eCivis User Guide

Application Workspace Manual
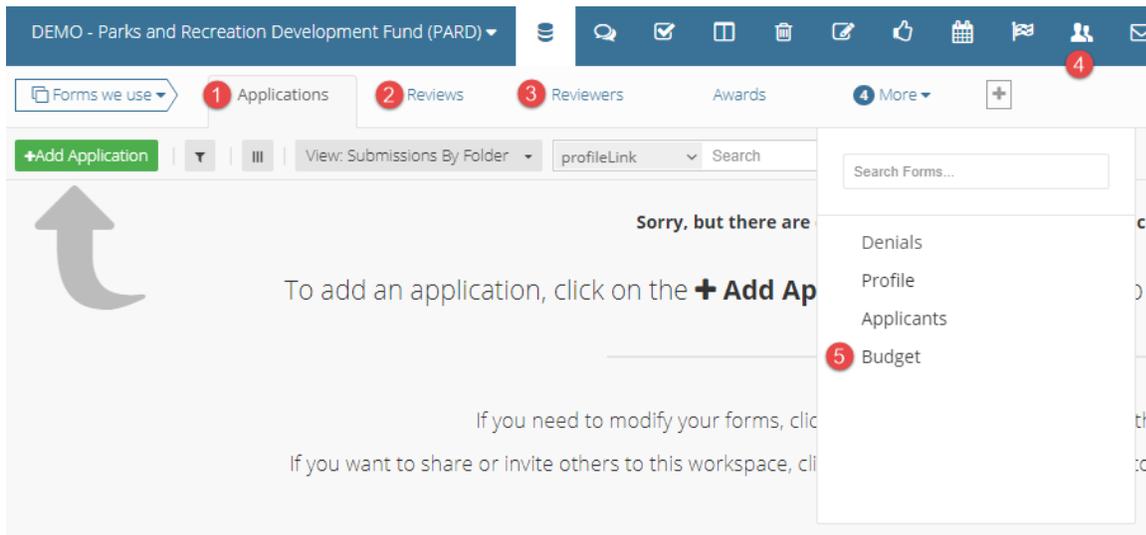
## Contents

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

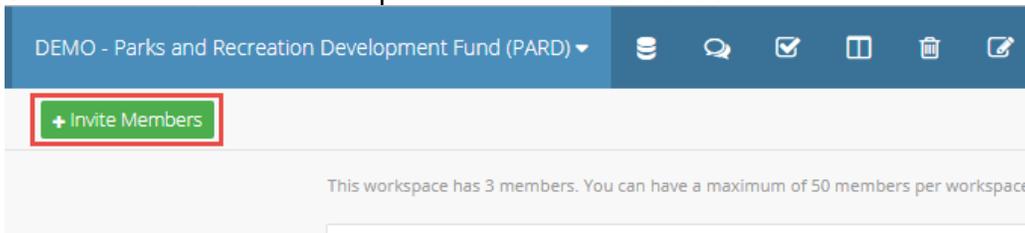## 2. Adding new workspace members

  a. Select the *People* icon at the top of the page.
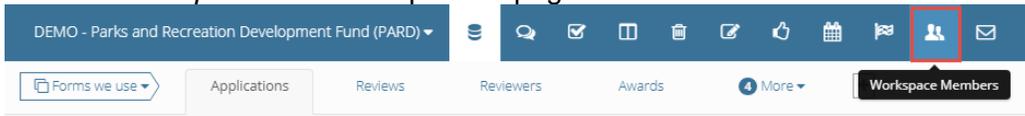
  b. Select *Invite members*, enter an email address, and select a user role. Refer to the Standard Roles link for an explanation of the user levels.

c. Add email address and user role:

👥 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.

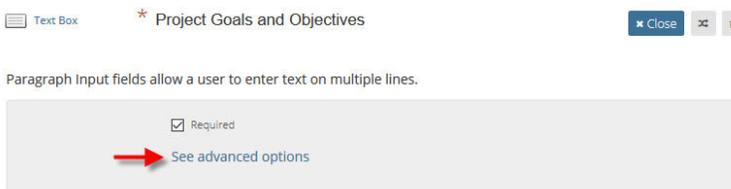1. **Adding help text and/or character limitation to application fields**

