration

Home


Home
Scholarship Search




Setup Users




Setup Application Forms




Setup Scholarship




Evaluations




Batch Awards (All Scholarships)




Administration



Review Applicants




Institutional Reports




Notification Center

Administration Dashboard:


Administration




Search Filters




Sponsoring Organization




Status Details




Control Mapping




Password Policy




Application Invitation




External System Authentication Settings




Site Settings




Manage System Messages




Set Master Application




Manage Application Funds




Manage Role Types




Manage Academic Years



Upload Applicant Credentials



Assign Scholarship to Role Types



Plug-in Mapping

## 2. Search Filters

When you have multiple fund applications available, Search Filters allow the applicants to search for funding based on specific fund eligibility criteria(s), and to be able to locate only those funds that they are eligible for.

This keeps the applicant from having to scroll through pages of available funds in order to find only those that they are eligible for. When the applicant searches on specific eligibility criteria(s), they are then directed to the appropriate fund(s) that they qualify to apply for according to what they selected.

Search filters are mainly used in a **1:1 Application process**, where the application they are applying to only applies to one funding source.

The Search Filters set up allows the Global Administrator to create all the applicable fund eligibility criteria questions to search for all the funds that will be set up in the CommunityForce system.

**Important Note:** This is an optional feature. If you do not want to use search filters you can turn this feature off in the **Administration>Site Settings: General Settings: Enable Search by Eligibility Criteria** by selecting “**No**” to disable this feature. If disabled, it will not be necessary to set up search filters and you can skip this item in the site setup.

If you do decide to use this feature you will want to confirm that this functionality has been activated on your site and that the **Administration>Site Settings: General Settings: Enable Search by Eligibility Criteria** is set to “**Yes**” to enable this feature. You will also need to decide where in the login process will the **Search Screen** appear, and adjust the setting in the **Administration>Site Settings: General Settings: Default Page before Login** or **Default Page after login**.

Once this feature is enabled, when you setup the funds in the Funds setup, the search filters that are available will appear in that funds setup page.

It is recommended that you first create all the search filters needed for **every funding source** that will be active on your site, before creating the actual funding source in the Fund Setup. Once the search filters are created you can then go to the fund setup and assign all the active criteria(s) to all of your funding sources.

If using Search Filters, it is important to remember that these filters are used to search for specific funds. Therefore, **every funding source** that applicants need to search for must have a reply added for **every search filter** created in order to be returned in search results.

Think about each criteria you set up on a fund asking “If the applicant selects only this filter to search on should the fund appear in the results to the applicant.”

### **Example:**

**You have only two search filters created for your site:**

**State** (the state filter contains values for every single state)

**Major** (you have a listing of majors that are for eligibility in only specific funds)

**Fund 1** – Applicants from Virginia are eligible no matter what their major is. (This is the only eligibility criteria requirement for this fund.)

**When setting the search filters on Fund 1**

**State** - Since the only state for eligibility is Virginia, you would only select Virginia.

**Major** - Since the fund does not limit Majors, every major in your listing would need to be selected so that when the applicant from Virginia also selects a major in the search, this fund would appear as they are allowed to apply to this fund if they live in Virginia.

**Fund 2** – Applicants that are Majoring in Business Administration are eligible for the fund no matter what state they live in. (This is the only eligibility criteria requirement for this fund.)

**When setting the search filters on Fund 2**

**State** – Since the fund does not limit States, every state in your listing would need to be selected so that when the applicant with a business administration major also selects a state in the search, this fund would appear as they are allowed to apply to this fund if they are majoring in Business Administration.

**Major** – Since the only major for eligibility is Business Administration, select only Business Administration.

**Fund 3** – Applicants from Virginia, Majoring in Health Care are eligible for this fund

**When setting the search filters on Fund 3**

**State** - Since the only state for eligibility is Virginia, you would only select Virginia.

**Major** – Since the only major for eligibility is Health Care, select only Health Care.

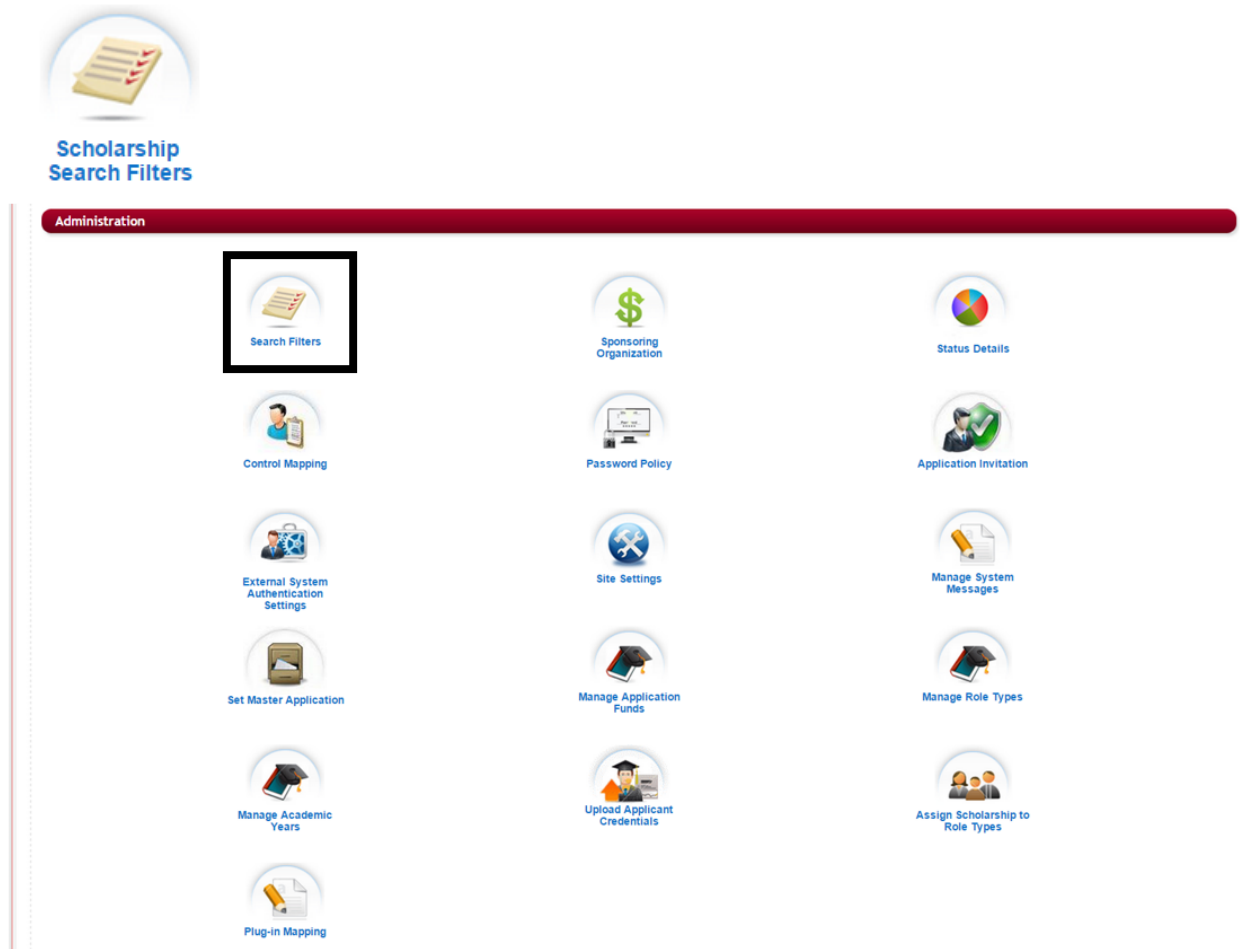
Below is an example of the **Search Screen** that the applicant sees when entering the CommunityForce system.

The screenshot shows the 'Search for Scholarships' interface. It features three primary search methods: 'Search by Keyword', 'Search by Scholarship(s) Eligibility', and 'Search by Sponsoring Organization'. The 'Search by Scholarship(s) Eligibility' section is highlighted with a black box and contains a list of filters, each with a 'Select' dropdown and a checkmark icon. The filters include: Eligible Years of Study, Eligible Terms of Award, Eligible Grant or Fellowship Purposes, Eligible Year College Majors, Eligible Global Regions, Eligible Countries, Eligible FAS Graduate School Disciplines, Eligible Professional School Disciplines, Eligible Languages, Eligible Terms of Funding, and U.S. Citizenship. Below the filters are 'Search by Eligibility' and 'Clear' buttons. The 'Search by Keyword' section has a text input field and 'Search by Keyword(s)' and 'Clear' buttons. The 'Search by Sponsoring Organization' section has a dropdown menu and 'Search by Sponsor' and 'Clear' buttons.

## 2.1 Setting up the Search Filters

### Exercise 1

- **Step 1:** From the **Administration Dashboard** click on the Search Filters Icon



- **Step 2:** The screen below will open:



Scholarship Search Filters											
Save ▶		Save & Exit ▶		Cancel ▶		Exit ▶					
Edit	Up	Down	Sort Order	Active	Required	Hidden From Search	External Name	Internal Name	Filter Type	Question Xml Name	List Items
			1	No	No	No	Country	Country			Africa: All-Africa: Algeria-Africa: Angola-Africa: Benin-Africa: Botswana-Africa: Burkina Faso-Africa: Burundi-Africa: Cameroon-Africa: Cape Verde-Africa: Central African Republic-Africa: Chad-Africa: Comoros-Africa: Congo-Africa: Côte d'Ivoire-Africa: Djibouti-Africa: Egypt-Africa: Equatorial Guinea-Africa: Eritrea-Africa: Ethiopia-Africa: Gabon-Africa: Gambia-Africa: Ghana-Africa: Guinea-Africa: Guinea-Bissau-Africa: Kenya-Africa: Lesotho-Africa: Liberia-Africa: Libya-Africa: Madagascar-Africa: Malawi-Africa: Mali-Africa: Mauritania-Africa: Mauritius-Africa: Mayotte-Africa: Morocco-Africa: Mozambique-Africa: Namibia-Africa: Niger-Africa: Nigeria-Africa: Reunion-Africa: Rwanda-Africa: Saint Helena-Africa: Sao Tome and Principe-Africa: Senegal-Africa: Seychelles-Africa: Sierra

**NOTE:** There are only 20 available pre-designed questions for search criteria filters.

Your system has pre-loaded search filter questions that may not be specific to your organization. If you are not using this feature, you will want to make sure all the questions are marked **inactive**. If you are using this option then you will need to edit the questions according to your organization's needs.

➤ **Step 3:** To add your funding sources' search filter criteria(s) you will need to edit an existing filter that is already pre-loaded on the site.

➤ **Step 4:** Next to the Filter you are editing, click on the Edit icon.



➤ **Step 5:** This will open the fields so that you can edit them with your criteria information.

Edit	Up	Down	Sort Order	Active	Required	Hidden From Search	External Name	Internal Name	Filter Type	Question Xml Name	List Items
	▲	▼		<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	Country	Country	DropDown ▼		Africa: All-Africa: Algeria-Africa: Angola-Africa: Benin-Africa: Botswana-Africa: Burkina Faso-Africa: Burundi-Africa: Cameroon-Africa: Cape Verde-Africa: Central African Republic-Africa: Chad-Africa: Comoros-Africa: Congo-Africa: Côte d'Ivoire-Africa: Djibouti-Africa: Egypt-Africa: Equatorial Guinea-Africa: Eritrea-Africa: Ethiopia-Africa: Gabon-Africa: Gambia-Africa: Ghana-Africa: Guinea-Africa: Guinea-Bissau-Africa: Kenya-Africa: Lesotho-Africa: Liberia-Africa: Libya-Africa: Madagascar-Africa: Malawi-Africa: Mali-Africa: Mauritania-Africa: Mauritius-Africa: Mayotte-Africa: Morocco-Africa: Mozambique-Africa: Namibia-Africa: Niger-Africa: Nigeria-Africa: Reunion-Africa: Rwanda-Africa: Saint Helena-Africa: Sao Tome and Principe-Africa: Senegal-Africa: Seychelles-Africa: Sierra

➤ **Step 6:** You will need to adjust every column to fit the use of your new criteria

- **Active** – Is this an active search filter criteria that should be added to all your funding sources? (You may at times have criteria filter questions that no longer apply, so you can make them **not** active so that they do not continue to appear when setting future eligibility of funds going forward)
  - Yes** – activates it and you will need to add a value for this criteria in every funding source.
  - No** – if this should not be activated then select No and it will not appear in the funding sources setup.

- **Required** – Is this a required search filter that the applicant is forced to search on. If required the applicant will not be able to perform a search without first selecting something in this filters search field.
  - Yes** – makes it required and the applicant is forced to make a selection for this search filter.
  - No** – this is not required and the applicant can skip this field when searching.
  
- **Hidden from Search** – allows you to create search filter questions, that are shown on the fund page but **not available** on the Search Page. It will show on the Funding source setup page, but is hidden so that the applicant does not have it as an option in the Search screen.
  - Yes** – Hides the search filter from the Welcome Search page
  - No** – Search criteria is viewable on the Welcome Search page
  
- **External Name** – the search filter question name that is shown to the applicant on the Search Page.
  
- **Internal Name** – the search filter question name that is shown for internal purpose only. Usually an abbreviated version that is understandable to internal staff within your organization.
  
- **Filter Types** - Set how the criteria values are displayed when selecting the specific filter for the search question type.
  - Drop Down** – A dropdown list that allows only a single selection of an item
  - Multi Select** – A dropdown list that allows multiple selections of an item within a criteria filter.
  
- **Question XML Name:** the xml name given to the search filter. Important when using external integration with your organization’s program and matching applicants to specific criteria that they have been matched to internally and you want those fields to populate with the same data you have internally, you will need to know the XML names to be able to map effectively.
  
- **List Items** – Listing of the available value replies for the search filter question. You will want to delete the existing items by selecting them and clicking delete on your keyboard. Then add your new listing separating each individual value with the tilde symbol (~) do not add spaces between the values, this will be one long string listing all the available values for that filter.
  - Example:**  
Illinois~Indiana~Ohio~West Virginia~Virginia
  
- **Step 7:** Once you have completed editing your item you can click Save to save that item only and continue to the next item to edit.
  
- **Step 8:** if you need to adjust the sort order of the items you can click on the Up/Down arrows to move it up or down in the listing. This will also adjust the sort order to the position you move it to.
  
- **Step 9:** Once you have completed editing and adding all your search filters that will be for your funding sources, you can click the Save and Exit, to return to the Administration Dashboard. Once these are saved and activated they will be available for use in the Funding Source Setup.

**Cancel** – Cancels changes and remains on the page

**Exit** – Does not save any changes and returns to the Administration Dashboard

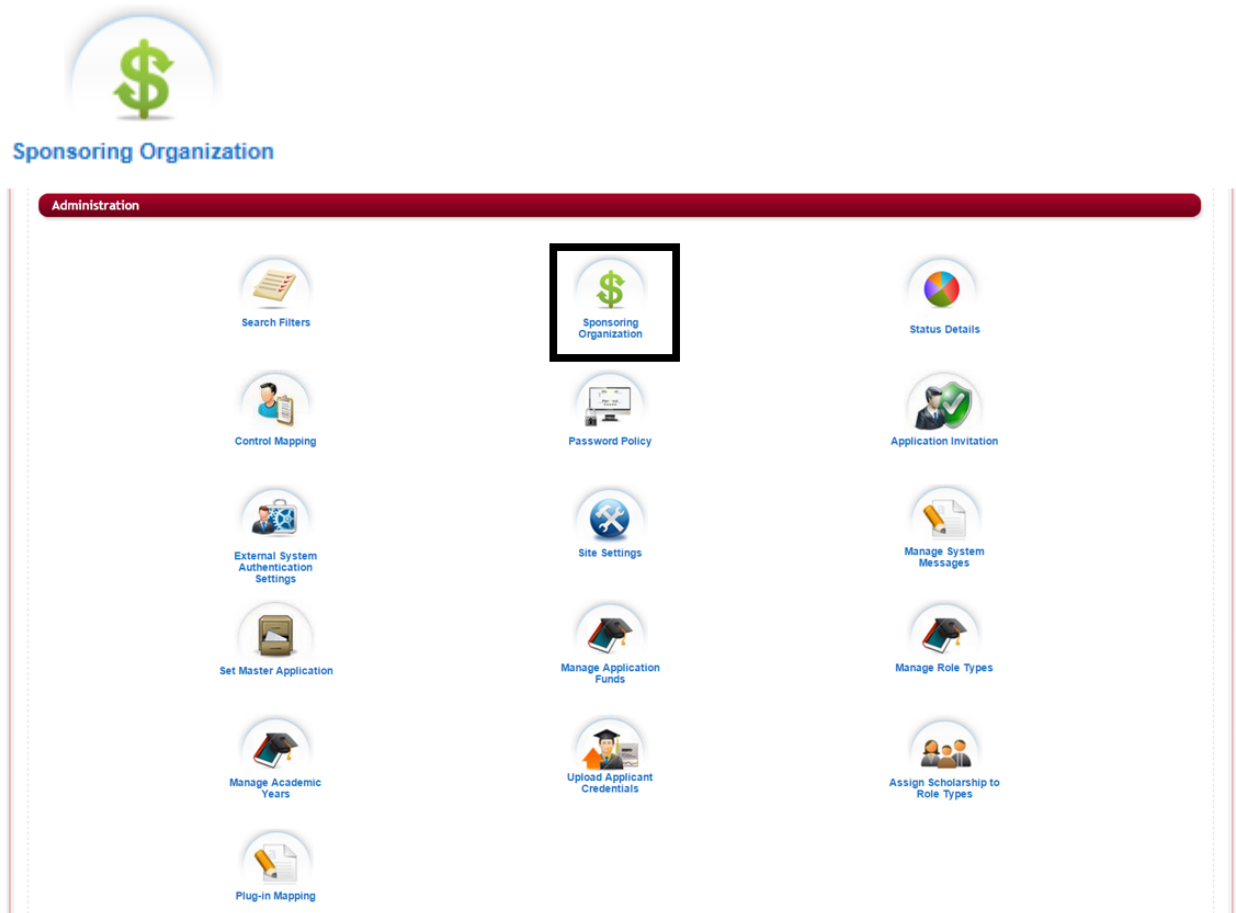
### 3. Sponsoring Organization

There may be organizations that process applications across multiple departments within their organizations as well as organizations that process applications for multiple organizations. The Sponsoring Organization setting allows the Global Admin to enter multiple sponsoring organizations and connect specific funds, applications, and user accounts to those separate organizations.

#### 3.1 Adding Sponsoring Organizations

##### Exercise 1

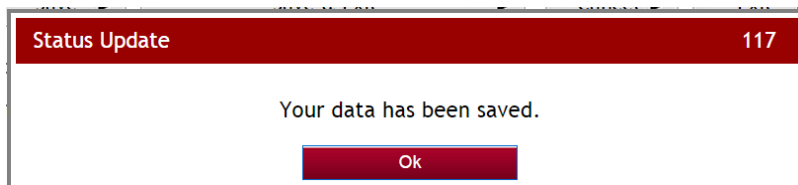
- **Step 1:** From the **Administration Dashboard** click on the **Sponsoring Organization** Icon



- **Step 2:** The Sponsoring Organization page will open:

Sponsor Name		Description
<input type="checkbox"/>	Department of History of Art and Architecture	History of Art and Architecture
<input type="checkbox"/>	Department of History of Science	History of Science
<input type="checkbox"/>	Department of Human Evolutionary Biology	Human Evolutionary Biology
<input type="checkbox"/>	Department of Legal History, American Legal Education	Legal History, American Legal Education
<input type="checkbox"/>	Department of Libraries/Museums	Libraries/Museums
<input type="checkbox"/>	Department of Literature and Comparative Literature	Literature and Comparative Literature
<input type="checkbox"/>	Department of Mathematics	Mathematics

- **Step 3: Sponsoring Organization Name** - Add a new Sponsoring Organization by typing a Sponsor Name in the Sponsoring Organization Name field. If you only have one organization then you will only enter that one organization's information as the Sponsor for all your applications/funds.
- **Step 4: Sponsoring Organization Information** – Enter a brief description for the Organization.
- **Step 5: Sponsoring Organization Logo** – If you have a logo for this organization, upload the logo for this Organization by clicking on the Upload Sponsor Logo.
  - Logos must be formatted:**
  - Max Height: 80px
  - Max Width: 400px
- **Step 6:** After you have entered information. Click Save and a System Message will appear. Click OK to continue.



- **Step 7:** The new sponsoring organization will appear in the table grid below.

Sponsor Name		Description
<input type="checkbox"/>	Department of History of Art and Architecture	History of Art and Architecture
<input type="checkbox"/>	Department of History of Science	History of Science
<input type="checkbox"/>	Department of Human Evolutionary Biology	Human Evolutionary Biology
<input type="checkbox"/>	Department of Legal History, American Legal Education	Legal History, American Legal Education
<input type="checkbox"/>	Department of Libraries/Museums	Libraries/Museums
<input type="checkbox"/>	Department of Literature and Comparative Literature	Literature and Comparative Literature
<input type="checkbox"/>	Department of Mathematics	Mathematics

**Export to Excel**

– You can click the Export to Excel to open the listing of the table grid to and Excel document.


**Save** – Saves your changes and stays on the page

**Save & Exit** – Saves your changes and exits to the Administration Dashboard

**Cancel** – Cancels your changes and stays on the page

**Exit** – Does not save any changes and exits to the Administration Dashboard

### 3.2 Editing a Sponsoring Organization:

To edit an existing sponsoring organization in the table listing, click on the edit icon  to the left of the organization you wish to edit. Their information will appear in the top section, make your changes and click Save for the changes to be saved.

