eCivis User Guide

Application Workspace Manual

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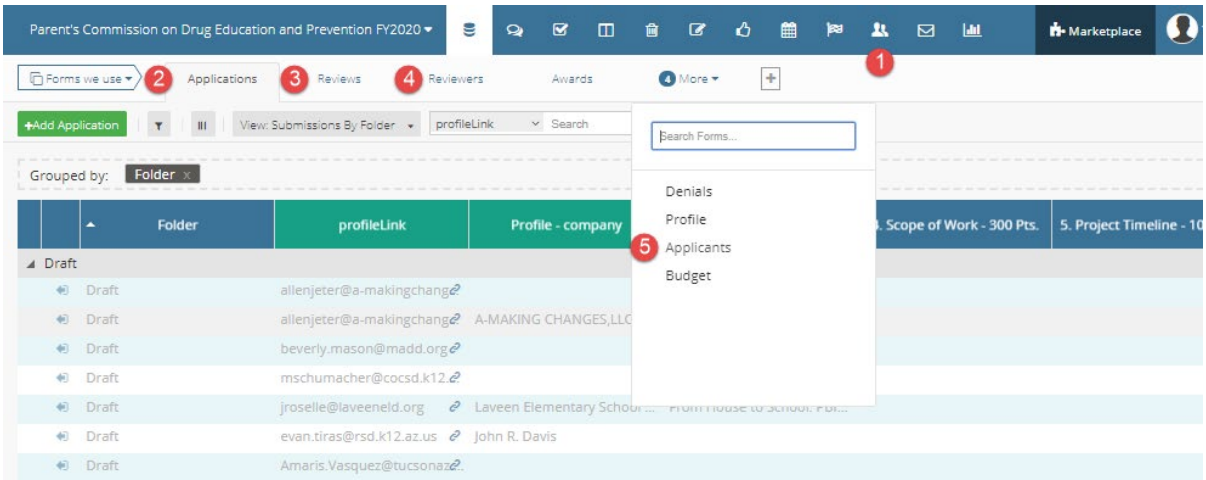
Administration

1. Overview

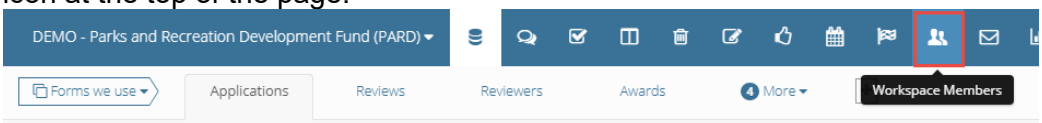
Once you have accepted your invitation to the application workspace, you can review and edit the application form and review form. You can also add other workspace members who will work on these forms:

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

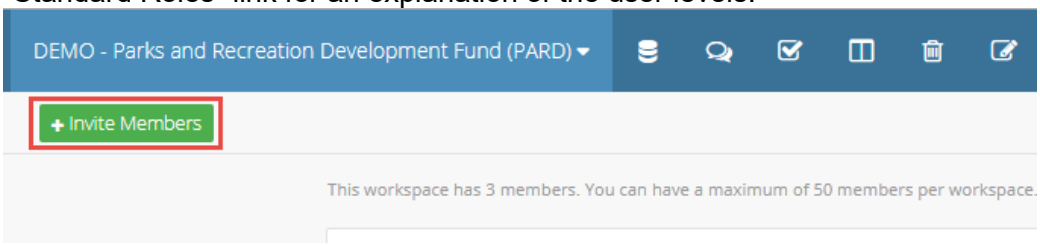


2. Adding new workspace members

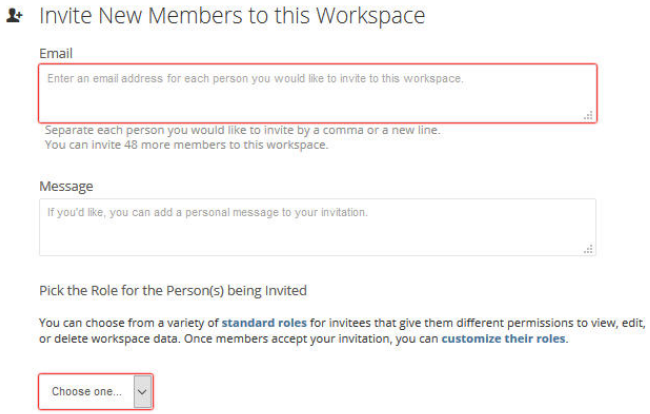
a. If there are other team members who will edit the applications and review forms, or will be responsible for moving applications to the Awarded status, select the “People” icon at the top of the page.



