

# eCivis User Guide

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## Application Workspace Manual

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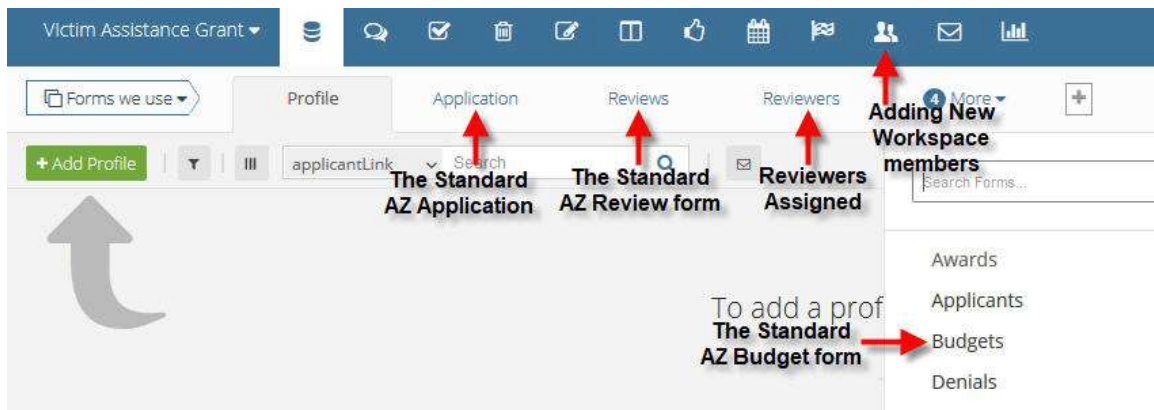
- Administration
- Application content
- Review content
- Publishing your solicitation

# Administration

## 1) Overview

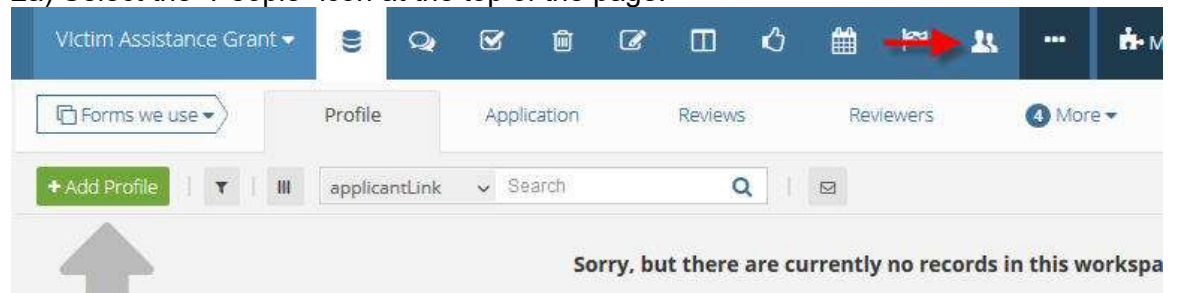
Once you have accepted your invitation to the application workspace, you can review and edit the application form, review form, and add additional users to the workspace.

- 1a) Application form
- 1b) Review form
- 1c) Reviews form
- 1d) Budget form
- 1e) Workspace members



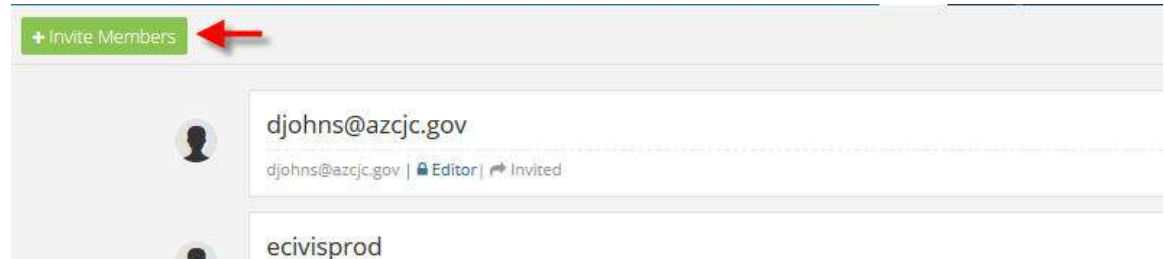
## 2) Adding new workspace members

2a) Select the "People" icon at the top of the page.