**Delete** – Select the red “X” to the left of the organization you wish to delete. You will receive a confirmation to delete message, answer “yes” to delete.

			Sponsor Name	Description
<input type="checkbox"/>			Department of History of Art and Architecture	History of Art and Architecture
<input type="checkbox"/>			Department of History of Science	History of Science
<input type="checkbox"/>			Department of Human Evolutionary Biology	Human Evolutionary Biology
<input type="checkbox"/>			Department of Legal History, American Legal Education	Legal History, American Legal Education
<input type="checkbox"/>			Department of Libraries/Museums	Libraries/Museums
<input type="checkbox"/>			Department of Literature and Comparative Literature	Literature and Comparative Literature
<input type="checkbox"/>			Department of Mathematics	Mathematics

## 4. Status Details (Optional)

Status Details are *custom* stages designed to help you with your application process.

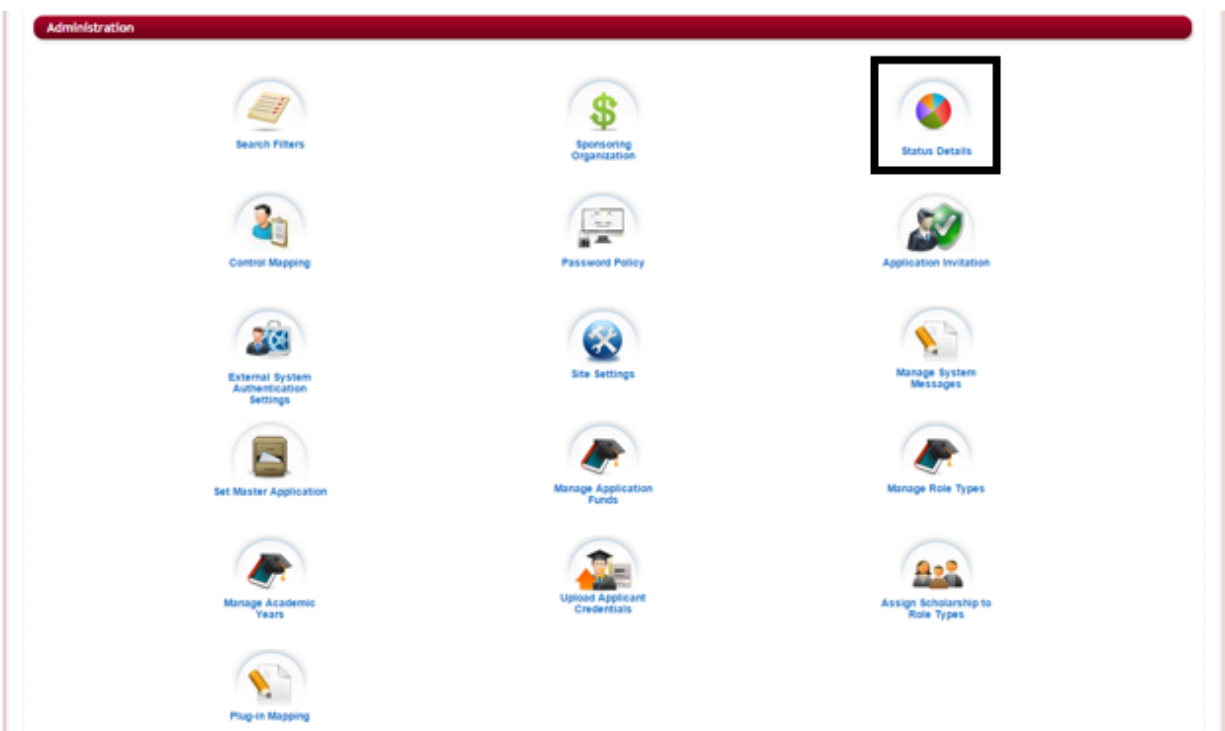
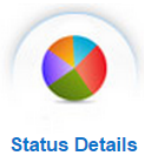
As the applicants move through the application process the system uses Status(es) to define where the applicants are at in the application process. Status are automatically triggered by the system as an applicant is moved through the process. However, many of our clients need to be able to track the applicants beyond those standard statuses. Therefore, **Status Details** allows you to create additional status/stages that will help you know what stage of your process those applicants are in.

Status Details are global items and when created are available on all applications.

### 4.1 Adding a new Status Detail

#### Exercise 1

- **Step 1:** From the **Administration Dashboard** click on the **Status Details** Icon.



- **Step 2:** The Status details table grid will open grid showing all the current Status Details.
- **Note:** You site will come preloaded with some common Status Details that can help give you an idea of some Status Details that have been used by some of our clients. All of these are editable, and can be changed to a name that better fits your process, and you can add additional Status Details, as needed. There's no limit on how many status details you can add.

Home > Administration > Status Details

Status Details				
				Add a Status Detail
	Application Status Detail	Description	Active	Sort Order
	✗ Assigned For Review	The student's application is being reviewed	Yes	1
	✗ Returned to Student	Grant Admin returned the application to the student for additional information	Yes	2
	✗ Not Qualified	The Grant Admin determined the applicant is not qualified for the grant or fellowship they applied first	Yes	3
	✗ Not a Finalist	The student's application was reviewed and is not on the list of finalists	Yes	4
	✗ Preliminary Award	Preliminary Award	Yes	5
	✗ Preliminary Award Alternate	Preliminary Award Alternate	Yes	6
	✗ Final Award	Student selected for an award	Yes	7
	✗ Final Award Alternate	Student selected as an alternate for the final award	Yes	8
	✗ Award Declined	The student declined an award from this grant	Yes	9
	✗ Closed	The application is closed.....	Yes	10

Go to Page  [Go](#) Page 1 Of 2 Display  Records per Page

- **Application Status Detail** – the current name of the status detail
- **Description** – a brief description of the purpose of this status detail
- **Active – Yes** – The Status Detail is currently active and available for use within your application process.
- **Active – No** – The Status Detail is currently not active and will need to be activated before it can be used within your application process.
- **Sort order** – This is the sort order of the Status Detail in how it will display when viewing a status details dropdown box within various reporting areas of the application's evaluation sections,

- **Step 3:** To add a new status detail, click on the **Add a Status Detail** button

**Add a Status Detail**

**Status Details**

[Add a Status Detail](#)

Application Status Detail	Description	Active	Sort Order
Assigned For Review	The student's application is being reviewed	Yes	1
Returned to Student	Grant Admin returned the application to the student for additional information	Yes	2
Not Qualified	The Grant Admin determined the applicant is not qualified for the grant or fellowship they applied first	Yes	3
Not a Finalist	The student's application was reviewed and is not on the list of finalists	Yes	4
Preliminary Award	Preliminary Award	Yes	5
Preliminary Award Alternate	Preliminary Award Alternate	Yes	6
Final Award	Student selected for an award	Yes	7
Final Award Alternate	Student selected as an alternate for the final award	Yes	8
Award Declined	The student declined an award from this grant	Yes	9
Closed	The application is closed.....	Yes	10

Go to Page  [Go](#)      Page 1 Of 2      Display  Records per Page

- **Step 4:** The Status Detail setup section will open at the top of the page.

**Status Details**

Save   Save and Exit   Cancel   Exit

\*Application Status Detail:  \*

\*Description:

\*Sort Order:

Active:

Save   Save and Exit   Cancel   Exit

Items marked with an (\*) are required and will need to be completed when creating a new Status Detail.

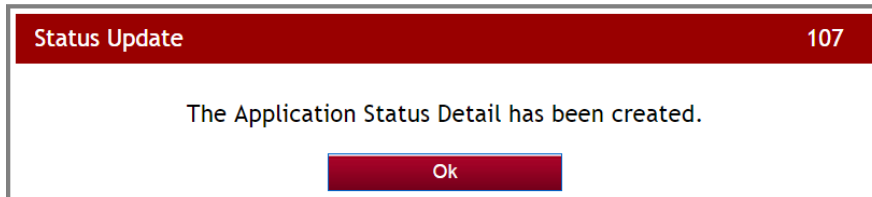
- **Step 5: \*Application Status Detail** – Enter the name for the new Status Detail you want to create, this is the name that will appear in the Status Detail drop down listings.
- **Step 6: \*Description** – enter a brief description describing the purpose of this Status Detail
- **Step 7: \*Sort Order** – This is the display order given to the Status Detail and is the order it will be displayed in the dropdown menu selection when selecting the Status Detail within you applications.
- **Step 8: Active** – Select this if you want this Status Detail to appear as an option when selecting Status Details within all your applications. If this is not selected the Status detail will not be activated and will not appear in the dropdown menu selections.
- **Step 9:** Click **Save** to Save your information and stay on the page or click **Save and Exit** to save the status detail and return to the Status Details Table.



**Cancel** – Clears all data you entered and stays on the page

**Exit** – Does not save any data you entered and returns you back to viewing only the Status Details table grid.

- **Step 10:** Once you save the new status detail a message will appear showing it has been created, click Ok to continue. Once saved your new status detail will appear in the Status Details table.



## 4.2 Editing an Existing Status:

- **Step 1:** While in the Status Detail Table grid, to edit an Existing Status Detail click on the Edit icon located next to the Status Details you want to edit.

The screenshot shows a table titled "Status Details" with the following data:

Application Status Detail	Description	Active	Sort Order
Assigned For Review	The student's application is being reviewed	Yes	1
Returned to Student	Grant Admin returned the application to the student for additional information	Yes	2
Not Qualified	The Grant Admin determined the applicant is not qualified for the grant or fellowship they applied first	Yes	3
Not a Finalist	The student's application was reviewed and is not on the list of finalists	Yes	4
Preliminary Award	Preliminary Award	Yes	5
Preliminary Award Alternate	Preliminary Award Alternate	Yes	6
Final Award	Student selected for an award	Yes	7
Final Award Alternate	Student selected as an alternate for the final award	Yes	8
Award Declined	The student declined an award from this grant	Yes	9
Closed	The application is closed.....	Yes	10

At the bottom of the table, there is a "Go to Page 1 Go" button, "Page 1 Of 2" navigation, and a "Display 10 Records per Page" dropdown menu.

- **Step 2:** The Status Detail setup box will appear at the top of the page, with that status detail's information. You can change any field in the Status Detail to better suit your organization's use.

**Status Details**

Save Save and Exit Cancel Exit

\*Application Status Detail: Qualified for Review \*

\*Description: Used to qualify an applicant to continue moving them through the review process, when under committee review.

\*Sort Order: 2

Active:

Save Save and Exit Cancel Exit

- **Step 3:** Once you make the changes to the Status Detail, be sure to click Save or Save and Exit to save any changes you have made.

### 4.3 Deleting an Existing Status:

- **Step 1:** While in the Status Detail Table grid, to delete an Existing Status Detail click on the red “X” icon located next to the Status Details you want to delete.

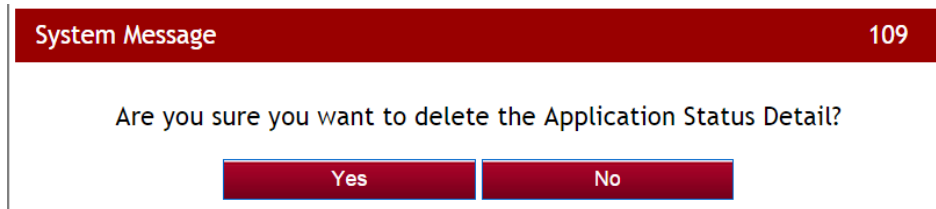
**NOTE:** If you no longer want a Status Detail to appear as an option in your applications, **you do not want to delete** it once it has been used in an application. Deleting an existing Status Detail will remove the historical data for those applicants that you originally used that Status Detail on. You will need to mark that Status Detail as **Active – No-** by clicking on the Edit Icon next to the Status Detail, and unchecking the **Active box** on the edit page. Be sure to save your changes.

**Status Details** Add a Status Detail

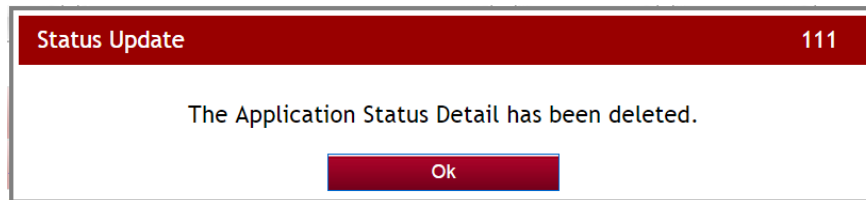
	Application Status Detail	Description	Active	Sort Order
	Assigned For Review	The student's application is being reviewed	Yes	1
	Returned to Student	Grant Admin returned the application to the student for additional information	Yes	2
	Not Qualified	The Grant Admin determined the applicant is not qualified for the grant or fellowship they applied first	Yes	3
	Not a Finalist	The student's application was reviewed and is not on the list of finalists	Yes	4
	Preliminary Award	Preliminary Award	Yes	5
	Preliminary Award Alternate	Preliminary Award Alternate	Yes	6
	Final Award	Student selected for an award	Yes	7
	Final Award Alternate	Student selected as an alternate for the final award	Yes	8
	Award Declined	The student declined an award from this grant	Yes	9
	Closed	The application is closed.....	Yes	10

Go to Page 1 Go Page 1 Of 2 Display 10 Records per Page

- **Step 2:** A new window will open asking you to confirm you want to delete the status, click “Yes” to continue with the deletion.



- **Step 3:** An additional box will appear notifying you that the Status detail was deleted, click OK to finalize the deletion.



## 5. Control Mapping

Control Mapping allows you to change the Control Name Labels on all the icons located within the various dashboards on your site.

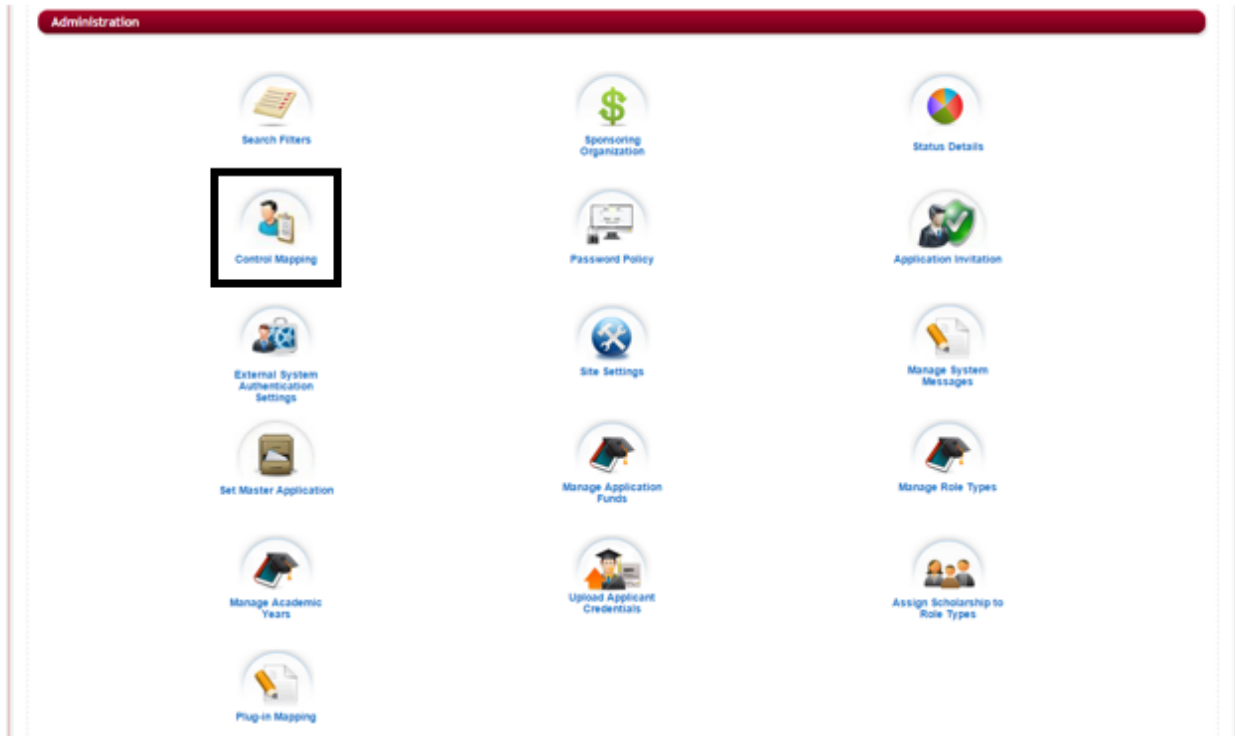
**Important:** If you change any of the label names, please keep a list of the old name so that you can refer to the original label when reviewing our help guides, training videos and when putting in a request for support.

### 5.1 Changing a Control Name Label

#### Exercise 1

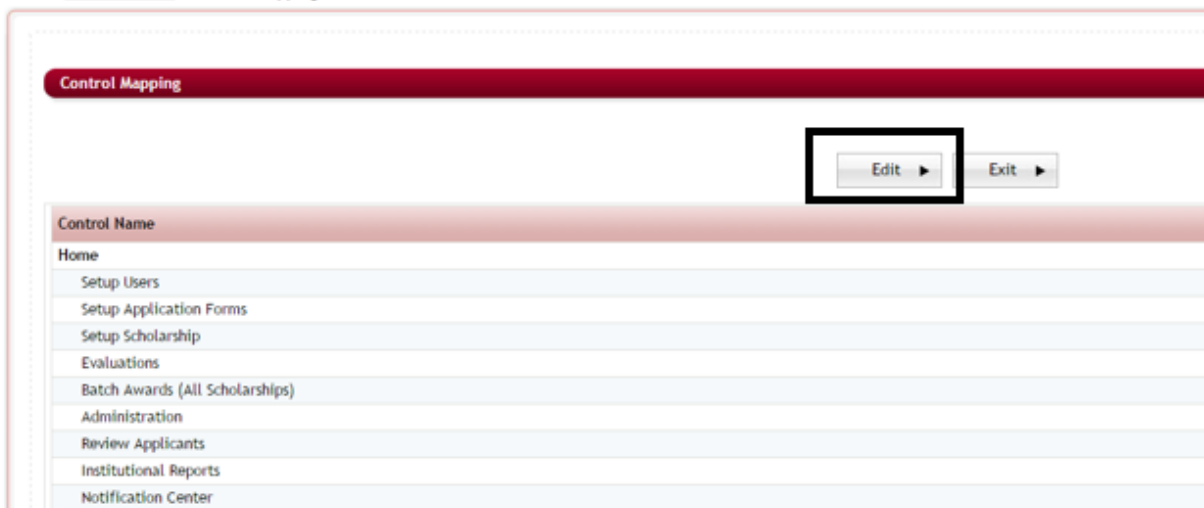
- **Step 1:** From the **Administration Dashboard** click on the **Control Mapping** Icon.





- **Step 2:** The Control Mapping listing will appear, showing all the icon items for every dashboard on the CommunityForce site.

Home > Administration > Control Mapping



- **Step 3:** Click the **Edit** button to open up the Fields for editing.

## Control Mapping

Save ▶

Cancel ▶

Exit ▶

Control Name	
Home	*
Setup Users	
Setup Application Forms	
Setup Scholarship	
Evaluations	
Batch Awards (All Scholarships)	
Administration	
Review Applicants	
Institutional Reports	
Notification Center	
Applications Module	
Pre-Qualification Questions	
Sections and Questions	
Request Instructions	

- **Step 4:** Locate the control name item(s) you want to edit, and type the new label name for each control name you want to change by typing over the existing name. Items that are **bolded** are the name of the actual dashboard that contains the icon.
  - **Caution:** If you change the name of an item, use caution not to duplicate a name already used on another label, especially when renaming the actual dashboard name do not change the dashboard name to another dashboard that already exists. The only labels that should carry the same name are labels for icons that direct you to a dashboard named the same as the icon. (i.e. the **Evaluation Setup** icon on the Evaluations Dashboard, directs you to the **Evaluation Setup** dashboard both those items can have the same label name)
- **Step 5:** Once you have changed all the items you want changed, click the **Save** button to save the changes you have made to the label prior to exiting and returning to the Administration Dashboard.