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.



c. Add email address and user role:

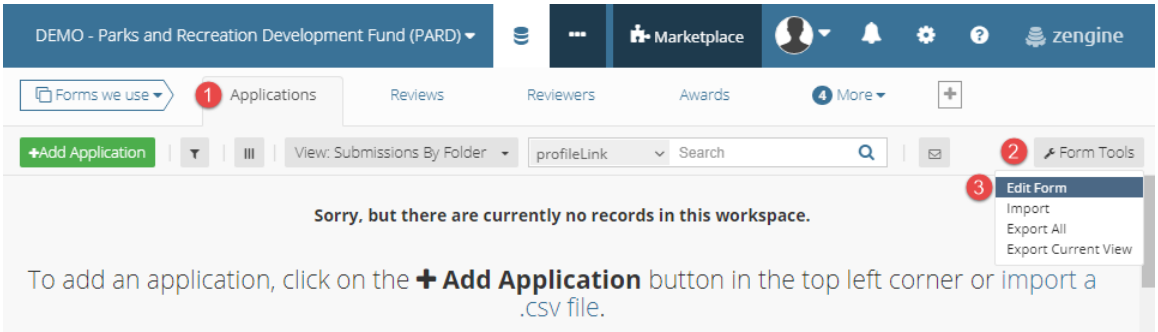


Application content

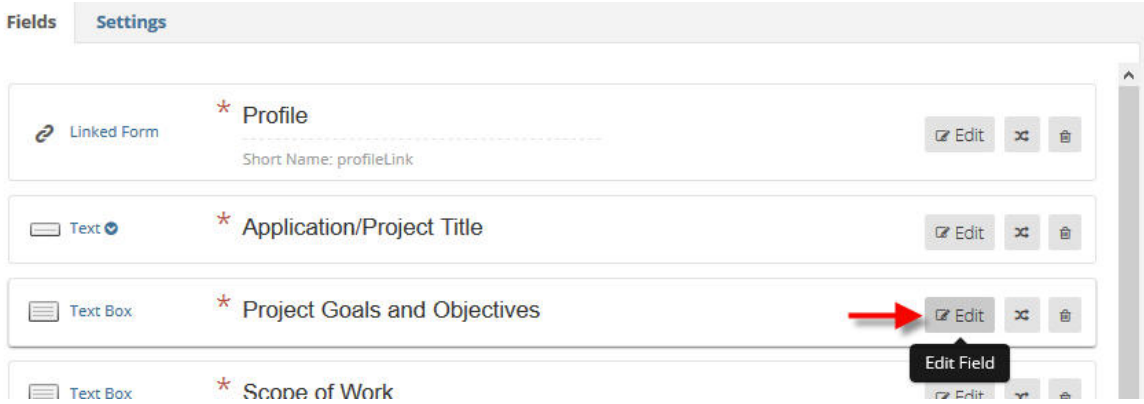
Prior to publishing your solicitation you can add custom help text and optional or mandatory file uploads. NOTE: Help text will appear to the applicant directly above the field and can be used to general describe the purpose of the field.

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

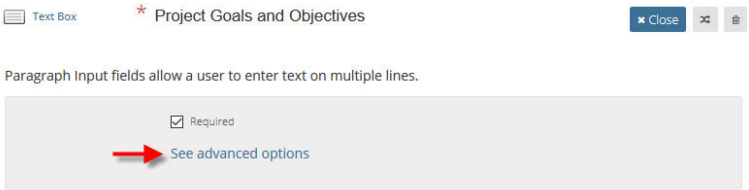
a. Select the Applications form. On the right side of the page, click on *Form Tools* and select *Edit Form*:



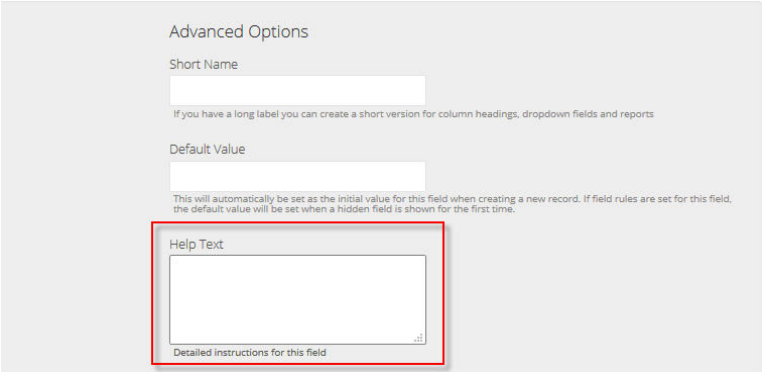
b. Select the *Edit* button for the desired field:



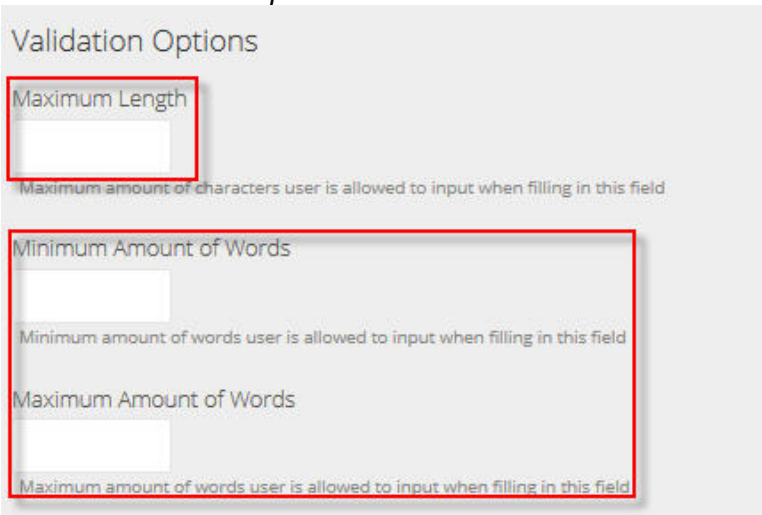
c. Select *See advanced options*:



d. Enter instructions in the *Help Text* box

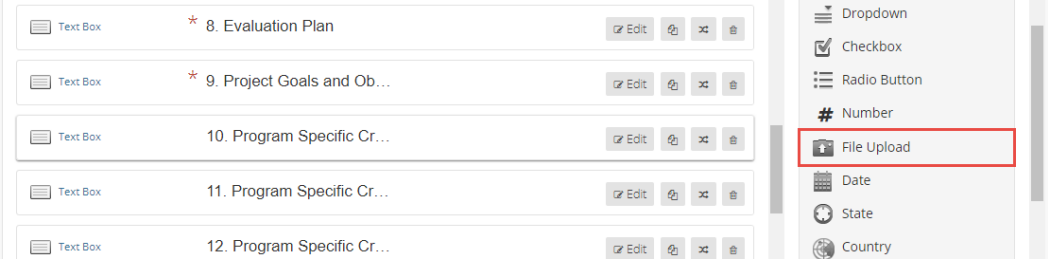


e. Use the *Validation Options* to set character or word count limitations

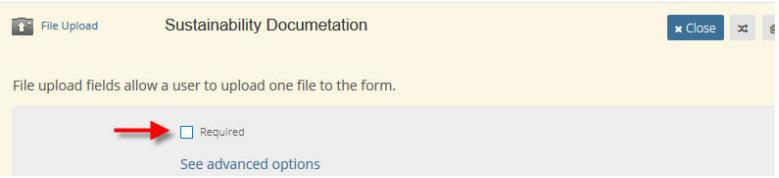


f. Add a file upload (optional)

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:



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



Review content

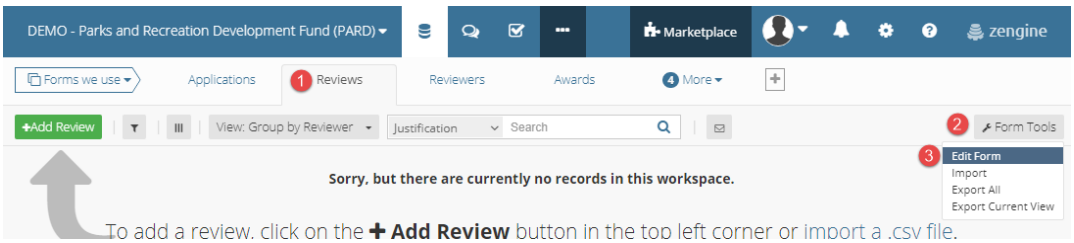
The standard Arizona review form contains essential conflict of interest qualifications and standard narrative fields and scoring. Additional file uploads and adjustments to the weighting of the questions can be made.

