

# eCivis User Guide

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## Application Workspace Manual

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## Administration

### 1. Overview

Once you have accepted your invitation to the application workspace, you can review and edit the application form and review form. You can also add other workspace members who will work on these forms:

1. Workspace members
2. Application form
3. Review form
4. List of reviewers assigned
5. List of applicants

The screenshot shows the 'Parent's Commission on Drug Education and Prevention FY2020' workspace. The navigation bar includes 'Forms we use', 'Applications', 'Reviews', 'Reviewers', 'Awards', and 'More'. A search dropdown is open, showing options: 'Denials', 'Profile', 'Applicants', and 'Budget'. The 'Applicants' option is highlighted with a red circle and the number 5. The main content area shows a table of draft applications with columns for 'Folder', 'profileLink', and 'Profile - company'.

Folder	profileLink	Profile - company
Draft	allenjeter@a-makingchange	
Draft	allenjeter@a-makingchange	A-MAKING CHANGES,LLC
Draft	beverly.mason@madd.org	
Draft	mschumacher@cocsd.k12.e	
Draft	jroselle@laveeneld.org	Laveen Elementary School...
Draft	evan.tiras@rsd.k12.az.us	John R. Davis
Draft	Amaris.Vasquez@tucsonaz2	

### 2. Adding new workspace members


- a. If there are other team members who will edit the applications and review forms, or will be responsible for moving applications to the Awarded status, select the "People" icon at the top of the page.

The screenshot shows the workspace header for 'DEMO - Parks and Recreation Development Fund (PAR)'. The 'People' icon in the top right navigation bar is highlighted with a red box. Below the navigation bar, the 'Workspace Members' button is visible.

- b. 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.

The screenshot shows the workspace header for 'DEMO - Parks and Recreation Development Fund (PAR)'. The '+ Invite Members' button is highlighted with a red box. Below the header, a message states: 'This workspace has 3 members. You can have a maximum of 50 members per workspace.'

c. 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 48 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**.

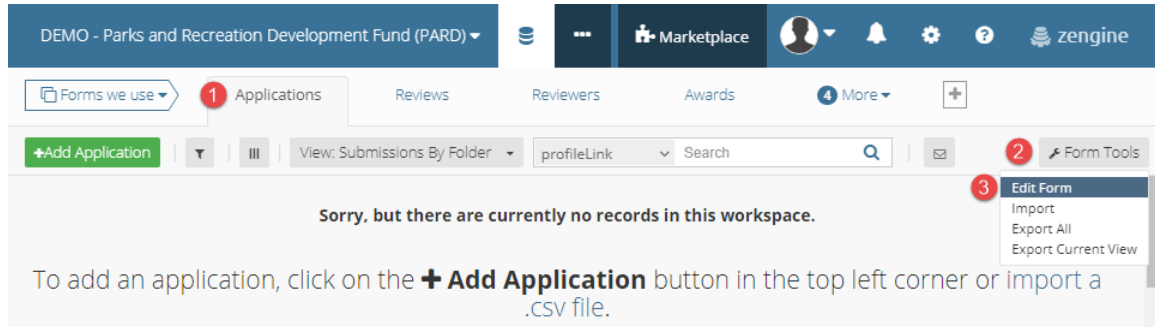
Choose one... 

## Application content

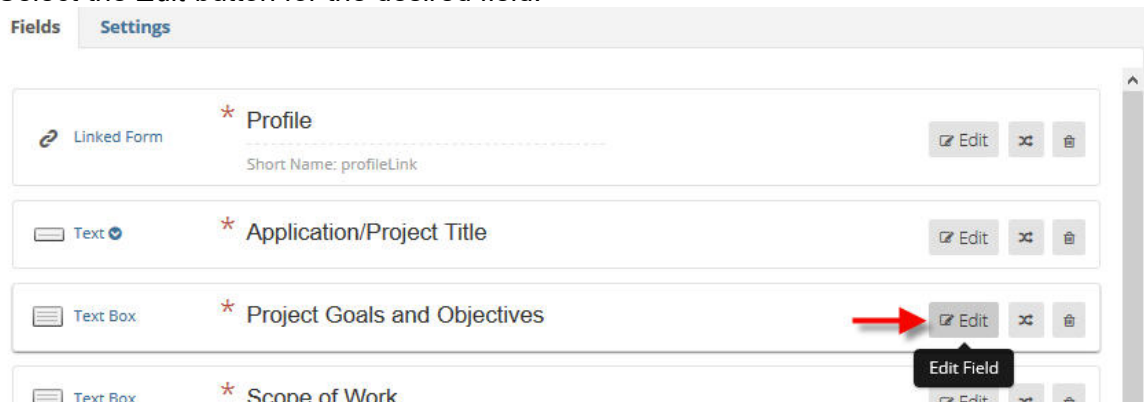
Prior to publishing your solicitation you can add custom help text and optional or mandatory file uploads. NOTE: Help text will appear to the applicant directly above the field and can be used to general describe the purpose of the field.