2b) Select "Invite members", enter an email address, and select a user role. Refer to the "Standard Roles" link for an explanation of the user levels.

### Invite members



## Add email address and user role

**Invite New Members to this Workspace**

**Email**  
Enter an email address for each person you would like to invite to this workspace.  
Separate each person you would like to invite by a comma or a new line.  
You can invite 45 more members to this workspace.

**Message**  
If you'd like, you can add a personal message to your invitation.

**Pick the Role for the Person(s) being invited**  
You can choose from a variety of standard roles for invitees that give them different permissions to view, edit, or delete workspace data. Once members accept your invitation, you can customize their roles.

Choose one

# Application content

Prior to publishing your solicitation you can add custom help text and optional or mandatory file uploads. NOTE: Help text will appear to the applicant directly above the field and can be used to general describe the purpose of the field.

## 1) Adding help text and/or character limitation to application fields

### 1a) Select the "Applications" form and select "Form Tools" "Edit form"

The screenshot shows the top navigation bar with 'Victim Assistance Grant' and 'Marketplace'. Below it, a breadcrumb trail includes 'Profile' (highlighted with a red arrow) and 'Application'. A 'Forms we use' dropdown is set to 'profileLink'. A search bar and a 'Form Tools' button (highlighted with a red arrow) are visible. The 'Form Tools' dropdown menu is open, showing options: 'Edit Form', 'Import', 'Export All', and 'Export Current View'. A red arrow points to the 'Edit Form' option. The main content area displays a message: 'Sorry, but there are currently no records in this workspace. To add an application, click on the + Add Application button in the top left corner or import a .csv file.'

### 1b) Select the "Edit" button for the desired field

The screenshot shows the 'Settings' page for application fields. It lists four fields: 'Profile' (Linked Form, Short Name: profileLink), 'Application/Project Title' (Text), 'Project Goals and Objectives' (Text Box), and 'Scope of Work' (Text Box). Each field has an 'Edit' button. A red arrow points to the 'Edit' button for 'Project Goals and Objectives', which is highlighted with a black tooltip that says 'Edit Field'.

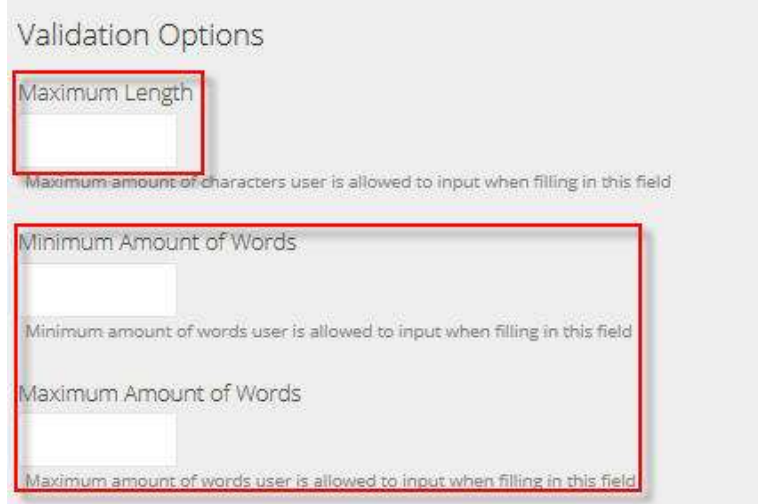
1c) Select “See advanced options” and enter desired text in the “Help text” box  
*Select See advanced options*



*Enter text in the “Help text” box*



*Use the “Validation Options” to set character or word count limitations*



## 2) Adding a file upload

2a) On the right hand side of the screen, drag and drop the “File Upload” in the desired location on the application form and rename the field appropriately.

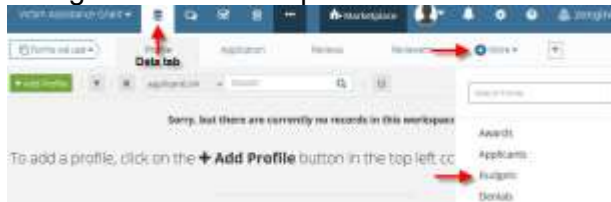


2b) To make the file upload required for applications, select the “Edit” button and check the “Required” box.