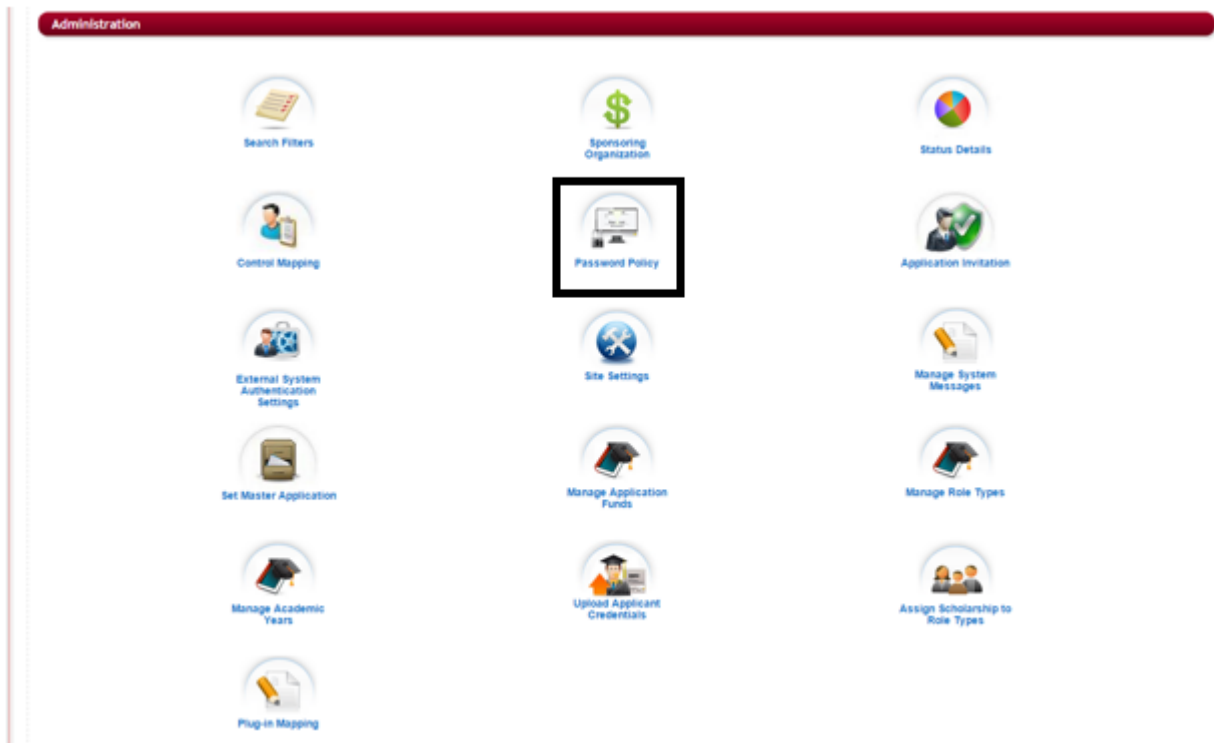
Home > Administration > Control Mapping

Control Mapping

Control Name	
Home *	
Setup Users	
Setup Application Forms	
Setup Scholarship	
Evaluations	
Batch Awards (All Scholarships)	
Administration	
Review Applicants	
Institutional Reports	
Notification Center	

## 6. Password Policy

(For details on how to use and set up this feature please see Module 2 – Managing User Accounts – 3. Changing Password Policy)



## 7. Application Invitation

(For details on how to use and set up this feature please see Module 6 – Application Invitation Setup)



## 8. External System Authentication Settings

Used for setting Single Sign-on (SSO) Authentication for clients using External System Authentication with third party sites (i.e. SAML, LDAP). It lets end users login to CommunityForce from their organization's portal page, without having to create new credentials or re-login to the CommunityForce system.

If you wish to integrate to an external system please contact CommunityForce for assistance.

**Note:** If you are not using an External System Authentication to have your applicants log in in to the CommunityForce site, then you will not need to set up this functionality.

### 8.1 External System Authentication Settings Setup

#### Exercise 1

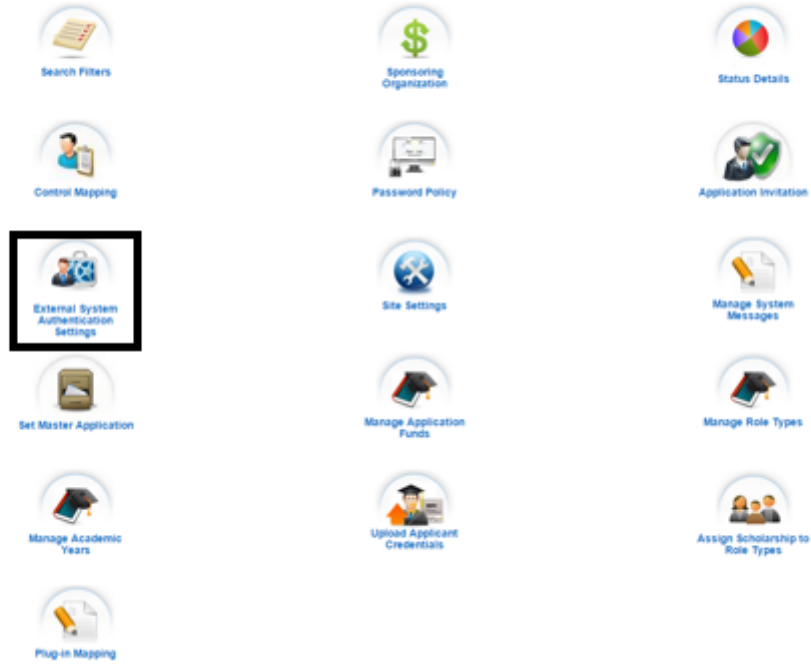
- **Step 1:** From the **Administration Dashboard** click on the **External System Authentication Settings** Icon.



External System  
Authentication Settings



Administration



- **Step 2:** When you click on the External System Authentication Settings icon from the Administration Dashboard the following screen will appear.

## External System Authentication Settings

Save Save & Exit Exit

Enable Single Sign On :  Yes  No

Single Sign On Redirection URL :  \*

Allow New User Creation :  Yes  No

Applicant ID Length :

Link Expiration Time (Secs) :

Shared Secret Key :  \*

Incoming URL :

Link Expiration Time Message :

Font Verdana Size 2 (10 pt)

Your session is expired, log back into Student Portal to continue the Scholarship Application process.. **Student Service USD**  
<http://cricinfo.com>

Design mode HTML text

Authentication Failed Message :

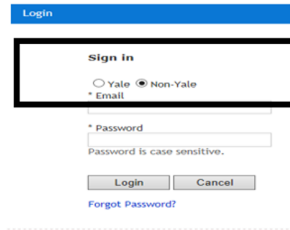
Font Verdana

Your session is expired, log back into Student Portal to continue the Scholarship Application process..  
**Student Service USD**  
<http://uoogle.com>

Design mode HTML text

- **Step 3: Enable Single Sign On** – Set your Enable Single Sign On to “Yes”. This Activates the Single Sign On authentication. – **Yes**-Enabled, **No**-Default not enabled.
- **Step 4: Single Sign On Redirection URL** – Enter the URL of your site address, which is the URL that the applicant will be redirected to.
- **Step 5: Allow New User Creation** – There may be occasions, where, a user is currently present on the client’s site but may not have had their credentials pushed down to the CommunityForce system. In that instance, the **Allow New User Creation** allows client to decide if they will allow the CommunityForce system to create new users that are currently in their site, onto the CommunityForce system. **Yes**-will allow the new users to be created. **No**-will not allow the new user creation.

**Note:** This will also activate the ability to login as a member or non-member of your organization and will add those option buttons to the login in screen that is accessed directly in the Communityforce site.



- **Step 6: Applicant ID Length** – Set the Length of the ID that client’s organization allows in *their* system, enter the number of how many characters are allowed.
- **Step 7: Link Expiration Time (Secs)** – Set the length of time in seconds that the Single Sign-On session will timeout if not connected to the CommunityForce system. When both the application session and the Single Sign-On session timeout, the user will be directed to the Single Sign-On login page to re-authenticate.
- **Step 8: Shared Secret Key** – Enter the Shared Secret Key. Both CommunityForce and the client will use the same key, which will send a user to the CommunityForce system and in reverse CommunityForce will be using the same key to confirm the user as the client’s user. This provides a safe encryption by verifying that the token comes from a trusted source.
- **Step 9: Incoming URL:** Enter the URL for the Incoming URL. This is the URL Portal Page that the user will be using to log into the CommunityForce system. The Internal login page.
- **Step 10: Link Expiration Time Message** – Enter the message that you want your users to see. This is a customizable message the user will see when the session has expired due to the Link Expiration Time being reached as set in the *Link Expiration Time*.
- **Step 11: Authentication Failed Message** – Enter the message that you want your users to see. This is a customizable message the user will see when the *Authentication failed*.

**Design mode** – The editor box works similar to Microsoft Word. Type the information into the body of the editor just as you would be typing and formatting a Microsoft Word document using the tools present in the editor box.

**HTML Text** –You can switch to HTML text and create your message using HTML tags with the content and it will display the content and tags as you format. Switch back to Design mode to preview.

- **Step 12: Save** – Once you have completed entering the information above, click on Save to remain on the page, or Save & Exit to save the data and return to the Administration Dashboard.

**Exit** – Exit’s to the Administration Dashboard without changing data.

## 9. SITE SETTINGS

The system allows you to configure certain site settings to customize the use of the site to your organization's needs. Site settings are also used to enter the necessary settings to connect to your organization's external site if using External Site integration.

CommunityForce will configure some of these settings prior to site delivery. After finishing **Module 1 – Accessing Your System** we suggest that you review the items in this section. Some of these features you will want to have set up prior to going live. If you are a large organization dealing with multiple Department Admins we suggest discussing your system needs as a group prior to setup.

Before setting up your Organization Information in the site settings you will need the following:

- 1) Decide on a name for your CommunityForce Product
- 2) Decide on your Organization Code name
- 3) Obtain a high resolution Organization logo; the size should be 370 x 80 pixels using a jpg or png format.

### **Exercise 1**

- **Step 1:** From the **Administration Dashboard** click on the **Site Settings** Icon.





**Step 2:** The following screen will appear:

Home > Administration > Site Settings

**Site Settings**

Organization

\*Organization Name : CommunityForce

\*Organization Application Name : CommunityForce Training Site Database

\*Organization Code : CFTS

\*Organization Logo :

\*Organization Domain : communityforce.com

\*Site Behaviour :  Individual  Organizations

Grants/Fellowship Settings

Default Name	Show on Grant Setup	Show on Awards	Display Name	Type	Values
Custom Field 1	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	Custom Field 1 Drop Down	DropDown	
Custom Field 2	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	Custom Field 2 Drop Down	DropDown	
Custom Field 3	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	Custom Field 3 Drop Down	DropDown	
Custom Field 4	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	Custom Field 4 Drop Down	DropDown	
Custom Field 5	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	Custom Field 5 Drop Down	DropDown	
Custom Field 6	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	Custom Field 6 Drop Down	DropDown	
Custom Field 7	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	Custom Field 7 Text	TextBox	
Custom Field 8	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	Custom Field 8 Text	TextBox	
Custom Field 9	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	Custom Field 9 Text	TextBox	
Custom Field 10	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	Custom Field 10 Text	TextBox	
Custom Field 11	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	Custom Field 11 Text	TextBox	
Custom Field 12	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	Custom Field 12 Text	TextBox	
Custom Field 13	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	Custom Field 13 Numeric	Numeric	
Custom Field 14	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	Custom Field 14 Date	Date	
Custom Field 15	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	Custom Field 15 Date	Date	
Custom Field 16	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	Custom Field 16 Date	Date	
Custom Field 17	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	Custom Field 17 Essay	Essay Box	
Custom Field 18	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	Custom Field 18 Essay	Essay Box	
Custom Field 19	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	Custom Field 19 Essay	Essay Box	

**Step 3:** The Site Settings page has been sectioned off into separate setup areas, please see the sub-sections below for the explanation of each setup feature located in these areas.

**Organization**  
**Grants/Fellowship Settings**  
**External System Settings**  
**Manage Awards Custom Fields**  
**General Settings**

**Note:** When you receive your CommunityForce site, these items should already be completed according to your organization's needs. However, there may be occasions when you need to make adjustments to your site.

**Important:** Site Settings control how your system operates, therefore, use *extreme caution* when updating areas you are not familiar with, as this may cause your site to not function as expected. If you are unsure about how to set an item, please contact support for assistance.

## 9.1 Updating Your Organization Information (Organization Branding - Name, Logo, domain)

In the **Site Settings** your **Organization** setup information is located at the top section of that page:

The following items are available in the Organization section for updating:

**Note:** all items that are marked with an \* are required fields to be filled in.

**\*Organization Name** – Your Organization's name. This name will appear at the bottom left hand corner of all screens. Enter the name how you want it to appear to your applicants

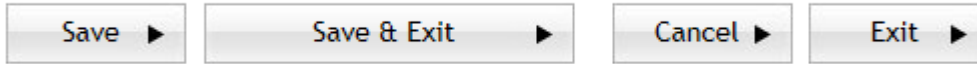
**\*Organization Application Name** – Name of the type of application system you are using. (I.e. Scholarship Database or Grant Database). This name will appear at the bottom left hand corner of all screens, next to your Organization's Name. Enter the name how you want it to appear to your applicants

**\*Organization Code** – Abbreviated version of your organization's name. Used for backend coding purposes, to identify your organization in coding without using a long version. (I.e. Montgomery County Community Foundation = MCCF). Enter the abbreviated version you would like to use for your organization.

- 1) **\*Organization Logo** – Upload your organization logo for branding purposes. The logo appears in the upper left hand corner of the screens Header. Logos must be sized to 370 x 80 pixels using a jpg or png format.

**\*Organization Domain** –Your organization's domain name. A domain name represents an Internet Protocol (IP) resource. Domain names are also used as simple identification labels to indicate ownership or control of a resource. Typical domain name: @harvard.edu.

**Site Behavior** – The behavior of your site whether it is a Scholarship Site with individuals as applicants or a Grant Site with Organizations as applicants. This will be pre-set for you. **Do not change!**



Once you have confirmed your Organization’s Information it is a good idea to save any changes you have made prior to continuing to the other site settings. You can either click **Save** to save your changes but stay on the Site Settings page to continue updating, or click **Save & Exit** and return back to Administration Dashboard.

**Cancel** – Clears all data from the fields.

**Exit** – Undo changes and return to the Administration Dashboard

## 9.2 Grants/Fellowship Settings

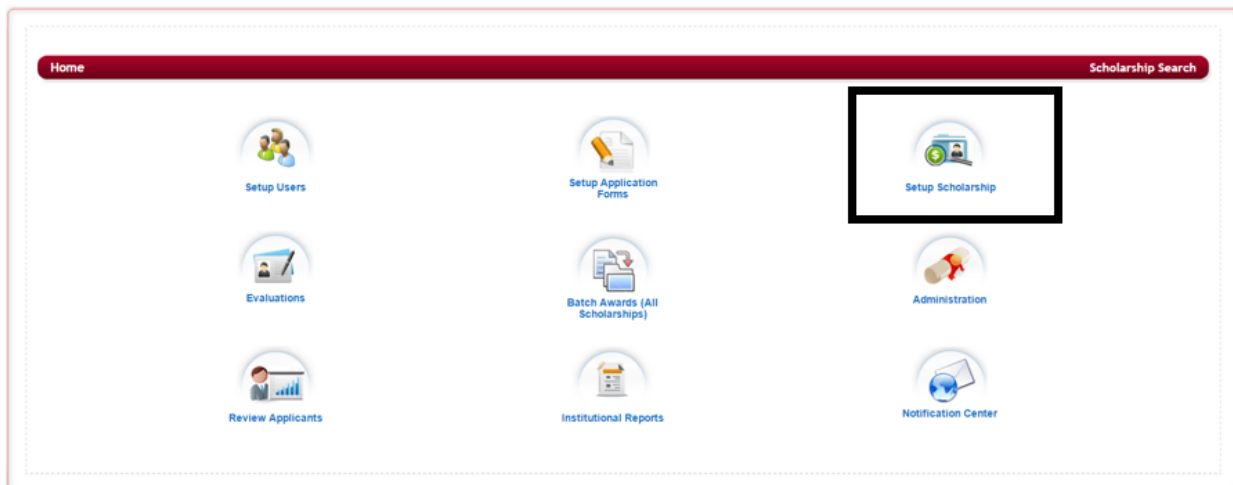
The settings in this section are related to the setup items available in the **Setup Scholarship** (Funding Source) Icon in your **Home** Dashboard.

**(Note:** The name of the icon may differ based on the name defined in the control mapping module of the application, as organizations have different names for their *funding source* (Funds, Awards, Grants, Fellowships, Scholarships, or Competitions). To change the icon’s label name, see the **Control Mapping settings located in this guide.**)



### Setup Scholarship

Home



**Scholarship Details:**

\*Scholarship Name: 2014-2015 SDSU Scholarship Application \*

Associated Application: Select

Sponsoring Organization: Select

\* Annual Budget/Academic Year: \$0 2014-2015

General Ledger Account: Award Amount:

Custom Field 1 Drop Down:	Custom Field 2 Drop Down:
Custom Field 3 Drop Down:	Custom Field 4 Drop Down:
Custom Field 5 Drop Down:	Custom Field 6 Drop Down:
Custom Field 7 Text: *	Custom Field 8 Text: *
Custom Field 9 Text:	Custom Field 10 Text:
Custom Field 11 Text:	Custom Field 12 Text:
Custom Field 13 Numeric:	Custom Field 14 Date:
Custom Field 15 Date:	Custom Field 16 Date:

The settings in the **Administration>Site Settings: Grants/Fellowship Settings** section control what fields will display in the Setup section that are to be completed to capture information regarding your funding sources.

Some organizations want to have at their fingertips information on their funding sources without having to constantly consult with their external systems. CommunityForce has made available twenty customizable fields in this section. You can choose whether or not you wish to use them and define the values. Prior to setting this section up it is important to determine which controls you would like to use.

**Best Practice Tip** - We suggest that you review your funding source and decide what you need keep track of in this system before proceeding in editing this section.

The following items appear in the **Administration>Site Settings: Grants/Fellowship Settings**:



Grants/Fellowship Settings

Default Name	Show on Grant Setup	Show on Awards	Display Name	Type	Values
Custom Field 1	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	Custom Field 1 Drop Down	DropDown	
Custom Field 2	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	Custom Field 2 Drop Down	DropDown	
Custom Field 3	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	Custom Field 3 Drop Down	DropDown	
Custom Field 4	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	Custom Field 4 Drop Down	DropDown	
Custom Field 5	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	Custom Field 5 Drop Down	DropDown	
Custom Field 6	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	Custom Field 6 Drop Down	DropDown	
Custom Field 7	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	Custom Field 7 Text	* TextBox	
Custom Field 8	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	Custom Field 8 Text	* TextBox	
Custom Field 9	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	Custom Field 9 Text	TextBox	
Custom Field 10	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	Custom Field 10 Text	TextBox	
Custom Field 11	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	Custom Field 11 Text	TextBox	
Custom Field 12	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	Custom Field 12 Text	TextBox	
Custom Field 13	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	Custom Field 13 Numeric	Numeric	
Custom Field 14	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	Custom Field 14 Date	Date	
Custom Field 15	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	Custom Field 15 Date	Date	
Custom Field 16	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	Custom Field 16 Date	Date	
Custom Field 17	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	Custom Field 17 Essay	Essay Box	
Custom Field 18	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	Custom Field 18 Essay	Essay Box	
Custom Field 19	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	Custom Field 19 Essay	Essay Box	
Custom Field 20	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	Custom Field 20 Essay	Essay Box	

Enable Fund Contact :  Yes  No      Enable Fund Donor :  Yes  No

Show Funds based on Role Types :  Yes  No

**Each Custom Field has the following Columns:**

**Default Name** - The default name given to the field for tracking purposes.

**Show on Grant Setup** – This controls whether or not this field will display in the funding source setup. Select “yes” to have it display or “no” if it is not going to be used by your organization.

**Show on Awards** – These same items can appear in the Manage Awards screen when awarding your applicants using the Evaluations>Evaluate Applicants>Manage Awards. If you wish an item to appear select “yes” or “no” if you do not want to see this field when awarding.

**Display Name** – Enter the label name for this field that you want it to display as when viewing it in either the Funding Source Setup or the Manage Awards areas.

**Type:** Each field has a preformatted type, if the field is activated the Type in the Type Column is the way that field will function.

**DropDown** – There are six customizable Dropdown fields. This field type allows you to create a dropdown listing of items that your administrators can select from for this specific field type. If activated, enter the values in the Values field as one long string, using the ~ symbol between each separate value. Do not use spaces between the values.

Type	Values
DropDown	Donor Advised-Restricted-Unrestricted-Scholarship-Fellowship

**TextBox** – There are six customizable TextBox fields. Two of these field are marked with an \* and are required fields that can appear to administrative staff that must be completed in the funding source setup. Administrators can enter and format text regarding descriptive information you would like to capture on this funding source. You will not enter anything in the Values column.

**Numeric** – There is one six customizable Numeric field. This field type allows you to activate a field that the administrators can enter a numeric number in. You will not enter anything in the Values column.

**Date** - There are three customizable Date fields. This field type allows you to activate a field that the administrators can use to enter a date that you would like to capture. You will not enter anything in the Values column.

**Essay Box** – There are four customizable Essay box fields. This field type allows you to activate an essay box field that allows administrators to enter text data on this funding source but is not able to be formatted.

There are additional items located for setup that affect what is displayed in the Funding Sources setup. If you want these section to appear in the setup function, you will need to activate them in the Site Settings by selecting “Yes” and saving the information.

In Site Settings, these are located directly below the Customizable fields section. They are as follows:

Enable Fund Contact :  Yes  No

Show Funds based on Role Types :  Yes  No

Enable Fund Donor :  Yes  No

**Enable Fund Contact** - This will activate the Add Contact Button on the Funding Source. This will allow you to attach the Administrator responsible for this funding source. The contact would be the key person responsible for maintaining the fund and is helpful for organizations with multiple administrators/divisions, overseeing different funds within the CommunityForce system. The contact must have a user account already created in the CommunityForce site.

**Enable Fund Donor** - This will activate the Add Donor Button on the Funding Source Donors. You will be able to add the following information about a donor:

## Add/Edit Donor

* Donor ID:	<input type="text" value="ca239859"/>
Last Name:	<input type="text"/>
First Name:	<input type="text"/>
Organization:	<input type="text"/>
Email:	<input type="text"/>
Cell Phone:	<input type="text"/>
Notes:	<input type="text"/>

**Show Funds based on Role Types** – when viewing funds in the fund setup section you can have it set so that only certain role types can access those funds. This works in relation to the **Administration>Assign Scholarship to Role Types**. If this feature is activated by marking it “yes” in the Site Settings you will also need to setup up the Assign Scholarship to Role Types feature.

Once you have activated the Grants/Fellowship setting that your organization is going to use, it is a good idea to save any changes you have made prior to continuing to the other site settings. You can either click **Save** to save your changes but stay on the Site Settings page to continue updating, or click **Save & Exit** and return back to Administration Dashboard.