   a. Select the Applications form. On the right side of the page, click on *Form Tools* and select *Edit Form*:
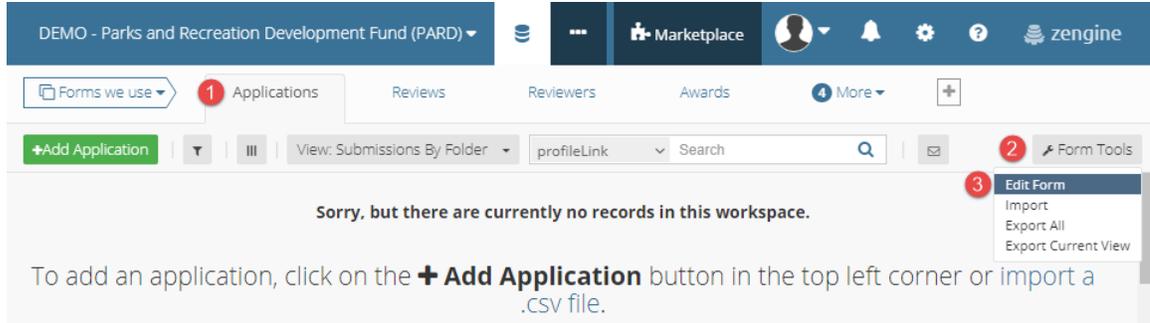
   b. Select the *Edit* button for the desired field:
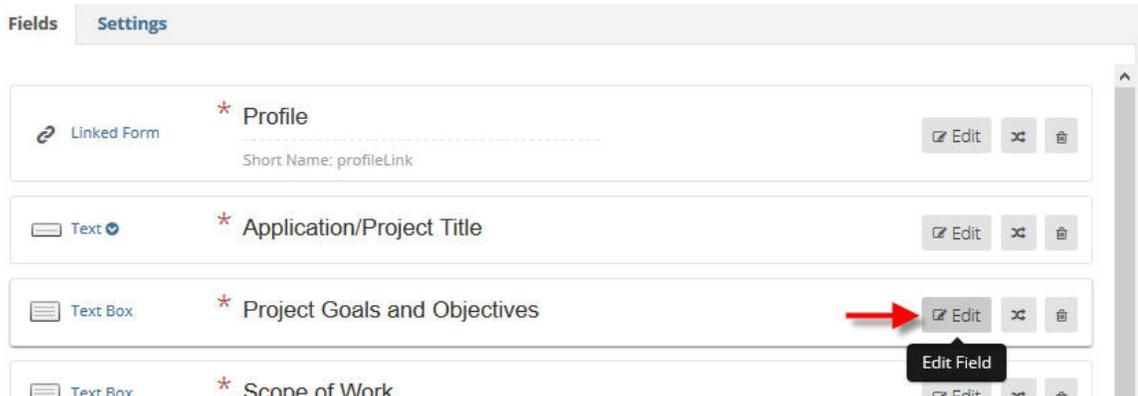
   c. Select *See advanced options*:

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	Edit
Text Box	* 9. Project Goals and Ob…	Edit
Text Box	10. Program Specific Cr…	Edit
Text Box	11. Program Specific Cr…	Edit
Text Box	12. Program Specific Cr…	Edit

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:
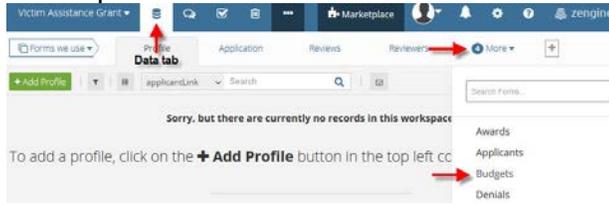
File Upload   Sustainability Documetation   × Close

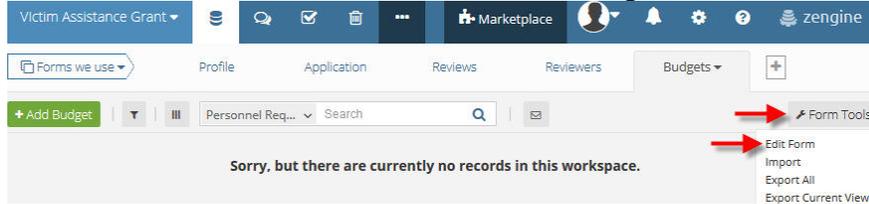File upload fields allow a user to upload one file to the form.

☐ Required

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:

   ii. Select *Forms Tools* and *Edit For* to edit the Budget form:

   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   = 0-10
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*:
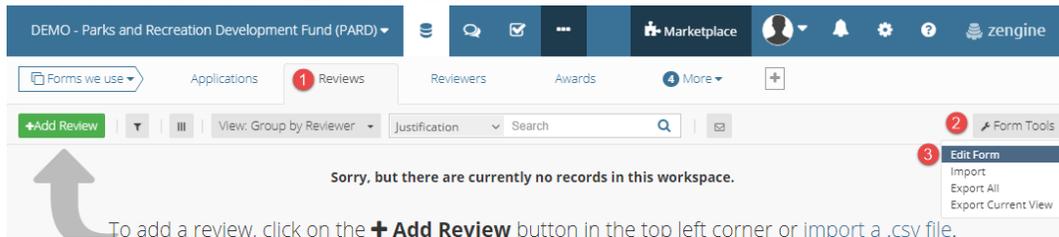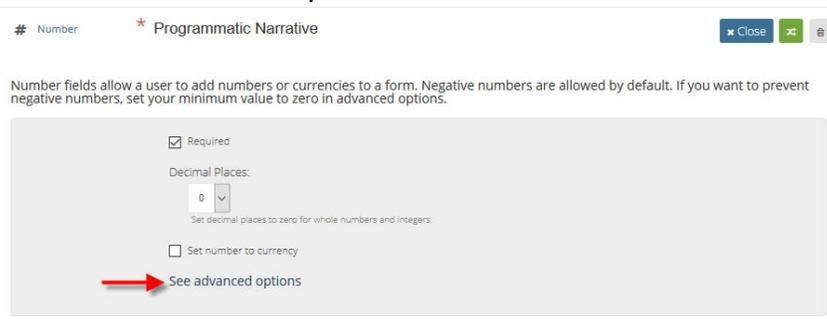

2. Adding help text and adjusting weighting

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 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::

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

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

New Reviewer

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

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 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 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.