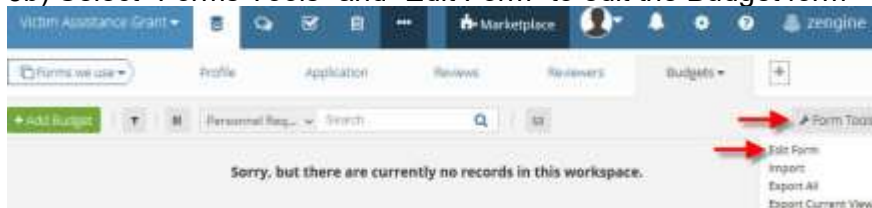


**3) Adding help text, file uploads, and/or character limitations to the Budget form**

3a) From the data tab, select “More” for additional forms, and select the “Budgets” from the drop down menu



3b) Select “Forms Tools” and “Edit Form” to edit the Budget form



3c) Help text, file uploads and/or character limitations can be added in the same way as described in the “Application Content” section of this manual. Refer to this section for instructions.

## Review content

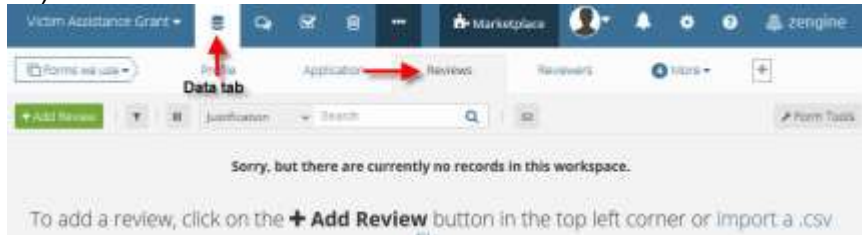
The standard Arizona review form contains essential conflict of interest qualifications and standard narrative fields and scoring. Additional file uploads and adjustments to the weighting of the questions can be made.

The default review fields and weighting (minimum and maximum values) are as follows:

- |                                    |        |
|------------------------------------|--------|
| 1. Programmatic Narrative          | = 0-10 |
| 2. Budget Alignment                | = 0-10 |
| 3. Implementation Plan             | = 0-10 |
| 4. Evaluation Plan                 | = 0-10 |
| 5. Sustainability Plan             | = 0-10 |
| 6. Goals and Objectives            | = 0-10 |
| 7. Collaborations and Partnerships | = 0-10 |
| 8. Program Specific Criteria #1    | = 0-10 |
| 9. Program Specific Criteria #2    | = 0-10 |
| 10. Program Specific Criteria #3   | = 0-10 |

## 1) Accessing the review form

1a) From the “Data tab” select the “Reviews” form



1b) Select “Forms Tools” and “Edit Form” to edit the Review form



## 2) Adding help text and adjusting weighting

2a) Select the “Edit” button for the field you want to edit and select “See Advanced Options”

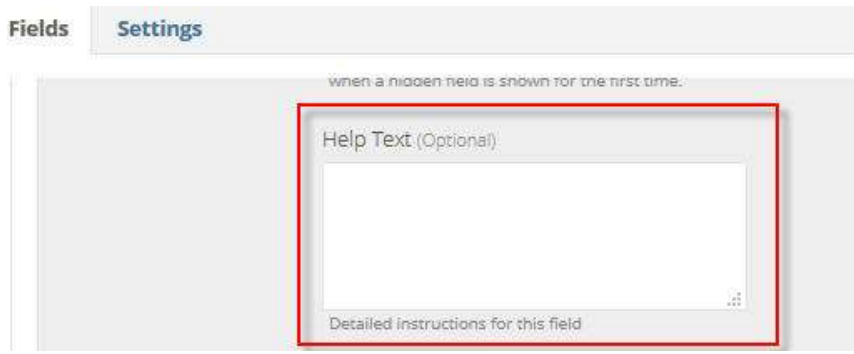
Select “Edit”