**Cancel** – Clears all data from the fields.

**Exit** – Undo changes and return to the Administration Dashboard

### 9.3 External System Settings

The following settings need to be changed if you are connecting to an external data source. (Otherwise they should be set to a **default** applicable to your organization’s needs or left blank as applicable).

External System Settings

*External System Name : <input type="text" value="Blackbaud"/>	*External System Member Id Name : <input type="text" value="Blackbaud ID"/>
GetApplicant Webservice URI : <input type="text"/>	LDAP Webservice URI : <input type="text"/>
SAML IdpSSo URL : <input type="text"/>	LDAP Password : <input type="text"/>
LDAP UserName : <input type="text"/>	
Enable LDAP in User Management : <input checked="" type="radio"/> Yes <input type="radio"/> No	Enable LDAP in Nominating Section : <input type="radio"/> Yes <input checked="" type="radio"/> No
Enable FE : <input type="radio"/> Yes <input checked="" type="radio"/> No	Enable GE : <input type="radio"/> Yes <input checked="" type="radio"/> No
Enable RE : <input type="radio"/> Yes <input checked="" type="radio"/> No	

**\*External System Name** – The name of the external system you are integrating with, enter “None” if not connecting to an external system. (I.e. Banner, Peoplesoft or Datatel)

**\*External System Member ID Name** – The name of the identifying number assigned to users in your external system. For example Banner uses a Net ID, so enter as Net ID.

**NOTE:** If not connecting directly to an external system, this field can also be used to manually enter an ID code field for applicants that may already be entered in your organization’s external database, and can be helpful when running reports to be able to do a cross mapping between your database and CommunityForce. (I.e. FIMS users could enter the title: “FIMS ID”). Once this field is set up you can go into the Create Users and add the ID Code number to any existing applicants/Users that may have existing ID codes in your organization’s database.

**GetApplicant Webservice URI** – Web Service identifier for the communication to access applicant information. **If N/A leave blank.**

**SAML IdpSSo URL** – The URL for the Security Assertion Markup Language for Single Sign On. **If N/A leave blank.**

**LDAP (Lightweight Directory Access Protocol)** is an Internet protocol that email and other programs use to look up information from a server. As a protocol, LDAP defines the "language" used for client programs to talk to servers (and servers to talk to servers). On the client side, a client may be an email program, a printer browser, or an address book. The server may speak only LDAP, or have other methods of sending and receiving data—LDAP may just be an add-on method. LDAP also defines: Permissions set by the administrator to allow only certain people to access the LDAP database, and optionally keep certain data private. **If N/A leave blank.**

**LDAP Webservice URI**– LDAP Web Service identifier – identifier for the communication between the two sites if integrating with an external system. **If N/A leave blank.**

**LDAP User Name** – LDAP user id to connect to external system. **If N/A leave blank.**

**LDAP Password** – LDAP password used to connect to external system. **If N/A leave blank.**

**Enable LDAP in User Management – Set to Yes** - If integrating with an external user directory, this will allow you to search the external directory to add/update user information. This will show a button in the Create Users section to add users from “External Directory”. **Set to No** – if not integrating with an external system.

**Enable LDAP in Nominating Section** – If integrating with an external user directory, this will allow the applicant to search the external directory to search for a nominee within the organization’s directory.  
**Set to No** – if not integrating with an external system.

**Enable FE:** If using Blackbaud and integrating with FE please select **Yes**, otherwise select **No**.

**Enable GE:** If using Blackbaud and integrating with GE please select **Yes**, otherwise select **No**.

**Enable RE:** If using Blackbaud and integrating with RE please select **Yes**, otherwise select **No**.

Once you have activated the External System Settings that your organization is going to use, it is a good idea to save any changes you have made prior to continuing to the other site settings. You can either click **Save** to save your changes but stay on the Site Settings page to continue updating, or click **Save & Exit** and return back to Administration Dashboard.

**Cancel** – Clears all data from the fields.

**Exit** – Undo changes and return to the Administration Dashboard

## 9.4 Manage Award Custom Fields

While Managing Awards and awarding applicants in the Evaluations>Evaluate Applicants>Manage Awards, you can have customizable fields appear in that section that you can complete regarding the awarding of the applicant.

In **Administration>Site Settings** there are twenty customizable fields available that can be activated.

Default Name	Enable/Disable	Display Name	Type	Values
Award Custom Field 1	<input type="radio"/> Yes <input checked="" type="radio"/> No	Test 1	TextBox	
Award Custom Field 2	<input type="radio"/> Yes <input checked="" type="radio"/> No	Test 2	TextBox	
Award Custom Field 3	<input type="radio"/> Yes <input checked="" type="radio"/> No	Award Custom Field 3	TextBox	
Award Custom Field 4	<input type="radio"/> Yes <input checked="" type="radio"/> No	Award Custom Field 4	TextBox	
Award Custom Field 5	<input type="radio"/> Yes <input checked="" type="radio"/> No	Award Custom Field 5	TextBox	
Award Custom Field 6	<input type="radio"/> Yes <input checked="" type="radio"/> No	Award Custom Field 6	TextBox	
Award Custom Field 7	<input type="radio"/> Yes <input checked="" type="radio"/> No	Award Custom Field 7	TextBox	
Award Custom Field 8	<input type="radio"/> Yes <input checked="" type="radio"/> No	Award Custom Field 8	TextBox	
Award Custom Field 9	<input type="radio"/> Yes <input checked="" type="radio"/> No	Award Custom Field 9	TextBox	
Award Custom Field 10	<input type="radio"/> Yes <input checked="" type="radio"/> No	Award Custom Field 10	TextBox	
Award Custom Field 11	<input type="radio"/> Yes <input checked="" type="radio"/> No	Award Custom Field 11	Date	
Award Custom Field 12	<input type="radio"/> Yes <input checked="" type="radio"/> No	Award Custom Field 12	Date	
Award Custom Field 13	<input type="radio"/> Yes <input checked="" type="radio"/> No	Award Custom Field 13	Date	
Award Custom Field 14	<input type="radio"/> Yes <input checked="" type="radio"/> No	Award Custom Field 14	Date	
Award Custom Field 15	<input type="radio"/> Yes <input checked="" type="radio"/> No	Award Custom Field 15	Date	
Award Custom Field 16	<input type="radio"/> Yes <input checked="" type="radio"/> No	Award Custom Field 16	Essay Box	
Award Custom Field 17	<input type="radio"/> Yes <input checked="" type="radio"/> No	Award Custom Field 17	Essay Box	
Award Custom Field 18	<input type="radio"/> Yes <input checked="" type="radio"/> No	Award Custom Field 18	Essay Box	
Award Custom Field 19	<input type="radio"/> Yes <input checked="" type="radio"/> No	Award Custom Field 19	DropDown	
Award Custom Field 20	<input type="radio"/> Yes <input checked="" type="radio"/> No	Award Custom Field 20	DropDown	

**Each Award Custom Field has the following Columns:**

**Default Name** - The default name given to the field for tracking purposes.

**Enable/Disable** – This controls whether or not this field will display in the Manage Awards section. Select “**yes**” to have it display or “**no**” if it is not going to be used by your organization.

**Display Name** – Enter the label name for this field that you want it to display as when viewing it in Manage Awards.

**Type:** Each field has a preformatted type, if the field is activated the Type in the Type Column is the way that field will function.

**TextBox** – There are ten customizable TextBox fields. This field type will create a text box field that the administrators can enter a short text regarding information you would like to capture on this award. You will not enter anything in the Values column.

**Date** - There are five customizable Date fields. This field type allows you to activate a field that the administrators can use to enter a date that you would like to capture. You will not enter anything in the Values column.

**Essay Box** – There are three customizable Essay box fields. This field type allows you to activate an essay box field that allows administrators to enter information regarding the award. You will not enter anything in the Values column.

**DropDown** – There are two customizable Dropdown fields. This field type allows you to create a dropdown listing of items that your administrators can select from for this specific field type. If activated, enter the values in the Values field as one long string, using the ~ symbol between each separate value. Do not use spaces between the values.

Type	Values
DropDown	Donor Advised~Restricted~Unrestricted~Scholarship~Fellowship

Once you have activated the Award Custom Fields that your organization is going to use, it is a good idea to save any changes you have made prior to continuing to the other site settings. You can either click **Save** to save your changes but stay on the Site Settings page to continue updating, or click **Save & Exit** and return back to Administration Dashboard.



**Cancel** – Clears all data from the fields.

**Exit** – Undo changes and return to the Administration Dashboard

## 9.5 Update General Site Settings

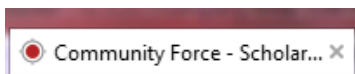
General Settings control various functionality and will need to be set prior to being able to use some functions within the CommunityForce Site. General settings will come preset, according to the needs of your organization, but can be changed if you decide to use a specific functionality on the site.

General Settings	
Title :	CommunityForce Scholarship Application Portal
Default Page before Login :	Search Page
Restricted Domains To Register With :	<input type="text"/>
	e.g. Yale.edu, Yale.com, gmail.com
Currency Symbol :	\$
Admin Help URL :	<a href="http://support.communityforce.com/">http://support.communityforce.com/</a>
Logout URL :	<a href="https://Scholarshiptraining.communityforce.com">https://Scholarshiptraining.communityforce.com</a>
Fund Label :	Scholarship
Enable User Creation using CF : (This will also have an impact on Proxy/Collaboration)	<input checked="" type="radio"/> Yes <input type="radio"/> No
Enable Search by Keyword :	<input checked="" type="radio"/> Yes <input type="radio"/> No
Enable Search by Sponsoring Organization(s) :	<input checked="" type="radio"/> Yes <input type="radio"/> No
Enable Application Publishing :	<input checked="" type="radio"/> Yes <input type="radio"/> No
Display SSO Id On All Screens :	<input checked="" type="radio"/> Yes <input type="radio"/> No
Show Application Summary As a Link :	<input checked="" type="radio"/> Yes <input type="radio"/> No
Enable Interests Cart :	<input checked="" type="radio"/> Yes <input type="radio"/> No
Enable Import Responses from Existing Applications :	<input checked="" type="radio"/> Yes <input type="radio"/> No
PreQualification questions appear :	After login
Enable Application Payments :	<input checked="" type="radio"/> Yes <input type="radio"/> No
Disable Review Screen Before Application Submission :	<input checked="" type="radio"/> Yes <input type="radio"/> No
Enable Automatic Application Creation Through Application Invitation :	<input checked="" type="radio"/> Yes <input type="radio"/> No
Push Committee Scores :	Push Scores within Application
Signature :	CommunityForce Scholarship Application Portal
Default Page after Login :	My Application Tab
*Date Format :	MM/DD/YYYY
Footer Note :	(c) 2010 - 2015 CommunityForce. All rights reserved
Applicant Help URL :	<a href="http://support.communityforce.com/faq/faq">http://support.communityforce.com/faq/faq</a>
Contact Us :	support@communityforce.com
Theme :	Maroon
Call External System to Update Data :	<input checked="" type="radio"/> Yes <input type="radio"/> No
Enable Search by Eligibility Criteria :	<input checked="" type="radio"/> Yes <input type="radio"/> No
Enable Global Search for Applicants :	<input checked="" type="radio"/> Yes <input type="radio"/> No
Disable Section Locks For Admin :	<input checked="" type="radio"/> Yes <input type="radio"/> No
Automatic Assignment of Applicants :	<input checked="" type="radio"/> Yes <input type="radio"/> No
Display Reviewer Comments on Application Summary :	<input checked="" type="radio"/> Yes <input type="radio"/> No
Send an email to Application Contact, when an Application is Submitted by Student :	<input checked="" type="radio"/> Yes <input type="radio"/> No
Enable Format Excel File :	<input checked="" type="radio"/> Yes <input type="radio"/> No
Show View All Grants :	<input checked="" type="radio"/> Yes <input type="radio"/> No
Enable Terms & Conditions / Consent :	<input checked="" type="radio"/> Yes <input type="radio"/> No
Show Apply Button Before Login :	<input checked="" type="radio"/> Yes <input type="radio"/> No
Enable Post Acceptance Section Submit Notification :	<input checked="" type="radio"/> Yes <input type="radio"/> No

### 9.5.1 Title

Title :

Title of the Page Tab at the top of the page in your browser, it will appear as CommunityForce – (title)



### 9.5.2 Signature

Signature :

Default Signature that is used in the Email Templates when you select the Signature Merge Field. However this signature can be overwritten, if an email signature is entered in the **Funding Source Setup** section of the system. The funding source's **Email Signature** will then take priority over this signature in email templates directly tied to Funding sources.

### 9.5.3 Default Page Options in General Settings

General Settings

Title : CommunityForce Scholarship Application Portal	Signature : CommunityForce Scholarship Application Portal
Default Page before Login : Applications Lists Page	Default Page after Login : My Application Tab
Restricted Domains To Register With : e.g. Yale.edu, Yale.com, gmail.com	*Date Format : MM/DD/YYYY
Currency Symbol : \$	Footer Note : (c) 2010 - 2015 CommunityForce. All rights reserved
Admin Help URL : https://communityforce.zendesk.com/access/unauthenticated	Applicant Help URL : http://support.communityforce.com/faq/faq
Logout URL : https://Scholarshiptraining.communityforce.com	Contact Us : support@communityforce.com
Fund Label : Scholarship	Theme : Maroon
Enable User Creation using CF : (This will also have an impact on Proxy/Collaboration) <input checked="" type="radio"/> Yes <input type="radio"/> No	Call External System to Update Data : <input type="radio"/> Yes <input checked="" type="radio"/> No
Enable Search by Keyword : <input checked="" type="radio"/> Yes <input type="radio"/> No	Enable Search by Eligibility Criteria : <input type="radio"/> Yes <input checked="" type="radio"/> No
Enable Search by Sponsoring Organization(s) : <input checked="" type="radio"/> Yes <input type="radio"/> No	Enable Global Search for Applicants : <input type="radio"/> Yes <input checked="" type="radio"/> No

#### 9.5.3.1 Default Page before Login:

This is the default page that an **applicant** sees as they first enter the CommunityForce site.

The following default page options are available:

**1. Search Page** When entering the CommunityForce site the applicant first lands on a search screen that they can search for available funding sources using one or all of the following search option sections: (after they locate a fund and click the **apply** they are then directed to the Login page to login and begin applying to that funding source, once they log in they will be directed to the dashboard for the funding source they selected)

**Search by Keyword, Search by Eligibility Criteria, and/or Search by Sponsor Organization.** Once they search, they are directed to a funding source listing page that list all the funding sources that meet the criteria they selected, they can then click on a funding source to view additional details and/or apply for that funding source. **You must have at least one** of these search options enabled to be able to use the Search screen as your Default page. (Below is an example of the Search screen with all the section options enabled)



Search by Keyword

Find Scholarship by Keyword:

Search by Scholarship Eligibility

Display Scholarship that match All of my selections:  
(Select more options to return a narrower set of results)

County

Gender

Is US citizenship required?

Major

State

Search by Sponsoring Organization

Find Scholarship by the Sponsoring Organization(s):

**2. Login page** – Shows **login page first**, then once the applicant **logs on they** will be directed to the page that has been set in the **Default Page after Login**.

Login

**Sign in**

\* Email

or

\* Password

Password is case sensitive.

[Forgot Password?](#)

**Welcome to your Scholarship Application Portal**

**New Applicants/First Time Users**  
Click the "Create New Account" button below in order to begin a new application.

**Existing Applicants**  
Enter your Username and Password to complete the application.  
*(Your username is the email address and password you initially used to set up your account.)*

**Forgot Password**  
Click on "Forgot Password" and enter your login email address to reset your password. Once complete, an email will be sent asking you to reset your password. You will receive a confirmation email once you've successfully reset your password.

**3. Application List Page** – Shows a listing of only the active funding sources/applications that are currently available to apply for. *(No search option screen will appear)* Applicant can click on the specific funding source and be directed to a login in screen to continue with logging in to apply for the specific funding source. (Used mainly with organizations that only have a few funding sources active to apply for). Below is an example of the Application List default page:

2016 Test Application	Begin Accepting Applications Date: 06/30/2015 Deadline Date (EST Time Zone): 08/31/2015 12:00AM
<p><b>Aaron C. Kesler Future Firefighters Scholarship</b></p> <p>Dan and Patty Kesler, parents of Aaron Kesler, established the Aaron C. Kesler Future Firefighters Scholarship award to honor his memory.</p> <p>The Aaron C. Kesler Future Firefighters Scholarship will provide an award toward tuition and fees to a public Montgomery County High School senior who will attend firefighter's school. The scholarship will be awarded for one year only and is not renewable.</p>	
Arvin-McCord Scholarship	
Bob J. Tandy Scholarship	
Los Almos Employees' Scholarship Application Form 2014	Begin Accepting Applications Date: 08/14/2014 Deadline Date (EST Time Zone): 12/31/2014 12:00AM
Los Almos Employees' Scholarship Application Form 2014 - Fund Name	
Scholarship for organization accepting Graduates based on Merit and Financial need	Begin Accepting Applications Date: 01/15/2014 Deadline Date (EST Time Zone): 08/31/2014 10:00PM
The Foundation is proud to support our seniors, graduate students and alumnae members in their post-graduate educational pursuits with...	

### 9.5.3.2 Default Page after Login:

This is the default page that an **applicant** sees *after they login* to the CommunityForce site.

If the applicant logs in **directly from the login screen** *before selecting a funding source* to apply to, you will need to select the page that the applicant sees after they log in.

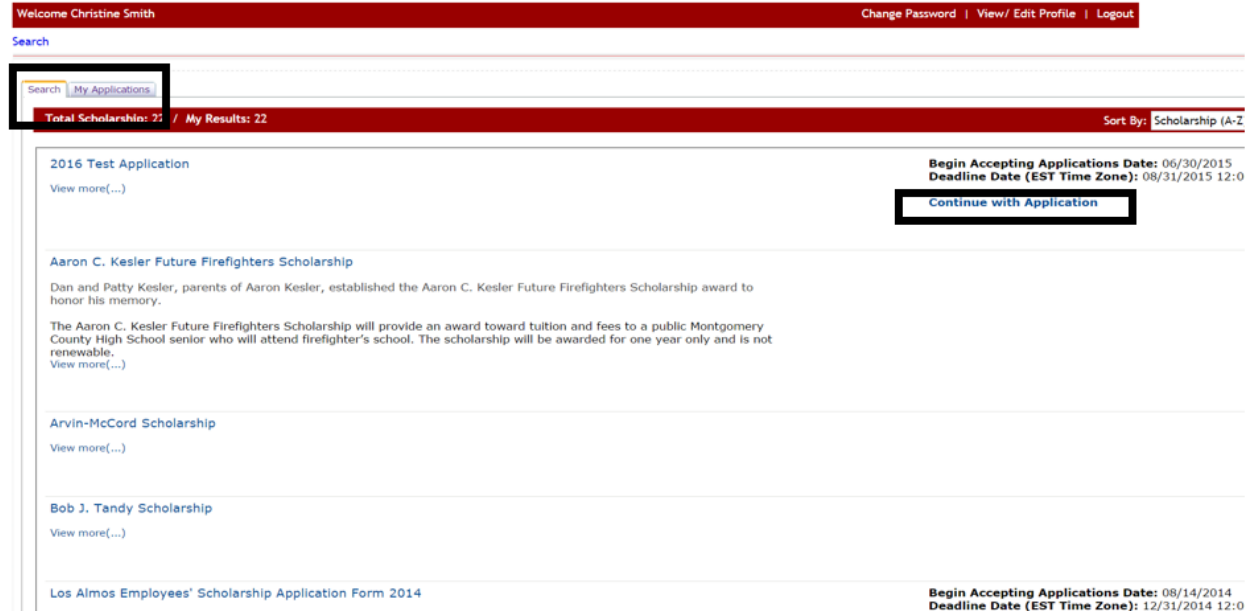
This would apply if the applicant's **Default page before login** is set to the **Login Page** or if the applicant was to click on the **Login** located at the top right hand corner of the Welcome page.



The following default page options are available:

- 1. Application List Page** – Shows a listing of only the active funding sources/applications that are currently available to apply for. Applicant can click on the Apply for the specific funding source and be directed to that funding source's dashboard to begin applying. If the applicant had already started the application for a funding source in the listing, the Apply would then show as **Continue with Application**. They also would have access to the **My Applications** tab to be able to see a listing of only the application forms they had started.

Below is an example of the Application List default page after login.



**2. Search Page** –This would open the search screen where the applicant can search for available funding sources using one or all of the following search option sections: (after they locate a fund and click the **apply** they are then directed to that fund’s dashboard to begin applying to that funding source. If the applicant had already started the application for a funding source in the listing, the Apply would then show as **Continue with Application.**)

**Search by Keyword, Search by Eligibility Criteria, and/or Search by Sponsor Organization.** Once they search, they are directed to a funding source listing page that list all the funding sources that meet the criteria they selected, they can then click on a funding source to view additional details and/or apply for that funding source. **You must have at least one** of these search options enabled to be able to use the Search screen as your Default page.

Below is an example of the Search screen with all the section options enabled. Note the applicant would also have access to the **My Applications** tab to be able to see a listing of only the application forms they had started.

Welcome Christine Smith Change Password | View/ Edit Profile | Logout

[Search](#) [My Applications](#)

---

**Search by Keyword**

Find Scholarship by Keyword:

---

**Search by Scholarship Eligibility**

Display Scholarship that match **All** of my selections:  
(Select more options to return a narrower set of results)

County

Gender

Is US citizenship required?