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

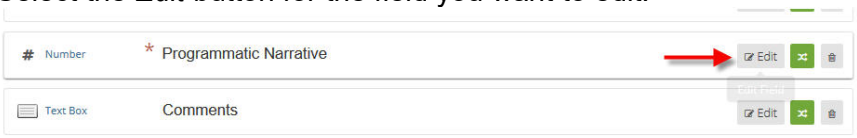
1. Accessing the review form

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

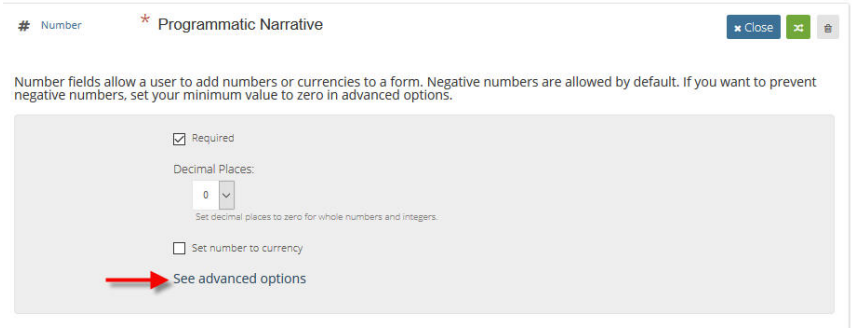


2. Adding help text and adjusting weighting

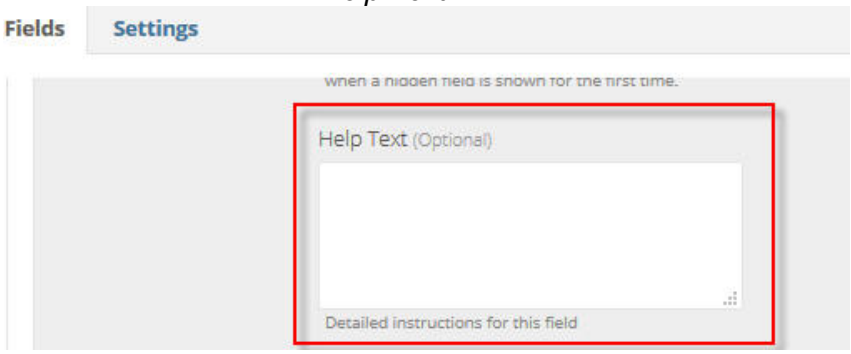
a. Select the *Edit* button for the field you want to edit:



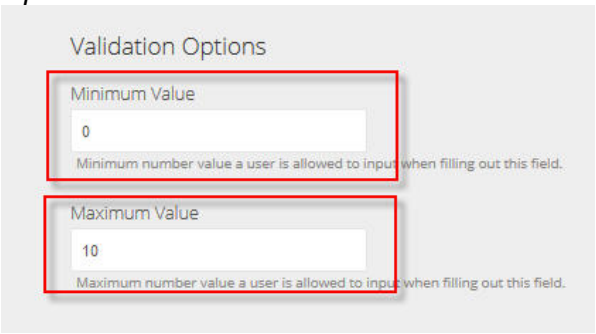
b. Select *See Advanced Options*:



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



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

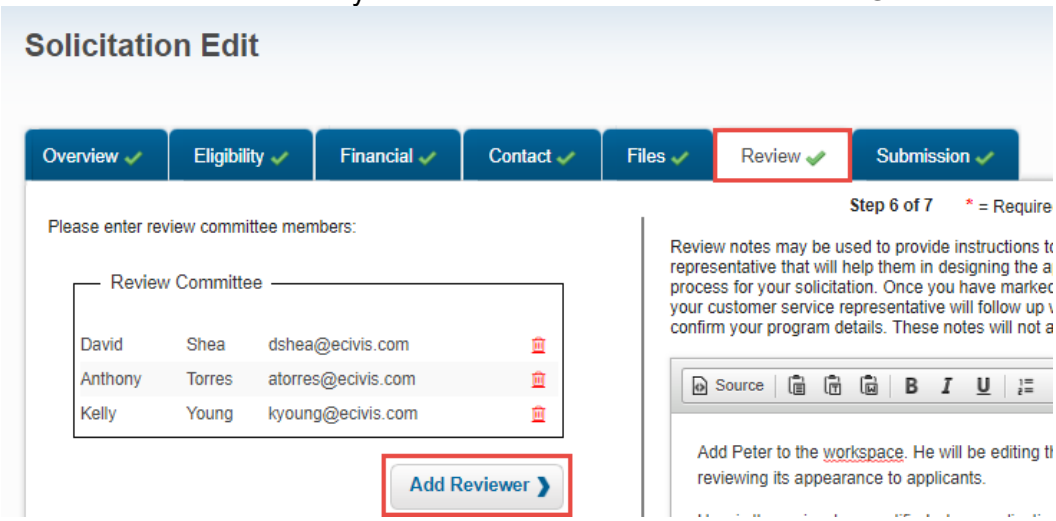


3. Adding additional file uploads

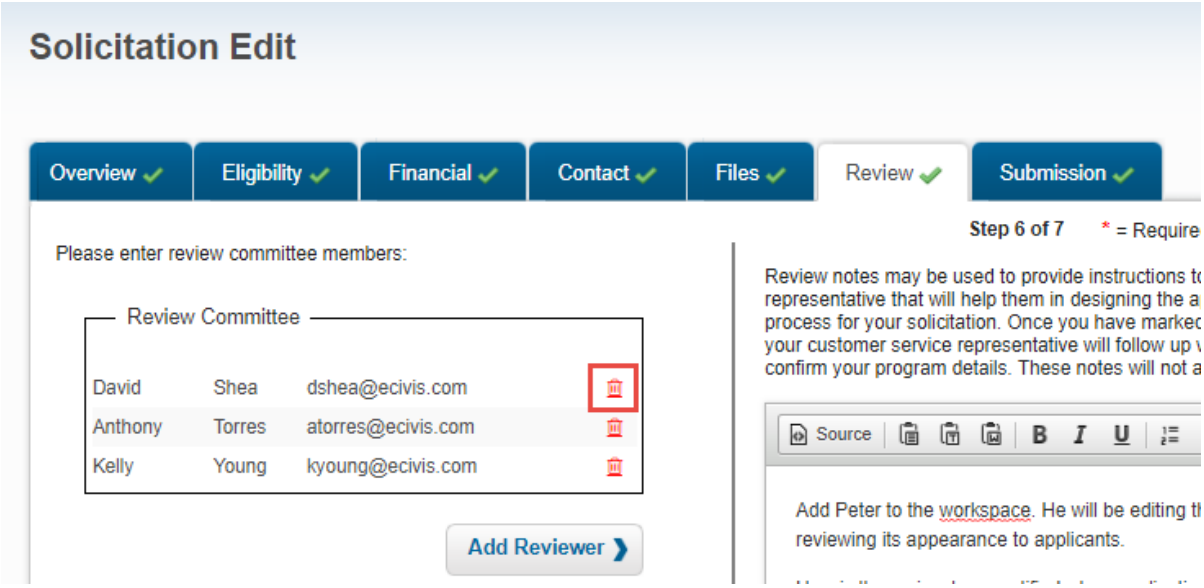
a. Additional file uploads can be added in the same way as described in the Application Content section of this manual. Refer to this section for instructions.

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:

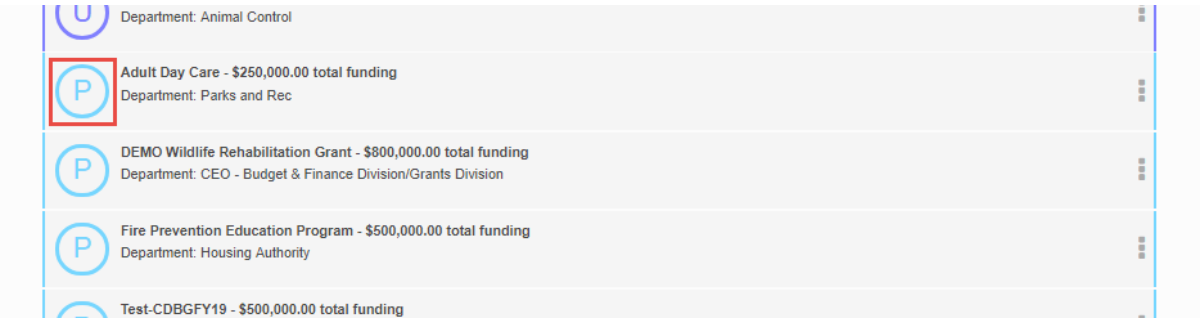

Solicitation Edit
Overview
Eligibility
Financial
Contact
Files
Review
Submission
Step 6 of 7
* = Require
Please enter review committee members:
Review Committee
David Shea dshea@ecivis.com
Anthony Torres atorres@ecivis.com
Kelly Young kyoung@ecivis.com
Add Reviewer
Review notes may be used to provide instructions t
representative that will help them in designing the a
process for your solicitation. Once you have marked
your customer service representative will follow up
confirm your program details. These notes will not a
Source
Add Peter to the workspace. He will be editing t
reviewing its appearance to applicants.

Publishing your solicitation

After you have finalized your Application and Review forms, email 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.