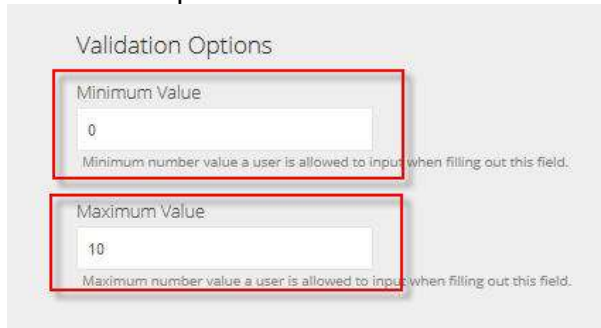
See Advance Options



2b) Enter desired text in the “Help Text” box



2c) Enter the weighting by adjusting the minimum and maximum values under “Validation Options”.

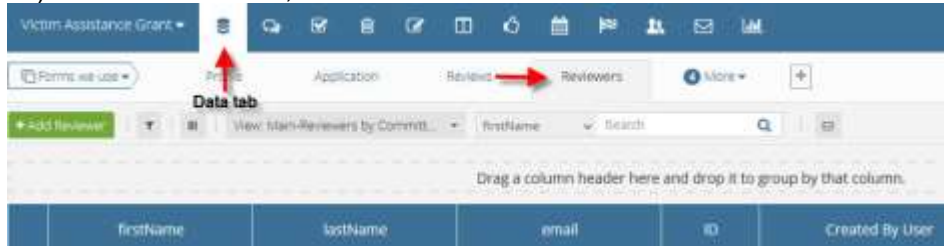


3) Adding additional file uploads

3a) Additional file uploads can be added in the same way as described in the “Application Content” section of this manual. Refer to this section for instructions.

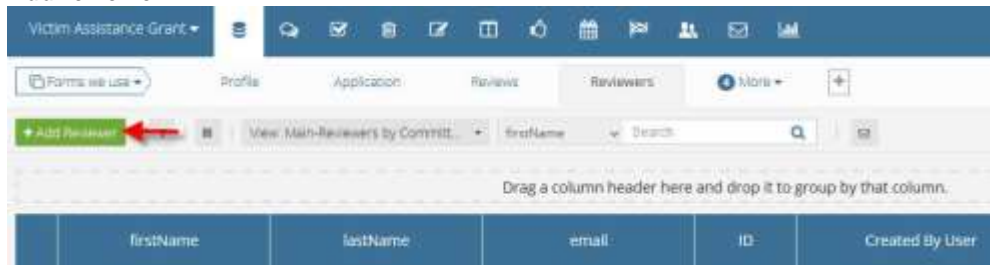
4) Adding/Editing application reviewers

4a) From the “Data tab”, select the “Reviewers” tab



4b) To add a reviewer select the green “Add Reviewer” button. Enter their name and email address and save.

*Add reviewer*



### Enter information

New Reviewer

Reviewer First Name required

Reviewer Last Name required

Reviewer Email required

4c) To delete a reviewer, click on the reviewer and select the red trash icon in the top right corner of the screen

Doe, Jane

Reviewer First Name required

Reviewer Last Name required

Reviewer Email required

# of Reviews

## Publishing your solicitation

After you have finalized your Application and Review forms, email [support@ecivis.com](mailto:support@ecivis.com) in the following format:

**Subject: Solicitation Ready to Publish**

**Body:**

- **Program Name**
- **Primary Workspace owner email**
- **Agency/Department name**
- **Desired publish date/time\***

**\*by default programs will be published within 3 hours of the request.  
Only include a desired published date if it is more than 3 hours.**

The eCivis support team will notify you when the solicitation has been published and provide the solicitation link and reviewer portal link.

You can also check the status of your program on the "Organization Programs" page in eCivis. The solicitation will move to the "Published" section when it is available.



Showing 1 to 1 of 1 entries

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**Published** Minimize

Showing 1 to 1 of 1 entries

← Previous 1 Next →

#	Title	Project / Funding Source	Availability	Applications	Actions
1	Downtown Arts Program	<a href="#">View</a> 1527120 - National Endowment for the Humanities (NEH) Media	<a href="#">Public</a>	0	  

Showing 1 to 1 of 1 entries

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**Archived** Open