Major

State

---

**Search by Sponsoring Organization**

Find Scholarship by the Sponsoring Organization(s):

**3. My Applications Tab** – Once the applicant logs in they are directed to their **My Applications Tab**. This will show them a listing of all the applications forms they have started or completed. They can then click on the Application Name in the Scholarship Column and access the dashboard for that specific funding source.

They also will have a “Search” tab available where they can search for additional funding sources that may be available that they had not yet applied to.

Welcome Christine Smith Change Password | View/ Edit Profile | Logout

[Search](#) [My Applications](#)

---

Below is a list of your application(s) and their current status.

Select	Scholarship	Academic Year	Date Submitted	Deadline	Status	Generate PDF
<input type="radio"/>	<a href="#">2016 Test Application</a>	2015-2016	-	08/31/2015	Pending Submission	
<input type="radio"/>	<a href="#">Aaron C. Kesler Future Firefighters Scholarship</a>	2015-2016	07/01/2015	05/28/2016	Additional Info Requested	
<input type="radio"/>	<a href="#">Common Application Form</a>	N/A	06/23/2015	N/A	Submitted	
<input type="radio"/>	<a href="#">Common Fund 1</a>	N/A	-	N/A	Pending Submission	
<input type="radio"/>	<a href="#">Common Fund 2</a>	N/A	-	N/A	Pending Submission	
<input type="radio"/>	<a href="#">Scholarship for organization accepting High School applicants with Multiple funds &amp; Multiple Request Sections</a>	2015-2016 year	-	12/31/2015	Pending Submission	
<input type="radio"/>	<a href="#">Scholarship for organization with multiple funds accepting High School applicants</a>	2015-2016 year	-	12/31/2015	Pending Submission	
<input type="radio"/>	<a href="#">Z1 First Fund</a>	2015-2016	-	05/28/2016	Pending Submission	
<input type="radio"/>	<a href="#">Z2 Second Fund</a>	2015-2016	-	05/28/2016	Pending Submission	
<input type="radio"/>	<a href="#">Z3 Third Fund</a>	2015-2016	-	05/28/2016	Pending Submission	

### 9.5.4 Restricted Domains To Register With:

If using integration from another site and allowing applicants to log in and create a user account from that site, enter the domain names of the sites the applicants are allowed to log in from to create their user account.

### 9.5.5 Date Format

The format of the date that you want the system to use. (I.e. mm/dd/yyyy or dd/mm/yyyy, etc.) This will be the date format value used for **all** date fields you enter in your application.

### 9.5.6 Currency Symbol

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 in to a currency format. You can set the type of currency format for your application values. Can only be one type of currency. (i.e. \$ for U.S. dollar or € for the euro)

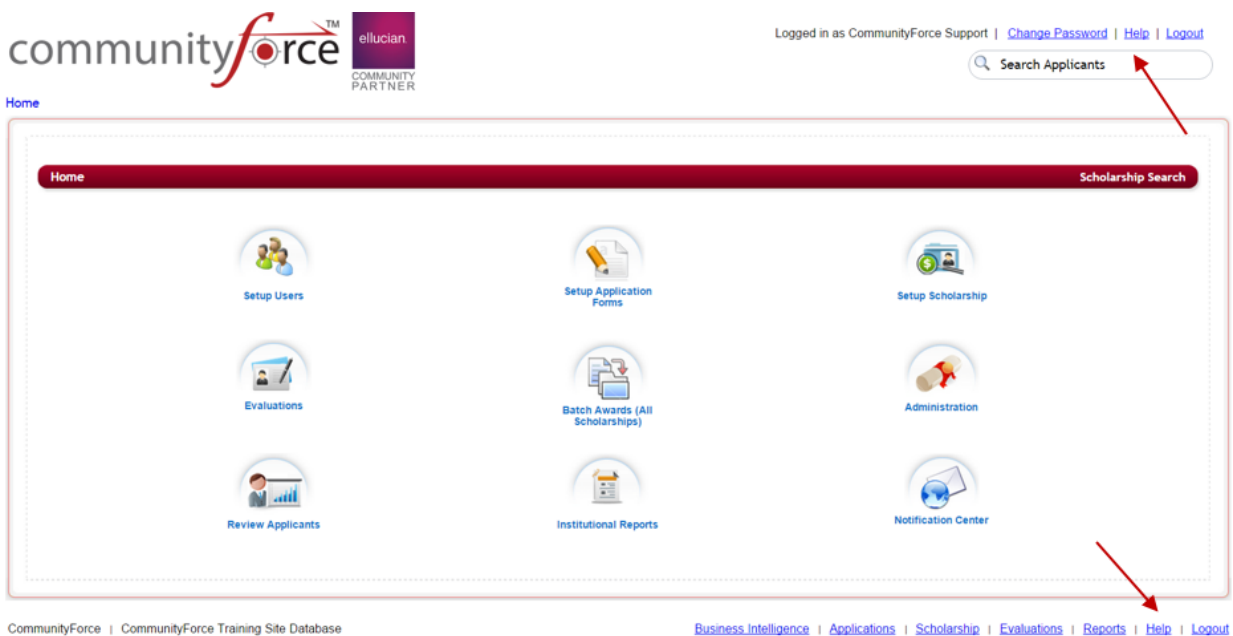
### 9.5.7 Footer Note:

A footer statement is added to the bottom of the welcome/login screen prior to the applicant logging in to the site. (I.e. best viewed in 480x70. (6.1). The (6.1) refers to which version of the software you are currently on.)

Copyright @ 2014 Best viewed in 480x270 (6.1)

### 9.5.8 Admin Help URL

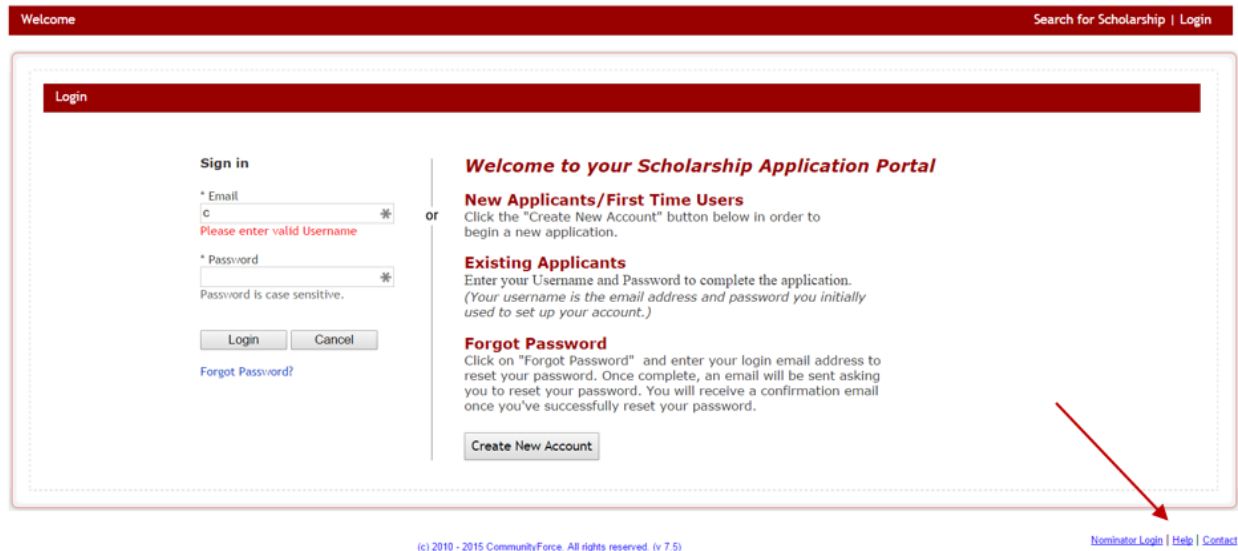
CommunityForce populates this field with the url to go directly to our Client Support Portal. All you have to do is click on the Help Link in the Admin Dashboard.



### 9.5.9 Applicant Help URL

CommunityForce will have a default URL directed to an Applicant help page on the support.communityforce.com.

If you currently publish a Help Guide for your applicants, and prefer to use that instead, you can insert the link here and when your applicants click on the link in their dashboard it will direct them to the page on your website.



### 9.5.10 Logout URL

Redirects the user to this URL when they log out. This is the system default URL. If you set a Logout URL in the General Information section of that applications setup, then when the applicant is in the application form and logs out the URL in the General Information will override this URL.

If you do not set a URL in the General Information, this will be the default Logout URL for that application form. Also, if the applicant logs in but does not access an application form, when they logout this is the URL they will land at.

### 9.5.11 Contact Us

This email address will be linked to the Contact Link in the applicant dashboard footer and is used as a site contact, not the application contact, that an applicant can use to email someone for assistance in using the site. When an applicant clicks on the **Contact** footer, their email program will open showing this contact address in the To: field allowing them to send a direct message to that contact person. Enter an email address that the applicant can use to contact someone directly for assistance.

**Best Practice Tip:** Best practice is to create a separate email account instead of using your personal business email so that you can manage the emails that come in. For example create a new email [scholarships@yourorganization.org](mailto:scholarships@yourorganization.org). Add the mailbox to your Outlook Account.

Welcome Search for Scholarship | Login

Login

**Sign in**

\* Email

or

\* Password

Password is case sensitive.

[Forgot Password?](#)

**Welcome to your Scholarship Application Portal**

**New Applicants/First Time Users**  
Click the "Create New Account" button below in order to begin a new application.

**Existing Applicants**  
Enter your Username and Password to complete the application.  
*(Your username is the email address and password you initially used to set up your account.)*

**Forgot Password**  
Click on "Forgot Password" and enter your login email address to reset your password. Once complete, an email will be sent asking you to reset your password. You will receive a confirmation email once you've successfully reset your password.

[Nominator Login](#) | [Help](#) | [Contact](#)

(c) 2010 - 2015 CommunityForce. All rights reserved. (v 7.5)

### 9.5.12 Fund Label

The CommunityForce system is used by organizations that provide different types of funding sources. (I.e. scholarship, fellowship, grants, competitions, etc.) Therefore, each organization has the ability to change the name of all items that have a **funding source** labeling to a name that better suits the organization. When entering label names do not use apostrophes in the name, however, you can use / or ().

Examples of labeled items, this is the search screen in the Funding source setup using the Fund Label of Scholarship:

Scholarship

Search By: \_\_\_\_\_

Scholarship Name:

**Note:** This does not change the name of the Dashboard Icons - For information on how to customizing Icons, see **Control Mapping Settings**.

### 9.5.13 Theme

Sets the color scheme for title banners and buttons within the site to better match your organization's color scheme. Select a color from the drop down.

### 9.5.14 Enable User Creation using CF (This will also have an impact on Proxy/Collaboration)

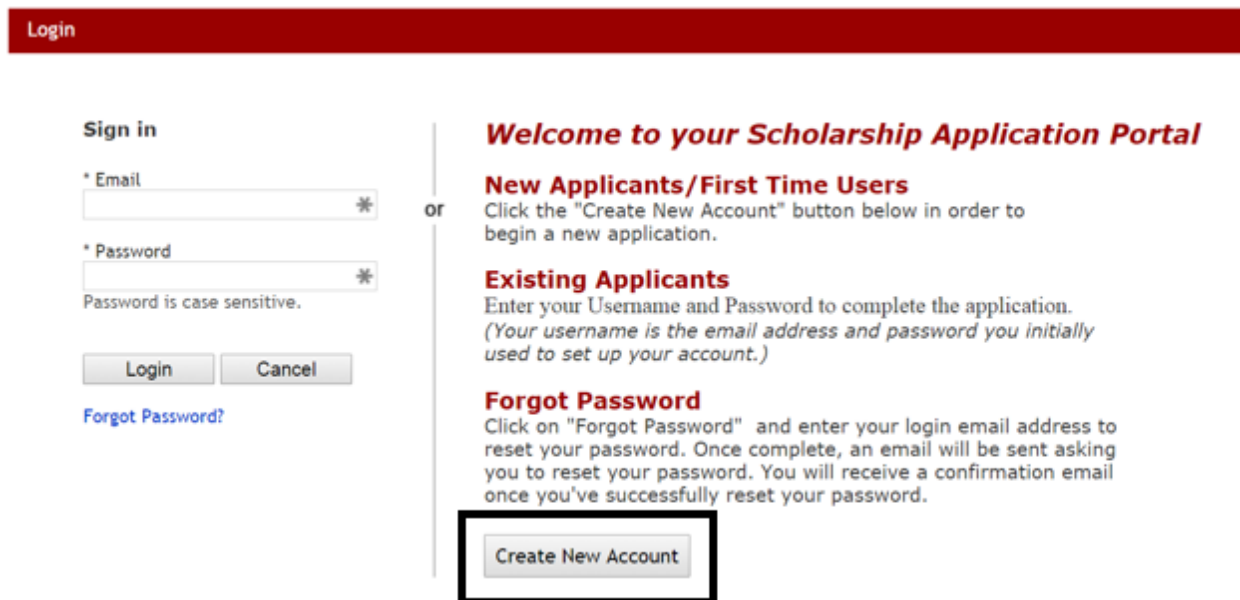
This will allow your applicants to create their own user profiles as well as profiles for other individuals if using the Proxy or Collaboration features.

This is usually set to “Yes” unless you are using integration with another site and are having the applicant login using their login information from that site and do not want to allow them to create a separate login in the CommunityForce site. (Single Sign On Authentication). If using Single Sign on Authentication and you do not want your applicants to create user profiles for themselves, or Proxy and Collaborated individuals, then this control should be selected as “No”.

**Yes** - will activate the **Create New Account** button on the login screen and allow your applicants to create user accounts for Proxy and Collaborated individuals.

**No** –will remove the **Create New Account** button from the login screen and applicants *will not* be able to create user accounts for themselves, or Proxy and Collaborated individuals.

**Important Note:** if set to “No” and you use the Proxy or Collaboration feature, then the applicant will only be able to choose individuals in that process that already have user accounts created in the system, they will not be able to create new user accounts for them.



### 9.5.15 Call External System to Update Data

This feature is used in integration with an external system in order to exchange data with external systems. By default this will be set to “No” and will only be set to “Yes” if using integration to exchange data.

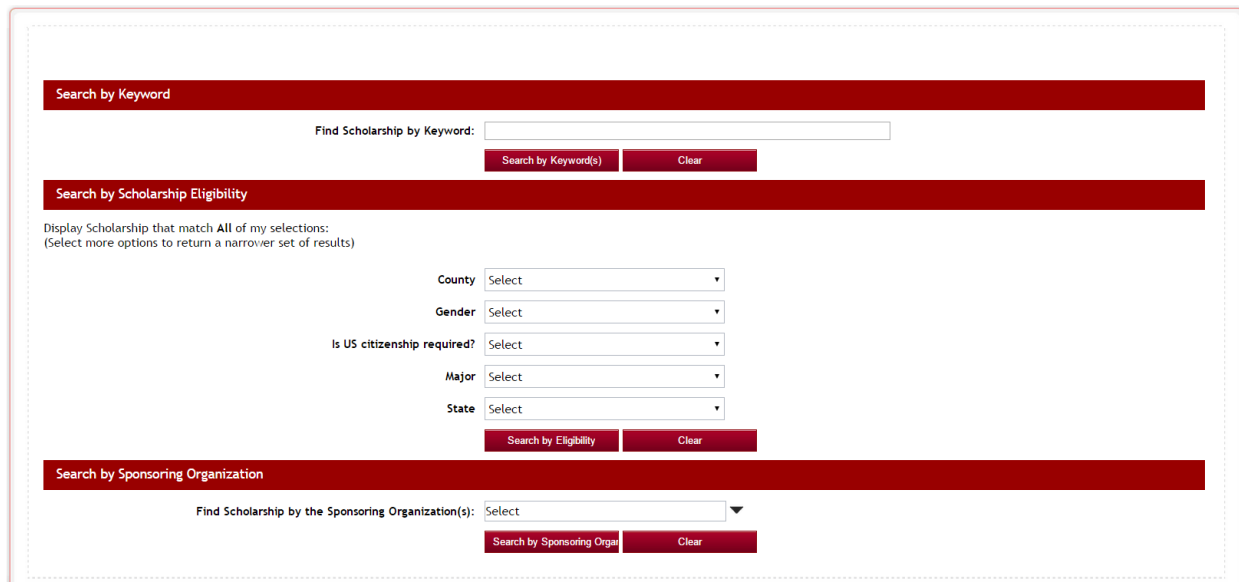


### 9.5.16 Enabling Search Screen Items

The search screen that is used to allow applicants to search for funding sources has three areas that search filters can be used that allow the applicants to search for funding by those search filter areas. They are as follows:

- Keyword
- Eligibility Criteria
- Sponsoring Organizations

Each of these sections can be enabled or turned off depending on what search filter areas you want to use when allowing applicants to search for funding.



The screenshot displays a search interface with three main sections, each with a red header bar:

- Search by Keyword:** Features a text input field labeled "Find Scholarship by Keyword:" and two buttons: "Search by Keyword(s)" and "Clear".
- Search by Scholarship Eligibility:** Includes the instruction "Display Scholarship that match All of my selections: (Select more options to return a narrower set of results)". It contains five dropdown menus for "County", "Gender", "Is US citizenship required?", "Major", and "State". Below these are "Search by Eligibility" and "Clear" buttons.
- Search by Sponsoring Organization:** Features a dropdown menu labeled "Find Scholarship by the Sponsoring Organization(s):" with "Select" as the current value. Below it are "Search by Sponsoring Organi" and "Clear" buttons.

#### 9.5.16.1 Enable Search by Keyword

This setting is used to set the search filter area on the Search Screen to allow applicants to search for funding by entering a keyword to search for funding sources that contain that keyword.

**Yes** – Activates the section so that an applicant can enter a keyword to find a funding source available.

**No** – Turns this section off and will not show on the Search Options page.

#### 9.5.16.2 Enable Search by Eligibility Criteria:

This setting is used to set the search filter area on the Search Screen so that an applicant can search for funding sources based on pre-determined groups of eligibility criteria that have been pre-set in **Administration>Search Filters**.

**Yes** – Activates the section so that an applicant can search specific eligibility criteria to locate a funding source they may be eligible to apply for.

**No** – Turns this section off and will not show on the Search Options page.

### 9.5.16.3 Enable Search by Sponsor Organization

This setting is used to set the search filter area on the Search Screen to allow applicants to search for funding provided by a specific organization/department.

If your organization maintains funding sources for multiple organizations/departments, then an applicant can search for funding sources available by specific organizations/departments.

**Yes** – Activates the section so that an applicant can search on a pre-determined listing of organizations to locate specific funding sources offered by that organization/department.

**No** – Turns this section off and will not show on the Search Options page.

### 9.5.17 Enable Global Search for Applicants:

This will activate a search feature that will appear in the header at the upper right hand corner of the **Admin's** dashboard. This allows for a global search of an applicant across all your applications.

This is useful when having multiple applications on your site, and trying to locate applicants that you are not sure what applications they have applied for.

**Yes** – Will activate this feature.

**No** – Will turn the feature off.



### 9.5.18 Enable Application Publishing

When setting up an application form in **Applications>General Information**, you have the option to turn on a **Published box** in the General Information setup page. However if it is turned on, only application forms that are marked as published will appear in the dropdowns views when searching for application forms to link to your funding sources. Since this has caused some confusion, the ability to remove this publish box from the **Applications>General Information** setup page has been added.

This is defaulted to “**No**” as the majority of our clients do not want this to be present in the application form setup. That way when they make an application live they only have to publish the funding source, not both the funding source and the application form.

However, if you wish to have to publish in both areas, then set this option to “**yes**” and the published box will appear in the General Information setup and must be checked before an application becomes live or appears in any application form dropdown fields for selection.

## Edit Existing Application

Save Save & Exit Exit

\*Scholarship Application Form Name: Form for organization with multiple funds accepting Adult Learners \*

\*Description: Form for organization with multiple funds accepting Adult Learners

\*Sponsoring Organization: My Organization Name 7, ▼

Does this Application have a Deadline:  Yes  No

\*Begin Accepting Applications Date: 10/03/2013

\*Deadline Date: 12/31/2014

\*Deadline Time (EST Time Zone): 5:00 PM  
(The time application goes offline.)

Academic Year: 2014-2015  
(This will be updated when the application is saved.)

Logout URL: https://Scholarshiptrial.communityforce.com Ex: http://www.yourdomain.com

Reply Sent from: scholarships@communityforce.com Ex: noreply@yourdomain.com

Applicant Minimum Age: 0

Application Form Cost:

Published:   
(This will make the application online.)

### 9.5.19 Disable Section Locks for Admins

Each application form has a setting in the **General Information** setup section of that application form to be able to **Lock After Submit**. This is also set on each individual section in the **Create/Edit Section** where you can **"Inherit"** from the Applications setting, or override for that specific section. If locked, then the applicant nor the administrator can go back in and make a change to their application form after they have submitted. If the Application or a specific section is *not locked* then the applicant and the administrator can make a change to that section.

If you want your Administrators (not applicants) to be able to go in on a *locked section* of an application form and be able to make changes to the application then you can **Disable** all those locks just for the Administrators. This does however open "all" the locked sections for the administrators, not just the ones that are unlocked in the form.

**Yes** – Disables and unlocks all the Application and Section editing locks for all your application forms. Your administrators can then go in and make a change to any applicant's application after that applicant has submitted their form even if a lock is on that form or application. Note your applicants would only be able to edit the unlocked.

**No** – The Application and Section locks would not be overridden. The Administrator would only be able to edit the Application Forms and sections that were unlocked. All questions will be grayed out and changes will not be able to be made.

#### Best Practice Tip:

If you do not want to disable this lock for your administrators, and you have a Staff Section for your administrators to complete, you will want to make sure that you mark the “Lock After Submit” to “No” in the Create/Edit for that Staff Section.