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

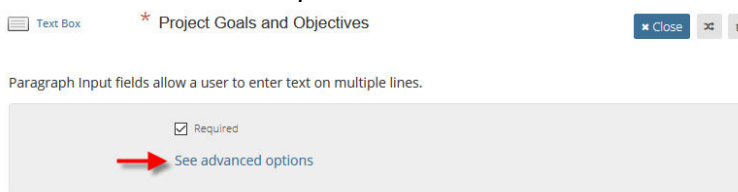
- a. Select the Applications form. On the right side of the page, click on *Form Tools* and select *Edit Form*:



- b. Select the *Edit* button for the desired field:



- c. Select *See advanced options*:



d. Enter instructions in the *Help Text* box

Advanced Options

Short Name

If you have a long label you can create a short version for column headings, dropdown fields and reports

Default Value

This will automatically be set as the initial value for this field when creating a new record. If field rules are set for this field, the default value will be set when a hidden field is shown for the first time.

Help Text

Detailed instructions for this field

e. Use the *Validation Options* to set character or word count limitations

Validation Options

Maximum Length

Maximum amount of characters user is allowed to input when filling in this field

Minimum Amount of Words

Minimum amount of words user is allowed to input when filling in this field

Maximum Amount of Words

Maximum amount of words user is allowed to input when filling in this field

f. Add a file upload (optional)

- i. On the right hand side of the screen, drag and drop the *File Upload* in the desired location on the application form. Once it is in the left column, click on its title to rename the field appropriately:

Text Box \* 8. Evaluation Plan

Text Box \* 9. Project Goals and Ob...

Text Box 10. Program Specific Cr...

Text Box 11. Program Specific Cr...

Text Box 12. Program Specific Cr...

Dropdown

Checkbox

Radio Button

Number

File Upload

Date

State

Country

- ii. To make the file upload required for applications, select the *Edit* button and check the *Required* box:

File Upload Sustainability Documentation

File upload fields allow a user to upload one file to the form.

Required

See advanced options

## Review content

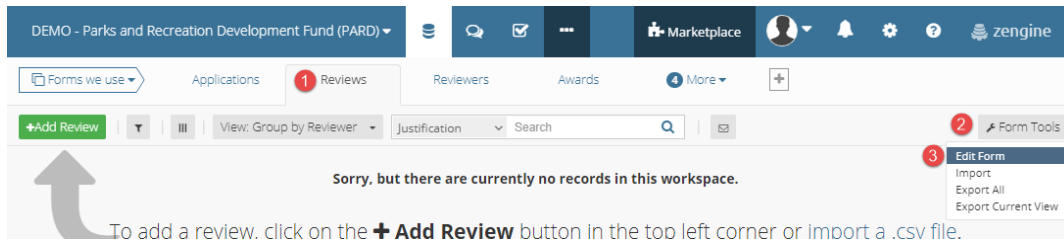
The standard Arizona review form contains essential conflict of interest qualifications and standard narrative fields and scoring. Additional file uploads and adjustments to the weighting of the questions can be made.

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

- a. From the Data tab select the *Reviews* form. On the right side of the page, click on *Form Tools* and select *Edit Form*:

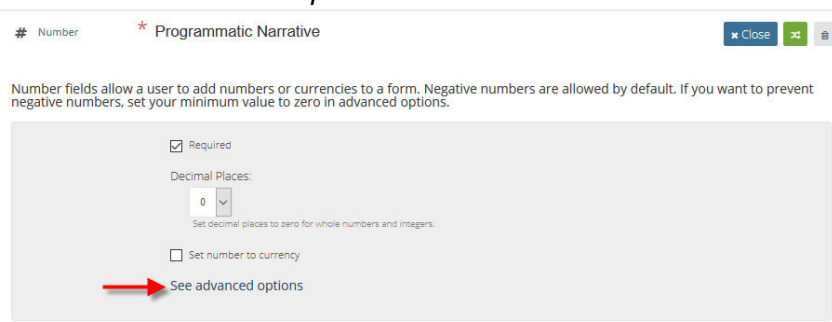


### 2. Adding help text and adjusting weighting

- a. Select the *Edit* button for the field you want to edit:



- b. Select *See Advanced Options*:



- c. Enter desired text in the *Help Text* box:

- d. Enter the weighting by adjusting the minimum and maximum values under *Validation Options*:

### 3. Adding additional file uploads

- a. 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

- a. Reviewers will automatically be transferred from the Review tab in Grants Network.

- b. You can remove a user by selecting the red trash can icon in Grants Network:

## Solicitation Edit

- Overview ✓
- Eligibility ✓
- Financial ✓
- Contact ✓
- Files ✓
- Review ✓
- Submission ✓

Please enter review committee members:

Review Committee			
David	Shea	dshea@ecivis.com	
Anthony	Torres	atorres@ecivis.com	
Kelly	Young	kyoung@ecivis.com	

[Add Reviewer >](#)

Step 6 of 7 \* = Require

Review notes may be used to provide instructions to representative that will help them in designing the a process for your solicitation. Once you have marked your customer service representative will follow up to confirm your program details. These notes will not a

Source |    **B** **I** **U** | 

Add Peter to the workspace. He will be editing the reviewing its appearance to applicants.



## 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. This email will provide the solicitation link and reviewer portal link.

You can also check the status of your program on the Program Dashboard in eCivis. The solicitation will move to the “Published” section when it is available.

	Department: Animal Control	
	Adult Day Care - \$250,000.00 total funding Department: Parks and Rec	
	DEMO Wildlife Rehabilitation Grant - \$800,000.00 total funding Department: CEO - Budget & Finance Division/Grants Division	
	Fire Prevention Education Program - \$500,000.00 total funding Department: Housing Authority	
	Test-CDBGFY19 - \$500,000.00 total funding	