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, review form, and add additional users to the workspace.

- a. Workspace members
- b. Application form
- c. Review form
- d. List of reviewers assigned
- e. Budget form

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Forms we use - 1 Applications 2 Reviews 3 Reviewers Awards	4 N	/ore 🔻	÷		
+Add Application T III View: Submissions By Folder - profileLink - Search	Searc	ch Forms			
Sorry, but there are	Der	nials			ce
To add an application, click on the + Add Ap	Pro	ofile			С
	5 Buc	piicants dget			
If you need to modify your forms, clic					th
If you want to share or invite others to this workspace, cli					:0

2. Adding new workspace members

a. Select the *People* icon at the top of the page.

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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.

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+ Invite Members							
	This workspace has 3 members. You	ı can hav	e a maxir	num of 5	0 membe	rs per wo	orkspace.

c. Add email address and user role:

✤ Invite New Members to this Workspace



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.



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:

Fields Settings * Profile Linked Form ☑ Edit 20 Short Name: profileLink * Application/Project Title Text 🛇 C Edit Text Box * Project Goals and Objectives Edit Field * Scope of Work Text Box c. Select See advanced options: * Project Goals and Objectives Text Box 🗙 Close 🔀 🖻 Paragraph Input fields allow a user to enter text on multiple lines.

Required	
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.

Validatio	n Options
Maximum I	ength
Maximum an	sount of characters user is allowed to input when filling in this field
Minimum A	mount of Words
Minimum am	ount of words user is allowed to input when filling in this field
Maximum /	amount of Words
Maximum an	nount 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:

		* .	rondown
Text Box	* 8. Evaluation Plan	GZ Edit Q₁ x4 😭	n opdown
			heckbox
Text Box	* 9. Project Goals and Ob	Ger Edit de 🖂 🛪 🖨	adio Button
		# 1	lumber
Text Box	10. Program Specific Cr	Gr Edit 🖗 🛪 🖨	ile Upload
Text Box	11. Program Specific Cr	Gr Edit Øn x4 🖨	ate
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ii. To make the file upload required for applications, select the *Edit* button and check the *Required* box:

File Upload	Sustainability Documetation	x Close x g
File upload fields a	llow a user to upload one file to the form.	
-		
	See advanced options	

- g. Adding help text, file uploads, and/or character limitations to the Budget form:
 - i. From the data tab, select *More* for additional forms, and select the *Budgets* from the drop down menu:



iii. 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 - 102. Budget Alignment = 0.103. Implementation Plan = 0 - 104. Evaluation Plan = 0-10 5. Sustainability Plan = 0-10 6. Goals and Objectives = 0 - 107. Collaborations and Partnerships = 0 - 108. Program Specific Criteria #1 = 0-10 9. Program Specific Criteria #2 = 0 - 1010. 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:

# Number	* Programmatic Narrative	Gr Edit 🛪 🔒
Text Box	Comments	Car Edit <mark>≭</mark> ⊜

b. Select See Advanced Options:

# Number	* Programmatic Narrative
Number fields all negative number	low a user to add numbers or currencies to a form. Negative numbers are allowed by default. If you want to prevent rs, set your minimum value to zero in advanced options.
-	Required Decimal Places:

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

when a hidden field is shown for the first time.
Help Text (Optional)

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

Minimum Value		
0		
Minimum number va	lue a user is allowed to input	when filling out this fiel
Maximum Value		
10		

3. Adding additional file uploads

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

4. Adding/Editing application reviewers

a. From the Data tab, select the Reviewers tab::

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Forms we use 🗸	Profile		Appli	cation		Review	vs —	Rev	iewers		4 Mor	e 🕶	+
+ Add Reviewer	Data ta Vi	i b ew: Main-	Reviewe	ers by Co	ommitt	•	firstName	6	 Searce 	ch		Q	
						C	Drag a co	lumn ł	neader h	nere ai	nd drop	it to gro	oup by that column.
firstName			las	tName				email			ID		Created By User

b. To add a reviewer select the green Add Reviewer button:

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Forms we use 🔻	Profile		Appli	cation		Review	WS	Rev	/iewers		4 Mor	'е т	+
+ Add Reviewer	I Vie	ew: Main	-Reviewe	ers by Co	ommitt	. •	firstNam	e	- Sear	ch		Q	
							Drag a c	olumn l	neader	here a	nd drop	it to gro	oup by that column.
firstName			las	tName				email			ID		Created By User

c. Enter the reviewer's name and email address and save:

New Reviewer	Frethlasse of Statific	0 6
Reviewer First Name		
[required
Reviewer Last Name		
		required
Reviewer Email		
		required

d. To delete a reviewer, click on the reviewer and select the red trash icon in the top right corner of the screen:

Doe, Jane	& Reviewers
Reviewer First Name	1
Jane	required
Reviewer Last Name	
Doe	required
Reviewer Email	
jdoe@email.com	required
# of Reviews	

Publishing your solicitation

After you have finalized your Application and Review forms, email <u>support@ecivis.com</u> 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 three hours of the request. Only include a desired published date if it is more than three 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.

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Title	Project / Funding Source	Availability	Applications	Actions
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