Section Display Image : Supplemental Information

\*Status(es) :

- All
- Pending Submission
- Submitted
- Withdrawn
- Under Committee Review
- Not Selected For Award

Deadline :  Inherit from Application  Section Deadline  No

Deadline Date: 8/31/2015

\*Deadline Time: 12:00 AM

Show Submit Button :  Yes  No

**Lock After Submit :  Inherit from Application  Yes  No**

#### 9.5.20 Display SSO ID on All Screens (Member Id)

If using the **External System Member Id Name**, and you have populated that setting in the **Site Setting>External System Settings** with your organizations Id Name, this will activate that Id column to appear on the various data grid reporting areas of the Communityforce site that list the applicants that have applied to your application form as well as in the User Setup.

**Yes** – will activate this column and it will appear in the applicant listing data grids and User Setup.

**No** – will de-activate this column and it will not appear.

**Applicant Status**

Search By: Last Name:  First Name:  Email:  Blackbaud ID:

Filter by Status:  Change Status to:    
 Filter by Status Detail:  Change Status Detail to:

Number Of Applicants: 155

Score Sheet	Applicant	Email	Blackbaud ID	Submitted Date & Time	Status	Status Detail	Released	Notification Date	Comments	Requested	Received	Is Paid
<input type="checkbox"/>	Aaron, Andre	andreaaron727@cf.com		03/07/2014 15:34	Under Committee Review	-	No	-		100%	100%	No
<input type="checkbox"/>	Albrecht, Kristen	kristenalbrecht@cf.com	1808586236	03/07/2014 09:55	Selected For Award	-	No	-		100%	100%	No
<input type="checkbox"/>	Arbo, Kiley	Kiley.Arbo@cf.com			Not Selected For Award	-	No	-	(pending submission) applications not completed automatically disqualified.	null	null	No

### 9.5.21 Application Review Settings

Automatic Assignment of Applicants :  Yes  No

Display Reviewer Comments on Application Summary :  Yes  No

Show Application Summary As a Link :  Yes  No

#### 9.5.21.1 Automatic Assignment of Applicants

Automatic Assignment of Applicants, allows you to have the system automatically assign applicants to the committees for specific tasks. You can have all the applicants assigned or have filters to assign applicants that meet a certain criteria automatically assigned. (This is best used on a one to one application process when you are only reviewing one application and awarding one funding source).

(For more details on this functionality, please see **Module 10 - Setting up Your Evaluation Task: Automatic Assignment of Applicants**)

The use of the Automatic Assignment of Applicants feature is a **global site feature not a per application option**. If selected **all application forms** will have to use the Automatic Assignment, and the ability to use the manual version where you get to select what applicants gets assigned to what task will not be available.

Select **“Yes”** to activate this feature, otherwise select **“No”**.

### 9.5.21.2 Display Reviewer Comments on Application Summary

This setting allows reviewers to see each other's comments in the Application Summary Page. Select **Yes** to activate this option. Once it is activated, when the reviewers review the application form they can scroll to the bottom of that form and see how all the other reviewers scored that applicant on any tasks and see any comments they entered in the comment questions for those tasks.

### 9.5.21.3 Show Application Summary As A Link

This option controls the view of the Applicant Score Sheet for reviewers who are assigned to review applicants. Keep in mind this is a global site setting and must be used across all application forms.

**If Show Application Summary is set to Yes:** In order for the Reviewer to view the application they must open it in a new window by clicking on either one of these links as shown in the below illustration:

The screenshot shows the 'Applicant Score Sheet' interface. At the top, there is a blue header with a graduation cap icon and the text 'Applicant Score Sheet'. Below the header, the section is titled 'Initial Review by Staff'. There are four buttons: 'Save', 'Save & Exit', 'Exit without Save', and 'Reset Form'. Below the buttons, the applicant's name is displayed as 'Henson, Byron'. Underneath the name are two links: 'View Application' and 'Admin PDE'. A red arrow points from the top right of the interface down to the 'View Application' link. Below the links, there are four radio button questions: 'Is Resume uploaded?', 'Is Transcript Uploaded?', 'Is Photo Uploaded?', and 'Are Tax Forms uploaded?'. Each question has 'Yes' and 'No' radio buttons. At the bottom of the form, there are four buttons: 'Save', 'Save & Exit', 'Exit without Save', and 'Reset Form'.

**If Show Application Summary as a Link is set for No:** It changes the view of the Applicant Score Sheet. The application summary is now automatically viewable without clicking on the links as shown in the below illustration:

Show Application Summary As a Link :  Yes  No

**Initial Review by Staff**

Applicant Name: **Hanson, Byron**

[View Application](#) | [Admin PDF](#)

<p>Is Resume uploaded?*</p> <input type="radio"/> Yes <input type="radio"/> No <p>Is Transcript Uploaded?*</p> <input type="radio"/> Yes <input type="radio"/> No <p>Is Photo Uploaded?*</p> <input type="radio"/> Yes <input type="radio"/> No <p>Are Tax Forms uploaded?*</p> <input type="radio"/> Yes <input type="radio"/> No	<p><b>Application Summary of : Hanson, Byron</b></p> <hr/> <p><b>Personal Information</b></p> <table border="1"> <thead> <tr> <th colspan="2">Name</th> </tr> </thead> <tbody> <tr> <td>*First</td> <td>Byron</td> </tr> <tr> <td>Middle</td> <td>Harry</td> </tr> <tr> <td>*Last</td> <td>Hanson</td> </tr> <tr> <td>Suffix</td> <td>Jr.</td> </tr> <tr> <td>Preferred</td> <td>Mr.</td> </tr> <tr> <td colspan="2"><b>Former Names</b></td> </tr> <tr> <td colspan="2"><small>First and Last name fields are required for each name row that is added.</small></td> </tr> </tbody> </table>	Name		*First	Byron	Middle	Harry	*Last	Hanson	Suffix	Jr.	Preferred	Mr.	<b>Former Names</b>		<small>First and Last name fields are required for each name row that is added.</small>	
Name																	
*First	Byron																
Middle	Harry																
*Last	Hanson																
Suffix	Jr.																
Preferred	Mr.																
<b>Former Names</b>																	
<small>First and Last name fields are required for each name row that is added.</small>																	

Reviewers still have the option of opening the application in a new window if they desire too. This is the preferred option for most Reviewers. It enables them to see the application next to the scorecard.

### 9.5.22 Enable Interests Cart

The **Interests Cart** should be used if you are offering several funding opportunities. This will enable your applicants to choose the opportunities they wish to apply to and manage the applications without having to search for the next opportunity. They can select applications and have them added to their interest cart for future referencing, without having to start the actual application form.

If you do not want to activate the interest cart then select **No**.

Set the the control to **Yes** to activate the Interest Cart for the Applicant. Once you activate it you will also need to go to the **Interest Cart Message** in the Site Settings and add a message for the applicant.

When active the Applicant will have the opportunity to place an application into their **My Interests Cart** and they will have a tab on their dashboard called “My Interest Cart”.

When they locate a funding source that they want to save for a later time, all they have to do is click on the Add to Cart instead of the Apply, and the application form will be added to their My Interest Cart tab.



Once they click the Add to Cart they will get a system alert message that it has been added to the cart, and they can click OK to continue.

System Alert

311

2016 Test Application has been added to my interests cart successfully.

Ok

They can then access that application form by clicking on the My Interest Cart Tab in their dashboard. When they can view all applications they have placed in the cart.

From there they are given the opportunity to Apply or Remove From Cart.

### 9.5.23 Send an email to Application Contact, when an Application is Submitted

If you have set up an **Application Contact** in the **Application>General Information** setup for your application form, then you can have the option to have a notification email sent to that contact every time an applicant submits their application form for that specific application.

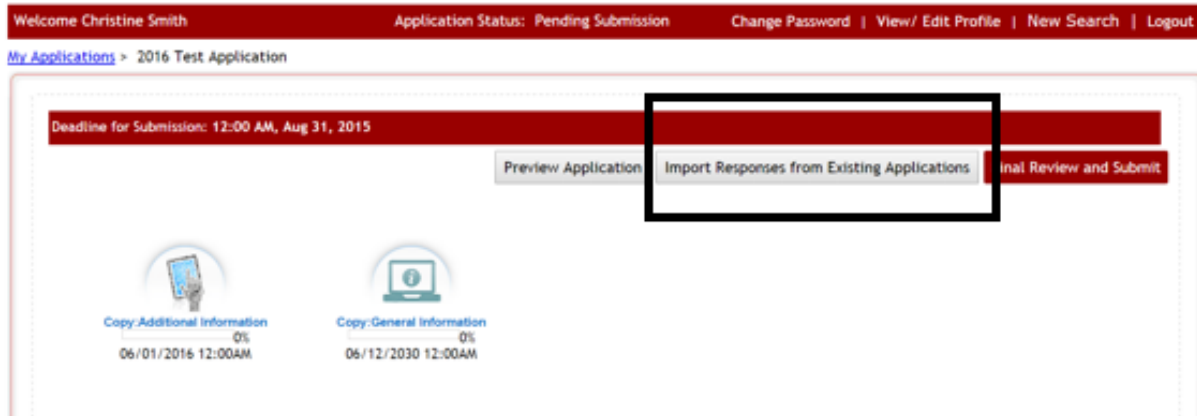
Select **“Yes”** to have the emails sent once the applicant clicks **“submit”**. Otherwise, select **“No”**, if you do not want the Application Contact to get an email.

### 9.5.24 Enable Import Responses from Existing Application

If you are using a Master template to create your application forms, or copying from the same form each time, so that all the XML section names and question names are the same for your common question across all the applications, you can allow applicants to import responses from one application to another application.



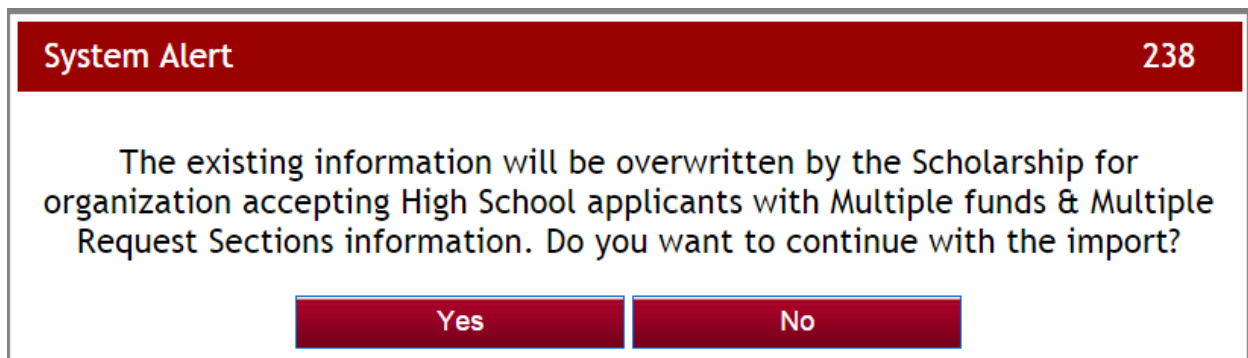
When the applicant applies to an application they will have a button on the application's dashboard, Import Responses from Existing Applications.



Once they click the Import Responses button, they will see a listing of all the applications they have applied to and can select the one they want to import responses from and click on the **Import** button for that application.

Important	
Scholarship	
Scholarship for organization accepting High School applicants with Multiple funds & Multiple Request Sections	<b>Import</b>
Scholarship for organization with multiple funds accepting High School applicants	Import
Z1 First Fund	Import
Z2 Second Fund	Import
Z3 Third Fund	Import

A message will appear notifying them that any information already entered will be overwritten in the new application form. They can click "Yes" to proceed with the import.



They will then receive an additional message notifying them to confirm all the imports for accuracy and can click OK to return to their dashboard to complete the application form.

Once the import is complete all the XML Sections and XML questions that match, from the other application they selected, will be automatically populated with the same values into the new application form.

#### 9.5.25 Enable Format Excel File

When exporting report to excel using the Export to Excel option, items that are numbers and date fields will export with left alignment. However, by selecting “**yes**” to this item, you can have numeric and date fields formatted with right alignment at the time of exporting to Excel.

#### 9.5.26 Pre-Qualification questions appear

If you have created and are using Prequalification questions in your application form, you can have the option to have those question appear:

**After Login:** After the Applicant selects an application form to apply to, and has logged into the site the prequalification question will appear for that application form.

**Before Login:** If the applicant has not logged in yet, and selects an application form to apply to, prior to logging in, the prequalification question will appear to prequalify that applicant to apply to that application form.

This setting is a **global setting** and will apply to all application forms that have prequalification questions activated in the Application Setup dashboard.

#### 9.5.27 Show View All Grants

When an applicant is viewing the search screen to locate funds they are eligible for, there is a button that can appear “**View all Scholarships**” (or funding source). When the applicant clicks on this they will be directed to the Application Listing view and get a listing of all the funding sources available on the site.

If you want to force your applicants to search and only want them to see results based on their search you can have that button deactivated.

Select **Yes** to have the **View All Scholarship** (funding source) button displayed

Please select an item below to filter for funding sources you are eligible for.

View All Scholarship

**Search by Keyword**

Find Scholarship by Keyword:

**Search by Scholarship Eligibility**

Display Scholarship that match All of my selections:  
(Select more options to return a narrower set of results)

County

Gender

Is US citizenship required?

Major

State

**Search by Sponsoring Organization**

Find Scholarship by the Sponsoring Organization(s):

Select **No** to deactivate the button and not have it appear.

Please select an item below to filter for funding sources you are eligible for.

**Search by Keyword**

Find Scholarship by Keyword:

**Search by Scholarship Eligibility**

Display Scholarship that match All of my selections:  
(Select more options to return a narrower set of results)

County

Gender

Is US citizenship required?

Major

State

**Search by Sponsoring Organization**

Find Scholarship by the Sponsoring Organization(s):

### 9.5.28 Enable Application Payments

If you have fees associated with your application forms, you can activate this feature to allow for fees to be paid on an application form. This does require integration with a third party payment software program and will require that CommunityForce implementation set this functionality.

This will activate in the General Information setup for the application form the option to set a fee amount on the specific application form. As well as activate the interaction with the third party payment software.

If you are using this feature select “**Yes**” otherwise. Select “**No**”.

### 9.5.29 Enable Terms & Conditions / Consent

Some clients must have their applicants review Terms and Conditions prior to creating their login user accounts. When creating their account they will have a questions with a link to the Terms and Conditions message and a box that they must select prior to submitting their login in credentials.

If this is activated you will also need to add the Terms and Conditions message to the **Enter Terms & Conditions / Consent** message located in the Site Settings.

The image shows a registration form with the following fields:
 

- \*First Name : [text input]
- \*Last Name : [text input]
- \*Date of Birth : [07] / [28] / [2015] (MM/DD/YYYY)
- Login Id (Email Format) : [text input]
- \*Password : [password input]
- \*Confirm Password : [password input]

 A checkbox is located below the password fields, which is highlighted with a black border. The checkbox is currently unchecked and is followed by the text "I agree to the [Terms of Service and Privacy policy](#)". Below the checkbox are two buttons: "Submit" and "Cancel".

### 9.5.30 Disable Review Screen Before Application Submission

When an applicant submits their application form and clicks the “Final Review and Submit” button on the application dashboard, they are first directed to a Final Review Page where they must review the application form and select the confirmation box acknowledging they have reviewed the form and then click the Submit button for final submittal.

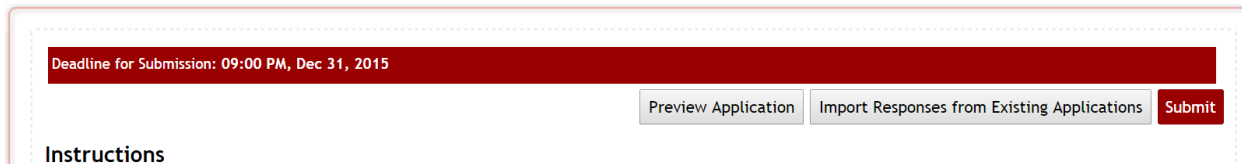
- Please check the check-box to confirm that you have reviewed your Scholarship for organization accepting High School applicants with Multiple funds application, then click “Submit”. You will not be able to update it after it is submitted.



The **Disable Review Screen** allows you to turn off the review function and the applicant will not receive the review screen. Once they click the Submit they will then immediately be submitted and will not need to do the final review.

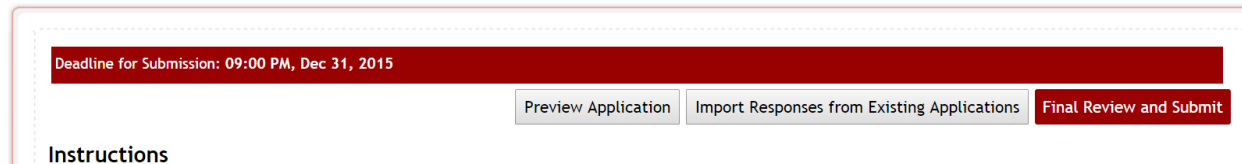
**Yes** – turns off the review feature. When the applicant submits they will not have the Final Review and Submit button, but instead only has a “Submit” button present on their application dashboard. The applicant does not have to do a review prior to final submittal.

[My Applications](#) > Scholarship for organization accepting High School applicants with Multiple funds & Multiple Request Sections



**No** – displays “Final Review and Submit” button on the application dashboard, and the applicant must select the confirmation box confirming they reviewed their form prior to final submittal.

[My Applications](#) > Scholarship for organization accepting High School applicants with Multiple funds & Multiple Request Sections



### 9.5.31 Show Apply Button Before Login

When viewing available funding prior to log in, this feature allows the “Apply” button to be present on the funding source view prior to the applicant clicking the funding source name and logging in to the site.

**Yes** – allows the Apply button to appear prior to logging in.



**No** – The applicant must first click on the Funding source Name to view the funding source and apply.

Welcome Login

---

Total Scholarship: 31 / My Results: 31 New Search | Sort By: Scholarship (A-Z) ▼

---

2015 Common Application Form (posting) Begin Accepting Applications Date: 06/12/2015  
Deadline Date (EST Time Zone): 12/31/2015 12:00AM

### 9.5.32 Enable Automatic Application Creation Through Application Invitation

When inviting applicants to apply to a private application form using the **Administration>Application Invitation** feature, you can choose to have the application form already started for the applicant and it would be available in their “My Applications” tab or you can have the applicant click on a link in an email and be directed to a login where they could then access the form to start the application themselves.

- **Yes** - allows you to invite an applicant and start the application form for the applicant. The applicant would then log in and the application form would be available in their “My Applications” tab and the applicant would then click on the application form to complete it. (If there were pre-qualification questions, the applicant will not have to answer those questions, and will be bypassed to the application form.)
- **No** - allows you to invite an applicant to apply to a specific application form, however, the application *will not* be automatically started and added to the applicants “My Application” tab. The applicant will have to click on the link in the email and then **must** log in through that link. Once they login in from the link the application form will appear to them, where they can click the apply button to begin applying to the application form. Once the applicant clicks apply and is directed to that application’s dashboard, the application will then be present in their “My Application’s” tab. (If there are pre-qualification questions, the applicant would have to meet the pre-qualification before accessing the applications dashboard.)

(Please see **Module 6 – Application Invitation Setup** for more details of the **Application Invitation process**)

### 9.5.33 Enable Post Acceptance Section Submit Notification

If you have set up an **Application Contact** in the **Application>General Information** setup for your application form, then you can have the option to have an notification email sent to that contact every time an applicant completes and submits a Post Acceptance Section. That section must have been created using the *Post Acceptance* Section Type. The email that is sent is in the Notification Center>System Email template>Application: Applicant Submit Post Acceptance Section.

Select “**Yes**” to have the emails sent once the applicant clicks “submit” for that Post Acceptance Section. Otherwise, select “**No**”, if you do not want the Application Contact to get an email.

### 9.5.34 Push Committee Scores

This allows committee reviewers that are assigned to the same applicant multiple times in different review tasks, to be able to push the same scores they gave to that applicant on another review tasks. This is a global setting and will apply to all application forms.

**Do Not Push** – this will not allow your committee reviewers to push scores and they will have to re-enter the scoring on every review task for the same applicant.

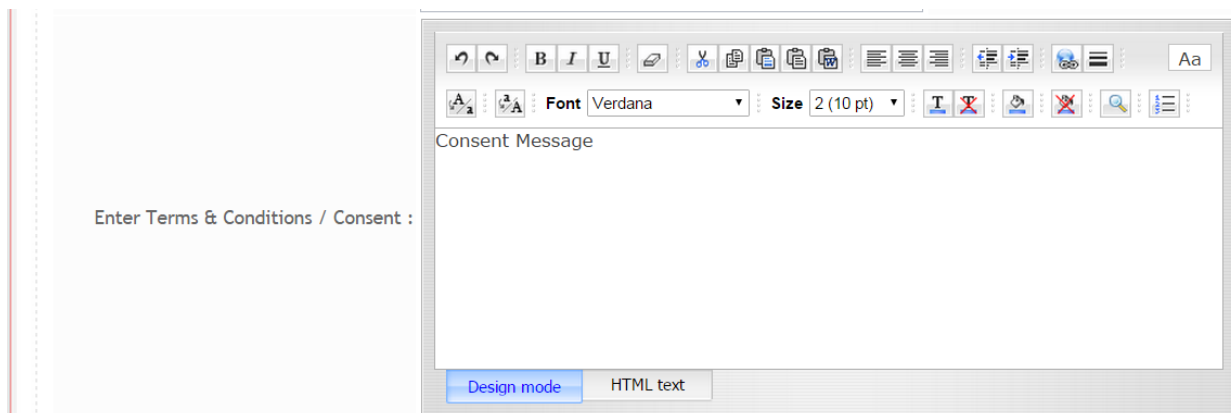
**Push Scores within Application** – this will allow your committee reviewers to push scores on the same applicants, if they are scoring that same applicant on different tasks, within the same application form.

