**Core Concept: Testing and Publishing an application**

|  |
| --- |
| Script |
| Welcome to the AmpliFund Core Concept video focused on testing and publishing an application |
| There are a number of key steps to successfully build and launch an application.  In this video we’ll focus on testing your application and publishing it for applicants to apply. |
| Testing is such a critical component to ensure a positive experience for your applicants, reviewers and you!  Once your application is live and you receive your first submission you are not able to make any edits to the application form, so it’s important to make sure the application is accurate before publishing.  As part of the testing process we want you to validate you are receiving all the expected information you desire from an applicant to be able to score, decide on recipients and ultimately award.  It’s also important to make sure your instructions are clear to applicants and reviewers to alleviate questions coming your way during the application and scoring phases. |
| Now, let’s dive into how to test.  Users involved in the testing process need to be set up as organizational administrators or the opportunity manager within AmpliFund.  You can change a users role in the Users page, located under Administration>System Security then Users.  Your opportunity must be open for submission, before the archive date and should not be published.  To access the application, click on the public link provided on the opportunity details page.  This will direct you to the applicant portal so you can test as if you were an applicant. |
| Once you arrive on the applicant portal you will land on the opportunity details page, if you’ve not already reviewed your opportunity page for clarity you may also want to review all content in this page, as everything here will be visible to applicants.  Next you can click on apply to jump into the application. |
| Once you are in an application there are a few key areas you should take note to test.  First the opportunity detail and evaluation and scoring tab, if you decided to include it, should be reviewed.  The project information tab is standard for all AmpliFund applications so you do not need to test.  The application forms, budget and performance plan should all be tested in detail. |
| Through the many applications AmpliFund has helped customers publish, we’ve learned a few best practices that might help you achieve the best possible outcome.  First we recommend reading instructions and questions out loud, this will help you identify any wording that might sound confusing or awkward.  Next, check that you’ve selected the appropriate question type and applicable answers, for example if you are asking a multiple choice question do you have all possible answers listed? Next review the order of questions to make sure questions are sequenced in a way that is clear.  Double check that you have marked all questions where you need an answer as required.  Any question not marked as required could be skipped by the applicant and they’d still be able to mark their application as complete and submit it.  If you set a character limit for entry type fields, be sure the character limit you provided is accurate.  For example if you are expecting a phone number you’d need at least 10 characters to get all the digits including area code.  We’d recommend completing multiple application forms and submitting them to walk through the full process.  And finally, the more sets of eyes the better, get others in your organization to review the form, especially if they’ve not been involved in the building process.  They will more easily spot items that applicants might not be clear about. |
| Once you’ve started a test application, you may notice that the pencil icon disappears on your application form page.  Don’t worry, you can get it back!  Go to the opportunity details page and click on delete testing data.  That will delete your test application and then you’ll be able to make any necessary changes to your application forms.  Don’t forget to go back and do another round of testing after you make any edits. |
| Once you’ve completed your testing and any required edits it’s time to publish your form!  Go to the opportunity detail page and check the box for “is published”, validate your open and closed dates for submission.  And do one final check now that your application is live, you can submit a form as an applicant again to make sure everything works as expected.  This can also help you with troubleshooting as applicants bring forward any questions. |
| Through this Core Concept video, you’ve learned how to test and publish an application.  Should you have additional questions please visit our support site.  Thank you! |