TRAINING GUIDE TO HUFP/COMMUNITY FORCE
HOW TO USE THIS GUIDE

CommunityForce publishes a series of video tutorials on their self-serve Help website. Using selections from these videos, this guide provides new HUF P Department Admins with a recommended overview of the basics of setting up applications in HUF P.

We have provided direct links to video tutorials and, where applicable, included commentary and screenshots that will be relevant for Department Admins.

For access to the greater CommunityForce self-serve Help website, please contact Autumn Bennett, OVPR Program Coordinator and HUF P Global Administrator at autumn_bennett@harvard.edu.
VIDEO 1 – GETTING STARTED FOR SCHOLARSHIPS AND GRANTS

GOAL: Preview the Department Admin dashboard and modules
VIDEO 1 – GETTING STARTED FOR SCHOLARSHIPS AND GRANTS
SUGGESTED PLAYLIST

3:03-3:37   Getting to know the dashboard
• See below for Department Admin dashboard (Video reviews Global Admin dashboard)

4:23 to 13:25    Useful Icons
• Application or Form Management
• Award and Competition Management
• Workflow and Evaluation Management

Screenshot: Department Admin dashboard
VIDEO 2 – GETTING HELP FOR SCHOLARSHIPS AND GRANTS

GOAL: Get to know the CommunityForce’s helpdesk system
VIDEO 2 – GETTING HELP FOR SCHOLARSHIPS AND GRANTS

Getting to know CommunityForce’s helpdesk system

Screenshot: Helpdesk (ZenDesk) ticket

RECOMMENDATION: We recommend some additional information specific to filling out this form for Harvard-based inquiries. [Click here to access a pdf guide.]
VIDEO 3 – ACCESSING THE NOTIFICATION CENTER

GOAL: Learn how to trigger automatic notifications from the CommunityForce system
VIDEO 3 – ACCESSING THE NOTIFICATION CENTER
SUGGESTED PLAYLIST

0:00 to 4:15  Getting to know Notifications
• Because Harvard-based users are behind the HarvardKey system, we do not make use of any
  Password notifications. If you want to open a competition to users outside of Harvard, please
  notify the Global Administrator.

7:00 to 22:02  Sending notifications from the Evaluation section
• Using merge fields in notification templates
• Creating custom notification templates

RECOMMENDATIONS:
• Always test a notification template before sending.
• Alert users that notifications will come from admin@communityforce.com.
VIDEO 4 – APPLICATION SCREEN OVERVIEW FOR SCHOLARSHIPS

GOAL: Get to know the Application Screen
VIDEO 4 – APPLICATION SCREEN OVERVIEW FOR SCHOLARSHIPS

SUGGESTED PLAYLIST

0:00 to 4:12  Getting to know the different sections of an application
- Pre-Qualification Questions
- Sections and Questions
- Request Instructions to Applicant
- General Information
- Submit Application Message
- Manage Text Tabs

8:24 to 9:14  Proxy Instructions

Screenshot: Department Admin view of Application Screen (Differs from Global Admin view featured in video)

RECOMMENDATION: Because HUFP operates within the HarvardKey environment, the OVPR has released additional notes regarding enabling the proxy function. Click here to access additional instructions.
VIDEO 5 – APPLICATION SETUP FOR SCHOLARSHIPS

GOAL: Learn the basics of setting up applications
Cloning and creating new applications

0:00 to 20:20
• 0:55 – Department Admins will **always** clone an application based on the Harvard Master Template.
• 3:38 – Instructions are relevant to cloning applications (despite video emphasis on creating.)
• 4:41 – Check with the OVPR if you are unsure of your Sponsoring Department.
• 7:22 – Department Admins do not have access to the Application Invitation function. *If you would like to test this function, please notify the Global Administrator.*
• 15:52 – Harvard competitions never have an Application Form Cost.

23:01 to 42:35
Cloning and creating new applications (Continued)
• 23:01 – Multiple Submissions must be enabled to access Proxy functionality.
• 32:37 – OVPR **does not recommend** enabling “Display Reviewer Tasks/Comments to Applicants” as Reviewer comments will no longer be anonymous.
• 33:42 – Harvard competitions do not use “Acknowledgment” section (skip this.)
• 35:23 – Harvard competitions do not use either “Choose Actions” to add Collaborators or allow users to “Import Responses from Existing Applications” (skip these.)
• 37:07 – If your application has both an internal deadline and a external sponsor’s deadline, the Deadline field shows your internal deadline.
• 40:16 – Adding an Application Contact: *Contact the Global Administrator for help with this process.*