**Push Scores across All Applications within the Academic Year.** – if you have multiple applications active within the same academic year and the same applicants could be applying to those other applications, then you can have committee reviewers that may be reviewing in multiple applications, be able to push the same scores they gave to the same applicants in another application form.

**Important Note to Administrators:** Only the scoring questions that are created in each score card with the exact same XML name and question type formatting will be pushed. If the XML Name on a scoring question is not the exact match, or the question type formatting has been changed it will not import and push that data. Therefore, it is best to clone the tasks when creating them in order to keep them consistent.

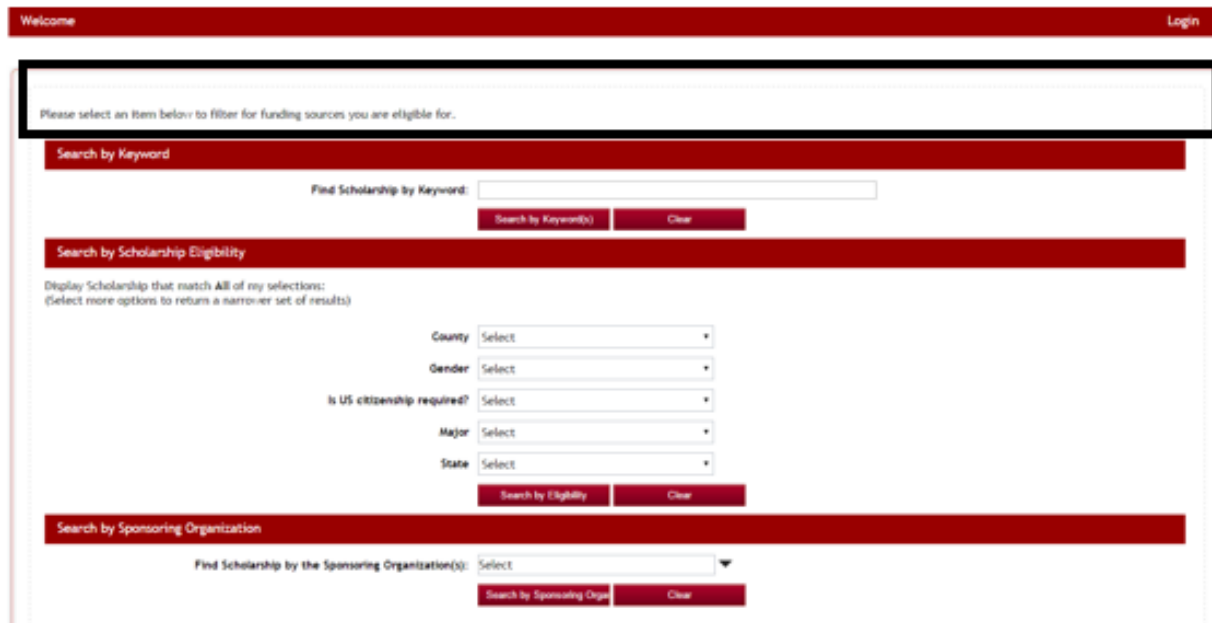
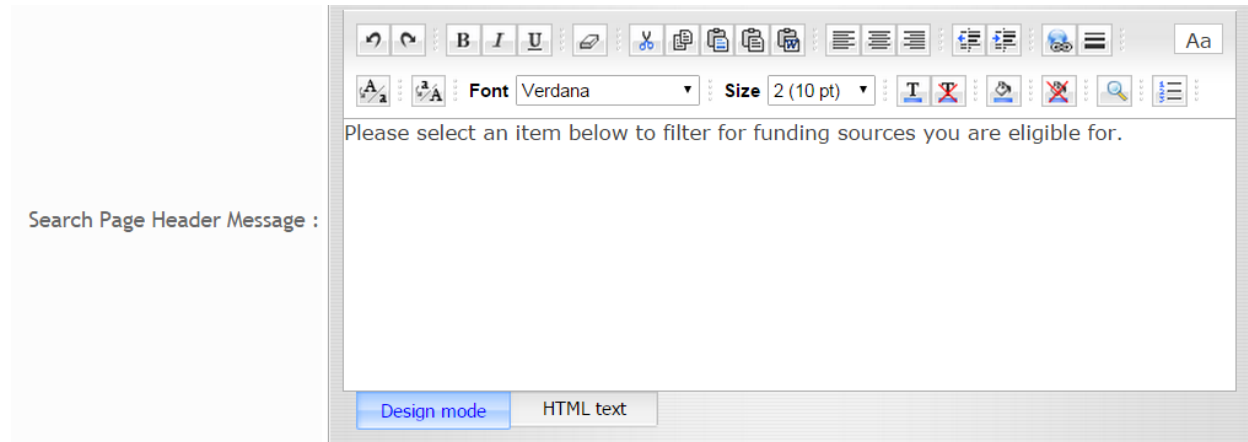
### 9.5.35 Enter Terms & Conditions / Consent

If you select “yes” to activate the **Enable Terms & Conditions / Consent** in the Site Settings above, you will need to add the actual Terms and Conditions in this editor box. Then when the applicant clicks on the link for the Terms, they will be directed to this message.



### 9.5.36 Search Page Header Message:

If you are using the search page option to allow your applicants to search for funding sources by a specific search filter type, then you will need to add a message that will appear at the top of that search page:



### 9.5.37 Interests Cart Message

If you activated the Interest Cart in Site Settings, you will need to enter a message to the applicant that will appear at the top of the page when the applicant is viewing their 'My Interest Cart tab.



Interests Cart Message :

The screenshot shows a rich text editor interface. At the top, there is a toolbar with various icons for undo, redo, bold, italic, underline, link, unlink, list, and other formatting options. Below the toolbar, the font is set to 'Verdana' and the size is '3 (12 pt)'. The main text area contains the following content:

**How to use your Interest Cart**  
 Use your Interest Cart to save opportunities you want to be notified of when they become eligible for your application submission.

Your cart will allow you to keep up-to-date on the latest opportunities and submit your applications on time in order for the most chances to be awarded more money for your education.

At the bottom of the editor, there are two buttons: 'Design mode' (highlighted in blue) and 'HTML text'.

The screenshot shows a user's profile page for 'Christine Smith'. The page title is 'Home > My Interest Cart'. A red navigation bar at the top contains 'Welcome Christine Smith' and links for 'Change Password', 'View/ Edit Profile', and 'Logout'. Below the navigation bar, the page content is displayed within a dashed border. A red banner at the top of the content area reads 'Total Scholarship: 22 / My Interests: 1'. The main content area features a box with the same 'How to use your Interest Cart' message seen in the previous screenshot. Below this, there is a section for a '2016 Test Application' with a 'View more(...)' link. To the right of this section, the following information is displayed:

**Begin Accepting Applications Date:** 06/30/2015  
**Deadline Date (EST Time Zone):** 08/31/2015 12:00AM  
[Apply](#) | [Remove From Cart](#)

At the bottom of the page, there is a pagination control showing 'Go to Page 1 Go', 'Page 1 of 1', and a 'Display All Records per Page' option.

### 9.5.38 Non Eligible Students Fund Message

This is used for clients that have applicants logging in using SSO (Single Sign On).

If an applicant tried to log in outside of the organization’s Single Sign on portal, and they try to apply to an application that has the linked funding source marked as **Allow Non-(org) applicants** set to **No** in the Funding Source Setup, then the applicant can receive the Non-Eligible Student Message. Only applicants that are Applicants coming in from that organization’s SSO portal would be allowed to apply.

Allow Non-CFTS applicants:  Yes  No      Allow CFTS Applicants:  Yes  No

You can create a custom message to appear when an applicant tries to apply for funding he or she is not eligible for.

Non Eligible Students Fund Message : [This message appears, when an applicant tries to apply for a Scholarship/Grant, he is not eligible for.]

Welcome Any Test CF Logout

Search
My Applications
My Interest Cart
My Proxy Applications

New Search

Thank you for taking the time to find out more about this opportunity. Apologies, but you're not currently eligible for this opportunity at this time. Please review the information you've entered on your application carefully and change any details you feel you've entered incorrectly. If all details you've entered are correct and you are, in fact, ineligible, then mark this opportunity and try again during our next open process.

[Nominator Login](#) | [Help](#) | [Contact](#) | [Logout](#)

### 9.5.39 Registration Instructions

This will allow the administrator to create Instructions on the Registration page where an applicant will create their login account for the system. You can use the Design Mode to edit exactly the same way as Microsoft Word in the editor box. Simply type the information into the editor or you can use the HTML Text function to create instructions using HTML tags.

#### Suggested Registration Instructions:

**Registration**

**Registration Information:**

Once you create a user account and begin an application you can save your work and return later to finish. All applications must be submitted by the deadline dates. You will not be able to submit your application after the deadline has passed. It is important that you review each section of the application making sure no information is missing.

Do not hesitate to contact us if you have questions. Good Luck!

\*First Name :

\*Last Name :

\*Date of Birth :  /  /  (MM/DD/YYYY)

\*Login Id (Email Format) :

\*Password :

\*Confirm Password :

I agree to the [Terms of Service and Privacy policy](#)

### 9.5.40 Login Instructions

**Login Instructions:** This will allow the administrator to create Instructions on the login page for applicants before they can login. You can use the Design Mode to edit exactly the same way as

Microsoft Word in the editor box. Simply type the information into the editor or you can use the HTML Text function to create instructions using HTML tags.

 **Suggested Login Instructions:**

Login

**Sign in**

\* Email

\* Password

Password is case sensitive.

[Forgot Password?](#)

or

**Welcome to your Scholarship Application Portal**

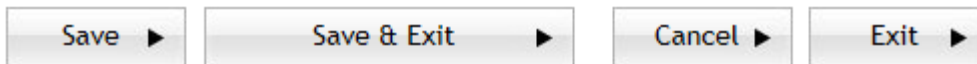
**New Applicants/First Time Users**  
Click the "Create New Account" button below in order to begin a new application.

**Existing Applicants**  
Enter your Username and Password to complete the application.  
*(Your username is the email address and password you initially used to set up your account.)*

**Forgot Password**  
Click on "Forgot Password" and enter your login email address to reset your password. Once complete, an email will be sent asking you to reset your password. You will receive a confirmation email once you've successfully reset your password.

### 9.5.41 Saving changes to General Settings

Once you have activated all the items in General Settings and added the appropriate messages you will want to save any changes you have made. You can either click **Save** to save your changes but stay on the Site Settings page to continue updating, or click **Save & Exit** and return back to Administration Dashboard.



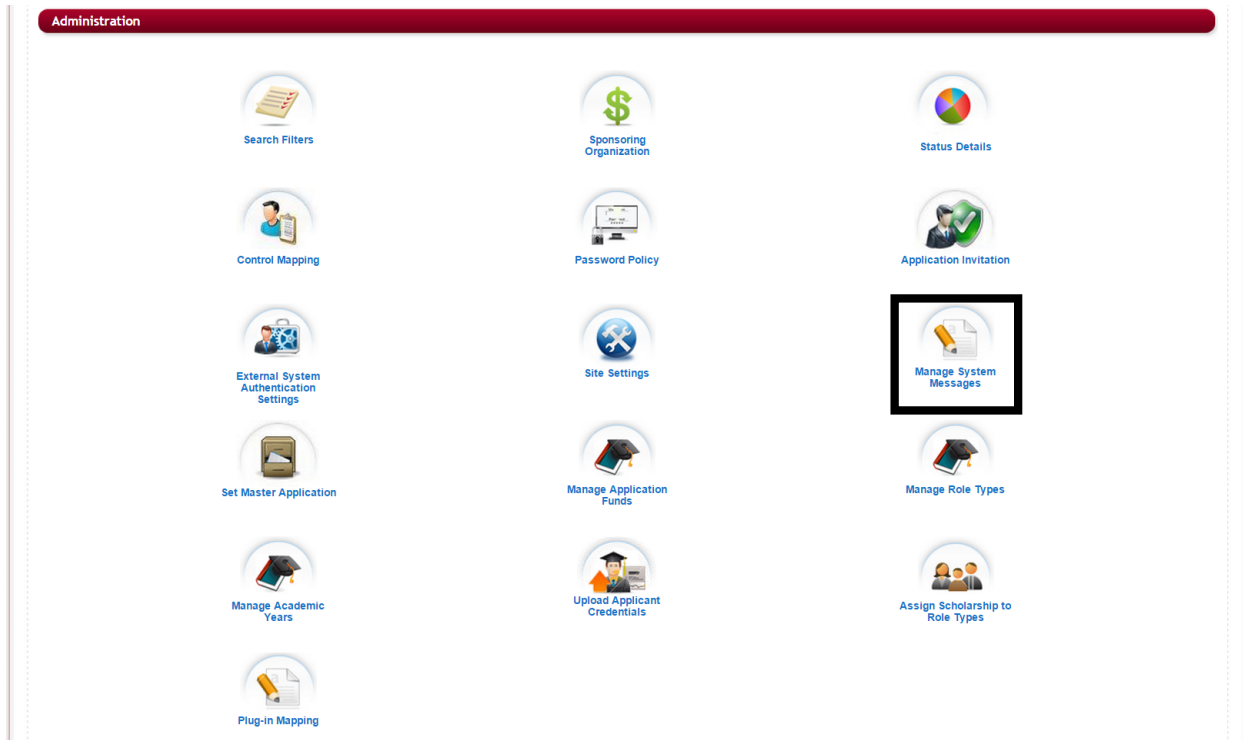
**Cancel** – Clears all data from the fields.

**Exit** – Undo changes and return to the Administration Dashboard

## 10. Manage System Messages



Manage System Messages



Manage System Messages allows the Global Admin to customize the language of the system generated messages that are used throughout the workflow of the system.

**The system messages cannot be deleted.** You can only edit the Message Type and the Message Description. The Message Code ties it to a particular workflow in the system and cannot be changed.

Home > Administration > Manage System Messages

Manage System Messages

Message Type:

Message Description:

Search By:

Message Code	Message Type	Message Description
101	Status Update	The Application has been saved.
102	System Error	Application Name already Exists. Please Try again.
103	System Message	Select an Application to duplicate. You will be able to edit the new Application.
104	System Alert	{Application Name} does not appear to be a valid Application to clone. Try again. Select the first "Application Selection" to clone.
105	System Alert	All of the sections associated with this Application will be deleted. Would you like to continue?
106	System Alert	The criteria associated with this Scholarship will be deleted. Would you like to continue?
107	Status Update	The Application Status Detail has been created.
108	Status Update	The Application Status Detail has been updated.
109	System Message	Are you sure you want to delete the Application Status Detail?
110	System Error	The Application Status Detail already exists. Choose a different Application Status Detail.

Go to Page   Page 1 Of 25 Display  Records per Page

## 10.1 Editing System Messages

### Exercise 1

- **Step 1:** From the **Administration Dashboard > Manage System Messages**, Search for a system message by entering information in the search by filters. You can search by entering the code number, the message type or message description. Once you have entered information in one or all fields hit the **Search Button**.

Search By:	Message Code: <input type="text"/>	Message Type: <input type="text"/>	Message Description: <input type="text"/>	<input type="button" value="Search"/>
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- **Step 2:** Search results will appear in the grid below.

Message Code	Message Type	Message Description
101	Status Update	The Application has been saved.

- **Step 3:** Once you locate the System Message you want to edit, click on the Edit icon next to that message.

Message Code	Message Type	Message Description
101	Status Update	The Application has been saved.
102	System Error	Application Name already Exists. Please Try again.
103	System Message	Select an Application to duplicate. You will be able to edit the new Application.
104	System Alert	[Application Name] does not appear to be a valid Application to clone. Try again. Select the first "Application Selection" to clone.
105	System Alert	All of the sections associated with this Application will be deleted. Would you like to continue?
106	System Alert	The criteria associated with this Scholarship will be deleted. Would you like to continue?
107	Status Update	The Application Status Detail has been created.
108	Status Update	The Application Status Detail has been updated.
109	System Message	Are you sure you want to delete the Application Status Detail?
110	System Error	The Application Status Detail already exists. Choose a different Application Status Detail.

- **Step 4:** The information from that message will populate at the top of the screen, in the Message Type field and the Message Description field. Type your changes in the Message description and click **Save** to save your changes.

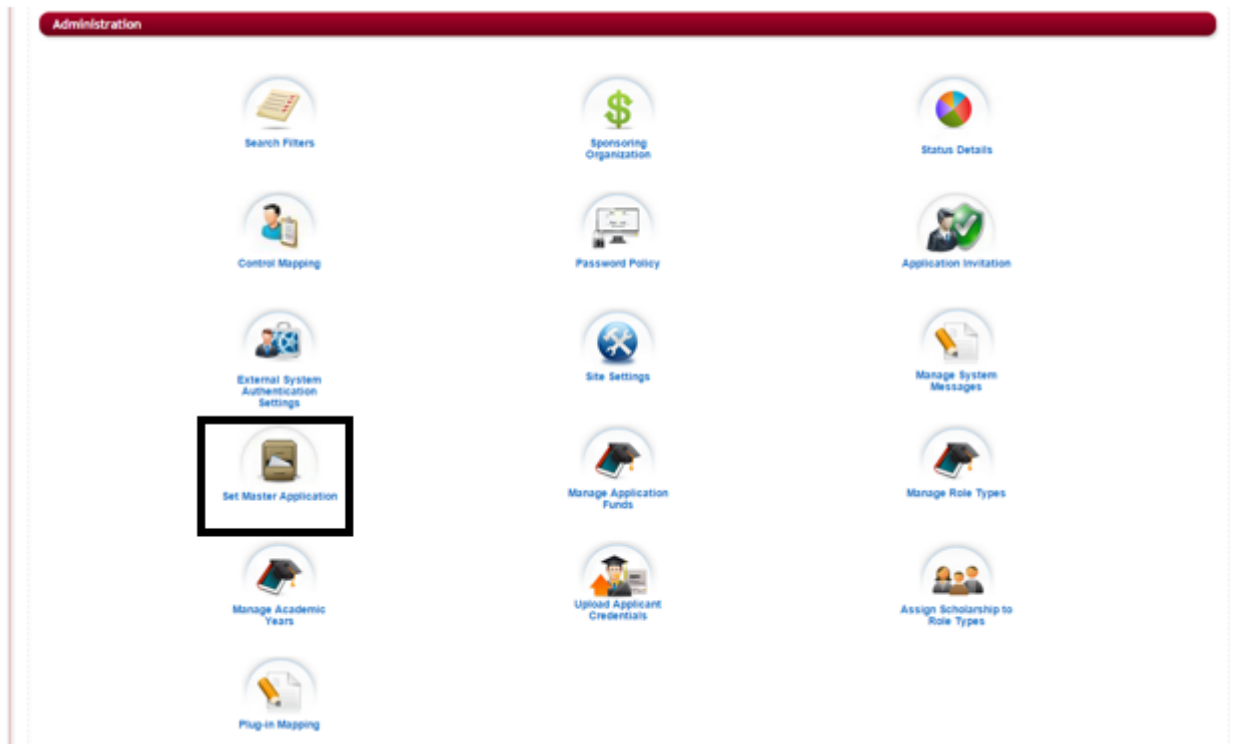
	<input type="button" value="Save"/>	<input type="button" value="Save &amp; Exit"/>	<input type="button" value="Cancel"/>	<input type="button" value="Exit"/>
Message Type:	<input type="text" value="Status Update"/>			
Message Description:	<input type="text" value="The Application has been saved."/>			
	<input type="button" value="Save"/>	<input type="button" value="Save &amp; Exit"/>	<input type="button" value="Cancel"/>	<input type="button" value="Exit"/>

- Save** – Save changes and remain on the page
- Save & Exit** – Save changes and return to the previous page
- Cancel** – Cancel changes and remain on the page
- Exit** – Undo changes and return to the previous page

**Note:** when editing messages use caution in changing items that have brackets around them { }. These items are merge fields that are merging to an item in the application site if you remove them then you remove the link and the item will not merge.

## 11. Set Master Application

(For details on how to use and set up this feature please see **Module 3 – Application Form Setup – 3.2 Setting the Master Application**)



## 12. Manage Application Funds

Manage application Funds in the Administration Dashboard has the same functionality as the Manage Application Funds in the **Setup Application Forms>Manage Application Funds**. However in the Administration Dashboard, you can select multiple applications and set the funds for all those separate applications forms from one page, without having to go to each separate application forms setup page.



## Manage Application Funds

Administration

- Search Filters
- Sponsoring Organization
- Status Details
- Control Mapping
- Password Policy
- Application Invitation
- External System Authentication Settings
- Site Settings
- Manage System Messages
- Set Master Application
- Manage Application Funds**
- Manage Role Types
- Manage Academic Years
- Upload Applicant Credentials
- Assign Scholarship to Role Types
- Plus-in Mapping

Select each application form separately in the **Select Application field** and then assign all the funds to that application form. Be sure to click **save** on that application form before selecting the next application form to begin assigning funds to.

Home > Administration > Manage Application Funds

**Manage Application Funds**

Select Application : --Select--

Un-Assigned Scholarship

Assigned Scholarship

▶

◀

Save

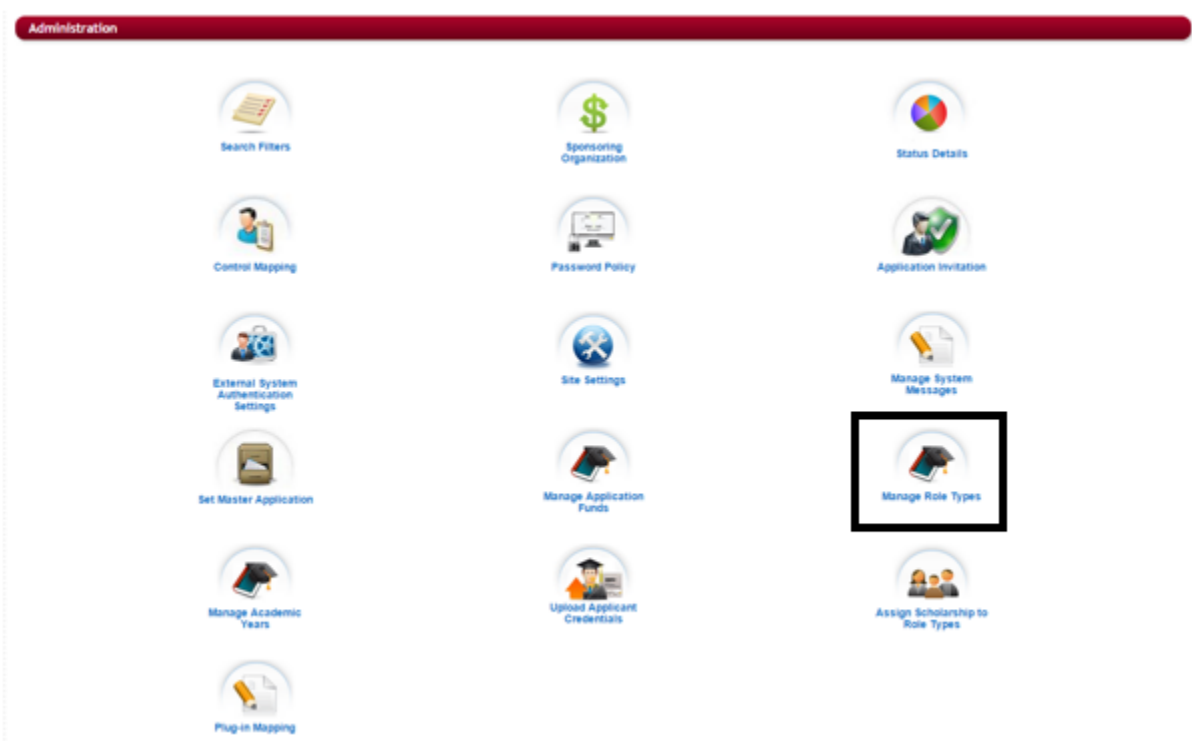
As you start assigning and saving those assignment the information will appear in the section below showing what application forms have what funding sources assigned to them.

Application Name	Scholarship
Test 6/30 2015 Application	2015-2016 Scholarship Application for all funding
Testing Form applicants vwith Multiple funds & Multiple Request Sections	Aaron C. Kesler Future Firefighters Scholarship
Form for organization accepting High School applicants vwith Multiple funds & Multiple Request Sections	Aaron C. Kesler Future Firefighters Scholarship
Form for University requiring integration vwith Datatel (Dept Specific Questions)	Aaron C. Kesler Future Firefighters Scholarship
Form for organization accepting High School applicants vwith Multiple funds & Multiple Request Sections	Arvin-McCord Scholarship
Form for organization vwith multiple funds accepting High School applicants	Arvin-McCord Scholarship
Testing Form applicants vwith Multiple funds & Multiple Request Sections	Arvin-McCord Scholarship
	Bob J. Tandy Scholarship
Form for University requiring integration vwith Datatel (Dept Specific Questions)	Bob J. Tandy Scholarship
	Brian Bovman Memorial Scholarship

(For additional information on how to use this see **Module 4 – Setting up Funding Sources – 2.3 Accessing the Manage Application Funds.**)

### 13. Manage Role Types

(For details on how to use and set up this feature please see **Module 2 – Managing User Accounts – 1. Manage Role Types**)



### 14. Manage Academic Years



Academic Years allows you to assign an application form or funding source to a specific academic year period. In the Administration Dashboard, you can set the dates that each academic year period starts and ends according to how your organization's academic years flow, in the Manage Academic Years.

### **Exercise 1**

- **Step 1:** From the **Administration Dashboard** click on the **Manage Academic Years** Icon

The image shows a screenshot of the 'Administration' dashboard. At the top, there is a red header bar with the word 'Administration' in white. Below the header, there is a grid of 15 circular icons, each with a label underneath. The 'Manage Academic Years' icon, which depicts a graduation cap and a book, is highlighted with a black rectangular box. The other icons include: Search Filters, Sponsoring Organization, Status Details, Control Mapping, Password Policy, Application Invitation, External System Authentication Settings, Site Settings, Manage System Messages, Set Master Application, Manage Application Funds, Manage Role Types, Upload Applicant Credentials, and Plug-in Mapping.

- **Step 2:** The Academic Years listing will appear showing all the current Academic years on the site.

Academic Years				
	Edit	Start Date	End Date	Academic Year
		1/1/2010	12/31/2010	2010-2011
		1/1/2011	12/31/2011	2011-2012
		1/1/2012	12/31/2012	2012-2013
		1/1/2013	12/31/2013	2013-2014
		1/1/2014	12/31/2014	2014-2015
		1/1/2015	12/31/2015	2015-2016
		1/1/2016	12/31/2016	2016-2017
		1/1/2017	12/31/2017	2017-2018
		1/1/2018	12/31/2018	2018-2019
		1/1/2019	12/31/2019	2019-2020

Go to Page:  Go      Page 1 Of 2      Display: 10 Records per Page

- **Step 3:** You can edit an existing Academic year by clicking on the Edit icon next to that year, or add a new year by clicking on the Add New Academic Year.
- **Note:** When editing the existing dates and you select a date that falls within another Academic years date range you will receive an error message, “**Dates for the Academic Year are Overlapping**”, and you will not be able to update that period. Therefore when adjusting the preloaded dates, you will want to start at the highest year listed and move backwards.

### Add New Academic Year

- **Step 4:** The Academic Year will open where you can enter the Start Date, End Date and Academic Year if adding a new year, and click **Save** or **Save & Exit** to return to the listing of current academic years.

Academic Years

Save ▶ Save & Exit ▶ Cancel ▶ Exit ▶

Start Date:

End Date:

Academic Year:

Save ▶ Save & Exit ▶ Cancel ▶ Exit ▶

## 15.Upload Applicant Credentials

This feature is the same feature in the Home Dashboard>Setup Users>Import User(s), and allows you to import a batch of user profiles at one time from a preformatted Excel document.



## Upload Applicant Credentials

Administration



Search Filters



Sponsoring Organization



Status Details



Control Mapping



Password Policy



Application Invitation



External System Authentication Settings



Site Settings



Manage System Messages



Set Master Application



Manage Application Funds



Manage Role Types



Manage Academic Years



Upload Applicant Credentials



Assign Scholarship to Role Types



Plug-in Mapping

When you first access the Upload Applicant Credentials you will be directed to the same page as if you clicked on the Import User(s) button in the Setup Users function. For more details on how to upload using an import file, please see **Module 2 – Managing User Accounts – 2.3.2 Creating User Profiles from an Import File.**

Upload Applicant Credentials

Select Type :  Excel  XML

Select Excel File :  [Click here to download the format of the file](#)

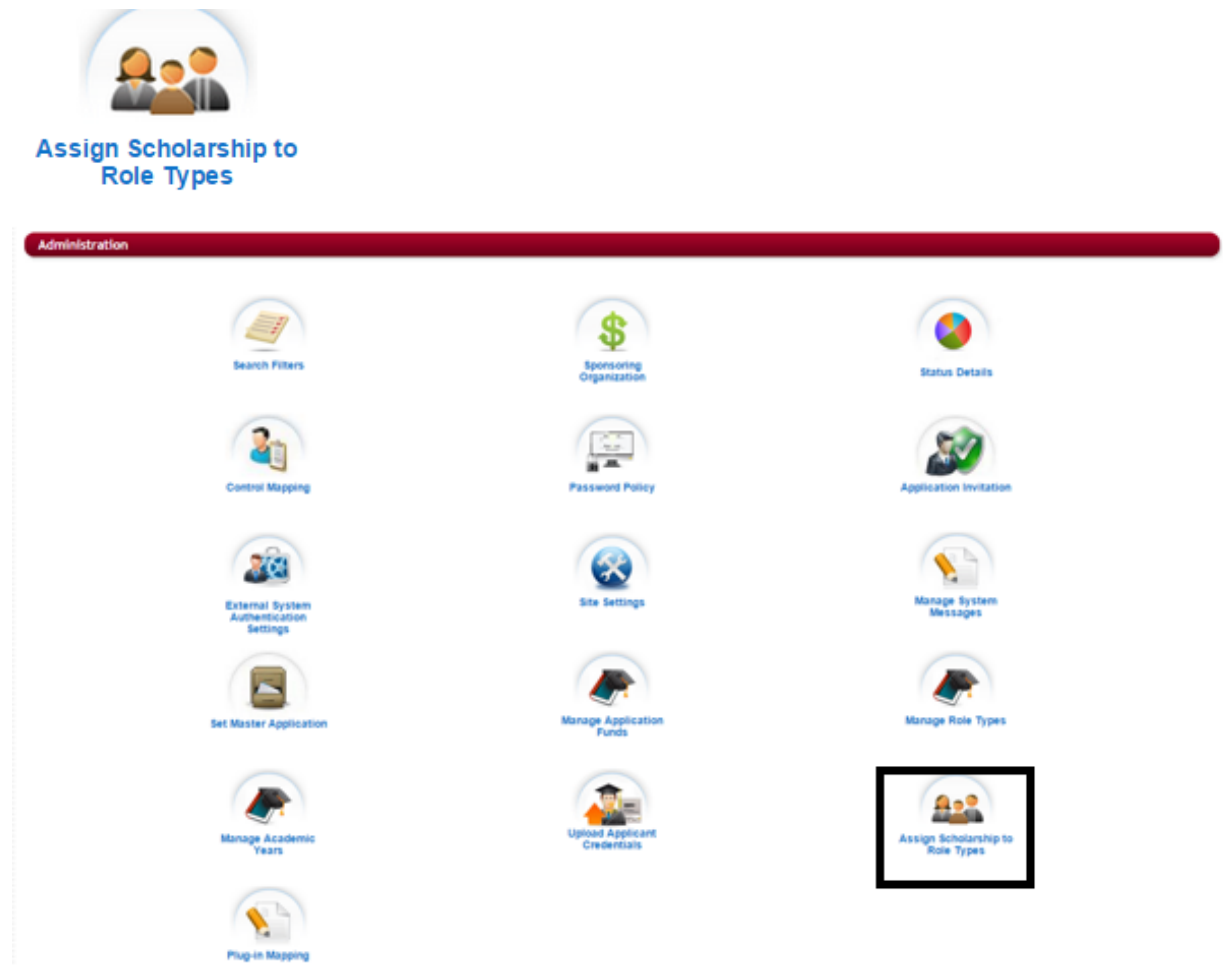
## 16. Assign Scholarship to Role Types

Assign Scholarship to role types allows you to assign individual funding sources to a role type. Then only that role type can have access to view the funding source. In order to access this icon and be able to assign scholarships you must first make sure that in the **Administration>Site**

**Settings>Grants/Fellowship Settings: Show Funds based on Role Types** has been set to “Yes”. If this is not set to “yes” then this icon will not be available for access.

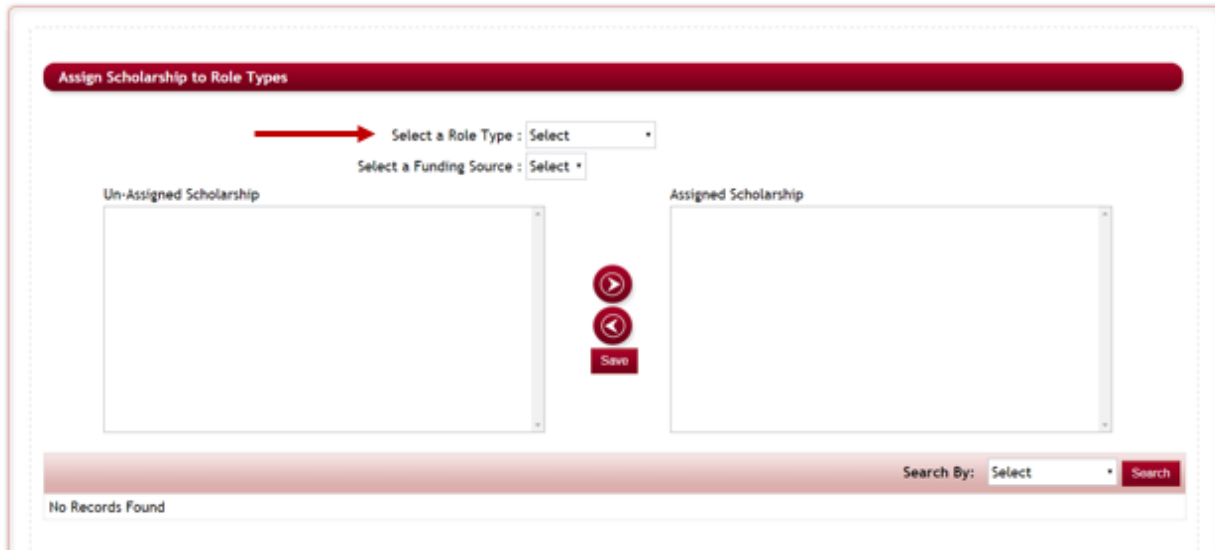
**Exercise 1**

- **Step 1:** From the **Administration Dashboard** click on the **Assign Scholarship to Role Types** Icon

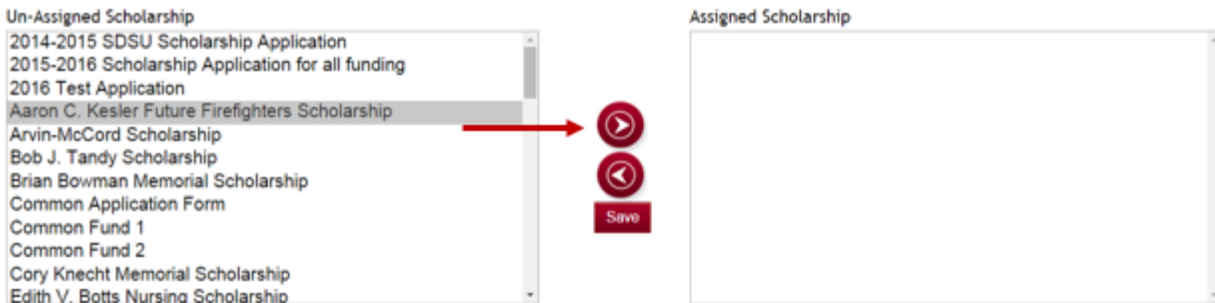


- **Step 2:** The Assign Scholarship to Role Types assignment screen will open:

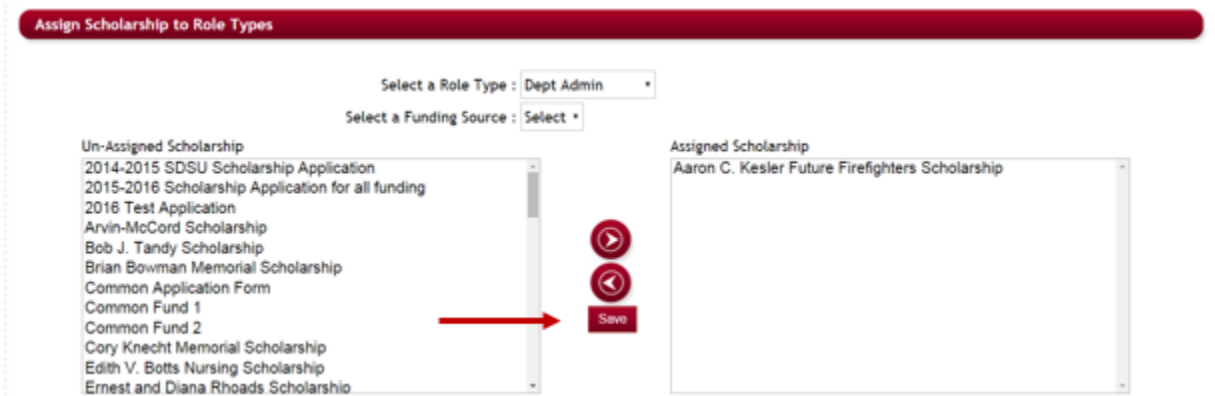
Home > Administration > Assign Scholarship to Role Types



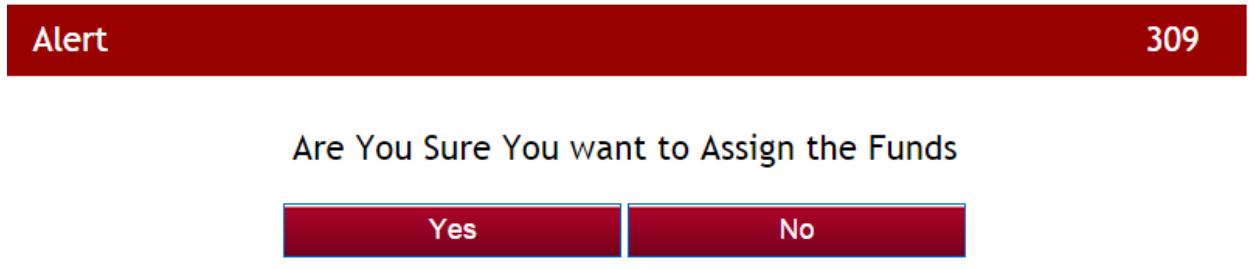
- **Step 3:** Select a role type that you want to assign by clicking on the drop down arrow on the **Select a Role Type**
- **Step 4:** The Available Funding sources will appear in the Un-Assigned Scholarship listing.



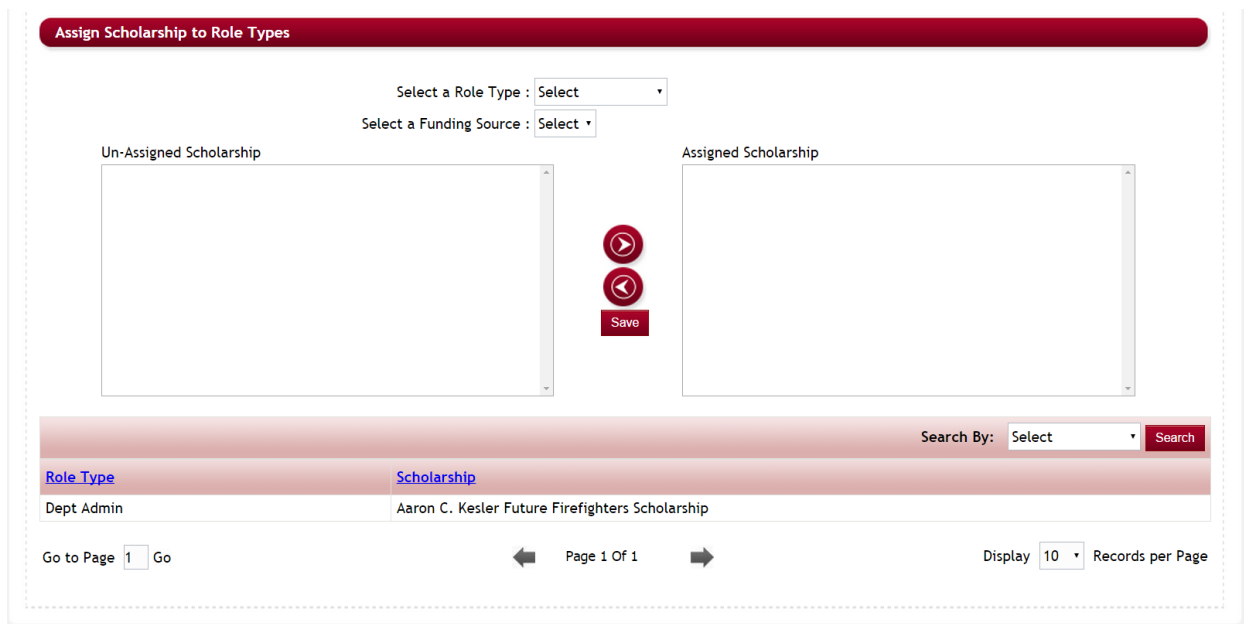
- **Step 5:** Select the fund in the listing, and then click the right directional arrow to move that fund to the Assigned Scholarship Column. Repeat this for all the funding sources you want to assign to that Role Type.



- **Step 6:** Once you have added all the appropriate funding sources to the Assigned Column. Click Save to save that assignment.
- **Step 7:** You will receive an alert to confirm you want to save this assignment. Click Yes to continue.



- **Step 8:** The assignment will now appear at the bottom of the page showing what role type has been assigned to what funding source.



To undo an assignment select the role type again in the “Select a Role Type” and move the Assigned Scholarship to the Un-Assigned using the left directional area, and save.

## 17.Plug-in Mapping

Plug in Mapping is used in integration with an external site and is used to link your external System to the CommunityForce site. This feature will be setup by a member of the CommunityForce Implementation team and **should not be changed** once the system mapping has been selected. Changing this can cause your system to not function properly.



### Plug-in Mapping

Administration

Search Filters	Sponsoring Organization	Status Details
Control Mapping	Password Policy	Application Invitation
External System Authentication Settings	Site Settings	Manage System Messages
Set Master Application	Manage Application Funds	Manage Role Types
Manage Academic Years	Upload Applicant Credentials	Assign Scholarship to Role Types
Plug-in Mapping		

Select the External System to Map to:

[Home](#) > [Administration](#) > [Mapping](#)

Mapping

External System: