Module 1: Prepping Your Instance

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Welcome to OpenWater!

OpenWater is an application and review web-based platform with online event cloud capabilities. We're excited to have you join us for training and learn how our platform works in order to optimize your team's workflows and utilize the platform to maximum effect.

For Module 1, we will be covering the basics of getting your instance in OpenWater prepped, as well as prepping some portions of your very first program.

1.1 Updating your organization's information

When you access the OpenWater admin panel, the very first order of business is to update the "Organization Information" section of your instance. These settings impact your admin panel

and certain settings across your instance.

Organization Information is a page of settings which controls:
- The name of your instance (i.e. the name of your organization)
- Your organization's country
- Your organization's website
- The default time zone for all of your programs
- Reply-to name (the name of the sender from any outbound emails generated by OpenWater)
- Reply-to address (the email address that all outbound emails generated by OpenWater appear to come from)

Let's have you set up your organization information.

Step 1:
From the dashboard, look to the left-hand menu. This is a "global" menu in which certain data that applies everywhere within your instance can be found. Find the option called "System Settings" and click on it to open the dropdown.

Step 2:
Once the dropdown has opened, the first option in the list will be "Organization Information". Click on this to access the settings page for it.

Step 3:
These fields will be blank and ready for you to fill in. While most options are not required, please note that "Organization Name" and "Reply-To Address" are required. We highly recommend filling out all fields to the best of your ability to ensure accurate settings across your instance.

Fill out the following fields:

1. Organization Name
2. Country
3. Web Site
4. Time-Zone
5. Reply-To Name
6. Reply-To Address*

* By default, OpenWater will always populate this field with our non-maintained email inbox, noreply@secure-platform.com. We highly recommend that you fill this out with a maintained inbox that your team manages, so in the event someone replies to an email generated by the platform, it goes to your team for review.

If your team doesn't yet have a general catch-all email, here are some common ones we see:

- info@yourorganization.com
- information@yourorganization.com
- noreply@yourorganization.com
- support@yourorganization.com

Once you have filled out these fields, click "Save".

You should see your changes take effect, most notably your organization name will now populate in the top-left corner of the admin panel.

If you manage multiple instances or are a consultant working with multiple OpenWater clients, this helps you keep track of whose instance you are in.

1.2 Building out your first application form

Now that you have your instance prepped, let's start building out your first application form. For this example, you will build a replica of the demo program you interacted with before.

You should still be on the Organization Information page from 1.1. Navigate back to the left-hand menu and click the option called "Dashboard" at the very top of the list to go back to the homepage of your admin panel.

The dashboard is a helpful area to help provide you with overview information about programs you have currently running, a helpful getting started tutorial series (for program management later on, not implementation), as well as dashboard messages (if added) in the "Home Screen" section.

For 1.2, let's look at the Programs area. Since the instance is brand new, we haven't any programs up and running to populate this area yet. Let's change that.

Step 1:
Click the "Add Program" button in the "Programs" area of the dashboard.
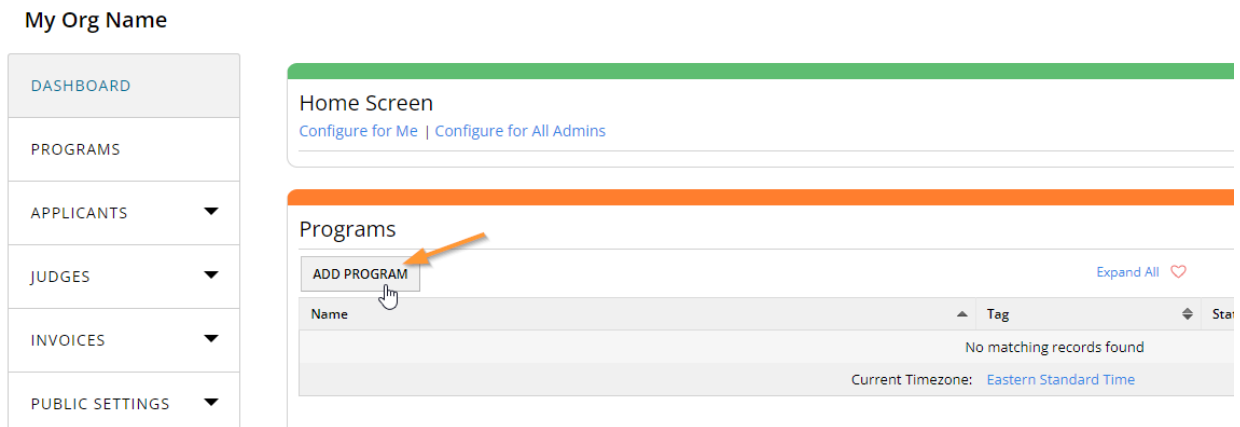
Step 2:
Once the page loads, you should see the following page titled "Select Program Template":

While we have numerous templates available to save you time for future programs, for this module you will start a program entirely from scratch.

Click the "Start From Scratch" button above the template table.

My Org Name

| DASHBOARD |
| PROGRAMS |
| APPLICANTS ▼ |
| JUDGES ▼ |
| INVOICES ▼ |
| PUBLIC SETTINGS ▼ |
| SYSTEM SETTINGS ▼ |
| SYSTEM LOGS ▼ |
| LICENSE / BILLING ▼ |

Programs > Select Program Template

Select Program Template

START FROM SCRATCH   **IMPORT**

Search:

Name	Description	Action
Simple Awards Program	Get started with this awards Program starter kit. • Applicants Submit • Judges Review and Score Them • You select and notify Winners and non-Winners	Select
Awards Program with Finalist Round	Use this starter kit when you have more than one round of selection. Perhaps you get a large entry pool and need to narrow it down to a group of finalists; if so this would be your best option. • Applicants Submit • Judges Review and Score Them • Narrow down the selection pool into finalists • Judges come back and score the short list • Select and notify Winners, finalists, and non-Winners	Select
Registration and Payment Before Submitting	Some Programs require a commitment and payment from Applicants before they are allowed to submit. This starter kit is useful when you have a period of time when people can submit and pay for their intent to participate, then they can come back later and finish their Submissions. • Applicants Submit intent to Participate and Fees • Applicant can continue Submission	Select

Step 3:
OpenWater will prompt you with some basic information about the program before the platform fires it up.

My Org Name

| DASHBOARD |
| PROGRAMS |
| APPLICANTS ▼ |
| JUDGES ▼ |
| INVOICES ▼ |
| PUBLIC SETTINGS ▼ |
| SYSTEM SETTINGS ▼ |
| SYSTEM LOGS ▼ |
| LICENSE / BILLING ▼ |

Programs > Select Program Template > New Program

Program Name ✱	
	Displayed on the home page and throughout the site
First Round Name	
	Leave blank if you only have one round
Program Tag	
	Enter a keyword that describes this program, e.g. Award, Fellowship, Grant, Scholarship
Public Website Base Url	☐ Force Base Url
	☑ Display on Website Programs List
	CANCEL **SAVE**

The following fields will appear:

1. Program Name – The name of your program that is displayed to admins, applicants, and judges
2. First Round Name – The name of the round, e.g. Initial Application, Nomination Form, etc, which is displayed to admins, applicants and judges
3. Program Tag – An admin-only field that allows you to tag a program, e.g. awards, nominations, grants, etc
4. Display on Website Programs List*

Take note that the only required field here is "Program Name". For the "Program Name" field, enter the following: Best Restaurants of the Year

If you feel inclined, for "First Round Name" enter the following: Nomination Form and for "Program Tag", enter the following: nominations.

Once you've finished, click "Save" and OpenWater will fire up your program.

Display on Website Programs List is a special feature that will automatically add this program to a platform generated list that by default populates on your OpenWater domain's homepage. You can leave this checked for now if you like.

Step 4:
The page will reload and you will be brought to what we call the "Program Overview" page of your newly created program. As the name implies, this shows overview data about the specific program you are viewing. We'll come back to this later.

For now, take note that you now have a number of buttons near the top of the page - This is your indicator that you are within a program in OpenWater. Find the option called "Round Settings" near the right-hand side and click it to open the dropdown.

Once the dropdown opens, click the option called "Submission Form".

Step 5:
You will now be brought to what we call "Question Pages" in OpenWater. Essentially, these are pages of your form that you can utilize to break up your form into sections and organize the information you collect from applicants.

By default, OpenWater will always have a single question page already generated for you called "Applicant Information". Click "Select" under the Action column on the right-hand side.

Step 6:
Question pages will always allow you to preview what field(s) you have on a question page, so if you ever need to double check what field is where, this is a handy feature without needing to hop into the submission form builder.

Let's rename this question page and call it "Business Information". If you wish to give the question page a short description, you may do so, but be aware this is only visible to admins – It's helpful to fill out if you have specific info you need to refer back to at a glance. Click "Save" and then click the button called "Edit Form Fields".

Step 7:
The OpenWater form builder will open in a new tab. You'll notice the page is broken up into two major columns – Your field options and settings will be on the left, the form you're putting together will be on the right.

By default, OpenWater always generates what's called the "Application Title Field" and a basic multiline textbox.

The Application Title Field is a special field in OpenWater – Every application has to have a name of some kind associated with it. It's also unique in that it can be a single line input, or you can choose to split it into two fields.

For now, let's just keep it as a single-line field and rename the label to "Name of Business". To do so, click on the field on the right-hand side and you'll see the Field Settings appear in the left-hand column. Change label text to "Name of Business".

Step 8:
Let's delete the "Narrative" field and clear that out. Note the icons for copy and deletion - Click the trash bin icon. You will be prompted if you want to delete this, click "OK".

Step 9:
Now, let's build some fields to ask for the nominated business's contact information.

Add the following fields:

- URL field, with the label "Business Website" and set it as a required field.
- Phone field, with the label "Business Telephone" and set it as a required field.
- File upload field, with the label "Business Logo Upload" but do not set it as required. In the Field Settings area, scroll down with this field selected and ensure only image previews are enabled, and add file extension limitations in the field for png, jpg, jpeg.

Once you've completed this step, your form should look something like this:

Click "Save" at the bottom of the page when you've finished and click the "Close" button to return to the question page preview.

Step 10:
With the "Business Information" page built, let's add one more question page to ask specific nomination questions. Click "Back to List" to return to the list of question pages, and then click the button called "Add Question Page" at the top of the table.

When prompted, for the name of this page, let's call it "Nomination Information" and click "Save".

Like with Step 6, click "Edit Form Fields" to open the form builder for this page.

Page Name ★	Nomination Information
Short Description	
	SAVE BACK TO LIST
	EDIT FORM FIELDS

Step 11:
For this part of our form, we want to ask nominators some questions about why they are nominating their chosen business. Without these responses, judges won't have much to evaluate when they go to decide the strongest nominations.

Let's build the following questions:

- In your opinion, what is this business's top qualities?
- Why are you nominating this business?

In your left-hand column, choose the Checklist field and change the label to the "In your opinion…" question.

Let's also notify applicants that they can only select a maximum of three options from this list. Under the label input, tick the box for "Turn on Rich Text Mode" and then click "Edit" next to "Details". This allows you to add guidance or sub-header text within the same field, as well as additional options to hyperlink, bold, format text, etc.

For now, just add this text in the pop-up window that appears: "You may select up to 3 options." Once you've added this in, click the X icon to close the pop-up window.

Now we need to add options to choose from. OpenWater has a helpful bulk addition feature to make it quick and easy to build out lists in one go, without needing to add items individually. Click the "Bulk Add" hyperlink to open a new pop-up window and paste in the following values:

Ambience
Bar service
Drink offerings
Events
Food offerings
Live music
Menu pricing
Specials
Staff service

Then click the button called "Add Values" to add them in. While we're here, tick off the boxes for the pre-generated "Value 1" "Value 2" "Value 3" items and then click the red "Bulk Delete" hyperlink above the list. You will be asked if you wish to delete, click "OK".

In the Field Settings window, set the field to required and scroll further down and add the number 3 to the second input for "Selected Item Count" range. This tells OpenWater that an applicant can only select a maximum of three selections.

Step 12:
Now that we added the first question, let's add the second. Toggle to the "Add Field" tab and click "Multiline Text". When you add a field, by default it will always go to the end of the form.

Replace the label text with "Why are you nominating this business?"

For this example, you may also leave this field not required. In the Field Settings area, you can modify the size of the box with the following options as you wish: Small, Medium, Large, and WYSIWYG ("What you see is what you get", a rich text editor). You also have the ability to set word/character minimums and maximums for this field if you like.

Click "Save" at the bottom of the form builder when you've finished, then "Close" to return to the question page preview.

1.3 Building out your review form

Nice job on building out your very first form in OpenWater! In a nomination workflow like this, there is almost always a review stage of some kind where judges* evaluate the submitted applications and decide on winners.

While we commonly use the term "judging", your organization may have different terminology for this role, such as reviewers, adjudicators, and so on.

Step 1:
For this example, we'll build out a basic judging scorecard. From the question page preview area, navigate to the "Round Settings" button and click to open the dropdown. Then click the option called "Evaluation Form" within the dropdown.
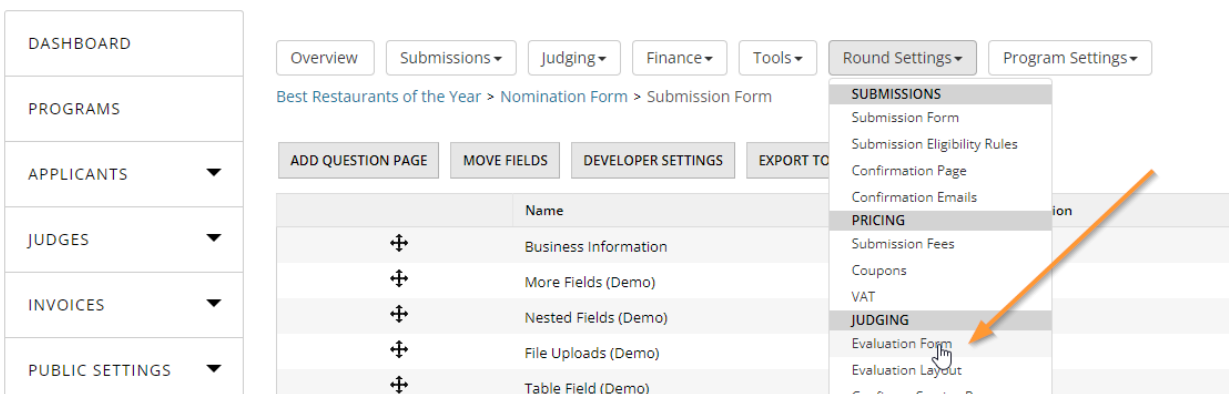
Step 2:
This certainly looks familiar, doesn't it? The evaluation scorecard area in the admin panel is structured similarly to question pages, except the options listed in the table below are the individual criteria that your judges have to score upon.

Let's start fresh and click "Delete" next to the system generated evaluation criteria called "How well did this applicant perform?". Click "OK" when you are prompted to confirm deletion.

DASHBOARD	
PROGRAMS	
APPLICANTS ▼	
JUDGES ▼	
INVOICES ▼	
PUBLIC SETTINGS ▼	
SYSTEM SETTINGS ▼	

Overview | Submissions ▾ | Judging ▾ | Finance ▾ | Tools ▾ | Round Settings ▾ | Program Settings ▾

Best Restaurants of the Year > Nominations > Evaluation Form

Evaluation Scorecard

These questions are asked to all judges in addition to any field specific questions

Select Round: Nominations ▾

ADD QUESTION   DEVELOPER SETTINGS

Search:

	Question	Alias	Field Type	Weight	Action
✛	How well did this applicant perform?	howWellDidThisApplicantPerform	1 - 5	1	Select | Clone | Delete

Display 100 (recommended) ▾ records

Showing 1 to 1 of 1 entries

1

Step 3:

Now click the button called "Add Question". To start, let's make a separator field with some guidance text for judges.

Best Restaurants of the Year > Nominations > Evaluation Form

Evaluation Scorecard

These questions are asked to all judges in addition to any field specific questions

Select Round: Nominations ▾

ADD QUESTION   DEVELOPER SETTINGS

	Question
	N

Display 100 (recommended) ▾ records

Showing 0 to 0 of 0 entries

For "Question Name", let's call it "Judging Guidance".

For "Instructions", add the following text:

Evaluate this nomination via the criteria and dropdowns below. All criteria are scored on a scale of 1 to 5, with 1 point being the lowest amount you can give, and 5 points being the highest.

For "Type", choose "Separator".

Then click "Save".

Best Restaurants of the Year > Nominations > Evaluation Form

Question Name *	Judging Guidance
	Displayed on Judge evaluation form

Alias (used in placeholders)	
	Alias must contain only alphanumeric characters and start with alphabetical character. Leave it empty to generate Alias automatically.

Instructions

X 🗐 | ↶ ↷ | ᴬᴮᶜ ▾ | ∞ ⇎ ⚑ | 🖼 🗐 | ⊞ ☰ Ω 🌐 ⚙▾ | ⤢ | ⧉ Source

B I U S x₂ x² | Iₓ | ☰ ☰ | ⇥ ⇤ | 🗩 | ☰ ☰ ☰ ☰ | A▾ A▾ | Styles | Normal | Font | Size | ?

Evaluate this nomination via the criteria and dropdowns below. All criteria are scored on a scale of 1 to 5, with 1 point being the lowest amount you can give, and 5 points being the highest.

body   p

Short set of instructions, leave blank for none

Type *	Separator ⌄
	What kind of control should be presented to the Judge?

CONFIGURE CATEGORY GROUP SETTINGS

CSS Class	

CANCEL   SAVE

Step 4:

Upon saving, you should be brought to the list of criteria. Let's add a scoring item now. Click "Add Question" again to start.

For the "Question Name", enter the following: Does this nomination clearly outline why this business is worthy of an award?

For "Type", select "1-5" and click "Save".

Question Name ★	Does this nomination clearly outline why this business is worthy of an award?
	Displayed on Judge evaluation form
Alias (used in placeholders)	
	Alias must contain only alphanumeric characters and start with alphabetical character. Leave it empty to generate Alias automatically.
Instructions	
	Short set of instructions, leave blank for none
Type ★	1 - 5
	What kind of control should be presented to the Judge?
Weight / Multiplier ★	1
	The score entered by the Judge for this question is multiplied by this value
	CONFIGURE CATEGORY GROUP SETTINGS
CSS Class	
	CANCEL SAVE

Step 5:

Let's add another question and save ourselves some steps while we're at it. Next to the criteria we just built, on the right-hand side click the text called "Clone" under the Action column. When you clone an evaluation question, most settings from the field you are cloning from are retained, except the "Question Name". Since our judging guidance says every field is on a 1-5 scale, we can save some time by cloning.

Overview | Submissions▾ | Judging▾ | Finance▾ | Tools▾ | Round Settings▾ | Program Settings▾

Best Restaurants of the Year > Nominations > Evaluation Form

Evaluation Scorecard

These questions are asked to all judges in addition to any field specific questions

Select Round: Nominations ▾

ADD QUESTION   DEVELOPER SETTINGS   Search:

	Question	Alias	Field Type	Weight	Action
✛	Judging Guidance	judgingGuidance	Separator	1	Select | Clone | Delete
✛	Does this nomination clearly outline why this business is worthy of an award?	doesThisNominationClearlyOutlineWhyThisBusinessIsWorthyOfAnAward	1 - 5	1	Select | Clone | Delete

Display 100 (recommended) ▾ records   1
Showing 1 to 2 of 2 entries

For this question, enter the following as the name: Please provide an overall rating for this business.

Then click "Save".

Question Name ✱	Please provide an overall rating for this business.
	Displayed on Judge evaluation form
Alias (used in placeholders)	
	Alias must contain only alphanumeric characters and start with alphabetical character. Leave it empty to generate Alias automatically.
Instructions	
	Short set of instructions, leave blank for none
Type ✱	1 - 5
	What kind of control should be presented to the Judge?
Weight / Multiplier ✱	1
	The score entered by the Judge for this question is multiplied by this value
	CONFIGURE CATEGORY GROUP SETTINGS
CSS Class	
	CANCEL SAVE

Step 6:
As a final detail, let's give judges a private comments box that they can use if they wish for each entry that comes in.

Click "Add Question" and name it "Comments and Remarks".

For instructions, add the following text:

Use the box below to enter any comments or remarks you may have about this nomination. Your remarks will only be visible to yourself and administrators. Comments are not required but are encouraged.

Then for "Type", select "Free Text" and then click "Save".

Question Name ★	Comments and Remarks
	Displayed on Judge evaluation form
Alias (used in placeholders)	
	Alias must contain only alphanumeric characters and start with alphabetical character. Leave it empty to generate Alias automatically.
Instructions	
	Use the box below to enter any comments or remarks you may have about this nomination. Your remarks will only be visible to yourself and administrators. Comments are not required but are encouraged.
	body p
	Short set of instructions, leave blank for none
Type ★	Free Text
	What kind of control should be presented to the Judge?
	☐ Is Required?
	CONFIGURE CATEGORY GROUP SETTINGS
CSS Class	
	CANCEL SAVE

Et voila, you've built your very first evaluation form!

1.4 Building out your confirmation e-mail

While the submission form and evaluation form are crucial parts of every program, there are other details to configure to bring it all together.
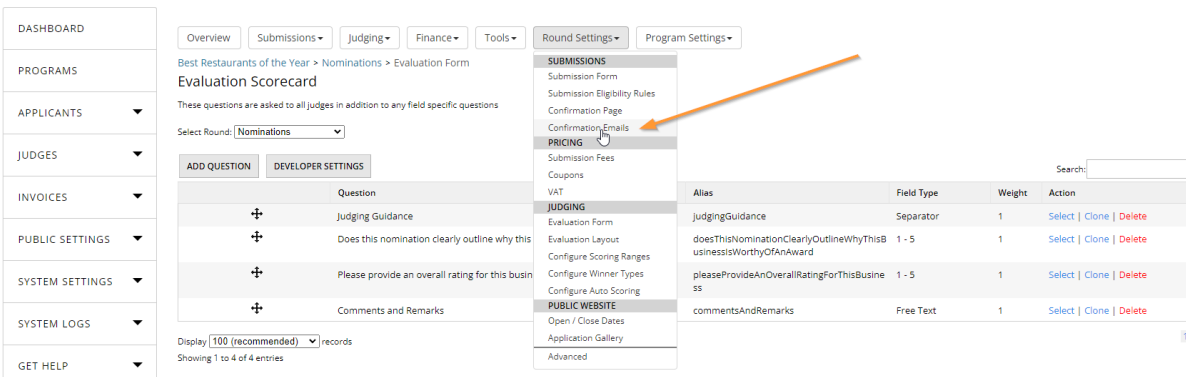
Another vital component to programs are confirmation e-mails. As the name implies, these automatically send to the applicant once she or he has submitted an application into your program. Think of it like shopping online - It's a receipt of your action, such as a purchase.

Let's configure a confirmation e-mail for this program.

Step 1:
You may be getting familiar with these steps now – Navigate to "Round Settings" and open the dropdown. Click "Confirmation Emails" from the list.

Step 2:

OpenWater does not generate confirmation emails by default, so you will always have a blank slate when starting from scratch. Click the "Add Email" button at the top of the table.

Step 3:

Give this confirmation e-mail a name. This is only visible on the admin side, so let's keep it short and sweet: Nomination received

Select "Send this E-mail" and leave "Send Immediately" as is.

You will notice an additional number of fields here:

- Override From Name
- Override From Address
- Override To Address
- Cc Address
- Bcc Address

These are more advanced options, but in essence they allow you to change whom the email appears to be coming from, whom the email is going to, and also the ability to CC / BCC others automatically. For this module, we'll skip those.

| Overview | Submissions⌄ | Judging⌄ | Finance⌄ | Tools⌄ | Round Settings⌄ | Program Settings⌄ |

Best Restaurants of the Year > Nominations > Confirmation Emails

Name ★	Nomination received
	● Send this E-Mail ○ Send this E-Mail when conditions are met ○ Do Not Send this E-Mail
	● Send Immediately ○ Send after Delay
Override From Name	
	leave it blank, if you want use default value
Override From Address	
	leave it blank, if you want use default value
Override To Address	Insert variable
	leave it blank, if you want use default value
Cc Address	Insert variable
Bcc Address	Insert variable
Subject ★	Insert variable
	● Render from WYSIWYG ○ Render from Template
Message ★	Insert variable

Scroll down to the bottom of the page where you will have "Subject" and "Message" inputs.

Step 4:
These two inputs are likely self-explanatory: "Subject" is the subject line of the email you are sending, and "Message" is the content of the email itself. Note that you have a rich text editor available to you in the "Message" box, so you have numerous options on how to format your message, add your organization's branding (e.g. logos), hyperlink, and so on.

For this module, we'll keep it simple. For the "Subject", enter the following: Thank you for your nomination.

For the "Message", enter the following:

Hi there,

Thanks again for your nomination for the Best Restaurants of the Year. Your nomination has been successfully received and will be reviewed when the judging period opens. We will notify winners once they have been determined. If you have questions in the interim, you may reply to this email.

You may have noticed the links for "Insert Variable" on this page as well - Variables are a powerful way to personalize and add dynamism to communications, reports, and more. For now

we'll skip these, but later on we will revisit this topic.

Cc Address	Insert variable
Bcc Address	Insert variable
Subject ★	Insert variable
	Thank you for your nomination.
	⦿ Render from WYSIWYG
	○ Render from Template
Message ★	Insert variable
	Hi there,
	Thanks again for your nomination for the Best Restaurants of the Year. Your nomination has been successfully received and will be reviewed when the judging period opens. We will notify winners once they have been determined. If you have questions in the interim, you may reply to this email.
	BACK TO LIST SAVE

Once you're done, click "Save". You should then see your newly created confirmation e-mail in the table.

1.5 Building out your confirmation page

Confirmation pages are closely related to confirmation emails, but serve a slightly different purpose. To reuse the online shopping example, when you check out and pay, usually a message appears giving you a confirmation that the transaction successfully happened. In OpenWater, the confirmation page serves the same general purpose.

However, a good rule of thumb is to keep any important information such as dates or follow-up information in your confirmation e-mail(s), and general confirmations in the confirmation page. Reason being is that when your applicant navigates away from the confirmation page, that information is lost and the applicant will not have a copy of that information. Whereas a confirmation e-mail will get sent on submission and provide the applicant with a record of the action.

So for the important details about your program, like dates, follow-up information → Email General "thank you" → Confirmation page

Step 1:
Like before, click "Round Settings" and select "Confirmation Page" from the dropdown options.
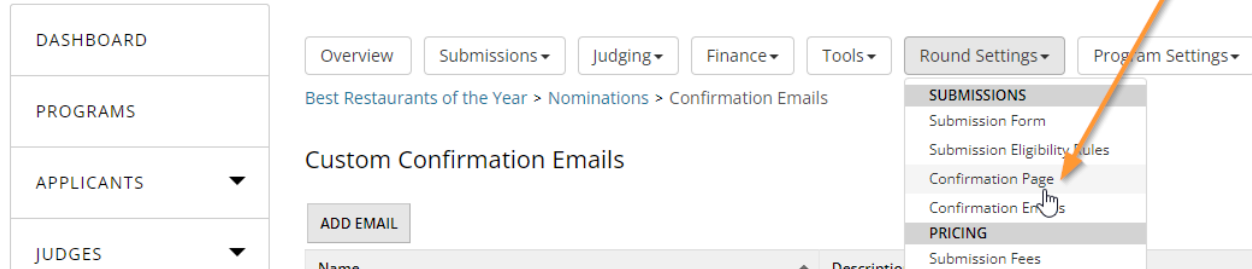
Step 2:
Like with other text input areas you have seen so far in OpenWater, the confirmation page also has a rich text editor (i.e. WYSIWYG).

In the "Confirmation Text" area, OpenWater generates sample text by default. Let's adjust it a bit.
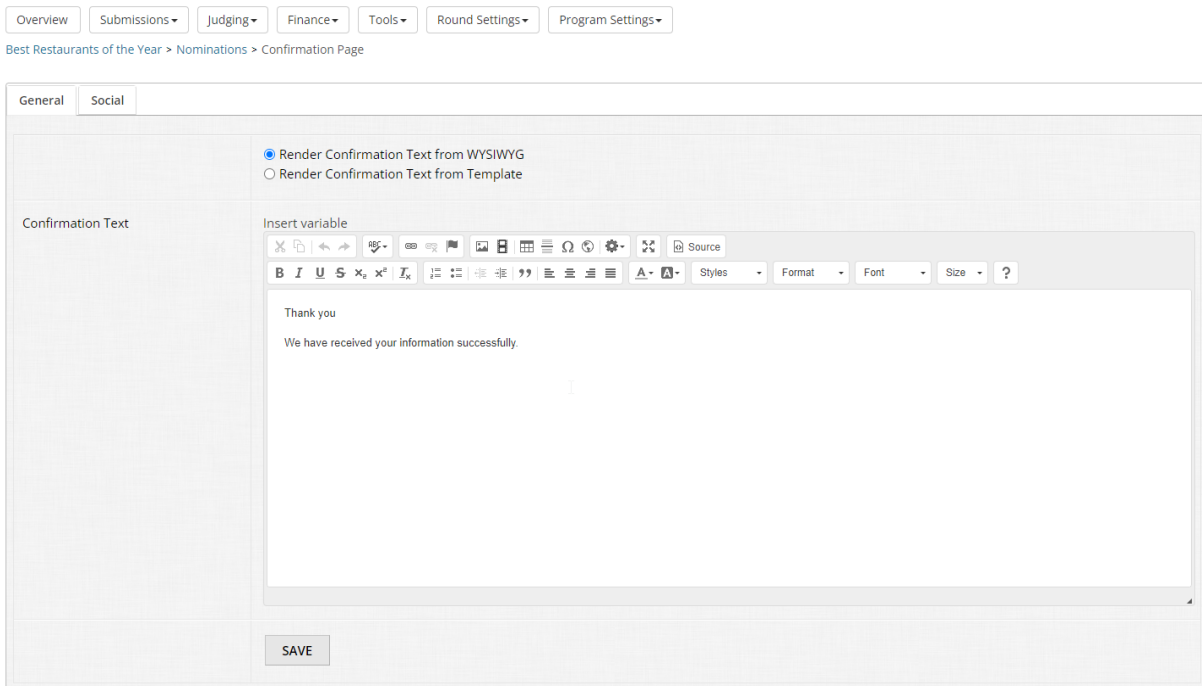
Change "We have received your information successfully." to the following: We have successfully received your nomination. A confirmation of your submission has been sent to your email for your records.

Click "Save".

General | Social

○ Render Confirmation Text from WYSIWYG
○ Render Confirmation Text from Template

Confirmation Text

Insert variable

We have successfully received your nomination. A confirmation of your submission has been sent to your email for your records.

body h4

SAVE

1.6 Setting your open and close dates

At this stage, you've now gotten the core aspects of your program built out. Now we need to tell OpenWater when the submission period opens and closes, as well as the judging period. Otherwise, how will applicants and judges access your program?

Step 1:
Go to "Round Settings" and click "Open / Close Dates" near the bottom.

Overview | Submissions ▾ | Judging ▾ | Finance ▾ | Tools ▾ | Round Settings ▾ | Program Settings ▾

Best Restaurants of the Year > Nominations > Confirmation Page

SUBMISSIONS
Submission Form
Submission Eligibility Rules
Confirmation Page
Confirmation Emails
PRICING
Submission Fees
Coupons
VAT
JUDGING
Evaluation Form
Evaluation Layout
Configure Scoring Ranges
Configure Winner Types
Configure Auto Scoring
PUBLIC WEBSITE
Open / Close Dates
Application Gallery
Advanced

| General | Social |

○ Render Confirmation Tex
○ Render Confirmation Tex

Confirmation Text

Insert variable

B I U S x₂ x² Iₓ

A ▾ A ▾ Styles ▾ Heading 4 ▾ For

We have successfully receive ... of your submission has been sent to your email for your re...

Step 2:

| Overview | Submissions ▾ | Judging ▾ | Finance ▾ | Tools ▾ | Round Settings ▾ | Program Settings ▾ |

Best Restaurants of the Year > Nominations > Open / Close Dates

Select Round: Nominations ▾

Start Accepting Submissions ✱	[ ]	12 ▾	00 ▾	AM ▾
Last Day to Submit ✱	[ ]	11 ▾	59 ▾	PM ▾
Judging Period Opens ✱	[ ]	12 ▾	00 ▾	AM ▾
Judging Period Closes ✱	[ ]	11 ▾	59 ▾	PM ▾

☑ Display Read Only View to Judges after Judging Period Closes

☑ Allow Judges to Make Edits While Judging Period Is Open

☑ Display on Website Programs List

⦿ Display Dates should match actual Dates
◯ Set Custom Display Dates

[BACK]   [SAVE]

Using the inputs, choose your dates and times for the following:

- Start Accepting Submissions – I.e. when applicants can start submitting into your program
- Last Day to Submit – I.e. the last day and time applicants can submit into your program
- Judging Period Opens – I.e. the day and time that judges, if conditions are met, can access nominations assigned to them for review
- Judging Period Closes – I.e. the last day and time that judges can enter or modify scores for their assigned nominations

A note on open dates - Since you should always be in the habit of testing your work, we recommend setting your submission open and judging open dates to the day before you are currently setting everything up so you can test everything before you officially launch.

Open and close dates can be changed at any time, so you can adjust the open dates once you are satisfied in your testing. This topic will be covered further in 1.8.

We generally recommend leaving "Display Read Only View to Judges after Judging Period Closes" and "Allow Judges to Make Edits While Judging Period Is Open" enabled.

Once you've finished, click "Save".

1.7 Updating your public website with content and materials

In preparation for testing and your official program launch, you will want to get your dedicated domain squared away and plugged in.

Step 1:
Navigate to the left-hand menu and click the option called "Public Settings" to open the dropdown. Then click "Website" from the available options.

Try OpenWater

DASHBOARD

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OpenWater

Overview Submissions ▾ Judging ▾

Best Restaurants of the Year > Nominations > C

Select Round: Nominations ▾

Start Accepting Submissions *	
Last Day to Submit *	
Judging Period Opens *	
Judging Period Closes *	

Step 2:
In this module, you only have one domain to manage. By default, you will be brought to a page with a table containing multiple tabs, with "Menu and Pages" loaded.

This tab is not only your OpenWater domain's navigation menu, but also your site map. You can see any and all website items you have created for this domain (Home and My Account will always exist and cannot be deleted), as well as whether the item shows in the navigation menu, etc.

For this step, let's plug up the website to the submission form. Start by clicking "Add Menu Item" at the top of the table.

Step 3:

You'll notice a number of options here. The "Parent" option is when you would like to nest website items under something else – E.g. About Us → Our Mission, Our History. "Root" means it is a top-level item and will be what is seen automatically in the navigation menu. For now you can skip it.

Give your menu item a name. Let's make it a call to action and enter the following: Nominate Today

For the URL key, this is for browsers and the address bar. Enter the following: nominate-today

Leave "Show in Menu" enabled and leave "Visibility to Users" as is. Skip Ordinal and then for Type, select "Program Home". A new dropdown should appear, and you should be able to select "Best Restaurants of the Year" from the dropdown.

Once you've finished, click "Save and Back". You've just linked to the submission form you built earlier in this module and OpenWater handles the rest – No need to go digging for the hyperlink.

General	Menu and Pages	System Content	Social	Advanced Settings		

Parent	Root
Name *	Nominate Today
URL Key *	nominate-today
	☑ Show in Menu
Visibility to Users	◉ Show to All Users ○ Show to Logged in Users ○ Show to Anonymous Users
	☐ Open in a new tab
Ordinal *	2
Type *	Program Home
Program *	Best Restaurants of the Year
	BACK SAVE AND BACK SAVE

Step 4:
Let's add some content to your OpenWater domain's homepage. Even if your organization doesn't have much content, the homepage should always have at least a small blurb. Leaving it blank can cause applicants to distrust or doubt your website's legitimacy or completeness.

As a rule of thumb, your homepage content should have at minimum a little information about the program(s) you are offering, the open / close dates, and any contact information if applicants should have questions.

Click "Edit" on the right-hand side for the "Home" page to open the editor.

Step 5:
Since we are editing the homepage, the page name and URL key are already set for you. Scroll down to the Custom Page editor and add in the following text:

Welcome to the nomination portal!

For Best Restaurants of the Year, click the "Nominate Now" link in the navigation menu to get started.

Submissions open on <insert dates of your choosing here> and the last day to submit is <insert

date and time of you choosing here>.

Best of luck!

Be sure to hit "Save" at the bottom once you've finished.

1.8 Testing and checking your work before launch

Whether in OpenWater or elsewhere, you should always be in the habit of checking your work.

In OpenWater specifically, checking your work entails the following:
- Checking your front-facing submission form
- Checking your confirmation page and email content
- Checking your evaluation form
- Checking your public website content
- Adjusting your open/close dates pre- and post-testing
- Clearing out any test entries

The reason for this is that we are humans after all, and sometimes we make mistakes that we don't catch when looking at things from the admin-only side.

Checking your work ensures that you have everything configured correctly and you have the peace of mind once you start marketing your program to your applicants.

Let's start with your submission form.

Step 1:
Go into your program via "Manage" and click Round Settings > Open / Close Dates.

Step 2:
Adjust your open dates for both submissions and judging to start at least one day prior to you testing your work, this ensures that these front-facing components are accessible to you.

Step 3:
Go back to the program navigation tabs at the top and click Overview to access the program overview page.

Step 4:
You should note the "Market Programs" box in the middle of the page. Copy the hyperlink in the "Direct to Submission Form" area and paste this into your browser. This is the link that takes you directly to your submission form.

Step 5:
Since you are logged in from the admin side, you should be automatically brought to the form. Fill out this entry as a test - Your focus should be on the form itself. Are the fields in the correct order? Did you spot any typos in your field labels or helper text? If you have conditional logic in your form, are those fields populating as expected? These are all questions you should be asking yourself and verifying the results as you go through the form.

Fill out your test entry with whatever you like, if you just want to input values, or keep it authentic, it's up to you.

Once you've finished, be sure to click "Save and Finalize" and click "OK" to the confirmation pop-up.

Step 6:
Take note of the platform behavior redirecting you to the confirmation page. If your content looks good, you can navigate away from this page. Be sure to check your email inbox as well for the confirmation email and ensure the content is formatted to your liking.

Step 7:
Return to the admin panel - In your left-hand user panel on the public website, you will have an option called "Admin panel". Click on this to return to your admin dashboard.

Step 8:
Go back into your program and then, in your program-specific navigation tabs, click Judging > View / Add Judges. It's time to test out your evaluation form.

Step 9:
Click the "Add Judge" button above the table and follow the prompts - OpenWater will always require the following for adding brand new judges to the platform:
- First name
- Last name

- Email address

Add in your information and click Save. You should see your information now appear in the table like so:

Step 10:
Now that you've added yourself as a judge, it's time to assign your test entry to yourself to check the evaluation form.

Click the hyperlinked number in the "# Unassigned" column and click "Assign" next to your test entry in the pop-up window which appears. When you do so, you can close the pop-up and you should see the numbers in the columns change to 1 into the # Assigned column. This means that you have successfully assigned that entry to yourself.

Step 11:
Now, let's check your evaluation form. At the very top of the page you will notice additional navigation items, click the link for "Public Website" to open your front-facing OpenWater domain in a new tab.

Step 12:
Since you're still logged in, you should notice a new item in your left-hand user panel: My Judging Assignments. Click on it to access the test entry you assigned yourself.

Step 13:
You will now be brought to what's called the List View Page. As the name implies, it's a page which lists your assignments as an overview list. Click on the "View Application" button next to your test entry.

Step 14:
Go through your test entry. On the left-hand column is the test entry as you submitted it; on the right-hand column are your evaluation criteria items. Feel free to enter whatever scores / inputs you like, as these scores won't impact your program.

The questions you should be asking yourself when going through this should be things like, are all fields which should be hidden from judges, actually hidden? Are there any typos? Do I have the correct inputs for each evaluation item, do my instructions make sense?

Once you're finished, go ahead and save your inputs. If everything is satisfactory, go to the navigation menu of this page and click "Home" to return to the homepage.

Step 15:
Check the content you entered for the homepage. Does it make sense, are there typos, is your formatting to your satisfaction? If not, adjust accordingly by returning to the admin panel. If yes, your last test should be to check your links in the navigation menu, particularly the link that takes you to your submission form. If everything works as expected, you are all set!

Let's return to the admin panel and adjust your open/close dates.

Step 16:
Once you've returned to the admin panel, go back into your program via "Manage" and then Round Settings > Open / Close Dates. Set your open dates to the actual open dates you would

like this program to start on and click Save.

Step 17:
The last step is to clear out your test entry (or entries) before launch, so you have a clean slate for when live applications start coming in. Go to the tab called Submissions > Complete.

Step 18:
Find your test entry in the list, select it and click the "Bulk Actions" button which appears at the top of the table. Click on this button and select "Delete" from the pop-up window which appears, then OK. The table will reload and your test entry will be deleted from the list.

Et voila, you've successfully checked your work and if you have no further adjustments, you are ready to start marketing your program!

Module 2: Form Builder Essentials I

Table of Contents

The "anatomy" of the Field Options menu are as follows:

1. Single line text
2. Date

3. Multiline text
4. Number
5. Checkboxes
6. Email
7. Radio list
8. File upload
9. Dropdown
10. Url
11. Separator
12. Address
13. Table*
14. Phone number
15. User profile
16. Letter of recommendation**
17. Add from template**
18. Charity check**

* This will be covered in Module 3.
** These will be covered in Module 4.

2.1 Address

As the name implies, this is a single field for an address, automatically combining multiple inputs.

Address fields are a great way to quickly collect an applicant's mailing address, whether that's for your team's internal records, or you need the address if the applicant is selected in your program and needs to be notified by mail. There are a myriad of use cases in which you may need to collect an address, and this field handles the legwork for you.

If needed, you can also enable a third line (after Line 2) – This can be helpful for places such as universities where departments may have additional address lines to specify their locations on campus for mailing purposes.

The country field is pre-populated with a full country list to accommodate applicants across the globe.

There are some things to be aware of, however, regarding this field:

- As an American company, OpenWater follows the foreign policies of the United States government in terms of the country names listed in the dropdown and cannot be modified. This may sound odd on its face, but if your organization allows for global submissions, you may encounter users who express sensitivities or make requests due to the way certain countries are named within the list. If this scenario might apply to your organization, we recommend creating some thoughtful, but standard responses to such inquiries.

- The individual labels for each line item within the address field cannot be modified at this time. We have seen these questions arise namely based on the "Zip / Postal Code" input. For these scenarios, we recommend utilizing the "Details" section of the field to provide any clarification or guidance to your users, particularly if your applicants are not US-based.

- As mentioned in the first bullet, the country list cannot be modified. If you need to limit addresses to a certain country or countries, this can be done with our Rules Engine discussed in Module 9.

2.2 Checkboxes

Checkbox fields are a great way to allow a user to make multiple selections and support nested fields.*

Common scenarios where checkboxes can be used are questions such as:
- Where did you hear about this program?
- Which days of the week are you available?
- Please select this business's top 3 qualities.

Checkboxes also support setting a range of selectable values. So perhaps you want to ask which days of the week the applicant is available, but limit how many values are selected – This field supports that, including a minimum number of selections to a maximum amount. Ranges can be mix-and-matched with no value like so:

With these settings, the applicant must select at least one value (since no minimum is specified) with a maximum of three.

Alternatively, we can set a minimum of two selections, with a maximum of four.

In short, there is flexibility here that can empower you to collect the data you need in the way you want it.

*Nested fields, also known as "form logic", will be discussed further in Module 3.

2.3 Date

As the name implies, the date field allows you to collect a date from the applicant. Date fields always collect an exact month, day, and year from applicants - So if you are in a scenario where you need just MM/YYYY or a similar format, you can either use a single line text field instead, or add guidance in the "Details" section of the field.

Some common text we've seen from clients:
- If you don't know the exact date, please select the first of the month.
- If you are unsure of the exact date, please choose the day closest to it.

If your organization utilizes the date format DD/MM/YYYY instead of the month first, you can set this in System Settings > Numbering and Dates.

2.4 Dropdown

Add Field	**Field Settings**

Label: Sample Dropdown Field

☐ Turn on Rich Text Mode

Details:

Type: Drop Down List ⌄

CSS Class:

Alias (used in placeholders):

Leave it empty to generate Alias automatically

Values: Bulk Add | Copy List to Clipboard

☐ 🔗 Value 1 🔓 ⋯

☐ 🔗 Value 2 🔓 ⋯

☐ 🔗 Value 3 🔓 ⋯

RE-ORDER

Preview

Sample Dropdown Field	Select ⌄	📋 🗑

CLOSE   SAVE FORM

Similar to the checkboxes field, a dropdown field allows you to add a myriad of values that the applicant can select from and supports nested fields. Keep in mind however, dropdown fields only allow one selection from the user.

A common question we receive from clients is: "When should I use a dropdown field instead of a radio list?"

As a rule of thumb, if you have a list of values longer than say, ten, where you want the applicant to only select one value from the list, you will want to use a dropdown field. Reason

being is anything greater than ten or thereabouts will clutter up your form with way too many options when you only want one selection.

2.5 Email

The email field is a special text input field that collects only email addresses. When utilizing an email field, you have a unique option that can be enabled: email confirmation.

Add Field	Field Settings	

Label:	Sample Email Field
	☐ Turn on Rich Text Mode
Details:	
Type:	Email ⌄
CSS Class:	
Alias (used in placeholders):	Leave it empty to generate Alias automatically
Size:	Large ⌄
	☐ Is this field required?
Confirmation:	☐ Does this field require confirmation?
	☐ Hide field from Applicants
	☐ Hide field from Judges

Think of it like when you create an account somewhere for the first time, some websites may have you enter your email address and password twice to ensure that you didn't make a mistake somewhere such as a typo. Enabling email confirmation has the same effect, and forces the applicant to enter her or his email twice over.

There are some advanced benefits of using the email field as well - Collecting email addresses in your form via this field allows you to utilize variables for these values in special ways.

Variables will be covered in Module 10 as they are powerful tools for developers and non-developers alike within the OpenWater platform.

2.6 File upload

File upload fields allow you to collect files from applicants. File upload fields have a great deal of flexibility – You can either leave them unmodified, or limit what kind or what size of file is ultimately uploaded.

File upload fields have the following unique settings:
- Showing a single line text input, bundled with the field as a caption*
- Permitted file extensions
- File previews
- Maximum file size limit

If "Show Caption" is enabled, you can change the label of the populated single-line text to whatever you like. Do you want a description of the file? Is this field for uploading photographs

and you need the copyright credit? The caption setting is meant for these purposes.

Keep in mind however, that if the field is required and you have the caption setting enabled, this makes the caption required also.

Permitted file extensions allow you to specify what types of files this field allows the applicant to upload. To assist you, you can type any of the following keywords to quickly populate the most common file types per media category: Audio, image, video, and document.

Underneath are tickboxes for file previews. Leave the respective box(es) checked where you would like a live preview to generate in the form for applicants and judges for easy viewing. If

you would prefer a hyperlink to the file instead, uncheck the box(es).

Add Field	**Field Settings**

placeholders):	Leave it empty to generate Alias automatically
	☐ Is this field required?
	☑ Show Caption
Label:	Name of File
Permitted Extensions (Leave blank for all files)	audi
	Audio (mp3, mp4)
	Images (jpg, jpeg, png, gif)
	PDF (pdf)
	Excel (xls, xlsx)
	Word (doc, docx)
Max Size	Video (mp4, avi, mpeg4)
	☐ Hide field from Applicants
	☐ Hide field from Judges

Finally, in terms of max size, you can either leave the field blank for no limit or provide a numerical value for the largest file size you wish to accommodate in MB.

We have a few rules of thumb you should follow when building file upload fields:
- If you have any limitations on what file types / sizes are accepted for the field, take advantage of the "Details" section to specify these limitations to the applicant. This will help your applicants know the requirements and eliminate any trial-and-error frustration.

- Utilize file type limitations. If you know you're collecting a file for a bibliography, for example, limit file types to Word and PDF files. This way you always have consistent file types uploaded to the respective field.
- Depending on the media you are collecting, keep your file size limits low, particularly with images (unless your workflow calls for otherwise). Large files take up more bandwidth and can be harder to work with or render, particularly for stakeholders with poor internet connections.

2.7 Multiline text

Similar to its sister field, the single line text, the multiline text input is a means for you to collect long-form answers from your applicants.

Multiline text fields support multiple sizes:

- Small, plain text input
- Medium, plain text input
- Large, plain text input
- WYSIWYG - An adjustable size rich text editor where you can specify what formatting options are available to the user

These fields also support word and character minimum / maximum counts. They are a great tool for collecting information such as, but not limited to:

- Comments or remarks
- Essay responses
- Abstracts text
- Biographies
- Bibliographies

Use minimum and maximum word counts in conjunction with a required field for such use cases, but not limited to:

- Ensuring quality responses by enforcing a minimum word/character limit
- Ensuring quality responses stay under a certain length for reviewing purposes

Add Field	Field Settings

Type: Multiline Text ▾

CSS Class: [   ]

Alias (used in placeholders): [   ]
Leave it empty to generate Alias automatically

Size: Small ▾

☐ Is this field required?

Limit:
○ Characters
○ Words

Min: [   ]

Max: [   ]

☐ Hide field from Applicants

☐ Hide field from Judges

CONFIGURE CATEGORY GROUP SETTINGS

Show Category group settings overrides

With the WYSIWYG option, you can specify formatting limits via HTML tags. If you leave this option blank, it provides all options:

But there are likely cases where applicants shouldn't have every formatting option available to them. For your convenience, here is a glossary of tags:

A

Br
Em
H1
H2
H3
H4
H5
H6
Li
Ol
P
S
Strong
Sub
Sup
Ul

A - Allows hyperlinking
Br - Allows the user to input line breaks, br must be added in order for line breaks to be saved
Em - Italics formatting
H1 - H6 - Header formatting, the smaller the number, the larger the text size
Li - Required tag when allowing numbered and non-numbered lists
Ol - Ordered list (i.e. numbered lists); if allowing a numbered list, "li" needs to be added as well
P - Paragraph tag
S - Strikethrough text formatting
Strong - Bold text formatting
Sub - Subscript text formatting
Sup - Superscript text formatting
Ul - Unordered list (i.e. non-numbered); the "li" tag must also be listed as an allowed tag when utilizing

Add Field	Field Settings

Alias (used in placeholders):	[ ] Leave it empty to generate Alias automatically
Size:	WYSIWYG ⌄
	☐ Is this field required?
Allowed HTML tags: (Leave blank for all tags or specify each tag delimited with a space or comma)	p,strong,em,sup,sub
Limit:	○ Characters ○ Words Min: [ ] Max: [ ]
	☐ Hide field from Applicants
	☐ Hide field from Judges

Sample Multiline Field (WYSIWYG)

B *I* U S x₂ x² I͟ₓ   Size ▾   Normal ▾   Font ▾   1≡ :≡ ≡ ≡ ≡ ≡   🔗 🔗

|

body   p

2.8 Number

The number field is a single-line text input which *only* allows for numerical values to be entered.

Similar to checkboxes and date fields, it allows specification of a range of values if you wish to limit what numbers an applicant inputs. By default, it is blank, and you can specify a minimum

value, a maximum value, or both if you like.

You may also specify the amount of decimal places that can be entered into the field. Commonly this defaults to two decimal places.

The final setting for this field is the format - If you specify 0.00, this will automatically turn any number with values other than 0 after the decimal point to be forcibly set to 0.

For example, 196.73 would become 196.00 instead.

Alternatively, you can specify the format with pound signs like #.## - This retains any numerical values input the applicant enters without modifying it like 0.00 does.

Power user tip: You can use the number field in unique scenarios - If you need the applicant to provide a year, but don't need an exact month/date, you can use the Range function to specify a minimum year to a maximum year. For example, if the applicant should only be able to enter a year from 1970 to 2030, those can be specified as your minimum and maximum values in the Range area.

2.9 Phone number

Similar to the number field, the phone field only allows for numerical input but specifically in telephone format. The applicant can specify the country origin of the telephone number and then provide it in that country's given phone format. This is a nice way to ensure consistency when collecting contact information from applicants.

2.10 Radio list

Like its sister fields, checkboxes and dropdowns, the radio field allows you to specify a field with multiple values that you set. However, radio fields are like dropdown fields in that only *one* option from the list can be chosen.

Radio lists are oriented towards questions where only one response is desired. Common uses of radio lists are:

- Yes / no questions
- True / false questions
- "Are you a professional or a student?"
- "What is your highest education level"
- And so on

Radio lists, just like checkboxes and dropdowns, support nested logic.

As a rule of thumb, if the amount of options for your radio list exceeds say, ten values, consider using a dropdown field instead to reduce visual clutter in your form.

2.11 Separator

One of the unsung heroes of the form builder is the separator field. It is unique in the sense that there is no true interaction from the applicant's perspective with this field - It is a separator, a means to break up and organize your form into visually appealing, bite-sized parts within a question page.

Think of them as headers or spacers in your form - They are vehicles for providing additional information to your applicants in an overarching way, without tying it to a specific field.

Do you have specific instructions for multiple file upload fields in your form, for example? Use a separator field to visually group them together and use the "Details" section to provide those

instructions to the applicant.

Details ✕

B *I* U S x₂ x² *Iₓ*   **A**▾ **A**▾   Size ▾   Format ▾   Font ▾

≣ ≔ | ≣ ≣ ≣ ≣   🔗 🔗   🖼 🎞 ⊞   ⟨⟩ Source

Use separators to convey guidance, information, or instructions where needed, but applicant interaction isn't required!

For maximum effect, use the "Turn on Rich Text Mode" option for the "Details" section of a separator to access more formatting options.

- You can **bold** and *italicize* your text
- Add emphasis with color formatting and size options
- Include hyperlinks to outside pages or link to document files

2.12 Single line text

Similar to its sister field, the multi-line text field, single line text is for a single line of text response from the applicant. These fields also support minimum and maximum word or character counts. When you want to force a short response from an applicant, this is the field to use.

Some use cases include, but are not limited to:
- Short or alternate titles
- Names
- Taglines
- Responses to an "Other" selection when you would like the applicant to specify

2.13 URL

Like the number and single line fields, this is a small, single line text input which *only* allows for hyperlinks as an input.

URL fields can't be adjusted in size, but they have some unique properties:

- When entering a hyperlink, OpenWater will check that it's a valid format
- When a valid hyperlink is entered, OpenWater will generate a hyperlink for the viewer to click on and open it in a new tab without losing her or his place in the form
- When linking to certain online media, such as YouTube or Vimeo videos, OpenWater will automatically generate an embed of the video directly in the form for ease of viewing

URL fields can also be used in lieu of file upload fields where applicants need to provide a folder of material in an online service such as Google Drive or Microsoft OneDrive.

2.14 User profile

These fields are vastly different than most other options at your disposal - By adding a user profile field, you are pulling in fields that live within a user's account.

To clarify, when you create an account in OpenWater, by default the platform requires at minimum the user's first name, last name, and email address. You have the power to collect additional information as part of the user's account as well. If your organization is utilizing Single Sign On (also referred to as SSO), you are able to use this functionality as well.

User profile fields are a great way to quickly save time for your applicants by pulling their information from their account, directly into the form.

For example, if your form includes a contact information section, and by default the applicant is the point of contact, you can add the corresponding user profile fields into the form and they will automatically populate with that applicant's information.

However, keep in mind that if you are building a form where applicants don't need an account to submit, user profile fields should be omitted as the platform will generate dummy data in them by default.

Module 3: Form Builder Essentials II

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3.1 Application Name Field I

The Application Name Field is a special field in OpenWater. No matter what kind of program you create, OpenWater requires that every submission form and subsequent application have a title of some kind. The submission form builder gives you a visual cue of which field is the

Application Name Field like so:

Note that the field has a dark grey box around it and cannot be deleted.

So what's in a name?

When you are building your program in OpenWater, consider the type of workflow you are creating. Are you taking in nominations? If yes, are people or organizations being nominated, or both? Are you taking in applications for grants or positions in your organization?

Your workflow will determine what the "name" of each application should be.

To expand upon the earlier examples:

- When nominating people, the Application Name Field should likely be the name of the nominee
- When nominating organizations, the Application Name Field should likely be the name of the organization being nominated
- When taking in applications for positions or grants, the Application Name Field should likely be the name of the individual or organization applying for the grant or position
- And so on

Understanding what the "title" of each application will be is a critical step in building an efficient program, as it has impacts throughout your program:

- In the admin panel, the Application Name will be whatever you named this field
- For applicants, this will be the name of their application(s) when viewing their accounts' submissions
- For judges, this will be the name of the application(s) they see when accessing their judging assignments

However, sometimes things happen and the Application Name Field needs to be changed. This is possible in OpenWater and will be discussed later within this module.

Something else to consider is if you are taking in different types of names for the Application Name Field, you may wish to keep the label text generic enough for applicants to understand what should be entered if you have different categories at play.

3.1 Application Name Field II

Now that you have a foundational understanding of this field, let's cover the specific functionalities this field has in the submission form builder.

Like before, note that it cannot be deleted and it cannot be cloned.

Add Field	Field Settings

Label:	Title
	☑ Is this field required?
	☐ Default to name of logged in user?
	☑ Display only one text field?
	☐ Anonymize this field for judges
Title:	
CSS Class:	
Alias (used in placeholders):	title *Leave it empty to generate Alias automatically*
Limit:	◉ Characters ○ Words Min: [ ] Max: [ ]

Unique functionality that this field has includes:
- The ability to split this field into two inputs (in order to collect information like first name and last name, for example) or retain a single line input
- The ability to automatically populate the applicant's first and last name into the field, based on the data listed in her or his user profile
- The ability to anonymize the field from judges; this is useful in cases where you are taking in nominations or using this field to collect names which should be blinded from judges

If you are in a scenario where names of individuals *and* other names may be used, you will likely want to stick to a single line of text input with a generic label.

If you are in a scenario where the title of the application should be the name of the applicant, enable the feature "populate with name of logged in user" to save the applicant some time. For maximum effect, include User Profile fields to quickly populate contact information as an added bonus.

3.2 The category field

The Category field is similar to the Application Name Field in the sense that this is a special, system-generated field that cannot be deleted or cloned, or at least not in the usual sense.

This field will not appear unless you have built categories for your program, and cannot be removed from a form once generated unless all categories within your program have been removed.

Like its sister field, the label for the field can be modified to whatever text you like, so don't feel constricted by the system-generated "Category" text.

Categories in OpenWater are essentially a means to group and organize applications in order to score them. You are likely familiar with this idea already as a general concept. Here are some examples:

"What category does your book fall under?"
- Novel
- Novella
- Anthology

"What size business do you run?"
- Large business

- Medium business
- Small business

Keep in mind that some workflows may be so focused or narrow in scope that categories aren't necessary, but in larger workflows, categories are a flexible tool at your disposal.

When planning out your workflow in OpenWater, consider how you organize and review entries. Are there any groups of entries that should only be scored against each other? If yes, then you likely need categories.

Let's add on to your first program by adding categories, then later category groups.

Step 1:

Within your program, go to Program Settings > Categories.
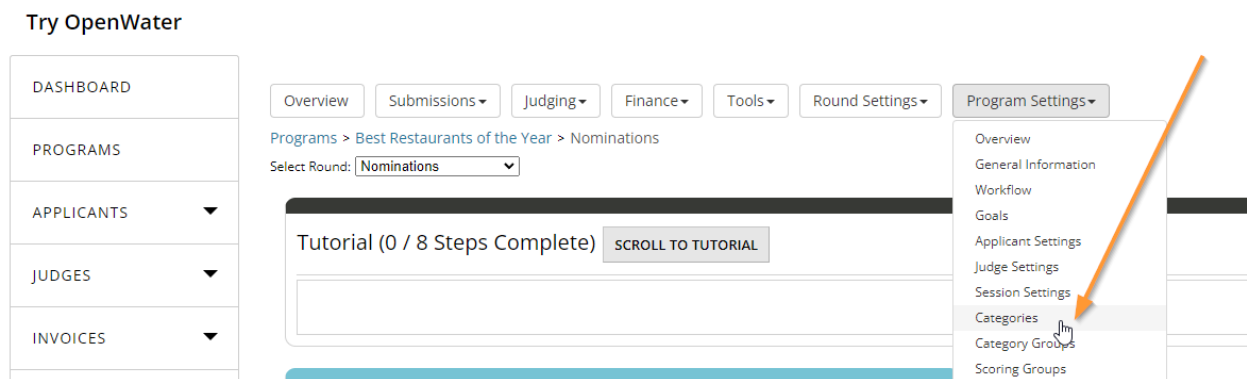
Now we're on the category settings page. There are two major ways to create categories: individually, one-by-one, or by importing categories. For now we'll just add them individually and importing will be covered later on.

To get started, click the button called "Add Category" at the top.

Step 2:

You should have a menu like this appear:

Step 3:

You will want to repeat this process thrice over, and we'll make our categories revolve around what size restaurant the nominee has. For code, give a shorthand code of your choosing. OpenWater supports dashes, letters, and numbers for input. For name, give the following:

- Small restaurant
- Medium restaurant
- Large restaurant

 If you're stuck on codes, here are some examples:

- 001, 002, 003
- SR, LR, MR

 Keep in mind that OpenWater sorts categories based on the code, not the category name. So if you would like to have your categories appear in a particular order (e.g. alphabetical order), numbers take precedence over letters from smallest to largest, and letters-only codes will follow alphabetical order.

Step 4:

Once you add a code and a name, you'll notice that you can add a description for the category.

Category descriptions only appear in the submission form under two conditions:

1. The applicant selects that respective category, and
2. There is content of some kind within that category description

It is a useful tool to provide instructions, guidance, or requirements if your workflow has multiple categories without cluttering up your form with information that may not be pertinent to other categories. And of course, you have a rich text editor as well, so you can format the description text as you like.

If you like, feel free to add some description text.

Step 5:

Once you've finished, click "Save" and you should be brought back to the list of categories. Repeat this process until all three categories have been built.

3.3 Category groups

An extension of our category functionality is the Category Groups feature. These give you additional flexibility over your form and evaluation forms by allowing you to have category-specific forms and unique rubrics per category.

To reuse an earlier example, let's say your workflow is nominating businesses and showcasing the creme de la creme. In this case, we may have differing questions for businesses of different sizes due to the unique circumstances that come with smaller or larger businesses.

To accommodate that, we would need to build corresponding category groups for the Small, Medium, and Large Business categories.

Let's add some category groups to your very first program and expand on it.

Step 1:

From the dashboard, navigate to your program within the Programs box and click on your program to open the dropdown. Alternatively, from the categories table, you can go directly to

the "Category Groups" tab:

Step 2:

From here, click "Manage" on the far-right side of the program to get into your program.

Step 3:

Navigate to your program-specific menu at the top, click Program Settings > Category Groups.

Step 4:

From this table, click the "Add Category Group" button. Like with other menus you've seen by now, you will be required to give this category group a name. As a rule of thumb, we generally recommend having clear, succinct names so you know what the group is for.

Step 5:

Add three category groups with the following names:
- Large business
- Medium business
- Small business

And you should have something like this:

Step 6:

Category groups can exist within your program, but in order for OpenWater to know what category or categories it controls, you have to pair your category groups to your categories.

At the top of the page is the Categories tab, click on it to navigate back to your categories.

Step 7:

Since our categories have the same name as our groups, click Select under the Action column for each and scroll down to the bottom of the page. You should see a required dropdown for Category Group. Click on it and select the respective category group for the category. Click "Save" and repeat this process until all three categories have been assigned their respective

group.

You should end up with something like this:

Keep in mind that category groups don't necessarily have to be an exact 1 to 1 match for every category, depending on your workflow. However, if you have categories where the form is the same, but the evaluation form differs, you will need separate category groups.

3.4 Table fields

Table fields are an excellent method in which to collect multiple iterations of an item based on a minimum and/or maximum range of your choosing.

It allows you to collect multiples of the same type of information without cluttering up your form and provides the applicant flexibility in providing as much information as needed, or as little information required at a minimum.

Even if you've not heard this name used for this type of field, you've likely encountered use cases for it before.

Here are some common examples:
- Please provide a minimum of one author for this abstract, with a maximum of 10 co-authors.
- Please enter up to 5 past awards you have received in the past which are pertinent to your submission.
- Please enter up to 8 of your most recent works from your bibliography.

Let's add on to your program and add a table field.

Step 1:

Go into your program via "Manage" and then Round Settings > Submission Form.

Step 2:

Click "Select" for the "Nomination Information" question page, and then click the button for "Manage Form Fields".

Step 3:

Once the form builder has opened, click the option for a table field in the left-hand menu.

Step 4:

Let's ask nominators what their favorite drinks or dishes are. For the label field, enter the following: What are your top three favorite offerings from this business?

Step 5:

Let's now add fields for each offering the nominator adds. Scroll down in the left-hand Field Settings menu and click the button called "Manage Row Fields" to open up the subform for the

table field.

Step 6:

For each row item, let's collect two pieces of information per. Add the following:
- Single line input with label "Name of offering"
- Dropdown field with label "Type of offering" and options "Food", "Drink"

Make both of these fields required. Click Save and then click Back at the bottom of the form editor to go back to the parent level of your form.

Step 7:

Now we need to edit the row template. When an applicant adds an item to the table, we need to display this information back to the applicant so she or he knows what was added for that item.

In the left-hand Field Settings menu, click the button called "Edit Row Template" and a pop-up should appear like so:

Step 8:

This is where variables come into play. How you format the row template is really up to you, but it's ideal to make it really clear to applicants what value(s) is/are populating.

For the text input, add in the following:
"Name of offering:"
"Type of offering:"
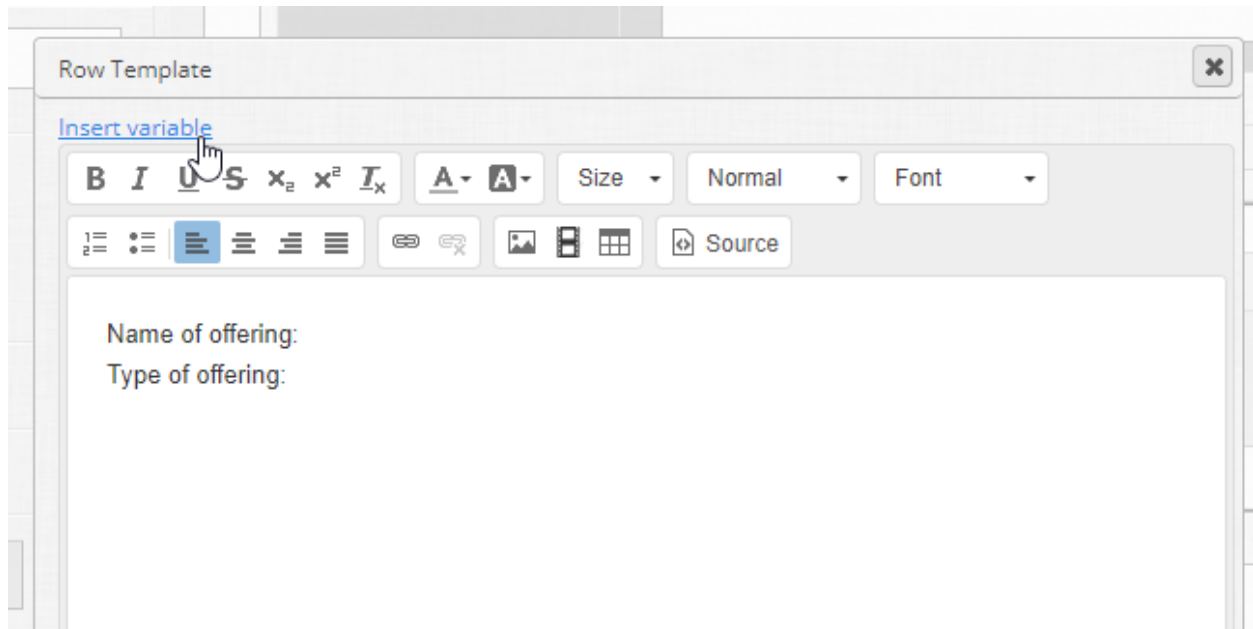
Then click the "Insert Variable" link near the top and select both fields.
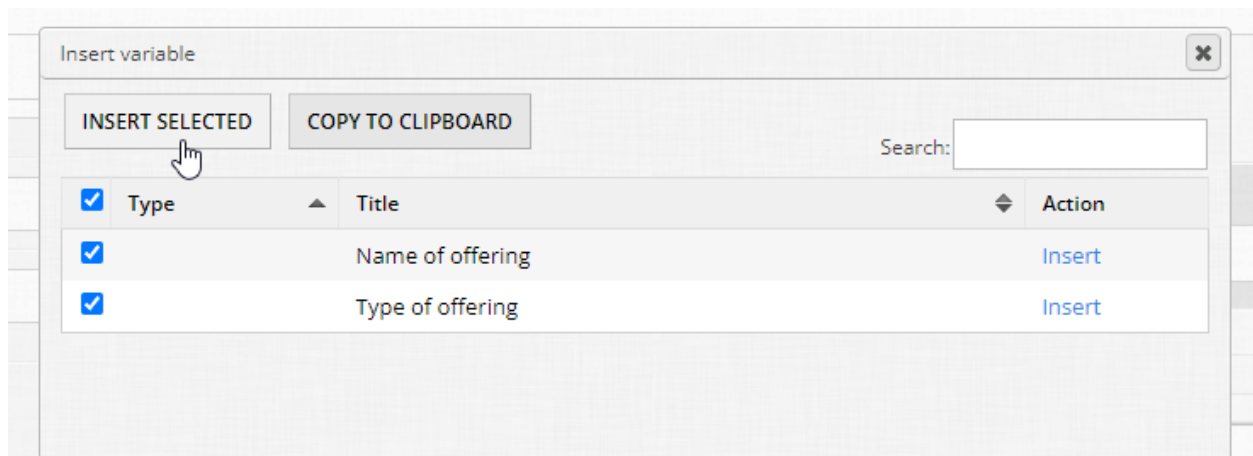
You may see some weird text in brackets, these are dynamic placeholders which will output whatever input the applicant gave for these two fields automatically. Adjust your formatting

accordingly so you end up with something like this:
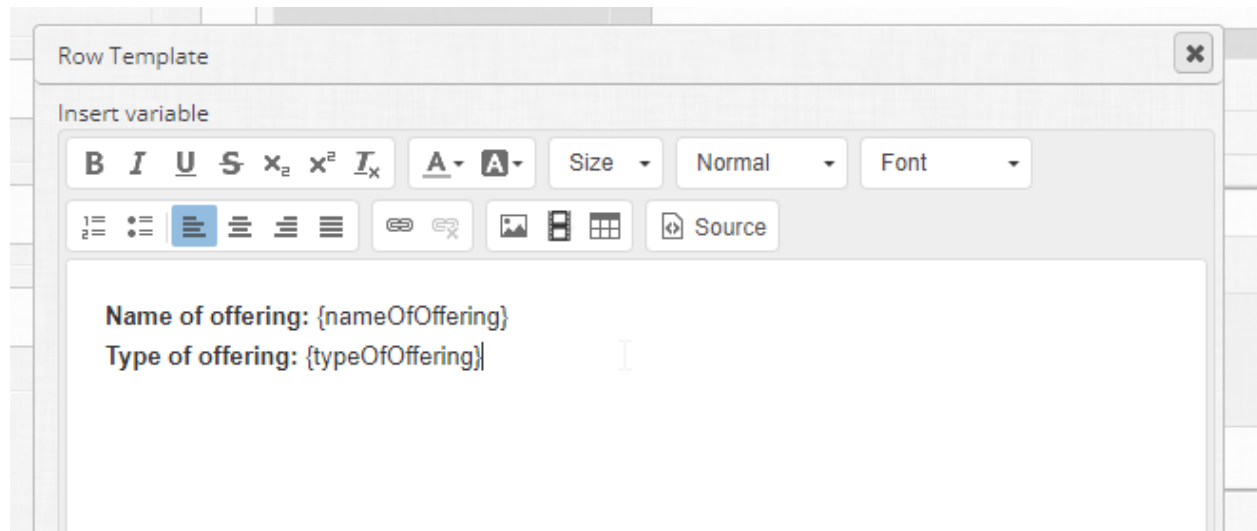
Step 9:

The last pieces are to specify the maximum number of allowable items to be added to the table and to change the verbiage the "Add Item" button uses. Item is the platform-generated term, but we can be a little more specific.

For the inputs, change "Maximum Allowed" to 5 and enter "Offering" and "Offerings" for the singular and plural forms, respectively. Now save your changes.
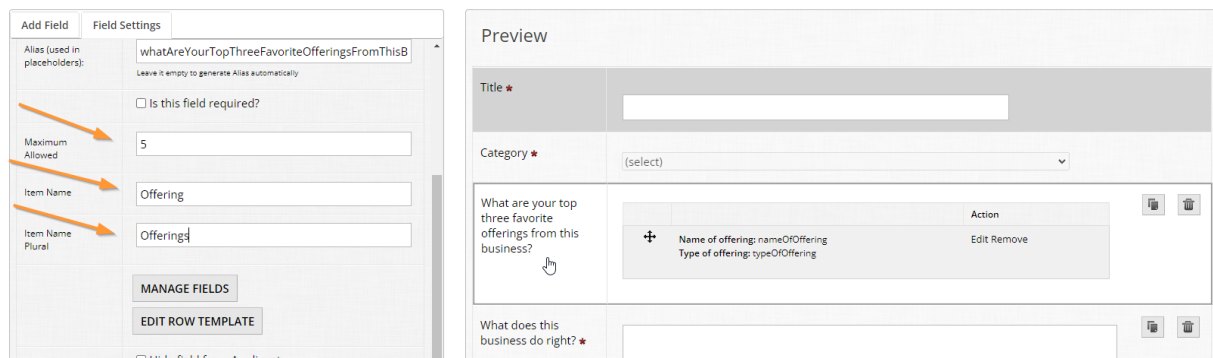
3.5 Nested fields

Nested fields are fields which only appear if the applicant chooses a particular option from certain fields.

You are likely familiar with the concept, a common other term for this functionality is called "conditional logic".

For example, let's say you have a question like: "Where did you hear about this competition?"

You may see potential options for a response such as:

- Online advertisement
- Social media
- Word of mouth
- Other

When you select the option called "Other", you may sometimes see a new field appear that asks you, "Please specify where you heard about us."

This is nested logic in a nutshell, and there are a number of fields which support this feature.

Fields which support nested fields:
- Checkboxes
- Dropdowns
- Radio lists
- Letter of Recommendation*

*Letter of Recommendation technically supports a "subform", but you may as well think of it as a type of nested fields also. This field will be covered in-depth in Module 4.

Let's have you add on to your first program and build a nested field.

Step 1:

From the dashboard, go to your program in the Programs List, click to open the dropdown and click "Manage" under the Action column on the far-right side.

Step 2:

Like you've done before, from your program-related options at the top of the page, click Round Settings > Submission Form.

Step 3:

Let's add our new field in the "Business Information" question page. Click "Select" under the Action column, and then click the button called "Manage Form Fields" to open the form builder.

Step 4:

In order to nest a field, there has to be a "parent" level field which exists first, and is a field type which supports it.

Add a checkboxes field and give it the following label: "Where did you hear about this awards program?"

Copy the following values and use the "Bulk Add" feature to quickly add them in:

Online advertising
Social media
Word of mouth
Other

Be sure to clear out the spare Value 1, 2, and 3 in the list to keep things tidy.

Step 5:

Now, you may have noticed this before, but there are chain link icons to each value in the list. When the chain link is whole, that is your visual cue that there are no nested fields within that value. Let's add a conditional field that *only* displays if the applicant selects "Other".

Step 6:

Click on the chain link icon next to "Other". There are some additional cues to help you understand where you are in your form:

| Add Field | Field Settings |

Type: **Checkbox List ▾**

CSS Class:

Alias (used in placeholders): **whereDidYouHearAboutThisAwardsProgram**

Leave it empty to generate Alias automatically

Values: **Bulk Add** | **Copy List to Clipboard**

☐ 🔗 Online advertising 🔓 •••

☐ 🔗 Social media 🔓 •••

☐ 🔗 Word of mouth 🔓 •••

☐ 🔗 Other 🔓 •••

Create dependent fields

RE-ORDER

☐ Is this field required?

☐ Hide field from Applicants

☐ Hide field from Judges

This tells us we are within the "Other" selection of this field.

Step 7:

Now, just like you've done before, add a single line text field and update the label to read: "Please specify where you heard about this awards program." Feel free to make it required if you like.

Once you're done, click "Back" at the bottom of the form builder to go back up to the "parent" level of your form.

You should now notice the chain link icon for "Other" has changed to a broken link - This is your visual cue that at least one nested field exists if the applicant selects "Other" in the submission

form.

This process is the same for all other fields which support nested fields, so if you would like to try this out with other field types, feel free. You are also not limited in how many additional fields are nested within a response, but we generally recommend keeping it succinct.

3.6 Advanced features: Moving fields around I

There are sometimes cases where we build fields and realize we have a bit of a predicament:

- Either we built a field that should be nested, and/or
- We built a field on the wrong question page

In both scenarios, OpenWater has options to adjust the placement of questions without having to rebuild your fields.

In the first scenario, let's say we built the "Please specify where you heard about this awards program." field at the parent level in our form on accident, when it should be nested under the "Other" value of "Where did you hear about this awards program?" question.

One way of moving fields is the "Move Field" button. You may have noticed it in the Field Settings tab when modifying a field:

If you have the field selected which you need to move, click the "Move Field" button. You should see a pop-up like this appear on your screen:

At this point, OpenWater is prompting you where this field should be moved to. You must select the parent field *and* the selected value you want to move this field into. Follow the prompts to confirm your changes and the platform will nest that field for you.

So no need to rebuild fields or go back on your work. You can inversely use this feature to make a field *not* nested in the event you accidentally built a field as a conditional response, but it should actually be in the parent level of your form.

3.6 Advanced features: Moving fields around II

As mentioned in the last page, the second scenario you may find yourself in is that you built your fields in the wrong question page, or you want to build everything first and then reorganize where those fields go.

There is a feature that accommodates this exact scenario. Save your changes and return to your list of question pages. You can only move fields between question pages as long as more than one question page exists for your form.

At the top of the table, click the "Move Fields" button. You can then drag, drop, and reorder fields as you like within the same question page or between question pages. Once you're

finished, as always, click "Save" at the bottom of the page to save your changes.

Super user tip #1:

There is no right or wrong way in how you choose to build and then order your fields. Some people prefer to build everything in a single question page first, add their additional question pages second, then use the "Move Fields" function to reorganize.

Some people prefer to create all of their question pages first and build fields in the respective question page instead of moving them around.

Ultimately, it boils down to preference and what you feel works best for you.

Super user tip #2:

If you are using category groups and have a large number of fields that only appear for a certain category or category group, some clients like to create a question page for *just* those fields to quickly distinguish the fields which are shared across all categories, versus specific categories.

This technique is also very useful when modifying your category groups en masse to show/hide whole pages.

3.7 Advanced features: Changing the Application Name Field

There may be scenarios where perhaps you set your Application Name Field a certain way, but later on you need to adjust the output.

For example, perhaps you ask for the applicant's first and last name, but you also wish to include a suffix or prefix (if provided) to the title of each application.

Since we don't recommend changing the Application Name Field once your program has launched, there's a way to change the output without impacting the data you've already collected.

Step 1:

From within your program, go to Program Settings > Applicant Settings
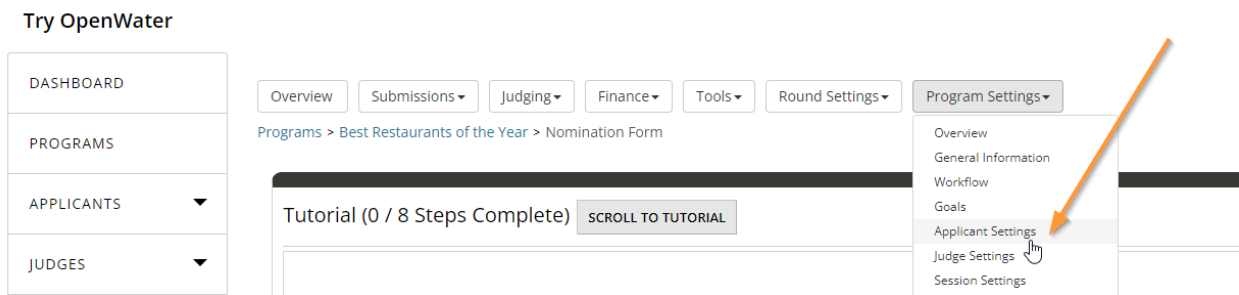
Step 2:

Scroll down to find the option called "Override Application Name Field Template" and enable it.

Essentially, we're telling OpenWater we want the output for the Application Name Field to be something else.

You can hardcode text, depending on the situation, or preferably, just use variables (dynamic placeholders of data that will change for each application).

Step 3:

Let's get you familiarized with the concept. Above the input field, click the "Insert Variable" link.

Step 4:

Select {FirstName}, {LastName} and insert them into the input line:
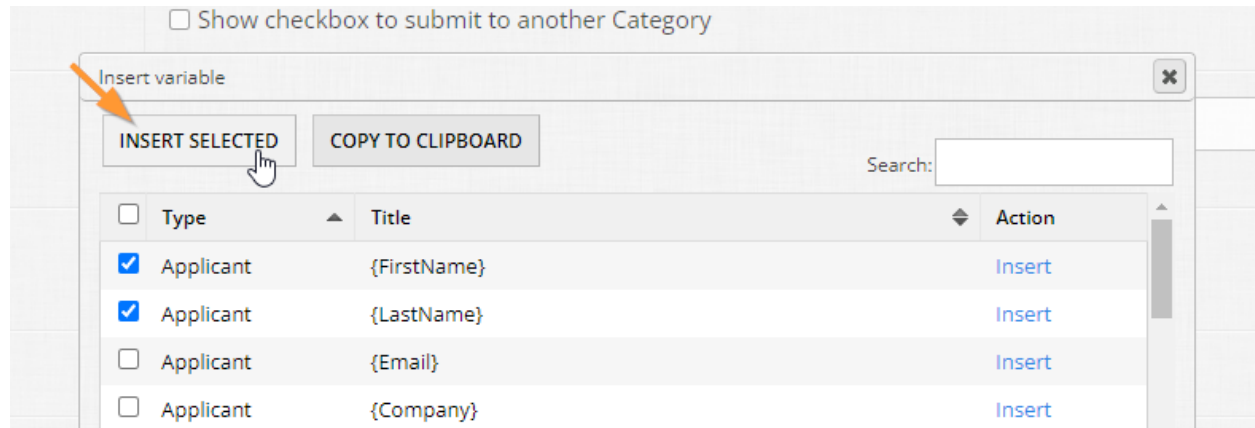
Be sure to add a space. Save your changes. This will replace the current "title" value of "Name of Business" with the first and last name of the nominator across the entire program. To disable, remove your text and uncheck the "Override Application Field Template" box. Be sure to save your changes.

3.8 Advanced features: Changing a text field to an email field

There are times where we accidentally build a single-line text field, when it should have either been built as the Application Name field or an email field. It happens to the best of us sometimes, even OpenWater staff! And sometimes, this problem won't be caught until you've started taking in entries.

The good news is, if you end up in this scenario, there is a method to change a single-line text input field into the Application Name field or an e-mail field. It can be done at any time, so if you catch this before going live, you can fix it; alternatively you can do this while your program is live to ensure you're only collecting email addresses in this field.

Try it out yourself to get a feel for this.

Step 1:

Go into any question page of your submission form for the program we've been building upon in these modules.

Step 2:

Add a single-line text input field. You can change the label now or later, it's up to you.

Step 3:

In the left-hand Field Settings area, take note of the "Type" option under "Label" and "Details". The dropdown for "Text" can't be modified, but there is a hyperlink next to it called "Change". Click on it to start the field change process.
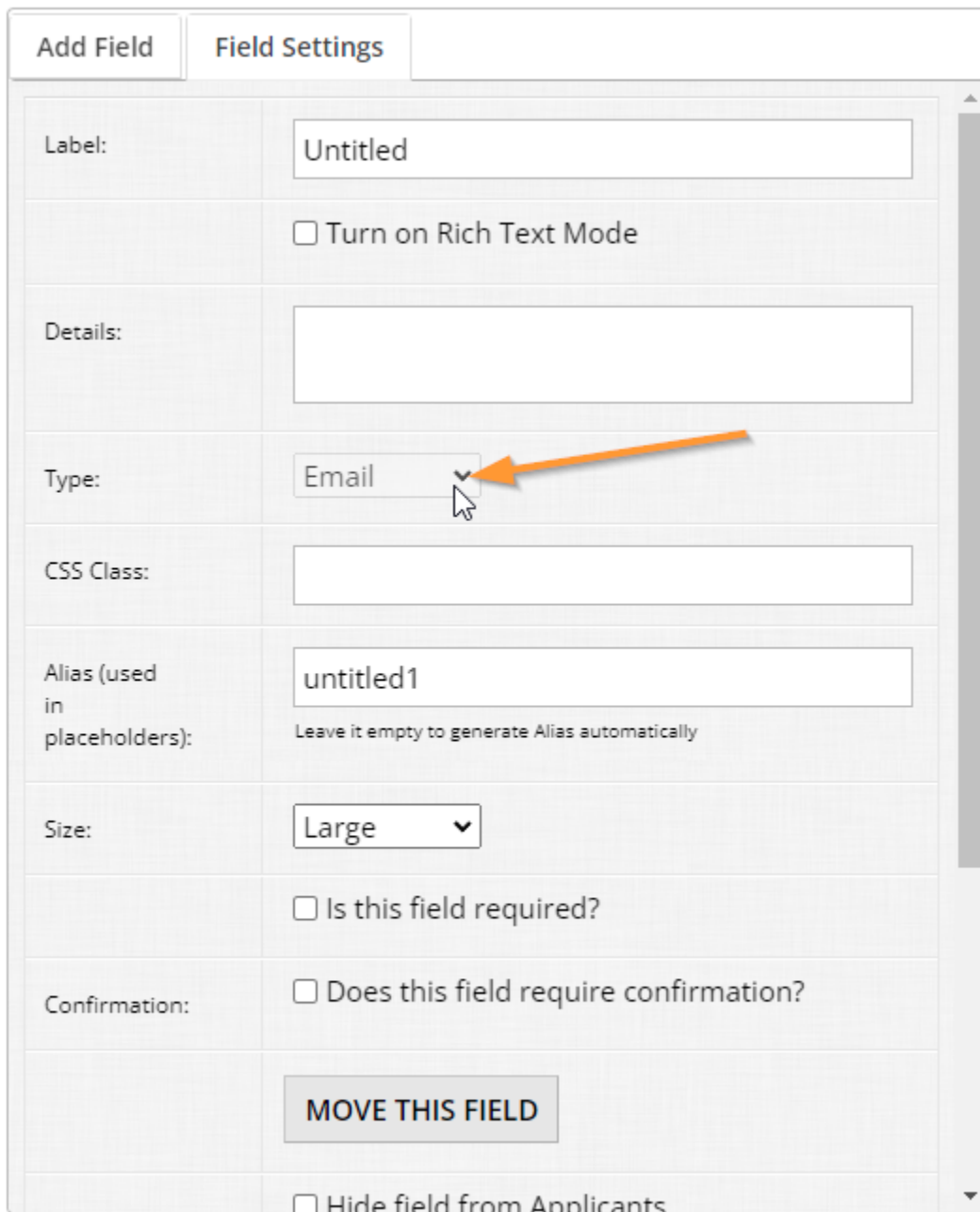
Step 4:

Once clicked, you'll see a new dropdown appear called "Migrate to" – The default option is to change this field into an email field. In this case, we'll leave it as an email field. Click "Migrate" next to this dropdown.

Step 5:

Once you click "Migrate", the form will save and it will now exist as an email field:

And that's all there is to it. Nice and easy, eh?

Module 4: Form Builder Essentials III

Table of Contents

4.1 Letter of reference I

The Letter of Reference field is a special field which supports a "subform". You can think of it as being similar to conditional logic, but it houses a separate form that is only accessible by administrators and whomever the recommender enters as a third party to provide information.

It bundles a number of items with it to be configured, which is why this particular field has multiple parts to cover.

We'll start with the overview of this field when adding it to your form.

Step 1:
When adding a Letter of Recommendation field, you will want to ensure the label is clear as to whom this letter request is meant to be sent to.

In this example, let's change the label to "Business Manager / Supervisor Verification".

Step 2:
You'll note there are two inputs within this field - The full name of the person that the request is being sent to, and the email address for that person.

By default, OpenWater does not provide any guidance text for this field. However, here is some sample language you can copy and paste into the "Details" section of the field to modify as you see fit (preferably with rich text mode enabled):

Use this field to request business verification from a third-party. The person you send this request to will **not** need to create an account in order to submit or upload verification. Once your request has been sent, she or he will receive an e-mail with instructions on how to provide the information needed for your submission. You will also receive a confirmation e-mail once we receive materials from this outside party.

Verifications must be received before the nomination deadline.

How to use this field:

1. Enter the full name of the third-party you wish to request verification from
2. Enter this individual's e-mail address in the e-mail field
3. Click the button titled "Send Request Now"
4. If your request was successfully sent, you may see a note in red like this: "(Not Received)" - It means that the third-party has yet to complete this information, not that your e-mail request itself was unsuccessful.

This way, it's clear to the applicant what this field is for, how it's used, and what field behavior to expect once a request is sent.

You should end up with something like this:

Super user tip:
As a rule of thumb, avoid specifying dates or years in your instructions - Otherwise, this results in additional text you have to update every time you clone your program for the next cycle. If you feel this isn't a hindrance to your workflow, that's fine too, just ensure to update the dates/years each cycle accordingly.

4.1 Letter of reference II

Now that our field has been created and we've gotten guidance text in there for applicants, let's dive into the subform for this field.

Step 1:
In the Field Settings tab, scroll down to the "Manage Fields" button and click on it to access the subform for this particular Letter of Recommendation field.

Step 2:
Take note that OpenWater will tell you which field you're in for your reference at the top of the form builder so you don't lose track of where you are:

Since we're asking for a verification from a business manager or supervisor, let's add some fields to collect from the third party. Start by deleting the platform-generated "Reference" field.

Add the following fields:
- First Name
- Last Name
- Email
- Telephone
- Are you a manager, owner, supervisor?
    - Manager
    - Owner
    - Supervisor
    - Other
        - Please specify your role in this business.
- Please confirm the name of this business.
- Please confirm the size of this business.
    - Small
    - Medium
    - Large

You should end up with something like this:

Step 3:
Once you've finished, click "Save Form" and then click "Back" to go to the parent level of your form.

4.1 Letter of reference III

Now that our subform is built, the last component to configure for the Letter of Recommendation field are the bundled communications.

Letters of Recommendation fields automatically include the following communication-related components:

- Email to the person writing the reference – I.e., the individual that the applicant sends the request to
- Email to applicant when reference completed – A notification email to the applicant that the Letter of Recommendation has been submitted by the third party
- Landing page content for person writing reference – When the third party accesses the subform, it is hosted on its own page of your OpenWater domain that is inaccessible except via the admin panel within a submission, or the link that is generated and emailed to the third party. The landing page content is the "header" of this page that holds the subform that the third party has to fill out. It is strongly recommended to provide additional information, context, and/or instructions.
- Confirmation page content for person writing reference – Like the confirmation page for submissions, this is a confirmation page specifically for the third party once the form has been submitted. There is no corresponding confirmation e-mail for the third party.

Let's go ahead and personalize these components.

Step 1:
In the Field Settings menu, scroll down to "Email to Person Writing Reference" and click "Edit".

Step 2:
This menu looks familiar, doesn't it? Just like with other email areas in OpenWater, you have your override, CC/BCC options as well as your email subject and message.

We're going to skip everything except for "Subject" and "Message".

Step 3:
You'll notice that OpenWater by default populates some content in here for you, notably with variables to dynamically personalize this email.

In this case, because our program is specifically nominating businesses, using the variable for the Application Name field (i.e. {ApplicationName}) doesn't make much sense. We will want to replace that variable with the placeholders for the applicant's first and last name.

Delete the entirety of the subject line and then click "Insert Variable".

Step 4:
A pop-up will appear with a massive list of variables, but don't get overwhelmed. The variables we want will be right at the top.

Take note that the variable list is broken into three columns:
- The type (information from the applicant, from the submission form, from a judge, etc)
- The data point that the specific variable is pulling

In this case, we want the first and last name values of the applicant to populate. Select {FirstName} and {LastName} from the list using the checkboxes at the left and then click "Insert Selected" at the top of the table:
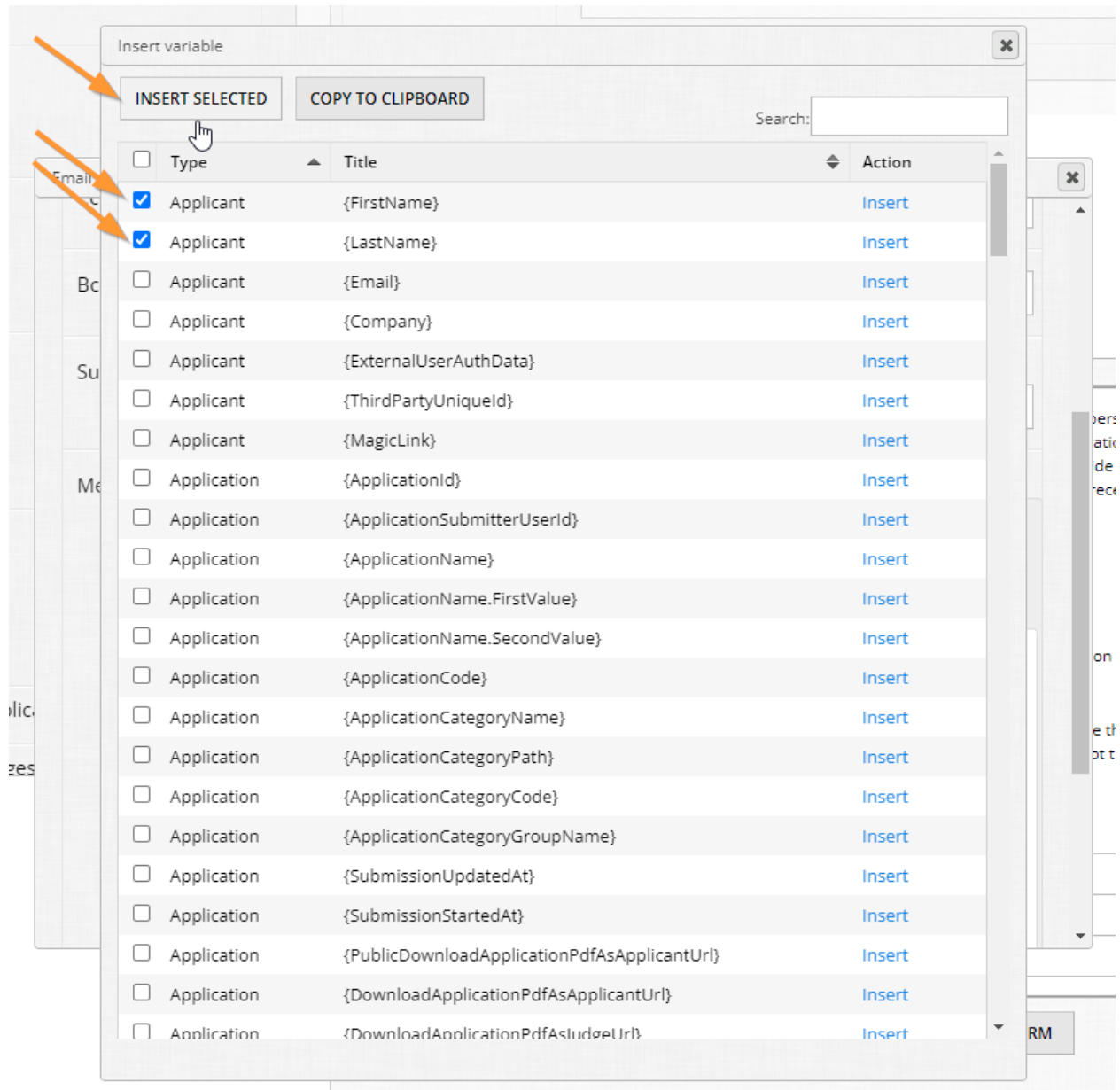
You should now have something like this in your subject line:

Step 5:
Naturally, people's names have a space between their first and last names, so add one between your variables. After the last name variable, add the following text:

is requesting business verification for the {SolicitationName}

Your subject line should look like so:

As an aside, {SolicitationName} is the variable that contains your program's name, so we can dynamically populate the title of your program through it automatically.

Step 6:
Now let's turn our attention to the body of this email.

The default content can be relatively spartan:
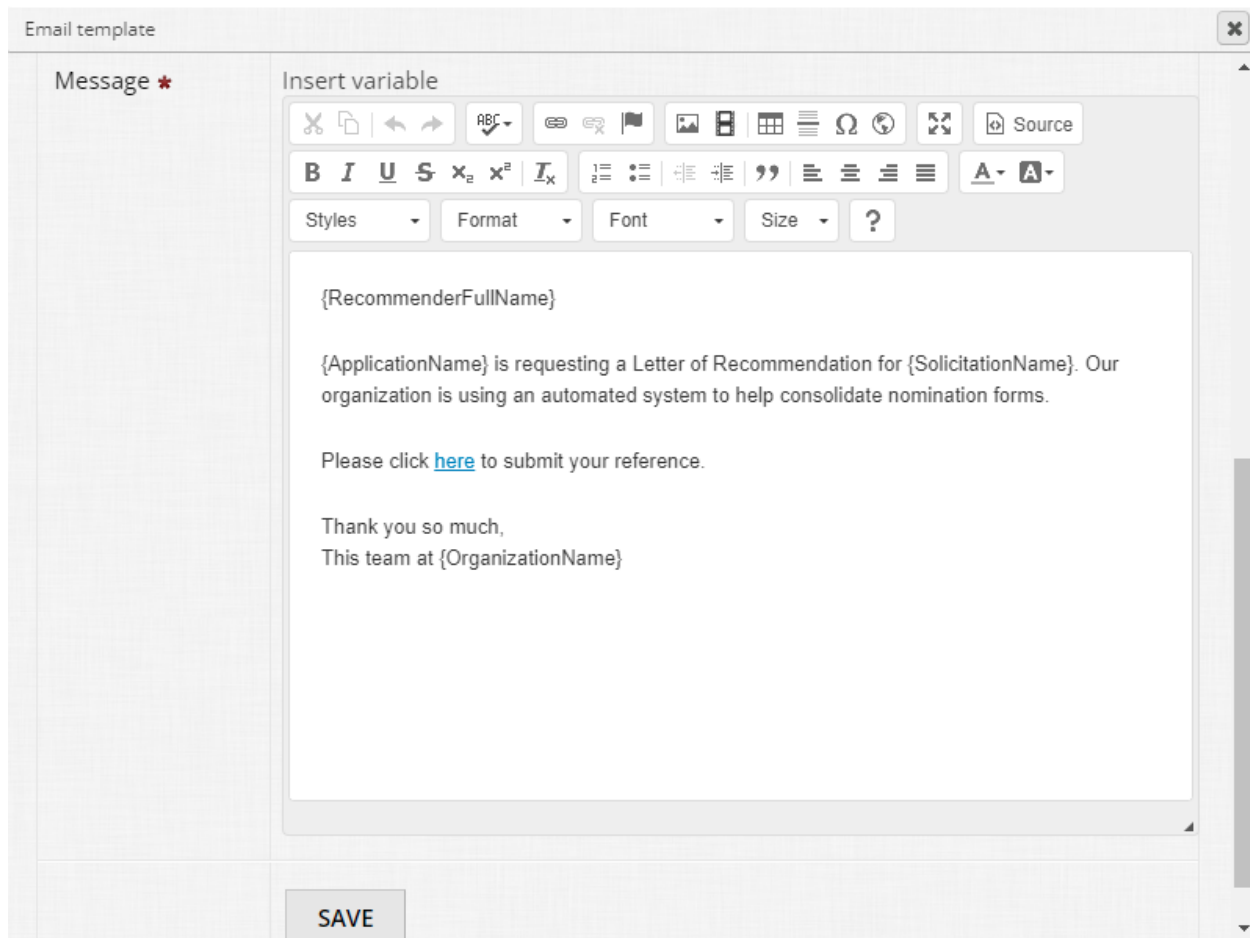
Let's tidy this up a bit.

- Add "Dear " before {RecommenderFullName} and a comma after.
- Replace {ApplicationName} with {SubmitterFirstName} {SubmitterLastName}
- Replace Letter of Recommendation with the term "business verification"
- Replace "reference" with "verification"
- Change the signature to simply "Thank you, {OrganizationName}"

If you would like to add your own personal touches, like a logo image for the signature, feel free.

You should end up with something like this:

Important: Do not remove the hyperlinked "here" as this populates the unique link for the third party to fill out the subform. Without it, the Letter of Recommendation is inaccessible and can't be filled out except by an admin.

Once you've finished, scroll down and click "Save" within the pop-up window to save your inputs.

Step 7:
Close the pop-up window and then click "Edit" next to "Email to Applicant when Reference Completed" to begin modifying this email.

Let's make this email language a little less stiff.

- Update the subject line to: "We have received a business verification for your {SolicitationName} nomination."
- Update the message content to:
  Dear {SubmitterFirstName},

  We have successfully received a business verification for {ApplicationName} from {RecommenderFullName}.

  Best of luck to your nominee!

  Thank you,
  {OrganizationName}

Your content should now look like so:

Like before, scroll down within the pop-up and click "Save" in order to save your inputs, then close the pop-up window.
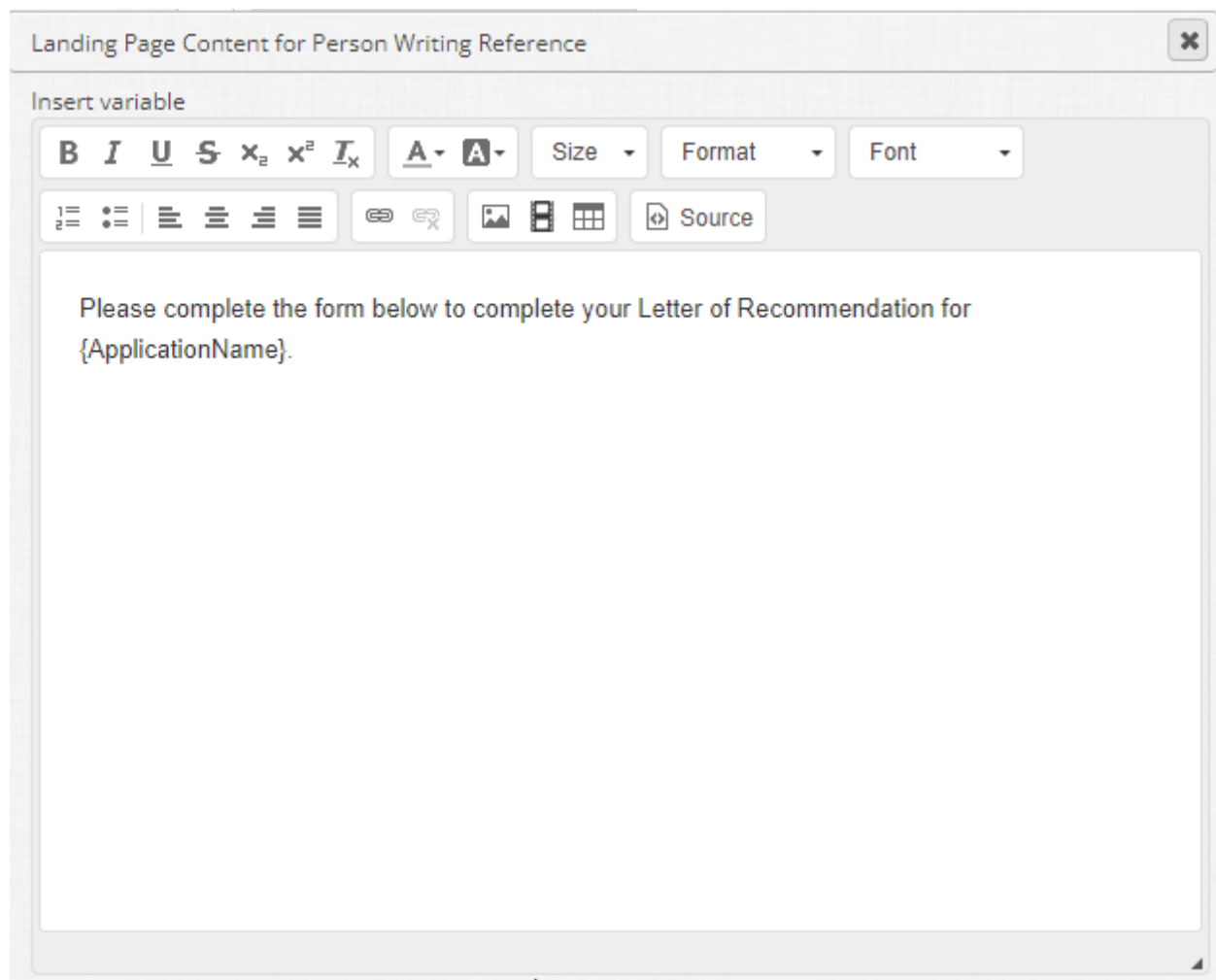
Step 8:
Time to add some landing page content for the third party! Click "Edit" next to "Landing Page Content for Person Writing Reference" to open the pop-up editor.

Step 9:

The content here is spartan. In short, this is the message that appears to the third-party when the requested individual accesses the Letter of Rec form:

We recommend personalizing this a bit with more information about your workflow and why info is being requested as an added touch. Configure this window with whatever content you like and simply X out of it when done.

Step 10:

The final piece to configure is the "Confirmation Page Content for Person Writing Reference". This content appears once the recommender submits the form and it is confirmation that the information was received (as well as subsequently appended to the requesting applicant's application).

Click "Edit" next to "Confirmation Page Content for Person Writing Reference":

Add Field	Field Settings	
Email to Applicant when Reference Completed	Edit	
Landing Page Content for Person Writing Reference	Edit	
Confirmation Page Content for Person Writing Reference	Edit	
	☐ Hide field from Applicants	
	☐ Hide field from Judges	
	CONFIGURE CATEGORY GROUP SETTINGS	
	Show Category group settings overrides	
	☐ Is this field scored?	

Step 11:

Configure the content here as you see fit and simply X out of the pop-up window once you've finished.

Step 12:

Be sure to save your changes to the form using the "Save Form" button at the bottom of the page!

Super user tip:

Letter of Recommendation fields have some additional settings which you can configure:

- Setting for making the field required or not
- Allow applicant to send request prior to finalizing - This allows the applicant to send a request for the field prior to the applicant submitting her or his application. We generally encourage having this enabled so users can submit applications once the requested information has been received.
- Allow applicant to view completed reference - OpenWater will automatically append the filled out LOR form to the applicant's application. Default behavior is that this information will not be shown to the applicant, and only to judges. Applicants do receive a note

indicating the request has been filled, but leave this unchecked if you wish to keep the LOR information received by the recommender confidential.
- Allow letter of recommendation to be received after the submission deadline - If you would like LOR data to be accepted even when your submission form is closed, you can leave this checked.

4.2 Digital signature

There may be instances where you need confirmation from the applicant (depending on your workflow) but a typed in signature or initials won't suffice.

OpenWater supports digital signature fields where the applicant can write in her or his signature accordingly. This is a special feature which can only be enabled for your instance through OpenWater staff, but once enabled, it is available as a field option for every program you have.

Please note that the digital signature field costs an additional fee, except for clients on our unlimited license. If you would like this feature enabled for your organization, reach out to your dedicated support rep at OpenWater.

One thing to keep in mind is that when adding in a digital signature field in the submission form builder, it displays like a single-line text input. Have no fear though, the front-facing form will show the full field for the user to enter her or his signature as intended.

Let's add in a digital signature field.

Step 1:
Go into the program we've been building on through these modules and go to Round Settings > Submission Form.

Step 2:
Let's add the signature field at the end of the form, so select the second question page and access the form builder.

Step 3:
Add a digital signature field at the very end and label it "Terms Agreement". For the "Details" section of the field, add the following text:

By signing my nomination, I attest that the nomination I am submitting is true and adheres to the contest rules.

Set it to required. You should end up with something like so:

Super user tip: When asking for any sort of confirmation to rules, regulations, terms and agreement, you should always make these fields required.

Step 4:
Click "Save" at the bottom of the form builder once you're done. The signature field will populate a full input box for applicants in the public form, but in the admin panel will always look like a single line text input field. If you get confused, just click on the field to double check the field type in Field Settings:

4.3 Charity check

For clients who disburse funds to other organizations such as charities, OpenWater has a special field for checking to ensure that a listed charity is indeed a real and valid entity by checking against an EIN number.

For the sake of demonstration purposes, we'll add a charity check field into the submission form you've been building through these modules.

Step 1:
Go into your submission form builder via Round Settings > Submission Form.

Step 2:
Let's put the charity check field in the Business Information question page. Click Select for it and then Manage Form Fields to open the form builder.

Step 3:
Add the charity check field and update the label to "Charity Validation". For the "Details" section, add the following: "Enter the charity's EIN number and click validate in order to confirm this organization's status."

Step 4:
Click Save at the bottom of the form builder.

You are welcome to pop back into the front-facing (public) submission form to see all of your changes in effect. Whether you start a new test entry or go back to one you have in progress is entirely up to you.

Super user tip: With the charity check field, we recommend pairing it with Eligibility Rules in order to ensure that only a valid EIN number is provided and can be submitted. Our rules engine will be covered in Module 9.
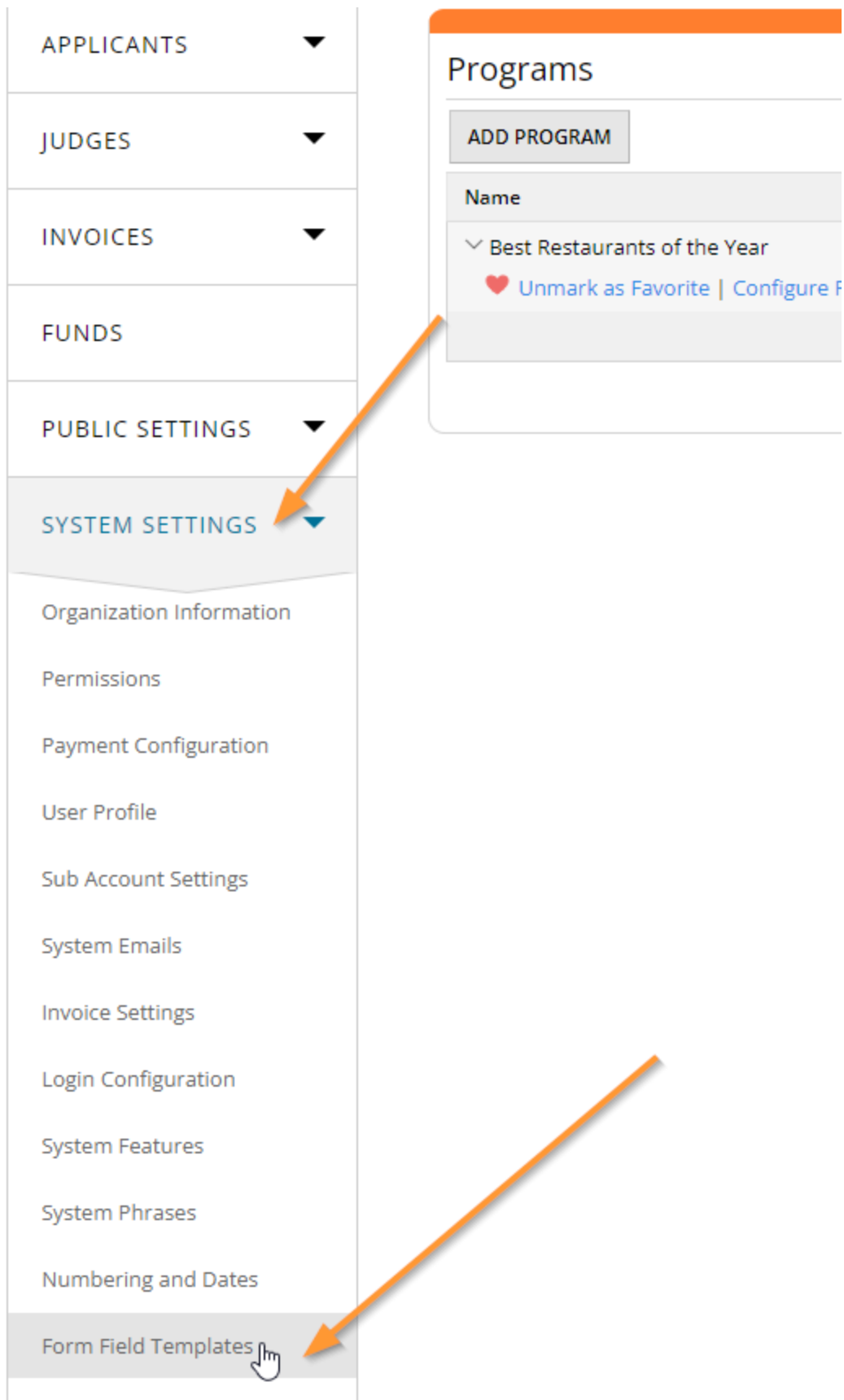
4.4 Form field templates

Another unsung hero of OpenWater functionality is the ability to create form field templates.

Form field templates are as the name implies - You can create a field or multiple fields ahead of time that can be reused in any program.

This can save you steps and time if you know of fields or questions that your organization commonly asks over and over in different forms.
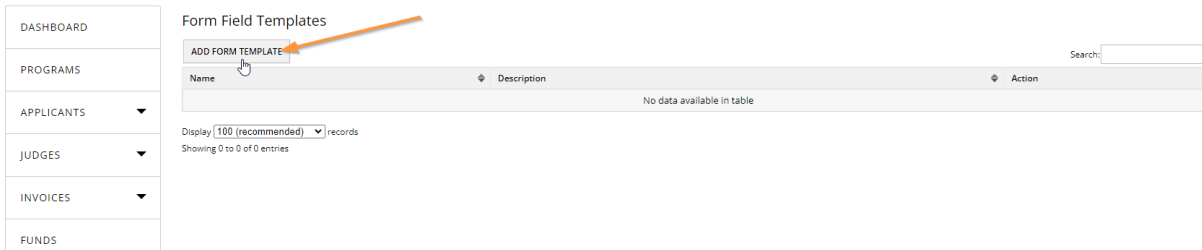
Step 1:
Within your admin panel, go to the left-hand menu and click System Settings > Form Field Templates.

APPLICANTS ▼

JUDGES ▼

INVOICES ▼

FUNDS

PUBLIC SETTINGS ▼

SYSTEM SETTINGS ▼

Organization Information

Permissions

Payment Configuration

User Profile

Sub Account Settings

System Emails

Invoice Settings

Login Configuration

System Features

System Phrases

Numbering and Dates

Form Field Templates

Programs

ADD PROGRAM

Name

∨ Best Restaurants of the Year

♥ Unmark as Favorite | Configure F

Step 2:

From the table which loads, click the button at the top to add a new field template.
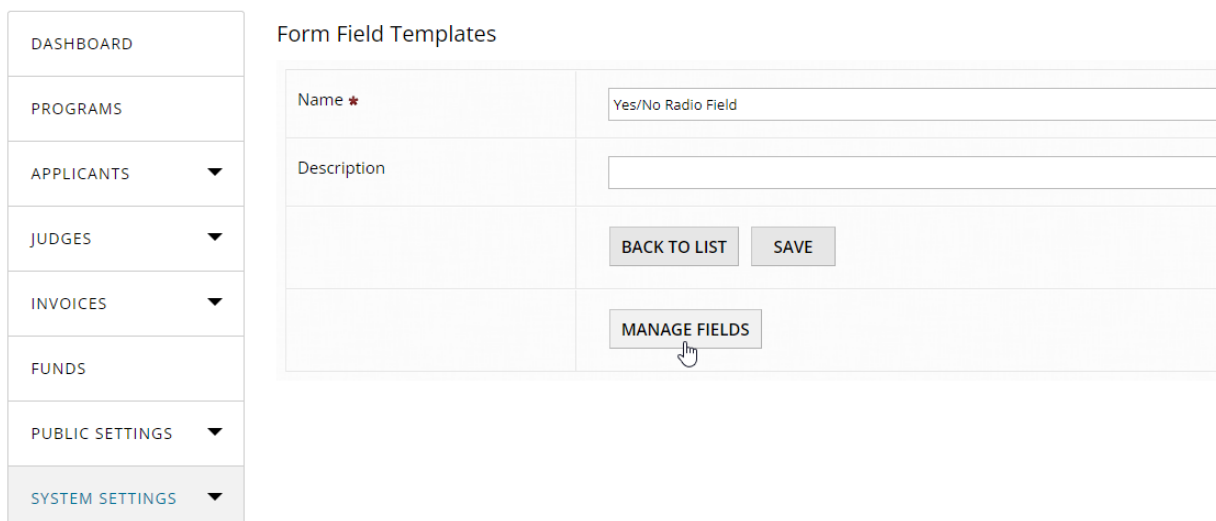
Step 3:

Like with many things in OpenWater, you have to give this form field template a name. For the sake of this example, let's keep it simple. Just call this field "Yes/No Radio Field". You have the option of giving a template a description, so keep this in mind if you ever use this feature to "bundle" multiple fields or have nested fields to give you a refresher. Click "Save" and then "Manage Fields" to begin building a form field template.

Step 4:

Field templates allow you to create either one or more fields in a single template. For the sake of this example, we'll keep it simple. Add a radio list, give it the label "Yes/No" and update the

values to have two options only, "Yes" and "No".

Then click "Save" and close the form builder.

Now, regardless of how few or many programs you have, when accessing the submission form builder you will now have an option called "Add From Template" which will allow you to quickly add in any and all templates you have configured.

Add Field	Field Settings		
Name	**Description**		**Action**
Yes/No Radio Field			Add

Preview	
Terms Agreement ★	By signing my nomination, I attest that the nomination I am submitting is true and adheres to the contest rules.
	Select form fields template

Please note that certain fields cannot be configured as Form Field Templates at this time, notably User Profile and Letter of Recommendation. For LOR fields, if you have standard helper text you wish to use every time, create a Form Field Template with a separator with this copy in it so you can quickly copy / paste as needed.

Module 5: Confirmations

Table of Contents

Confirmations are important aspects of your program that shouldn't be overlooked. They provide clarity to users and recognize certain actions they've made to ensure there are no questions or confusion by platform behavior. It may seem redundant, but in truth it isn't - If you've shopped online, wouldn't you be confused if your payment went through if there was no confirmation page once you've paid?

Confirmations within OpenWater serve a similar purpose, to ensure that the user is aware that an action was made and it is acknowledged in some capacity.

5.1 Confirmation Email

While the submission form and evaluation form are crucial parts of every program, there are other details to configure to bring it all together.

Another vital component to programs are confirmation e-mails. As the name implies, these automatically send to the applicant once she or he has submitted an application into your program. Think of it like shopping online - It's a receipt of your action, such as a purchase.

Since we covered this in an earlier module, we won't go as in-depth as before, however it is imperative to have at least one confirmation e-mail built for your program so there is a receipt of user interaction with your form.

5.2 Confirmation Page

Confirmation pages are closely related to confirmation emails, but serve a slightly different purpose. To reuse the online shopping example, when you check out and pay, usually a message appears giving you a confirmation that the transaction successfully happened. In OpenWater, the confirmation page serves the same general purpose.

However, a good rule of thumb is to keep any important information such as dates or follow-up information in your confirmation e-mail(s), and general confirmations in the confirmation page. Reason being is that when your applicant navigates away from the confirmation page, that information is lost and the applicant will not have a copy of that information. Whereas a confirmation e-mail will get sent on submission and provide the applicant with a record of the action.

So for the important details about your program, like dates, follow-up information → Email
General "thank you" → Confirmation page

Since we covered this in an earlier module, we won't go as in-depth as before, however there is one more important thing to be aware of with confirmation pages:

Confirmation pages are round-specific, so if your workflow has multiple rounds where submissions are collected by applicants, you will need to configure your confirmation page for each round accordingly. If your additional rounds are judging only, you won't have a confirmation page for the round to configure.

5.3 Confirmation PDF

OpenWater supports data exports in a number of ways, including the ability to export a PDF for applicants.

Although we're using the term "Confirmation PDF" for the sake of this module, this really encompasses two components: the submission form in PDF format from the view of the applicant, as well as an invoice PDF if/when you have a workflow which is collecting fees of some kind.

For this, we'll focus on the former - We'll call it the "applicant PDF" for simplicity going forward.

By default, OpenWater will automatically create a PDF layout when exporting an applicant's application.

Hopefully you've started a test entry at this point as we will go view a sample PDF.

Step 1:
From the dashboard, go to your program and click "Manage".

Step 2:
Go to the tab at the top called Submissions and click on it to open the dropdown. Then click "View All".
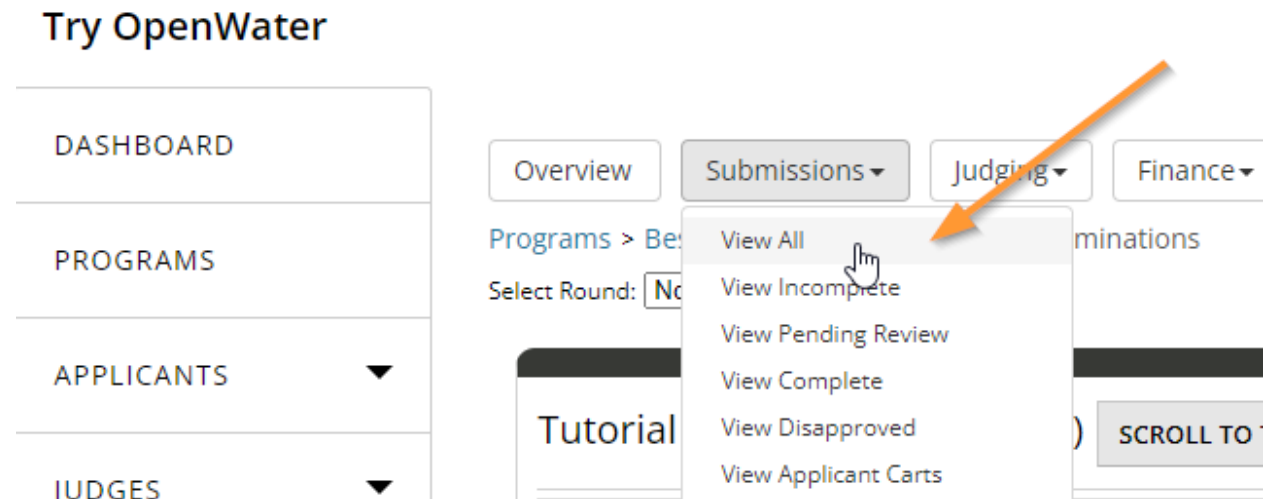
Step 3:
Once the table loads, find your test entry in the list and click "Select" in the right-hand side under the Action column. This will open the application details page in a new tab for you.
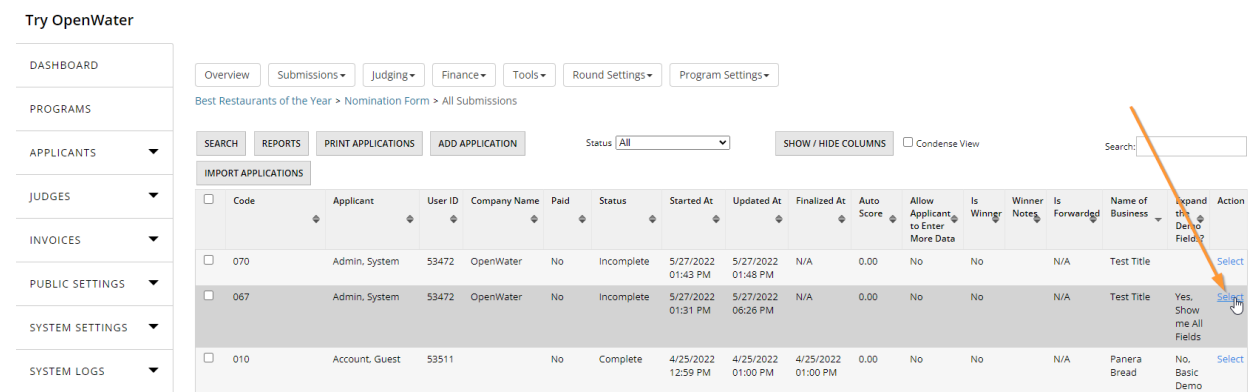
Step 4:

Once the application details page loads, you will notice some hyperlinks that are always present at the top of the page. Click the link called "Download PDF as Applicant".

Step 5:
View your PDF. OpenWater will generate a layout like so:

Let's make a few modifications to the PDF.

Step 6:
Go back to your browser's tab from steps 1 - 3 and click on Program Settings to open the dropdown, then click "Applicant Settings".

Step 7:

You should see the following menu:

Scroll down and let's quickly adjust the applicant PDF. Tick all of the boxes for the following:

- Generate image thumbnails
- Merge uploaded PDFs
- Merge uploaded Word docs (doc, docx, rtf)
- Merge uploaded PowerPoint presentations (ppt, pptx)

Once you've done so, scroll to the bottom and click "Save".

What we've just done is enabled OpenWater's PDF engine to take any of the above files that may be present in an application and merge them into the applicant PDF output you pulled in Step 5. So instead of pulling multiple files, you're able to pull the application as a packet in one go.

Some things to take note:

- If you have any fields hidden from applicants in the submission form, these will be omitted from the applicant PDF.
- The PDF engine OpenWater uses can merge/append the following files: images, PDFs, Word files, PowerPoint files only

● Any other files that are uploaded which are not visual in nature, such as audio or video files, will have a link to the file generated within the PDF

5.4 Email Wizard

The Email Wizard is a critical tool that allows you to communicate en masse to various users within your OpenWater program.

It allows you to send reminders, notifications, et cetera to applicants and judges in a way that saves you time and effort from having to communicate outside of the platform.

Common scenarios we see used for the email wizard:
● Reminder emails to applicants with in progress applications to submit by the deadline
● Reminder emails to judges with in progress scorecards to finish scoring
● Reminder emails to judges that their logins are ready and it's time to start scoring
● Notifications to applicants which have been approved or awarded
● Notifications to applicants of rejection or not being awarded
● Notifications to applicants that the next year's program is open for submissions

Keep in mind that the email wizard can only email users who have interacted with your OpenWater program – It cannot email users from another program and it cannot email people who have not interacted with your instance.

The email wizard is round-based. That means that "email blasts" you create are specific to each round of your program. So for example, if you have a program with multiple rounds of submissions from applicants, any reminder emails you build have to be rebuilt in each respective round you wish to use them in.

By default, OpenWater will always generate a number of email blasts that are partially configured for you to help you get started with the email wizard. Each pre-configured email blast

will have a descriptive name to indicate to you what its usage is:

Let's have you build a reminder email.

Step 1:

Go into your program and then Tools > Email Wizard.

Step 2:

Save yourself a few steps and clone the email blast called "Applicants who have Incomplete entries".

Step 3:

Give it a name. Click "Save" to finish the cloning process.

Step 4:

When the page reloads, you'll be brought to the General tab for this particular email blast:

On the General tab of an email blast, you have the following options:

- Name - The name of this email blast. This is only visible to administrators.
- Description - An optional description of the email blast. This is only visible to administrators. We recommend filling out this field if you have multiple conditions or other notes to be aware of with regards to what this email does, what it's for, etc.
- Type - This tells OpenWater what kind of email and recipient should be associated with this email blast.
  - One email per submission - This sends out an email or multiple emails to applicants per each submission the applicant has. If applicants have multiple entries, this will send a unique email for each.
  - One email per applicant - This sends out a single email to each individual applicant, regardless of how many entries the applicant may have. If you have a workflow where applicants can have multiple entries, it may be wise to utilize this email blast type to avoid accidentally spamming your applicants.

- ○ One email per judge - This sends out a single email to each individual judge within the round.
  - ○ One email per session - If your workflow utilizes OpenWater's session builder, this option will be selectable when sessions are enabled and will allow you to send a single email per session to the session chair(s).
- ● Filter Type - For your convenience, OpenWater has a number of common conditions already set for you:

This can save you time in building your email blast if the scenario you need is already covered in this list. Alternatively, if none of these pre-configured filter types are quite what you need, you can choose "All Submissions match Custom Conditions" to set your own parameters of what OpenWater should be looking for and which matches the parameters you set before sending out the email.

For this module, we'll keep it simple and keep our filter type as is.

Step 5:
An important thing to keep in mind when dealing with email blasts, is that OpenWater will **never** immediately send off your email. You will always be prompted to preview your email blast first – This is to prevent accidentally sending off mass communiques when you're not actually ready to do so.

When you're ready, click "Save" and then go to the tab called "Email Template".

Step 6:
The email template area is essentially the same as when you built your confirmation e-mail in module 1. For this module, let's go down to the Subject and Message line.

In the subject line, let's change the message to "Reminder: You have nominations in progress"

For the message, you can modify it however you like - The {ListOfIncompletedApplications} variable will populate every in progress application the recipient has, which can be useful.

When you're ready, click "Save and Preview" at the bottom of the page.

Step 7:

When you preview your email message, OpenWater will give you the following menu:

- Matches found - Clicking the 'download matches' link will generate a spreadsheet file which will display a list of all recipients who will receive this particular email blast based on the settings you have configured. This is a helpful tool at your disposal, particularly when dealing with email blasts where custom conditions are enabled to ensure your message is going to the correct recipients.
- Subject - This will preview your subject line; if you are utilizing variables in the subject, OpenWater will populate the variables with real data from applications you have in your program
- Message - This will preview your message content; if you are utilizing variables in the message, OpenWater will populate the variables with real data from applications you have in your program

At the bottom, you have the following controls:
- Email me preview - You can email yourself a copy of your email blast directly in order to double check the formatting. It will send to the email address that you are logged in the admin panel with.
- Send now - If you are satisfied and wish to send this email blast right away, you can send it off immediately.
- Schedule - If you would like to ensure this email blast is sent at a specific date and time, you can schedule the email to send at a future date and time of your choosing. This is our recommended method so you can set it and forget it.

If you like, feel free to send yourself an email preview. Let's check out the Schedule feature while we're here.

Step 8:
Click the "Schedule" button at the bottom to go to the scheduling settings.

Nomination Form > Email Blasts > Incomplete application reminder

General	Email Template	Preview	Schedule

Schedule on ＊   [ ]   [Hours ▾] [Minutes ▾] [AM or PM ▾]

SCHEDULE EMAIL

You can only schedule an email blast to send once at a future time and date, so be aware if you are scheduling email blasts, you will have to update the schedule day/time if you wish for it to be repeatedly sent.

Feel free to set a day and time if you like. When an email is scheduled and/or has been previously sent, this information will appear in the Email Wizard overview for your reference.

Otherwise, this concludes the Email Wizard functionality - These concepts apply to all email blasts you may create and give you flexibility to communicate en masse how you need for your workflow.

Module 6: Payments and Fee Collection

Table of Contents

While many workflows do not require payment, there are plenty that do in OpenWater. Some examples of payment workflows include:

- Submission fees, e.g. X fee per entry
- Coupon codes and waivers
- Optional donations
- Paying for tickets

Since these are common scenarios, OpenWater as a platform accommodates fee collection in the event your workflow calls for it. As a prerequisite, you will need to configure a payment gateway of some kind in order to collect fees.

At the time of this writing, OpenWater supports the following options for payments:
- Paying on location
- Paying by check
- Paying via PayPal Express Checkout
- Paying via debit/credit card with a different merchant account (e.g. Stripe, PayPal, Braintree, etc)

Be aware that our platform functions as a gateway only when utilizing payments - Meaning that you will need your own payment processor / merchant account separate from OpenWater to utilize it in the platform (if taking payments through anything other than location/pay by check).

For this module, we won't configure a payment gateway - However, if you would like to read up on this component in depth, feel free to peruse our help desk on the topic.

6.1 Price Rules

Price rules are as the name implies - The parameters in which a fee or fees should be calculated within a round in OpenWater once an applicant is ready to submit her or his entry.
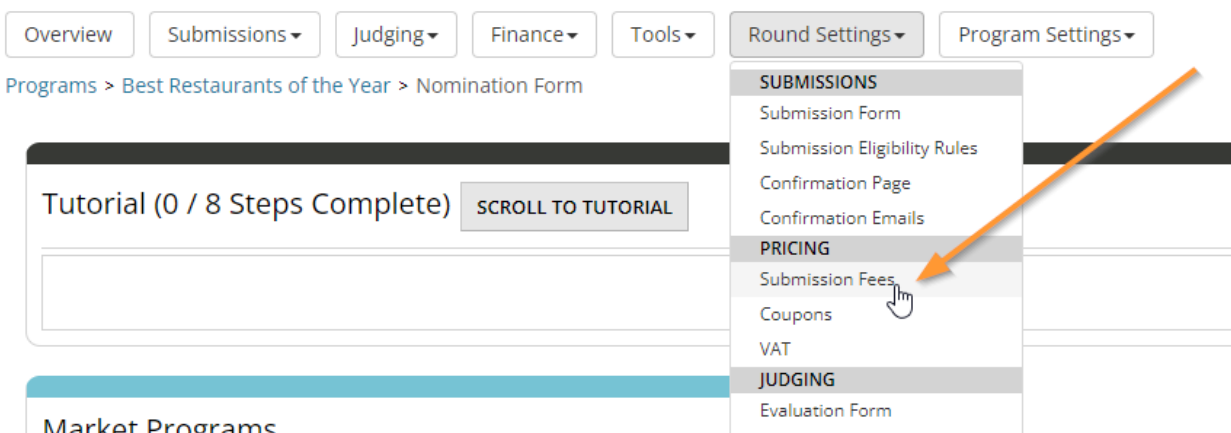
Let's set up a simple, sample price rule.
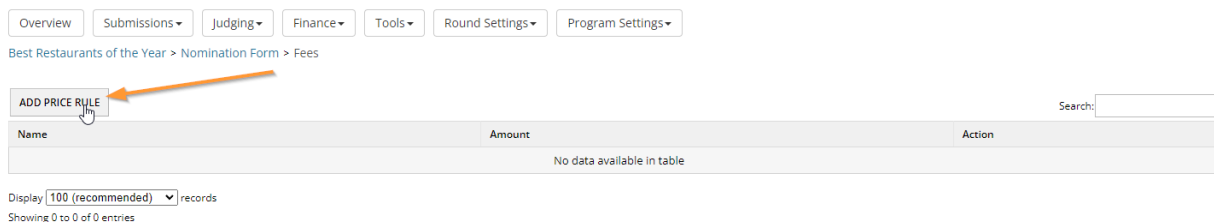
Step 1:
Go into your program via "Manage".

Step 2:
Go to Round Settings and click to open the dropdown, select "Submission Fees" from the list.

Step 3:
Once the page loads, you'll have a blank table by default. We need to add a price rule. To get started, click the "Add Price Rule" button at the top of the table.

Step 4:
Now we need to decide on some basic settings to create our rule. Take note of the following options:

- Name - This is the name of the rule and is visible to applicants, so ensure the price rule has a clear, concise name.
- Charge or discount - This tells OpenWater if this rule should charge X amount or if it should discount X amount.
- Amount - The amount of money that should be charged or discounted for this rule.
- Multiple amount by field value - In scenarios where applicants are buying things like tickets or registrations, you can multiply this price rule based on a number field within your form.

For now, build your price rule with the following:
- Name: Per Entry Fee
- Leave it set to Charge $
- Enter 10 for the amount
- Leave the multiplication option unchecked

You should have something like this; when ready, click "Save" to create the rule:

Step 5:
The page will reload and you will be brought to the Conditions table for your rule.

Conditions tables are present in many areas in OpenWater and allow you to set parameters of when your rule(s) should take effect.

If you are familiar with the concept of truth tables or and/or statements in programming, the Conditions table is essentially the same idea.

You will always have two sections, [all] and [any]. The former means that any and all conditions added to the [all] table **must** be met in order for the rule to apply. The latter means that any and all conditions added to the [any] table can include any data that matches the condition, but it isn't a hard requirement.

In this example, since we want a fee to be charged for every application that exists in the applicant's cart, we will leave the Conditions tables empty. So for every application that an applicant creates, OpenWater will charge $10 per entry.

Here are some common conditions we see for price rules:
- Setting a condition that charges an early bird fee as long as the entry is finalized on or before XYZ date
- Setting a condition which charges a standard fee as long as the entry is finalized on or after XYZ date
- Multiply a price rule based on a number value that the applicant fills out (for example, making donations or indicating the amount of people registering for tickets)

6.2 VAT

Value Added Tax (VAT for short) is a common requirement for our European and Australian clients where a tax rate needs to be applied to any fees collected from OpenWater.
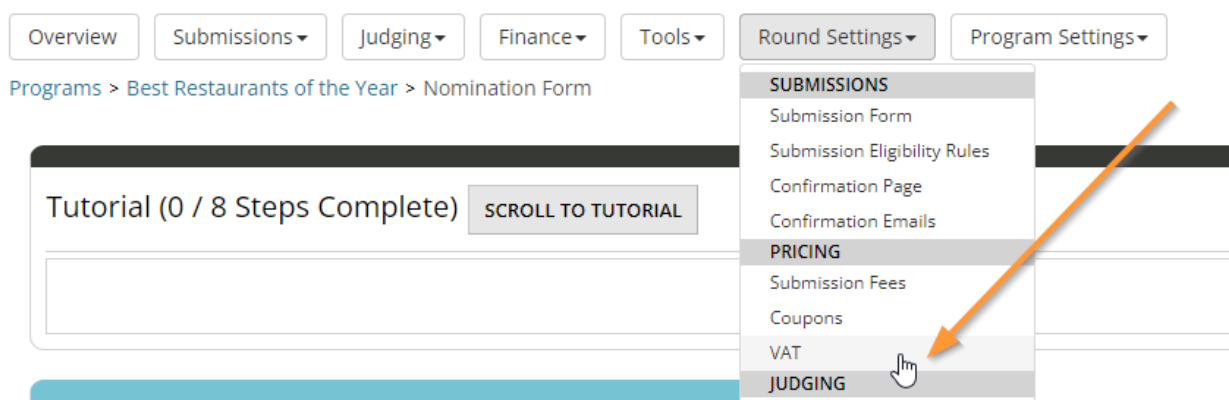
Adding VAT is almost identical to 6.1.

Step 1:
Go into your program via "Manage".

Step 2:
Go to Round Settings and click to open the dropdown, select "VAT" from the list.

Step 3:
Once the page loads, you'll have a blank table by default. We need to add a price rule. To get started, click the "Add Price Rule" button at the top of the table.

Step 4:
Now we need to decide on some basic settings to create our rule. Take note of the following options:

- Name - This is the name of the rule and is visible to applicants, so ensure the price rule has a clear, concise name.
- Charge by amount or percentage - This tells OpenWater if this rule should charge X amount or if it should charge by X percentage
- Amount - The amount which should be charged for this rule.
- Multiple amount by field value - In scenarios where applicants are buying things like tickets or registrations, you can multiply this price rule based on a number field within your form.

For now, build your price rule with the following:
- Name: VAT
- Set to Charge %
- Enter 10 for the amount
- Leave the multiplication option unchecked

You should have something like this; when ready, click "Save" to create the rule:

Name ✱	VAT
	Provide a name for this rule (to be applied to the overall cart)
	Charge Additional % ⌄
Amount ✱	% 10
	☐ Multiply Amount by Field Value
	BACK SAVE

Step 5:
The page will reload and you will be brought to the Conditions table for your rule.

General	Conditions

This rule will apply in all cases. Add one or more conditions to restrict when this applies.

Meets [all] of the following conditions

ADD CONDITION

Target	Condition	Value	Action
	No conditions set, please click Add Condition		

Also meets [any] of the following conditions

ADD CONDITION

Target	Condition	Value	Action
	No conditions set, please click Add Condition		

Conditions tables are present in many areas in OpenWater and allow you to set parameters of when your rule(s) should take effect.

If you are familiar with the concept of truth tables or and/or statements in programming, the Conditions table is essentially the same idea.

You will always have two sections, [all] and [any]. The former means that any and all conditions added to the [all] table **must** be met in order for the rule to apply. The latter means that any and all conditions added to the [any] table can include any data that matches the condition, but it isn't a hard requirement.

In this example, since we want taxes to be collected for every application that exists in the applicant's cart, we will leave the Conditions tables empty. So for every application that an applicant creates, OpenWater will charge 10% VAT per entry.
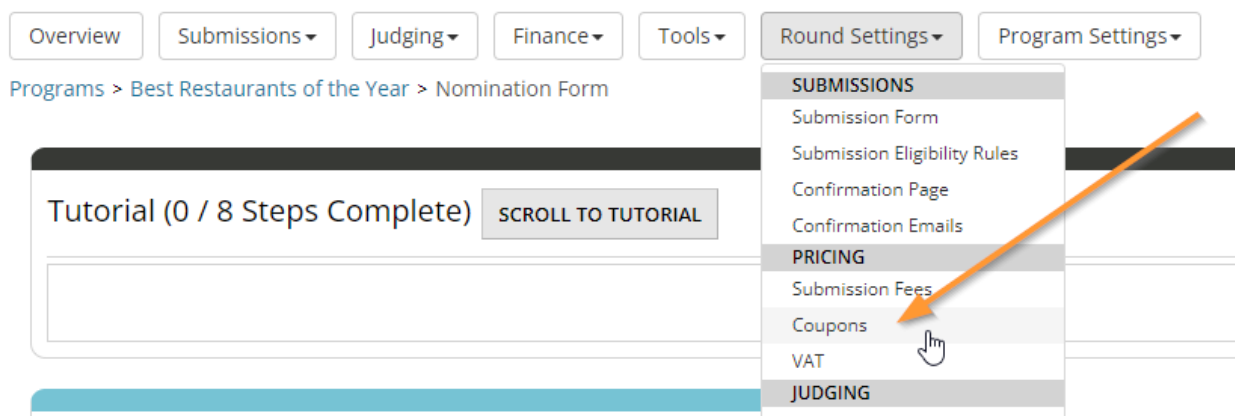
6.3 Coupons

Coupons are a great way to incentivize applicants in a pay-to-play workflow or to accommodate scenarios where you would like to discount or waive fees for applicants.

Step 1:
Go into your program via "Manage".

Step 2:
Go to Round Settings and click to open the dropdown, select "Coupons" from the list.

Step 3:
Once the page loads, you'll have a single option in the table called "Rules to Apply to Cart when No Coupon Code is Entered". This is only something you should modify in scenarios where you want a price rule to apply (separately from your main submission fees) without the applicant needing a coupon code.

For now, let's add a new coupon. To get started, click the "Add Coupon" button at the top of the table.

Step 4:
Now we need to decide on some basic settings to create our coupon. Take note of the following options:

- Name - This is the name of the coupon and is visible to applicants, so ensure it has a

clear, concise name.
- Code - The coupon code that the applicant must enter for this coupon to apply to her or his cart.
- Coupon enabled - Whether or not this coupon should be actively usable by applicants or not.
- Number of uses allowed in total - Whether there should be a maximum amount of times this coupon can be used, regardless if an applicant uses it multiple times.
- Number of uses allowed per user - Whether there should be a maximum amount of times which an applicant can use this coupon.

Because the last two options are optional, you can set these limits if you choose via a numerical value.
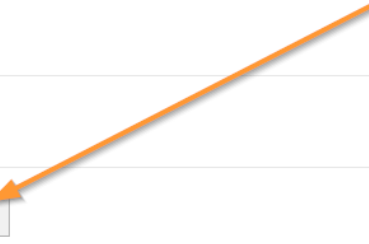
For now, build your price rule with the following:
- Name: 50% Discount
- Code: TAKE50

You should have something like this; when ready, click "Save" to create the rule:

Nomination Form > Submission Cart Coupons > New Coupon
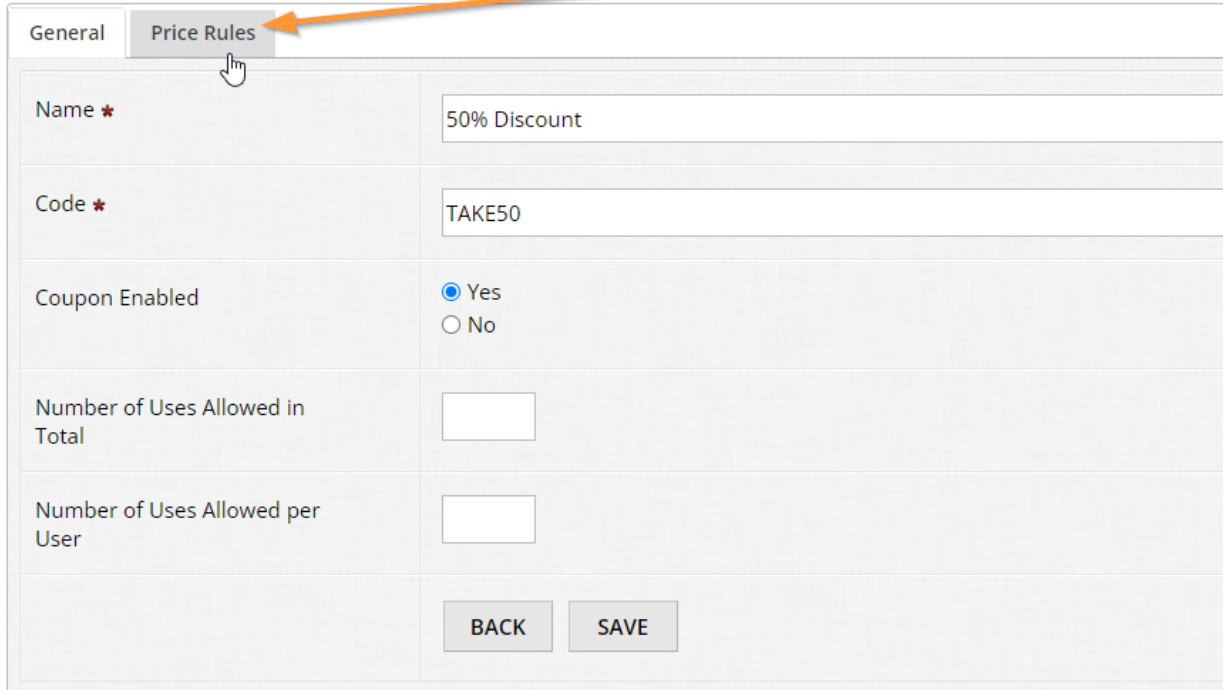
Name ✱	50% Discount
Code ✱	TAKE50
Coupon Enabled	⦿ Yes ◯ No
Number of Uses Allowed in Total	
Number of Uses Allowed per User	
	BACK SAVE

Step 5:
The page will reload and you now have the "Price Rules" tab available to you:

Now, coupons give you the option to target either individual entries within the cart and/or the cart overall.

Just like with the [all] and [any] tables, you can mix and match price rules in a similar way for a single coupon.

Step 6:
To start, let's add a rule for an individual entry in cart. Click "Add Price Rule" to get started:

General | Price Rules

Set Rules for Individual Items

ADD PRICE RULE   Search:

Name	Amount	Action
	No data available in table	

Display 100 (recommended) records
Showing 0 to 0 of 0 entries

Set Rules for Overall Cart

ADD PRICE RULE   Search:

Name	Amount	Action
	No data available in table	

Display 100 (recommended) records
Showing 0 to 0 of 0 entries

Just like when setting up our earlier price rule, we need to fill out a few settings in order to create it.

- Name - The name of the rule.
- Behavior of the rule - The dropdown allows you to charge a fixed amount, charge an additional percentage, discount a fixed amount, or discount a percentage.
- Amount - The amount, either fixed or percentage, in which to charge or discount.
- Multiply amount by field value - Enable this to allow this rule to multiply based on a number field's value within the submission form.

For this example, fill out the following:
- Name - BOGO
- Discount - Discount by %
- Amount - 50

You should have something like this, click "Save" once you're ready:

Submission Cart Coupons > 50% Discount > New Price Rule

Name *	BOGO
	Provide a name for this rule (to be applied to individual items)
	Discount By %
Amount *	% 50
	☐ Multiply Amount by Field Value
	BACK SAVE

Step 7:
Now we're at our condition tables for what parameters this individual price rule within our coupon should take into consideration.

Let's make it take effect for every other entry in the user's cart, effectively making every other entry half off.

Click "Add Condition" under [all] to get started.

General	Conditions

This rule will apply in all cases. Add one or more conditions to restrict when this applies.

Meets [all] of the following conditions

ADD CONDITION

Target	Condition	Value	Action
No conditions set, please click Add Condition			

Also meets [any] of the following conditions

ADD CONDITION

Target	Condition	Value	Action
No conditions set, please click Add Condition			
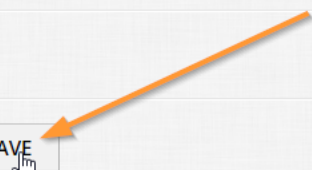
Step 8:
Let's tell OpenWater the parameters it needs to apply the rule. Select the following in the dropdowns which appear:

- Group - The different sets of parameters you can choose from. Submission fields, user profile fields, and other. For this example, choose "Other".
- Target - The individual parameter within the group set you wish to target. In this example, we want to target the numerical order of the entries in cart. Choose "In Cart Item Number"
- Condition - How this parameter should apply. In this case, select "Every Nth"
- Value - Enter 2

You should end up with something like this, click "Save" when you're done:

Submission Cart Coupons > BOGO > BOGO

What we're telling OpenWater here is that for every 2nd entry, take 50% off the submission fee.

Using coupons, here are some other scenarios that you can accommodate with the functionality in 6.3:
- Waive entry fees entirely
- Waive entry fees for any entries after a set amount (e.g. "unlimited" pricing)
- Discount entry fees for certain categories
- Charge an additional fee for certain categories or responses
- And so on

Super User Tip #1:

You can build a condition to set price rules and coupons to take effect automatically and/or expire at a certain day/time. This tends to be a common scenario.

To build such a condition you will need to set the following:
- Group - Others
- Target - Submission Finalized At
- Round - The applicable round this should apply (if you have a multi-round workflow)
- Condition - Is greater than, is greater than or equal to, is less than, or is less than or equal to
- Value - Choose the day and time which this should take effect

Here is a sample of such:

General	Conditions

Group	Others
Target	Submission Finalized At
Round	Nomination Form
Condition	Is greater than or equal to
Value	5/1/2022 12 00 AM

CANCEL   SAVE

This coupon will only take effect if the applicant is using the coupon on or anytime after May 1st, 2022 from midnight onwards. You can stack another condition that works in the opposite direction if you want the rule to expire at a certain time and date.

Super User Tip #2:

When building price rules, especially with any time/date style rules covered in the first tip, test them thoroughly with test entries! This way you don't end up with loopholes in your rules where the fees/coupons aren't applying as expected and you can ensure you are collecting fees as intended.

6.4 Cart Options

Now that we covered individual items, let's talk about overall cart options.

Step 1:
Go back to the price rules table for your coupon. Feel free to delete the coupon we built in 6.3 and then click "Add Price Rule" under the "Set Rules for Overall Cart" section:

General   Price Rules

Set Rules for Individual Items

ADD PRICE RULE   Search:

Name	Amount	Action
	No data available in table	

Display 100 (recommended) ∨ records
Showing 0 to 0 of 0 entries

Set Rules for Overall Cart

ADD PRICE RULE   Search:

Name	Amount	Action
	No data available in table	

Display 100 (recommended) ∨ records
Showing 0 to 0 of 0 entries

Step 2:
Just like we've covered before, there are some pieces of information you need to fill out in order to create the rule.

Let's make this coupon discount the entire cart's total by half. Set your rule to the following:
- Name - Half off
- Discount by %
- Amount - 50

You should have something like this, click "Save" when you're ready:

Submission Cart Coupons > BOGO > New Price Rule

Name *	Half off
	Provide a name for this rule (to be applied to the overall cart)
	Discount By % ∨
Amount *	% 50
	☐ Multiply Amount by Field Value
	BACK SAVE

For a simple coupon like this, we don't need to set any conditions. This will discount the entirety of the user's total by half. If you need to narrow down when this applies, you can use the [all] and [any] tables to specify.

6.5 Invoice PDF

When taking in payments in any sort of pay-to-play workflow, your applicants will (and should) always receive a receipt when paying for their submissions in OpenWater.

To accommodate this, OpenWater has an invoice PDF built in to the platform and you can customize it with your organization's branding as you see fit.

Most organizations only need one invoice template, so we'll modify the global invoice template for 6.5. Global in this case means that this invoice template will be used for any and all programs in your admin panel which are taking in payments, so keep that in mind.

Step 1:
To get started, located "System Settings" in the left-hand menu and click to open the dropdown, then click "Invoice Settings".

Try OpenWater

DASHBOARD

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Best Restaurants of the Year > Nomination Form

ADD COUPON

Name
Rules to Apply to Cart when No Coupon Code is Ent

Display [100 (recommended) ▾] records

Showing 1 to 1 of 1 entries

Step 2:
There are a few settings available to you as part of your invoice settings:
- Request purchase order / notes
- Render invoice template from WYSIWYG - This uses our rich text editor to generate your invoice PDF. If you are savvy with CSS/HTML, or you have a front-end developer on your team, you can utilize "Source" mode to adjust the template directly. If you aren't, you can just use the rich text editor as is.
- Render invoice template from template - This uses our Handlebars editor and engine to generate your invoice PDF.*
- Invoice template - If WYSIWYG is enabled, you will see the rich text editor with the default invoice template that OpenWater generates for you.
- Preview on save - Download a preview PDF when you save to check your work.

Invoice Settings

	☐ Request Purchase Order / Notes
	◉ Render Invoice Template from WYSIWYG ○ Render Invoice Template from Template
Invoice Template	Insert variable Invoice # {InvoiceNumber} **Fees** {InvoiceLineItems} Total: {InvoiceTotal} {PaymentInformation}
	☐ Show Preview on Save
	SAVE

Step 3:
The template is barebones, allowing you to modify as you see fit. Let's gussy this up a bit by adding a banner image.

If you don't have a banner image on hand, feel free to click here and download a sample banner to use.

Click on the first row of the table in the invoice template, then click the image icon in the rich text editor.

Invoice Settings

☐ Request Purchase Order / Notes

⦿ Render Invoice Template from WYSIWYG
○ Render Invoice Template from Template

Invoice Template

Insert variable

Invoice # {InvoiceNumber}

Fees

{InvoiceLineItems}
Total: {InvoiceTotal}
{PaymentInformation}

body   table   tbody   tr   td

☐ Show Preview on Save

SAVE

Step 4:
You should see the media manager popup appear. Click the "Add Picture" button to get your banner image added in.

Invoice Settings

☐ Request Purchase Order / Notes

⦿ Render Invoice Template from WYSIWYG
○ Render Invoice Template from Template

Invoice Template

Insert variable

Add picture   ✖

ADD PICTURE   Search: [   ]

Name	Type	Size	Action
No data available in table			

Display [100 (recommended) ▾] records

Showing 0 to 0 of 0 entries

Invoice # {InvoiceNumber}

{InvoiceLineItems}
Total: {InvoiceTotal}
{PaymentInformation}

body   table   tbody   tr   td

☐ Show Preview on Save

SAVE

Step 5:
Give your image a name, then click "Choose File" and select the banner image you need to upload from your computer. Once you've selected your file, click "Save".

Step 6:
Once you've saved, OpenWater will then insert your banner image for you like so:

You can do similar to add a footer. Now that we have an image in there, let's add a few more details to this invoice to make things easier for accounting / recordkeeping purposes.

Select the small box above the black row to start inputting text, then click the "Insert Variable" link above.

Invoice Template

Insert variable

1050 x 250

Invoice # {InvoiceNumber}

Fees

body   table   tbody   tr   td

☑ Show Preview on Save

SAVE
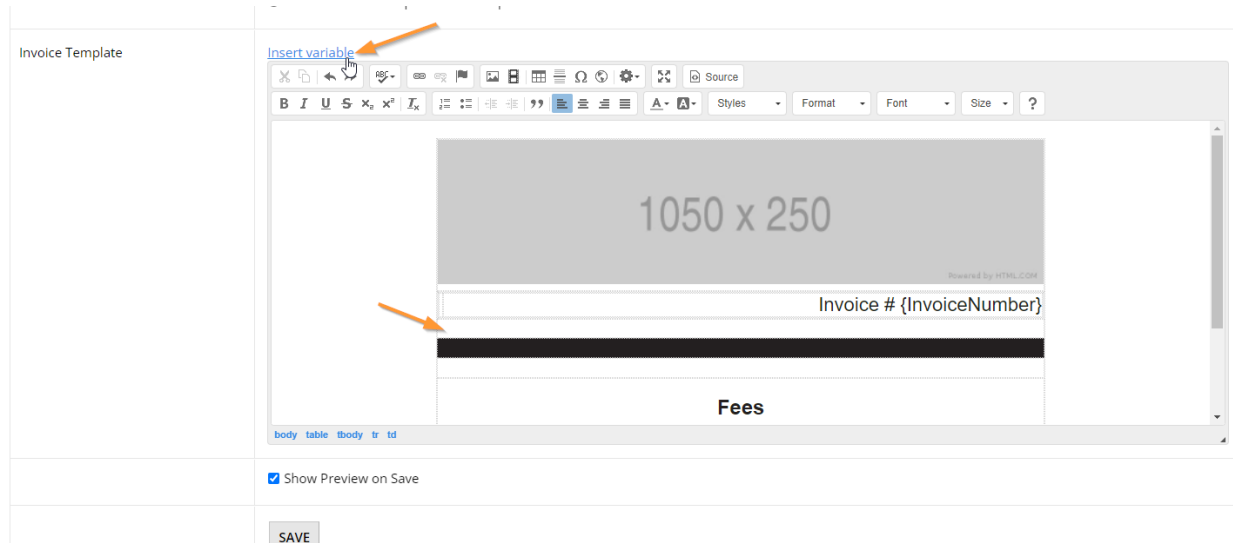
Step 7:
You should now have the variable list popup appear on your screen like so:

Insert variable   ✖

	INSERT SELECTED	COPY TO CLIPBOARD		Search:

☐	Type ▲	Title	⬍	Action
☐	Invoice	{AccountingTransactionId}		Insert
☐	Invoice	{Paid}		Insert
☐	Invoice	{BillingName}		Insert
☐	Invoice	{BillingDetails}		Insert
☐	Invoice	{AmountCharged}		Insert
☐	Invoice	{TransactionTime}		Insert
☐	Invoice	{PaymentReferenceNumber}		Insert
☐	Invoice	{PaymentReferenceNumbers}		Insert
☐	Invoice	{InvoiceNumber}		Insert
☐	Invoice	{InvoiceDate}		Insert
☐	Invoice	{InvoiceLineItems}		Insert
☐	Invoice	{InvoiceTotal}		Insert
☐	Invoice	{PaymentInformation}		Insert
☐	Invoice	{AmountOwed}		Insert
☐	Invoice	{InvoiceUrl}		Insert
☐	Invoice	{InvoicePurchaseOrder}		Insert
☐	Invoice	{InvoiceNotes}		Insert
☐	Invoice	{InvoiceRevisionNumber}		Insert
☐	Invoice	{InvoiceCurrencySymbol}		Insert
☐	Invoice	{InvoiceCurrencyMultiplier}		Insert
☐	Organization	{OrganizationName}		Insert
☐	Organization	{OrganizationCode}		Insert

While variables will be covered more in depth in a later module, you should have a general understanding of what they are and what they do.

In essence, variables are dynamic placeholders of data and are indicated as such in OpenWater with { } brackets. For example, {SubmitterFirstName} is a variable which pulls the value for the submitter's first name on demand. They are powerful tools to personalize and customize invoices, emails, PDFs, and more within OpenWater.

Depending on where you are in OpenWater and what you are modifying will determine what variables are available to you - In this case, the variables in the list are limited and focus on accounting/invoice placeholders.

Step 8:
With that information in mind, let's start by adding in variables for the payee so it's clear to whom this invoice was sent to. From the variable list, select the following using the checkboxes, then click "Insert Selected":

- (User Profile User Profile) Email Address
- (User Profile User Profile) First Name
- (User Profile User Profile) Last Name
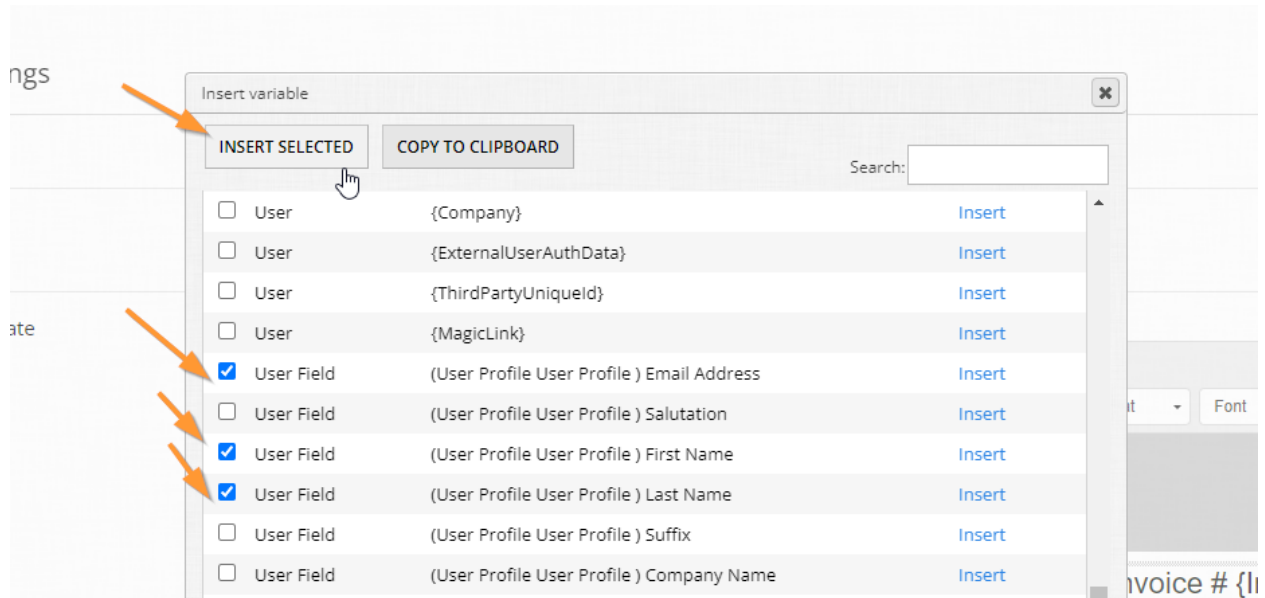
Step 9:
You should have something like this:
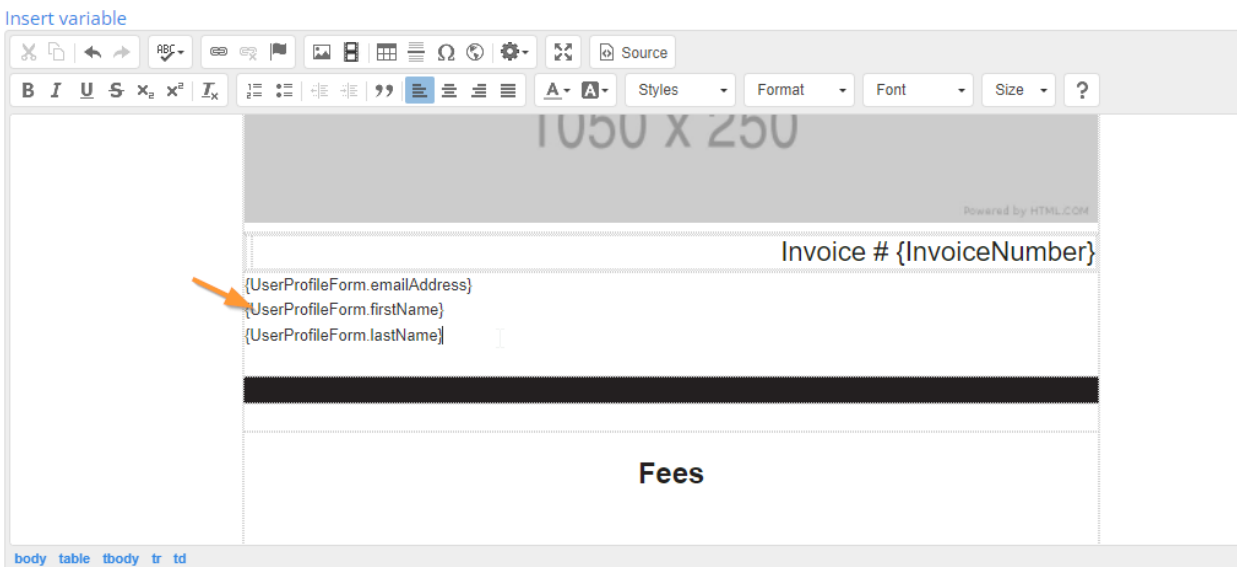
Adjust the variables so they are ordered so:

{UserProfileForm.firstName} {UserProfileForm.lastName}

{UserProfileForm.emailAddress}

This way the output for the applicant will appear thus:
Jane Doe
janedoe@janedoe.com

Let's add one more variable in there, repeat Step 8 and find {SolicitationName}. Copy it to your clipboard and paste it above the "Fees" text. {SolicitationName} will populate the name of your program where the invoice is being generated from.

You should ultimately have something like this:
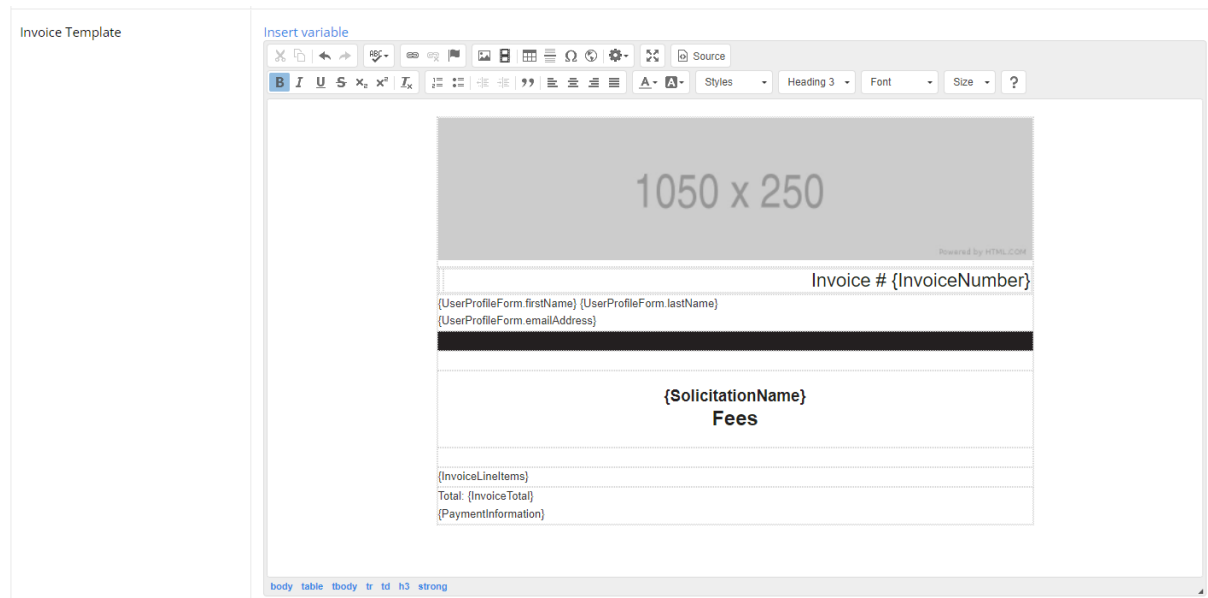
By customizing your invoice template with images and variables, you are not only using it as a marketing vehicle with your branding, but also making it easy to tell for you and your applicants exactly which program this invoice was generated from, to whom the invoice was made out to, and the identifier code for the invoice.

Super User Tip:
In the event you have multiple programs taking in fees and need a different template per program, there are overrides you can enable on a per program level to use unique settings. For more information, check out our help desk article on the topic [here](#).

Module 7: Review Module

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Anatomy of an Evaluation Item

When adding an evaluation item, the menu is as follows:

1. **Question Name:** The name of the evaluation line item. This is often in the form of a question or a directive for judges and we recommend keeping this short and sweet - Extended information should go in the Instructions area.

2. **Alias:** This is the code for the field item, you may have seen this in the submission form builder. By default OpenWater will create aliases automatically for you*, but if your questions are long, you may wish to rename them to keep the alias names short.

   As a note, aliases will not generate a proper name if your question name or field label starts with a non-letter, such as numbers or symbols. You can still use them, but you would need to manually rename your alias. Aliases will be covered with variables in Module 10.

3. **Instructions:** As the name implies, this is like the "Details" section of a submission form field. For extended instructions or guidance, you should add them in this box. Like with other areas of OpenWater, you have a rich text editor at your disposal so you can format,

hyperlink, etc as needed.

4. **Type:** The type of field this evaluation item should be.

5. **Category group settings:** If your program utilizes categories/category groups, this allows you to choose which category groups this evaluation item will appear or be hidden for (e.g. if you have different scorecards per category, this allows you to control which items are shown to judges per category group)

6. **CSS Class:** If you happen to have any CSS classes for styling purposes in your OpenWater theme which you wish to apply to this field, you can simply add the class name(s) in this field, separated by a space if using multiple.

7.1 Field type: 1 - 3

Type *	1 - 3
	What kind of control should be presented to
Weight / Multiplier *	1
	The score entered by the Judge for this ques

For a simple 1 to 3 scoring scale, the 1 - 3 option populates a simple dropdown that has the values 1 through 3 respectively and assigns the selected point value accordingly. This field can't be modified to show different values.

7.2 Field type: 1 - 5

Type *	1 - 5
	What kind of control should be prese
Weight / Multiplier *	1
	The score entered by the Judge for th

Like the 1 - 3 field type, this allows for scoring on a scale of 1 - 5. This has the same behavior as 1 - 3, populating a dropdown with the respective point values associated with it. This field can't be modified to show different values.

7.3 Field type: 1 - 10

Type *	1 - 10 ▾
	What kind of control should be prese
Weight / Multiplier *	1
	The score entered by the Judge for th

This is the same as the previous two fields, but on a scale of 1 - 10. This field can't be modified to show different values.

7.4 Field type: Numeric

Type *	Numeric ▾
	What kind of control should be presented to the Judge?
Range	0 - 50

This field allows you to specify a range of numerical values that the judge can input. So if you have a different point scale for a question, such as 0 - 50, you can specify this in the minimum and maximum range inputs accordingly.

However, keep in mind that this field does not come with any standard instructions on how to use the field, so you may wish to provide guidance on the point scale allowed, etc.

7.5 Field type: List

Type ★	List ⌄ What kind of control should be presented to the Judge?
List Values	Text: Did an OK Job — Score: 1 ✖ ✚ Text: Did a Great Job — Score: 2 ✖ ✚ Text: Did an Outstanding Job — Score: 3 ✖ ✚ Text: — Score: 0 ✖ ✚ Text: — Score: 0 ✖ ✚

This field is similar to the dropdown field in the submission form builder, but has some small differences.

When creating a List evaluation item, you have two inputs per value you add. One is the text that appears in the dropdown, and then the points / numerical value associated with that particular item. List fields give you the flexibility to utilize your own terminology or language while still associating points with the response.

So for example, you may have a question with values like:

Type ★	List ⌄ What kind of control should be presented to the Judge?
List Values	Text: Excellent — Score: 5 ✖ ✚ Text: Very good — Score: 4 ✖ ✚ Text: Good — Score: 3 ✖ ✚ Text: Fair — Score: 2 ✖ ✚ Text: Poor — Score: 1 ✖ ✚

7.6 Field type: Free text

Type ★	**Free Text** ⌄ What kind of control should be presented to the Judge?
	☐ Is Required?

A free text field is as the name implies, a multi-line text input field. This is commonly used for judges to provide comments or remarks, either for the application overall, or for sections of the evaluation form. This is one of the few evaluation item fields which can be optional or set to required.

7.7 Field type: Separator

Type ★	**Separator** ⌄ What kind of control should be presented to the Judge?

The separator field in the evaluation form has the same functionality as the separator in the submission form: it is a means to provide additional information, break up the evaluation form, but otherwise requires no interaction from the judge. This is a great field to use to provide scoring rubric information or additional materials that judges may need during the scoring process.

7.8 Field type: File upload

Type ★	File Upload ⌄ What kind of control should be presented to the Judge?			
	☐ Is Required?			
Permitted Extensions (Leave blank for all files)	.doc .docx .pdf ☐ Show Audio Preview	☐ Show Image Preview	☐ Show Video Preview	☑ Show Document Preview

This field type is essentially the same as its submission form equivalent: If your workflow requires some sort of file upload from judges, you can add a file upload field to the evaluation form. It has the same controls as in the submission form, so you can limit file previews or file extensions as you wish. It is also similar to the free text field in that it's one of the few evaluation items which can be optional or set to required.

7.9 Field type: Checkbox list

The Checkbox List field is similar to the List field in that for every option you provide, you have to give the checkbox item a name/label and a corresponding numerical value per. The difference is that this information will be displayed in checkbox format, as opposed to a dropdown like with List fields.

The other aspect is that it's also a field which can be optional or required - If it is set to required, like its submission form equivalent, you can set a minimum/maximum allowable range of values to be selected.

The Checkbox List is a great field for cases where there is a single criteria and judges just need to select all which apply, while adding points to an evaluation item.

7.10 Showing / hiding fields from judges

There are workflows and common scenarios where certain information should not be displayed to judges whatsoever. OpenWater accommodates these situations by allowing you to hide fields from applicants and/or judges per field.

Typical fields we see hidden from judges:
- Applicant contact information
- Emails
- Telephone numbers
- Other personally identifiable information

Let's hide a few fields from judges.

Step 1:

From the dashboard, go into your program via Manage then Round Settings > Submission Form.

Step 2:

Pick any question page and go into the form builder.

Step 3:

Select a field and scroll down in the left-hand Field Settings column.

Step 4:

Enable the option called "Hide field from judges". Repeat this process for multiple fields if you like.

Step 5:
Click "Save".

This will then hide those fields entirely from judges, giving you more flexibility over who sees what when it comes to reviewing applications.

Super User Tip:
If you are taking in applications where the Application Title Field should be anonymized for judges, you can enable this functionality for this field as well to hide it from judges.

Module 8: Ranking Mode

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OpenWater supports two modes of evaluating applications: the evaluation form and ranking mode. In some workflows, a simple ranking is sufficient for review in lieu of an extended scorecard. You are likely familiar with the concept:

- Rank your top 5 favorite movies in order
- Rank your top 10 favorite songs ever

In scenarios where shortlists are being put together and a quicker means of judging is needed, ranking mode accommodates this very concept.

Before we dive in, be aware that you can only have one mode of evaluation enabled per round. You can mix and match between scorecards and ranking with multiple rounds, but only one mode can be in effect per. Keep that in mind when determining what kind of review your organization performs before building it into your programs.

8.1 Enabling ranking mode

In short, think of ranking mode as a greatly pared down version of the evaluation form. Instead of having unique inputs to score submissions on specific criteria, ranking allows your judges to quickly add submissions to a shortlist.

Due to the nature of the mode, features and options available to you when building an evaluation form will not be present with ranking enabled. Most notably, free text boxes for things like judge comments will not be available.

By default, OpenWater will always have the evaluation form mode enabled. To enable ranking, there are a few steps you have to take to get started.

Let's have you add an additional round and set this to ranking mode.

Step 1:
Go into your program via "Manage" and then click on "Program Settings" to open the dropdown. Select Workflow from the list.
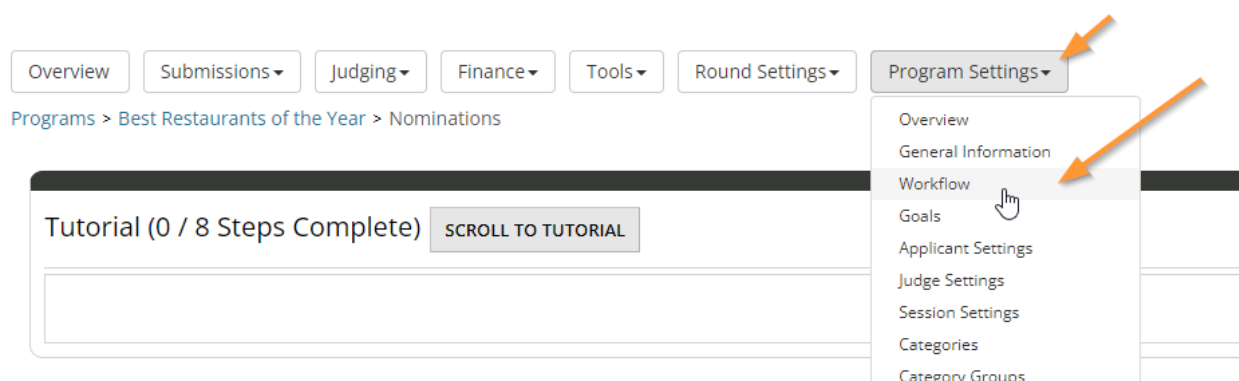
Step 2:
This page shows you an overview of your program's round structure. Click "Add Round" above the table.

Step 3:
Set this round to judging only and give it a name. Let's call it something like "Finalists Ranking", set it to "Judging Only" and click "Save".

Programs > Best Restaurants of the Year > New Round

Name *	Finalists Ranking
Type	○ Submissions + Judging ◉ Judging Only
Place after	Nominations ▾
	SAVE CANCEL

Step 4:
Now that your round is generated, let's swap the review mode. Click on "Round Settings" to open the dropdown and select "Evaluation Form" from the list.

Overview	Submissions ▾	Judging ▾	Finance ▾	Tools ▾	Round Settings ▾	Program Settings ▾

Programs > Best Restaurants of the Year > Finalists Ranking
Select Round: Finalists Ranking ▾

JUDGING
Evaluation Form
Evaluation Layout
Configure Scoring Ranges
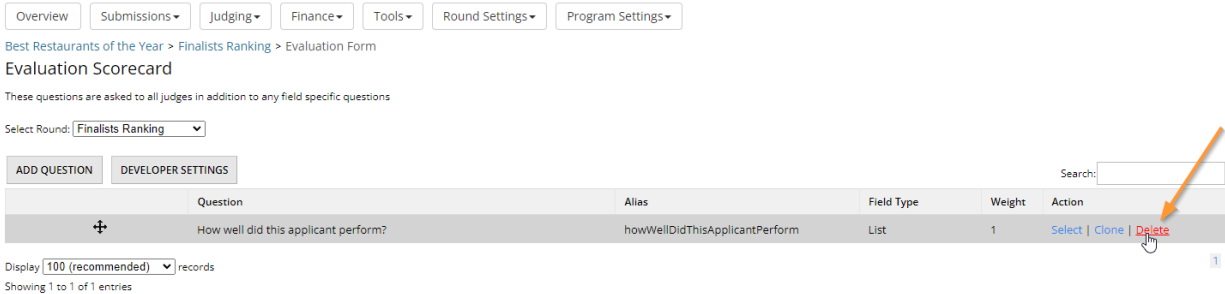Configure Winner Types
Configure Auto Scoring
PUBLIC WEBSITE
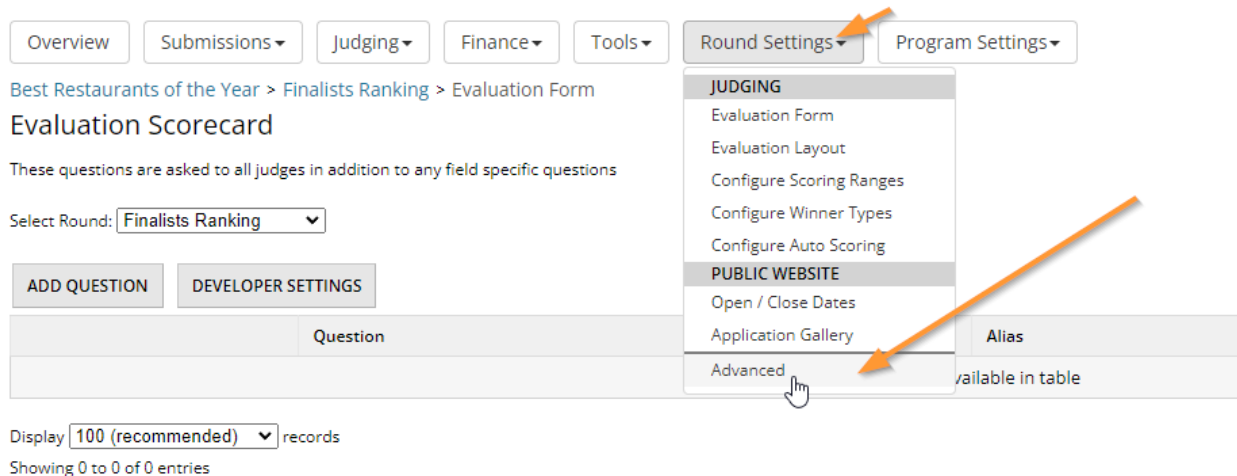Open / Close Dates
Application Gallery
Advanced

Tutorial (0 / 8 Steps Complete)   SCROLL TO TUTORIAL

Getting Started Tutorial

Step 5:

In order to enable ranking, any and all evaluation form items have to be removed first. Delete the platform generated evaluation item.

Step 6:

Go back to the "Round Settings" dropdown and then select "Advanced" at the bottom of the list.

Step 7:

This table is for managing advanced settings for the specific round you are currently in. You can control submission behavior and judging related settings. For now, head over to the "Advanced"

tab in the table:

Best Restaurants of the Year > Finalists Ranking > Advanced

Select Round: Finalists Ranking

Settings	Judging Restrictions	Advanced
Judge Score Visibility		⦿ Do not show Judge Scores to Applicants ◯ Show Anonymized Judge Scores to Applicants ◯ Show Judge Names and Scores to Applicants
Winner Visibility		☐ Show Winner Status in Applicant Portal
		BACK SAVE

Step 8:
Within the Advanced tab, find "Judge Evaluation Mode" and select "Ranking" in the list. Then click "Save" and refresh the page.

Step 9:
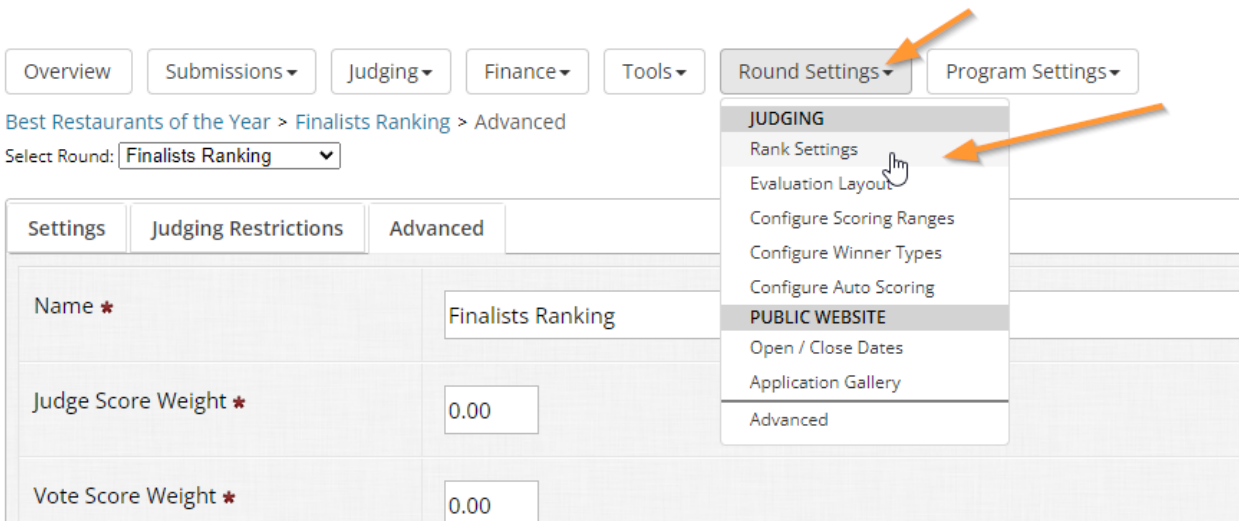Now that you've refreshed the page, go back to the "Round Settings" dropdown and select
"Rank Settings" in the list.

8.2 Ranking mode settings

Because of its simplicity, the settings available to you are all contained within a single page:

- Ranking instructions - Rich text editor which allows you to provide guidance and instructions to judges on how to review, utilize the functionality provided, and/or what is expected
- Ranking sets - This option is specifically for when dealing with categories. If a judge should have a single ranking / shortlist across all categories, the first setting "All submissions ranked against one another" handles that. If judges should have a unique ranking shortlist for each category, select "Submissions ranked within category".
- Require judge to rank all applications for scores to count - There are some situations where every submission assigned to a judge has to be reviewed in order for the given ranking to have it count/be given a score. This is a niche scenario that works for smaller amounts of entries, but if you have workflows with 50+ submissions, you would likely want to leave this unchecked.
- Default number of submissions to rank - This is the maximum value of entries that a judge can add to her or his shortlist. OpenWater will always by default populate with a 1, but commonly you may see 5, 10, 15, et cetera. If "Submissions ranked within category" is selected, you will have an optional function to specify differing ranking maximums per category if desired.
- Score calculation - This allows you to specify whether or not the position of an item within the shortlist has an impact on the entry's score via "Based rank position" and "Ignore rank position". The former takes the order of rank into account, so an entry in 1st place is worth more than 2nd place, 3rd place, and so on. The latter does not take rank order into account, so if your workflow calls for just the top 10 finalists for example, those 10 ranked entries are worth more than non-ranked entries but not more than one another in the shortlist.

For the sake of this example, let's keep it simple.

Step 1:
Adjust your ranking settings to the following:

- All submissions ranked against one another
- Set default number of submissions to rank to 5
- Set ranking to ignore rank position
- Update the ranking instructions to reflect your settings with text like so: "Please rank the 5 strongest nominations out of those assigned to you. Ranking order does not matter. You may make edits and adjust your shortlist until the judging deadline."

You should end up with something like this:

Then click "Save".

So regardless of category, judges will be prompted to rank 5 entries into her or his shortlist while ignoring rank order.

Super user tip:
When building programs, you should always:

1. Submit a few test entries and, if applicable, forward them through every round of your program
2. Add yourself as a judge in every round and assign those test entries to yourself
3. Ensure your open/close dates for judging are set to be open when you test
4. Then go to your public website* in OpenWater and double check your work
5. Adjust your judging open dates once you are satisfied

This way you are familiarized with the steps your judges will have to take to access their judging assignments and ensure you didn't miss configuring anything.

* You can quickly access your public website in OpenWater by using the shortcut link that is always present at the top of the admin panel:
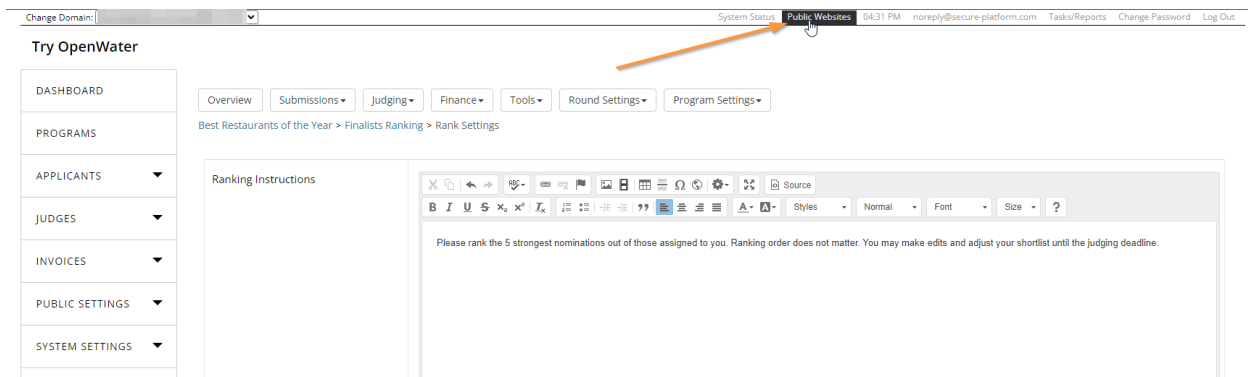
8.3 Workflow considerations

Ranking can be a helpful way to quickly conduct judging without relying on extended evaluation forms. However, the caveat is that it can be considered more subjective rather than objective in comparison to a scorecard, with defined criteria and rubrics determining how submissions are scored.

Oftentimes at OpenWater we see clients mix and match scoring modes. This is only possible in a multi-round workflow and this is the most common scenario we see:

- Round 1 utilizes the evaluation form for a defined, structured rubric on which to evaluate entries
- Finalists in Round 1 are forwarded to Round 2, which is ranking mode
- Judges reconsider the finalists and rank their top X applications, resulting in the final winners' selection

Consider the type of workflow you are building and how your organization reviews applications which come in. Is your workflow an awards program, or applications for grants? Are there great rewards that come with being a winner? If yes, you may wish to stick to evaluation mode for the majority of your judging, with potentially ranking mode enabled for a following round. If the stakes are lower and strict guidance isn't required, consider ranking on its own to save your judges time and labor of scoring.

8.4 Evaluation layout

Regardless of which scoring method your workflow utilizes, both the scorecard and ranking methods allow you to modify the evaluation layout. By definition, the evaluation layout are the pages specifically that judges see when accessing their judging assignments. This includes two major areas:

- List page settings - As the name implies, this is a page which has an overview list of the submissions which have been assigned to the judge. The header, description of each submission, sidebar content, and thumbnail images (if any are uploaded in your form) can be modified.
- Details page settings - As the name implies, this page is the details page of the individual application alongside the evaluation form/ranking table. The submission will be on the left-hand column; the description box above it can be modified.

One thing to note: Evaluation layouts are unique per round, so they have to be configured individually if your workflow has multiple rounds.

The evaluation layout is similar in settings as to application galleries, so if you become familiarized with these concepts in one spot, these do apply elsewhere (but for different audiences).

List page settings

In the list page settings area, there are a number of items you can configure:

- Whether or not you wish to display a thumbnail image next to each entry (if images were uploaded in your form)
- Header text
- Description text for each individual entry
- Sidebar text
- The viewing mode, either list or grid*
- How many applications should display at one time on the list page
- Allowable search and sort modes**
- Default sort mode and direction

- Whether or not you wish to display a numeric score

*List mode supports thumbnail images and displaying text/variables added in the Description box for each entry; grid mode supports thumbnail images and application name/category only.

**Search and sort are separate functions - Judges have a search box to search through their assignments based on allowed search parameters; certain fields on the submission form can be used as a search parameter. The sort function allows judges to sort the list of assignments in ascending or descending order based on parameters of your choosing similarly to search.

Details page settings

The details page settings area is where you can modify certain elements displayed to judges. You have the following options:

- Choose media to display - If your form takes file uploads, such as images or video, you can choose to display those in a carousel within the judging form. We recommend having this enabled and selecting files to display to judges for easy viewing during their review.
- Choose YouTube/Vimeo links - If you collect YouTube or Vimeo links via URL fields in your form, you can choose to enable this setting and display an embed of the video(s) directly in the evaluation layout for judges.

- Render options - This allows you to choose to render the Description box either via the rich text editor (easy option) or utilize our Handlebars engine* for this purpose.
- Render field options - Same as rendering the Description box, but specifically for submission form data
- Hide fields rendered in header - If you choose to display media in a carousel, you can hide them from displaying within the submission form area for a cleaner experience. We recommend leaving this enabled generally.

*Handlebars will not be covered in this course, if you are a casual developer and would like to learn more, please see our course dedicated to these topics.

With the above options, you can tweak and modify the layout in how judges see information about each individual submission she or he needs to judge. For reference, think of the Description box as a type of header area where you can provide either additional information, instructions, or other data as you see fit.

Module 9: Rules Engine

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Here at OpenWater, we believe that your data for your programs is yours to manipulate, control, and export. For Module 9, we'll cover our rules engines for eligibility and reporting in order to optimize and enhance your workflow.

9.1 Eligibility Rules I

When we use the term eligibility rules here at OpenWater, we are typically referring to conditional rules for the submission form itself for a program.

Oftentimes, you will have a workflow where there are some sort of restrictions on submissions your program is taking in - Perhaps applicants have to meet some sort of qualification to apply, for example in grants or certain award programs. There are three eligibility rule behaviors that can be applied to submissions within your program:

- Do not check for eligibility - In other words, eligibility rules are disabled
- Block ineligible submissions - Submissions that meet the rules you create will be blocked from submission
- Allow all submissions, but automatically disapprove ineligible ones - Submissions that trigger the rules you create will still be allowed to be submitted, but they will be put into the "Disapproval" status in OpenWater. The "Disapproved" status makes them ineligible/unavailable for judging but still accessible for admins and reports. By default, OpenWater will not notify applicants that their ineligible submissions were disapproved.

For this section, let's build a rule that allows all submissions, but automatically disapproves ineligible ones.
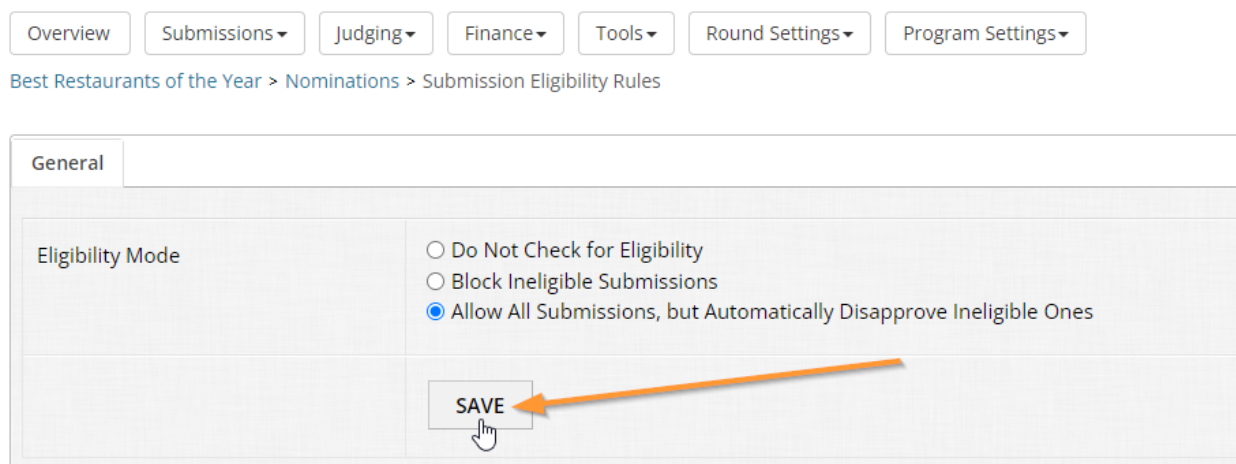
Step 1:
Go into your program via Manage, then go to Round Settings > Submission Eligibility Rules.
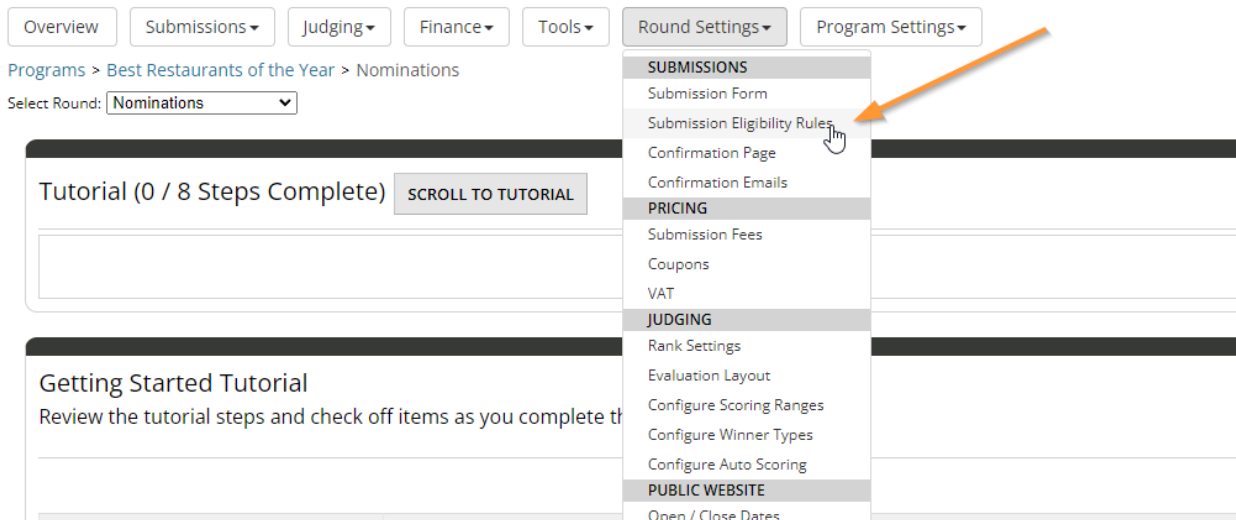
Step 2:
From the list, select "Allow all submissions, but automatically disapprove ineligible ones" and then click "Save".
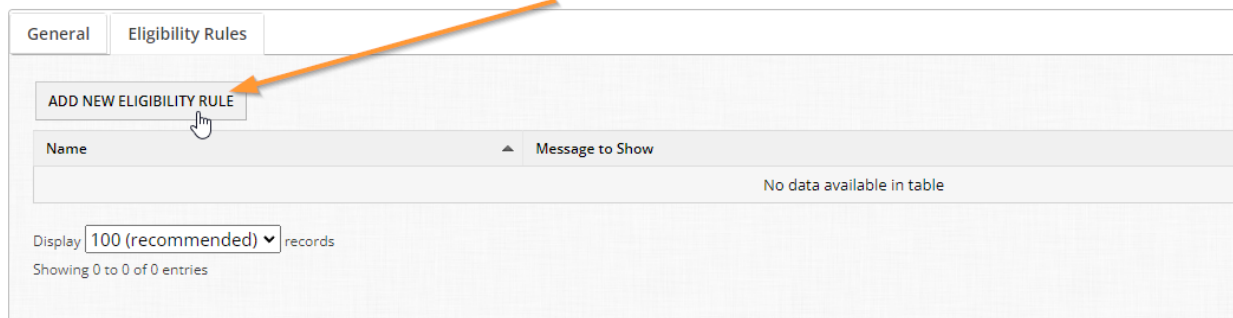
Step 3:
Once you save, you will now have the "Eligibility Rules" tab available to you. Click on it to open the menu. By default, this table will not have anything pre-populated so we will need to fire up a new rule. Click "Add new eligibility rule" at the top of the table to get started.
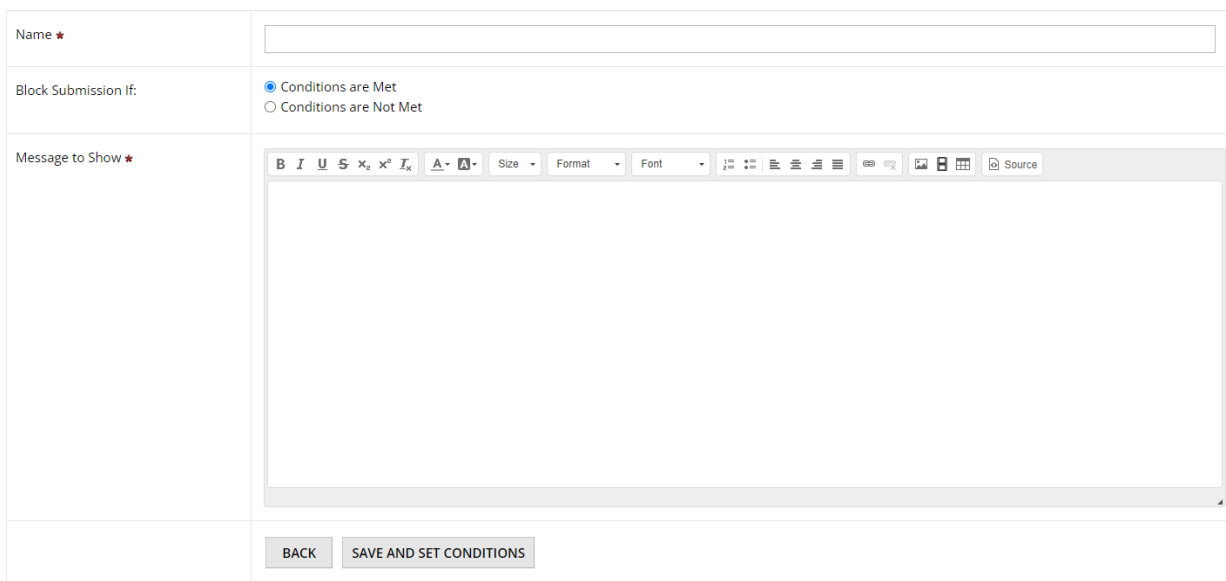
Step 4:
Just like with other menus you've seen before in OpenWater, there are some required details that you must provide in order to create the rule and start adding parameters.

For eligibility rules, you have the following options:
- Name of the rule - This is not visible to applicants, but it's important to give it a clear and descriptive name so you know what the rule does or is for
- Block submission behavior - Choose whether to trigger the rule if conditions are met or if conditions are not met

- Message to show - This is displayed to the applicant in a pop-up directly in the submission form if the applicant's responses trigger the rule(s) you create. Note that you have a rich text editor available to you to better customize the message.

Please note that when "allow all submissions but disapprove ineligible ones" is enabled, any content you place in "Message to Show" will not be displayed to the applicant. You will still need to add a message of some kind, but it will not be used due to the behavior of the setting.

Step 5:
Let's create a rule that disapproves applications if the applicant chooses to not provide anything for the field "Why are you nominating this business?"

Fill out the following:
- Name: No nomination text provided
- Block submission if: Conditions are met
- Message to show: Nominations should have even a basic blurb as to why this business is deserving an award.

You should end up with something like this, then click "Save and set conditions" to get into the condition tables:

Nominations > Submission Eligibility Rules > New Eligibility Rule

Name *	No nomination text provided
Block Submission If:	● Conditions are Met ○ Conditions are Not Met
Message to Show *	B I U S x₂ x² Iₓ A▾ A▾ Size ▾ Normal ▾ Font ▾ ⋮≡ ⋮≡ ≡ ≡ ≡ ≡ 🔗 🔗 🖼 🗄 ⊞ ⟨⟩ Source Nominations should have even a basic blurb as to why this business is deserving an award. body p

BACK   SAVE AND SET CONDITIONS
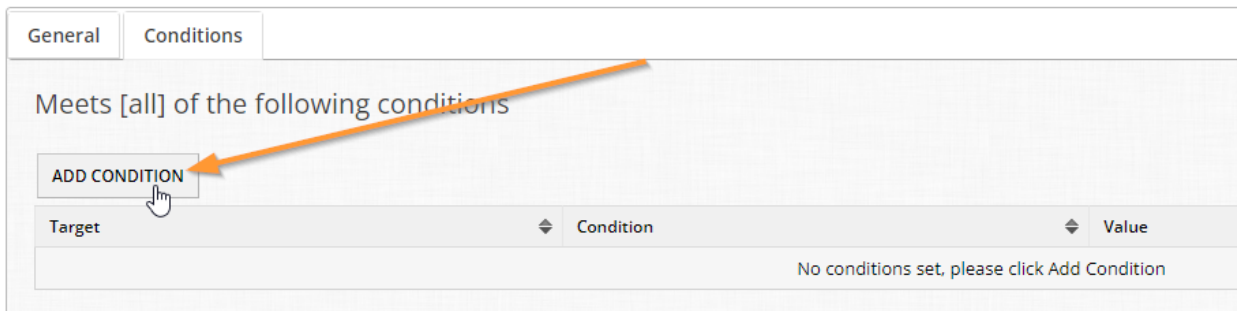
Step 6:
For this rule, we'll keep our parameters simple. Just like we've covered previously, eligibility rules utilize the conditions tables where you can mix and match multiple parameters that meet either [all] conditions and/or [any] conditions you have set.

Click "Add condition" for the [all] table.

Nominations > Submission Eligibility Rules > No nomination text provided

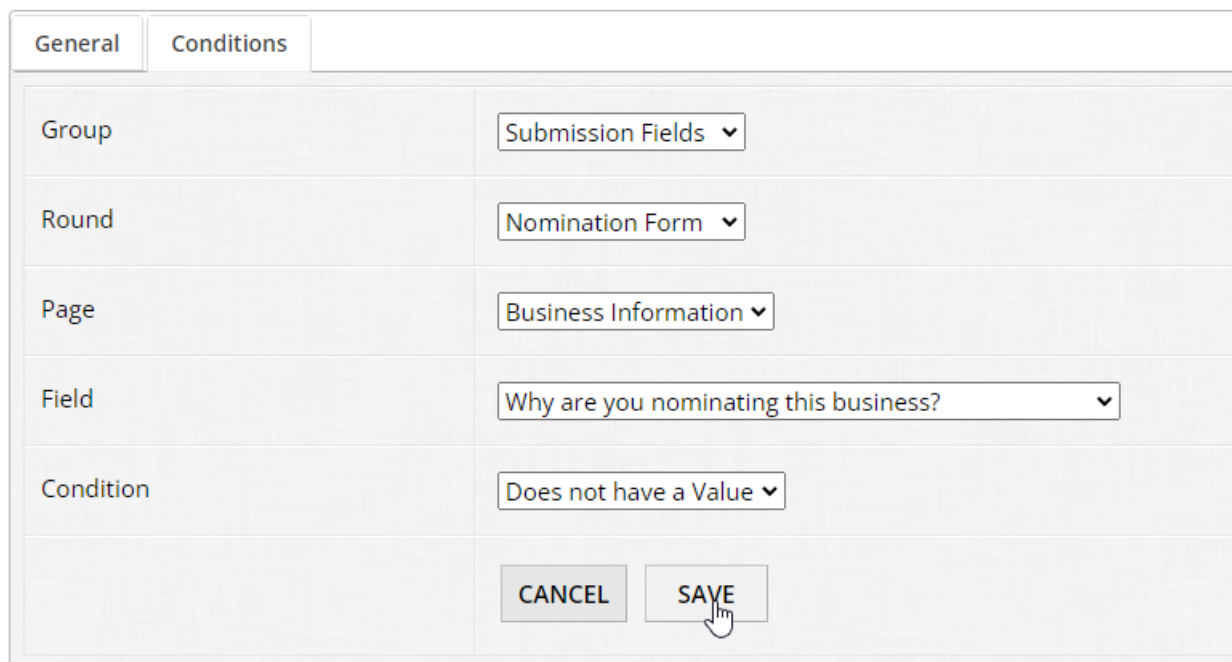| General	Conditions

Meets [all] of the following conditions

ADD CONDITION

Target	Condition	Value
	No conditions set, please click Add Condition	

Step 7:
We want to target the field in the submission form, so your settings should look like this:

Nomination Form > Submission Eligibility Rules > No nomination text provided

General	Conditions

Group	Submission Fields ⌄
Round	Nomination Form ⌄
Page	Business Information ⌄
Field	Why are you nominating this business? ⌄
Condition	Does not have a Value ⌄

CANCEL   SAVE

We are telling OpenWater the following:
1. Look within submission fields
2. Look within the Nomination Form round
3. Then look within the Business Information question page
4. Then find the field "Why are you nominating this business?"

5. Then check to see if any text (a value) exists or not
    a. If no text is provided, allow the entry to be submitted, but move it into Disapproved status
    b. If text is provided, the rule does not meet the condition set and will not trigger

9.2 Eligibility Rules II (Blocking)

Perhaps in your workflow, you don't want to accept applications which don't meet your program's requirements at all. This is a common scenario we see amongst our clients. There are some benefits to blocking applications versus quietly disapproving:

- Fewer entries to sort through
- Ability to automatically notify the applicant during the submission process that her or his application doesn't meet the criteria set

Let's change up our rule we set up in 9.1 to reflect this blocking functionality.

Step 1:
Go into your program via Manage, then go to Round Settings > Submission Eligibility Rules.
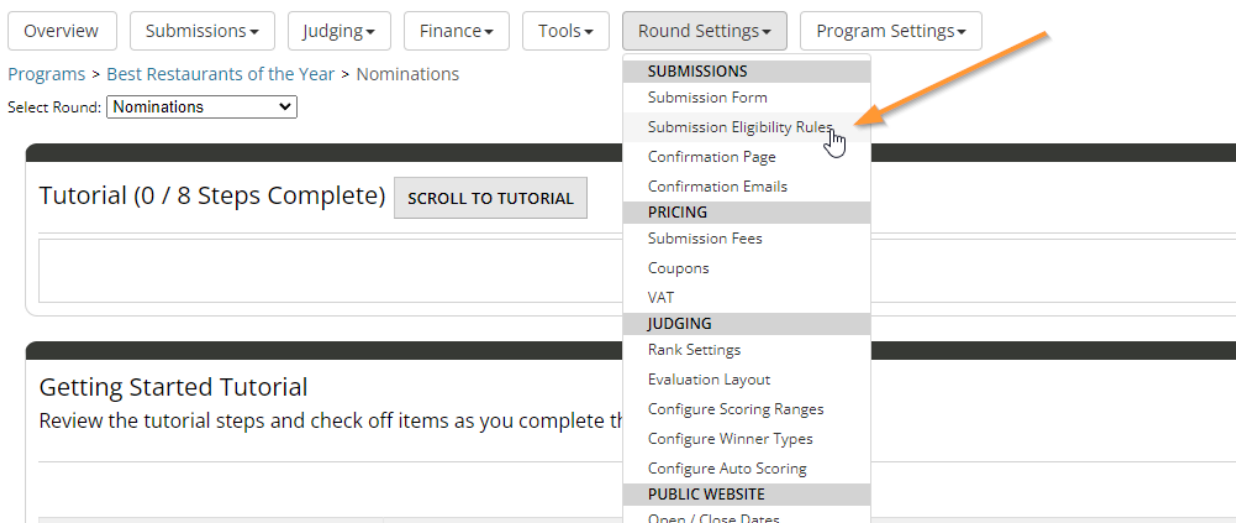
Step 2:
From the menu, set the eligibility mode to "Block ineligible submissions". When you do so, there is an optional setting you can enable if you wish called "check eligibility on save and next in addition to save and finalize / add to cart". This latter option changes the way OpenWater runs the eligibility rule checks:

- If enabled, OpenWater will check against any eligibility rules you have created within each question page of your form
- If disabled, OpenWater will only run checks against any eligibility rules you have created when the applicant attempts to submit her or his application

For now we'll leave this unchecked and click "Save".

Best Restaurants of the Year > Nomination Form > Submission Eligibility Rules

General

Eligibility Mode
○ Do Not Check for Eligibility
● Block Ineligible Submissions
○ Allow All Submissions, but Automatically Disapprove Ineligible Ones

☐ Check Eligibility on Save and Next in addition to Save and Finalize / Add to Cart

SAVE

Now the rule we set up in 9.1 will trigger if the field "Why are you nominating this business?" is blank and do two things:
1. Block the entry from submission until a value (i.e. text) of some kind is provided
2. Display the pop-up error text we configured in step 5 of 9.1

On a final note, you are not limited to just a single rule - You can have multiple rules as needed for your form. We recommend thoroughly testing your submission form when creating rules to ensure they are functioning as intended before you launch your program for live applications.

9.3 Reports Engine

Reports are likely the most helpful benefit of using OpenWater. As mentioned at the start of this module, we believe that your data is yours and should be exportable as you see fit in order to best manage your workflows.

For 9.3, we will focus mainly on reports for submissions as this is generally what our clients most frequently pull - You will find multiple areas with reporting functionality within the platform, both within programs specifically as well as across your instance.

Before we dive in, here are some things to keep in mind about reports:
- Where you access reports determines the type of data outputs you get; e.g. accessing reports under "Submissions" yields submission-related data, whereas accessing reports under "Judging" yields scoring-related data
- Program reports are typically round-by-round and you can have unique reports for each round of your program as desired.

- Depending on where and what report you are pulling, some variables may or may not be available to you.
- Reports are flexible and easily configurable - If you aren't a developer, you still have plenty of methods to customize your data output; if you are a developer, there are advanced settings available to take your reports to the next level. For developer level content related to reports, please see our developer-focused course which covers these aspects in-depth.

Let's take a look at submission reports for your program.

Step 1:

Go into your program via Manage, then go to Submissions > Reports.
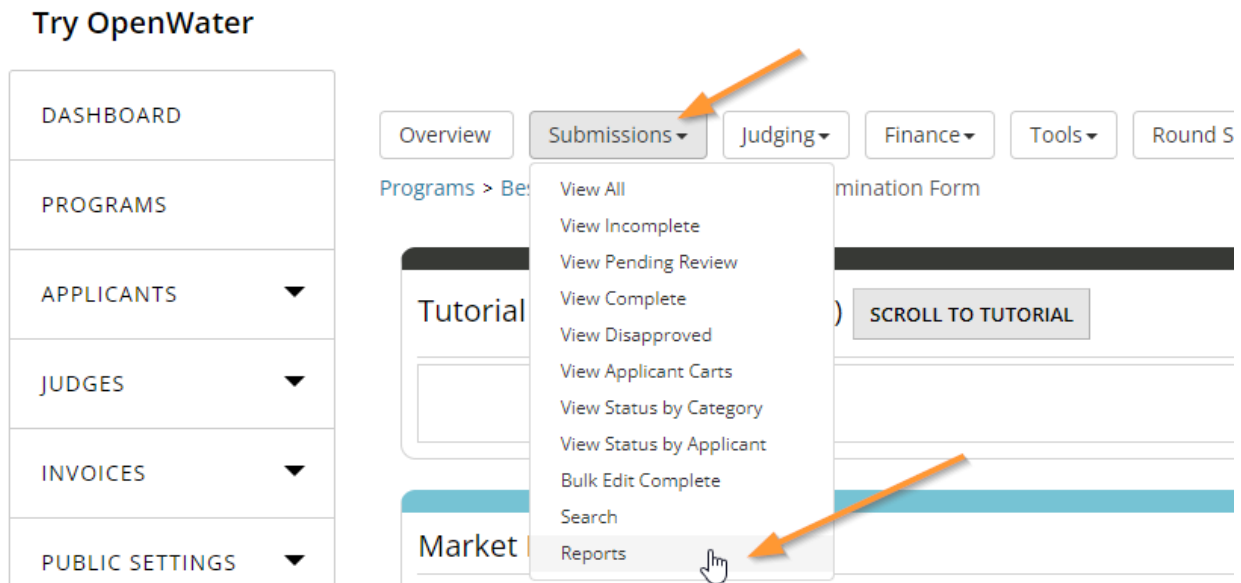
Step 2:

For your convenience, OpenWater will always generate a few basic reports for you to work with:

These system-generated reports focus on submissions of different statuses:

- Complete submissions - In other words, applications which have been submitted by applicants
- Incomplete submissions - Applications which are still in progress by applicants and have not yet been submitted
- Pending approval submissions - Applications which have been submitted, but are in Pending Approval status (if your workflow has this enabled for the round)
- Won submissions - Applications which have been assigned a winner type of any kind*

*If your workflow uses different winner types, you will want to ensure your report uses custom conditions and looks for "Application Winner Category" in order to select a specific segment of applications. This is especially important when creating Email Blasts, so please keep this in mind.

As a general rule of thumb, we recommend using the platform-generated reports as a base and cloning them out, or creating new ones from scratch. We also recommend utilizing the "Description" input area within reports to provide in-depth information as to what the report is pulling and/or what it's for, particularly if your organization heavily uses this feature.

Let's clone out the "Complete Submissions" report for this example. Click "Clone" under the Action column across from "Complete Submissions" to get started.

Best Restaurants of the Year > Nomination Form > Application Reports

ADD REPORT		
Name ▲	**Description** ⇕	**Action**
Complete Submissions		Select | Delete | Clone
Incomplete Submissions		Select | Delete | Clone
Pending Approval Submissions		Select | Delete | Clone
Won Submissions		Select | Delete | Clone

Display [100 (recommended)] records
Showing 1 to 4 of 4 entries

Step 3:
When cloning a report, all previous settings from the initial report are retained except for the name and description. Provide a name like "Streamlined Complete Submissions" like so and

click Save:

Nomination Form > Application Reports > Clone Report

Name *	Streamlined Complete Submissions
	SAVE CANCEL

Step 4:

OpenWater will automatically bring you to the Conditions tab for this report. As we've covered in previous modules of this course, you have both [all] and [any] tables to set any and all parameters for this report.

Keep in mind that the conditions you set tell OpenWater which applications should be included in your subsequent output - Anything that doesn't meet the conditions you have set will be excluded. If you have multiple conditions, you can clone pre-existing ones to save yourself a few steps as desired.

For this example, let's add another condition and only pull completed applications which filled out the field "Why are you nominating this business?". Click the "Add condition" button for the [all] table to get started:

Nomination Form > Application Reports > Streamlined Complete Submissions

| General | Conditions | Sort Order | Advanced | CSV/XLS Exports | Download Files |

Meets [all] of the following conditions

ADD CONDITION

Target	Condition	Value	Action
Nomination Form Submission Status	Is	Complete	Select | Clone | Delete

Also meets [any] of the following conditions

ADD CONDITION

Target	Condition	Value	Action
	No conditions set, please click Add Condition		

Step 5:
Just like we've done before, your condition selections should ultimately look like this:

Nomination Form > Application Reports > Streamlined Complete Submissions

General	Conditions	Sort Order	Advanced	CSV/XLS Exports	Download Files

Group	Submission Fields ▾
Round	Nomination Form ▾
Page	Business Information ▾
Field	Why are you nominating this business? ▾
Condition	Has a Value ▾

CANCEL   SAVE

We're telling OpenWater to check for a submission field within the Nomination Form round on the Business Information question page, and the field we're looking for is "Why are you nominating this business". The final check is that this field has a value (i.e. some text input from the applicant).

Click "Save" to add the condition to the [all] table:

Nomination Form > Application Reports > Streamlined Complete Submissions

| General | Conditions | Sort Order | Advanced | CSV/XLS Exports | Download Files |

Meets [all] of the following conditions

ADD CONDITION

Target	Condition	Value	Action
Nomination Form Why are you nominating this business?	Has a Value		Select | Clone | Delete
Nomination Form Submission Status	Is	Complete	Select | Clone | Delete

Also meets [any] of the following conditions

ADD CONDITION

Target	Condition	Value	Action
	No conditions set, please click Add Condition		

Because both of our conditions are in the [all] table, this tells OpenWater that both of these conditions must be met in order to include a submission into the report:

- The application is in Complete status (i.e. submitted by the applicant)
- The field "Why are you nominating this business?" has to have text in it

In future reports, you can absolutely mix and match parameters in either one or both tables in order to pull out the data you need.

Let's hop over to the Sort Order tab next.

Step 6:
Click the "Sort Order" tab at the top of the table:

Step 7:
This area of settings is specifically for spreadsheet outputs - To save yourself some steps and time from having to manually sort your file in an editor like Excel, OpenWater can sort certain elements for you when it generates your report.

Let's add some sorting by clicking the "Add Sort Mode" button:

Step 8:

Nomination Form > Application Reports > Streamlined Complete Submissions

General	Conditions	Sort Order	Advanced	CSV/XLS Exports	Download Files

Sort by   Select Sort Mode ▼

Direction   ○ Ascending
                 ○ Descending

                 CANCEL   SAVE

The settings for sort order are straightforward. Simply choose a value to sort by in the dropdown menu and then choose whether this sorting setting should be in ascending or descending order.

Your options for sorting are as follows:

Nomination Form > Application Reports > Streamlined Complete Submissions

General	Conditions	Sort Order	Advanced	CSV/XLS Exports	Download Files

Sort by   Select Sort Mode ▼
                 Application Name
                 Application Code
Direction   Application Category Code
                 Winner Type
                 Submission Finalization Date
                 Form Field
                 CANCEL   SAVE

- Application name - The value you have set for the Application Title Field for the program
- Application code - The unique identifier value for each application
- Application category code - If using categories, this will use the shortcode value for each category
- Winner type - If you have winner types in use, you can sort on this value
- Submission finalization date - Sort by when each application was submitted by the applicant

- Form field - If you would like to sort by a specific form field, you can select this and choose either to sort by a value from the User Profile (i.e. applicant account information) or a specific submission form field*

*Be aware that only certain types of fields are able to be sorted at this time, so if some fields are missing for you, it's normal platform behavior.

For now, add a sort order for Application Name in Descending order and click "Save":

Once saved, you should see the table populate like so:

OpenWater will show you the value you are sorting by and in which direction you are sorting by. Since you can have multiple sort orders, you can determine in which order these settings should be processed. The platform starts with the topmost setting in the list and progresses sorting downwards. If you have multiple sort orders listed, you can use the directional icon on the far left to drag and drop to reorder your sort modes.

Now let's hop over to our other setting tabs. For this module we will skip the Advanced tab, this covers .txt / PDF / HTML / JSON exports; for more information, please see our developer-focused course as this will be covered more in-depth there.

Step 9:
Navigate to the CSV/XLS Exports tab.

Step 10:
By default, OpenWater will select "auto-detect type" for XLS type detection and "All data" for the Export function.

XLS type detection will attempt to automatically format any and all data accordingly; e.g. dates processed as 01/01/2022, telephone numbers with +001, etc. In the event that XLS type detection isn't formatting your data correctly, you can use the "Render as text" option instead to get around the problem.

For export settings, "All data" means just that. In brief summary, all columns pull certain system data about the application, the applicant, all submission form fields, and all system related data regarding judging.

In many workflows, this ends up generating a large amount of columns and you may likely only need certain values for the work you're doing. That's where the "Subset of fields" option comes into play and makes spreadsheet report customization simple for all administrative users.

Select the "Subset of fields" option:

Once selected, you should see the "Configure fields" button and a light grey subtext of "No fields selected".

Let's customize our spreadsheet's output by clicking the "Configure fields" button.

Step 11:
This is our report editor graphic user interface:

The layout is as follows:
1. The dropdown contains sets of data points (aka variables) you can choose from as columns
2. The left-hand column is the list of available data points within the selected set from the dropdown in item 1 which are not yet added to your report's subsequent output

3. The left and right arrows between columns allow you to select a data point on one side or the other and move it. Moving a value from the left-hand side to the right means you are adding this as a column output; inversely moving a value from the right-hand side to the left means you are removing this data point as a column output.
4. Close button for the window - Be aware that you must save your work before Xing out of the window as there is no autosave function.
5. Once you have moved data points into the right-hand column, the arrows allow you to sort in which order your columns appear. The top-most value corresponds to the left-most column in a spreadsheet report.
6. Save button - Always remember to save your work before you X out of this window as OpenWater does not autosave the work you perform in building your report.

Step 12:
Let's add some data points and keep this report spartan. With "System" selected in the dropdown, select the following values in the left-hand column:

- Application code
- Selected category
- Application name

Super user tip:
On Windows, you can select multiple values at a time by holding the CTRL key and left-clicking at the same time. On Apple machines, use the equivalent of the CTRL key to achieve the same functionality.

And then use the right-hand arrow between both columns to add them to your report's output:
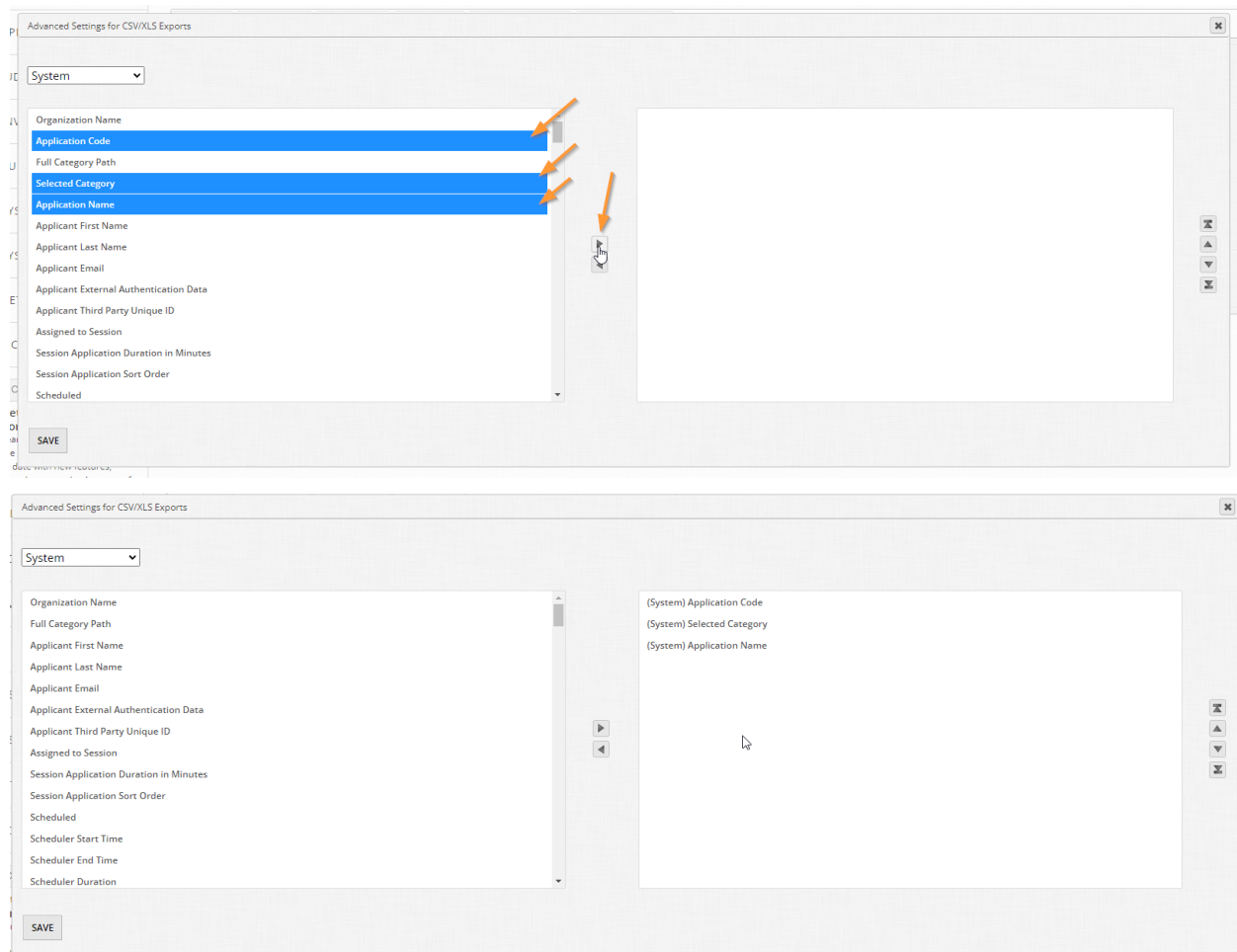
Step 13:
Change the dropdown to Submission Form > Nomination Form > Business Information and select the following values:

- In your opinion, what is this business's top qualities?
- Why else?
- Why are you nominating this business?

Then pull them over to the right-hand side:

Feel free to reorder the items in the right-hand column if you like, then click "Save" at the bottom:

Step 14:
Once you've saved, the window should close for you and display the variables you have selected as your columns / output:

This is a great overview way to quickly see what columns you're going to get. Take note that the text within parentheses tells you what kind of variable it is and/or where it comes from.

For example:
- (System) Application Code - This is a system-related variable as designated by (System) and Application Code is the specific value being pulled.
- (Submission Form) (Nomination Form - Business Information) In your opinion, what is this business's top qualities? - This variable is coming from the submission form as designated by (Submission Form), the round and question page designated by (Nomination Form - Business Information) respectively.

Great, you've now customized your spreadsheet output! If you would like to give this a test:

- Ensure you have some test entries submitted
- Navigate to the General tab
- Click "Excel" to automatically download your spreadsheet
- Open the file to check out your work

Step 15:
Let's check out the final aspect of the report settings table. Click on the tab called "Download files":

Step 16:
This tab is the unsung hero of reports and can be often overlooked. This tab allows you to download any and all file uploads you may have collected in your form, mass downloading of applications from the view of an applicant or a judge*, as well as options on how folders are generated to organize your download and how files should be named.

*The difference between these two hinges on any custom PDF layouts you may have created for applicant submission form layouts under Program Settings > Applicant Settings, including any fields hidden from applicant; the same applies for judges if you have a custom judge PDF

output enabled under Program Settings > Judge Settings, including any fields hidden from judges.

Be aware that any and all conditions you have set for this report under the Conditions tab also apply to any and all files/PDFs you choose to download in bulk. Any applications which do not meet the conditions will not have their files/PDFs pulled.

Let's break down your options:

Media selection
- Download media attached to applications - You can choose either all or select which media files you wish to download
- Download PDF of application as applicant - Download entries in PDF format with the PDF layout you have set, with any fields hidden from applicants not displayed in the file
- Download PDF of application as judge - Download entries in PDF format with the PDF layout you have set, with any fields hidden from judges not displayed in the file

Folder options
- Download all applications into base folder
- Create folders for each category and use category name
- Create folders for each category and use category code
- Create flat list of folders and use category code - This does not nest folders within folders, they are all parent level and use category code for the naming convention.
- Create folder per application - This groups all media/PDFs per application into a unique folder

File naming
- Use consistent file naming by application name - This uses the value in the Application Title Field as the file name
- Use consistent file naming by application code - This uses the Application Code (i.e. the unique identifier number) as the file name
- Use original file names - This leaves files named as they were submitted by the original uploader; any files with duplicate names will be appended numerically

Now, how to download?

You have two major options: Either link up your Dropbox account if you have one and save your bulk download job directly to the cloud, or download directly to your PC with the Download with OpenWater option. Please note that the latter does require you to download a small program of ours (available on Windows and Apple) that functions as a bridge to pull everything for you in whatever place you designate on your computer.

If you need to check what files will be downloaded before you commit to running a bulk download job, you can use the View individual files button to preview what will be pulled. This can be useful if your report has a number of conditions and you wish to double check that you will pull all the files you expect to pull.

And that's it! These concepts with reporting apply to any area you find in the platform with reports; the only difference is that the data output and certain options like variables available to use can change.

Module 10: Advanced Settings and Concepts

Table of Contents

For Module 10, we'll be focusing on advanced settings and concepts in OpenWater. Some of these concepts were covered to some extent in previous modules, some of them have not yet been addressed. Ultimately, this module is meant to reinforce and expound on what we've covered before, in a way that administrators of any level can learn to work with.

The two most important aspects of this module will be condition tables and variables, while linked programs and pre-filling submission forms are more advanced concepts that you may or may not use, but are worth learning about in the event you can leverage these functions in your workflows.

10.1 Condition Tables

There are many areas in OpenWater where you can specify parameters of what's included or when something triggers. Condition tables can be found in places, including but not limited to:

- Reports
- Auto-scoring rules
- Gallery settings
- Session gallery settings

- Evaluation layouts
- Eligibility rules
- Price rules
- And so on

Just like with reports in Module 9, the parameters you have available may change depending on where you are in the platform and what condition table you are working with.

Let's recap a sample condition table:

This particular condition table is part of a report's settings.

Like most other condition tables in OpenWater, you have two major sections here - the [all] table and the [any] table.

[all] means that every single condition you have set here **must** be met in order to be included in your report. Think of this as an AND statement if you are familiar with logic or truth tables.

[any] means that the condition(s) you have set here can be met if applications meet the conditions in this table, but it isn't a hard requirement. Think of this as an OR statement if you are familiar with logic or truth tables.

When building conditions in the [all] table, be sure to think about your parameters thoroughly. Here are some common errors we see in condition building that can cause unexpected or unwanted results:

- Wanting to pull a report that targets specific categories, but adding them all as conditions in the [all] table

  The resulting problem: Nothing will meet the conditions and result in an empty report

  The cause: Since applications can only have one category associated with one application at a time, the condition can't be met.

The solution: When looking to target specific categories in a specific report, add them in the [any] table

- Wanting to pull a report that looks for multiple values selected in a single dropdown field

  This is essentially the same as the first scenario - The solution would be to add this/these condition(s) in the [any] table

- Creating a price rule that only applies through XYZ date, such as an early bird fee but not setting a standard price rule in a similar fashion

  The resulting problem: Depending on the configuration, you can either end up with a "hole" where price rules aren't applied, or you accidentally stack the early bird fee with the standard fee.

  The solution: When building price rules that need to take dates into consideration, ensure that the early bird fee(s) have conditions for both a start and end date; ensure the standard price rule fee(s) have conditions for both a start and end date that takes place *after* the end date of the early bird fee. Think of it as a number line.

Condition tables are powerful tools but sometimes can be tricky at first. If it helps, write out your intention on paper, then configure your conditions. And of course, as always, test them thoroughly!

10.2 Variables

Just like with condition tables, variables are found throughout OpenWater in a variety of areas, including but not limited to:

- Reports
- Emails
- Gallery settings
- Session gallery settings
- Evaluation layouts
- Invoice templates
- And so on

The beauty of variables is that they are flexible and easy to use - You don't have to be a developer to utilize variables, but if you are, you can go even further with the concept.

So what exactly is a variable?

All a variable is, is a dynamic placeholder of data, indicated via { } brackets. So let's say you're building an email blast and you wish to start your email with a personalized greeting, i.e. the applicant's name.

You would utilize a variable like so:

"Dear {SubmitterFirstName},"

And because it is a dynamic placeholder, for every applicant who receives the email, OpenWater will automatically populate it with the recipient's first name as listed in their account profile.

So you would have emails like:
"Dear Jane,"; "Dear Kevin," and so on.

The sky is the limit with variables - There are variables for, including but not limited to:
- User profile data
- Submission form fields
- Judge evaluation fields
- Links to uploaded media
- Links uploaded in submission forms
- Emails provided in email fields
- Etc

Just like with condition tables and reports though, depending on what you are configuring, certain variables may or may not be available to you. For example, the variables available when configuring your Invoice PDF Template will be limited in comparison to the variables available when configuring an email blast in one of your programs.

For your convenience, anywhere you see "Insert Variable" will display a pop-up of all available variables and will look something like this:

Insert variable ✖

INSERT SELECTED   COPY TO CLIPBOARD

Search: [   ]

☐	Type ▲	Title	⇕	Action
☐	Account Urls	{LoginUrl}		Insert
☐	Account Urls	{ForgotPasswordUrl}		Insert
☐	Account Urls	{ResetPasswordUrl}		Insert
☐	Applicant	{FirstName}		Insert
☐	Applicant	{LastName}		Insert
☐	Applicant	{Email}		Insert
☐	Applicant	{Company}		Insert
☐	Applicant	{ExternalUserAuthData}		Insert
☐	Applicant	{ThirdPartyUniqueId}		Insert
☐	Applicant	{MagicLink}		Insert
☐	Applicant Field	(Applicant Profile User Profile) Email Address		Insert
☐	Applicant Field	(Applicant Profile User Profile) Salutation		Insert
☐	Applicant Field	(Applicant Profile User Profile) First Name		Insert
☐	Applicant Field	(Applicant Profile User Profile) Last Name		Insert
☐	Applicant Field	(Applicant Profile User Profile) Suffix		Insert
☐	Applicant Field	(Applicant Profile User Profile) Company Name		Insert
☐	Applicant Field	(Applicant Profile User Profile) Job Title		Insert
☐	Applicant Field	(Applicant Profile User Profile) Primary Address.Street		Insert
☐	Applicant Field	(Applicant Profile User Profile) Primary Address.Line2		Insert
☐	Applicant Field	(Applicant Profile User Profile) Primary Address.Line3		Insert
☐	Applicant Field	(Applicant Profile User Profile) Primary Address.City		Insert
☐	Applicant Field	(Applicant Profile User Profile) Primary Address.State		Insert

The anatomy of this pop-up are as follows:

- Insert selected - Using the checkboxes on the left-hand side, if you have one or more variables checked, you can insert directly into the text input box you're working in.

5

- Copy to clipboard - If you just need to grab variables and modify them elsewhere, if you have one or more variables checked, you can copy them directly to your clipboard without inserting them.
- Search - Because there are a plethora of data points to choose from, if you need to find something specific, you can save yourself some time by searching for it using the box on the top-right.
- At the top of the table, you'll notice a checkbox at the top - You can select or unselect all variables in the list.
- The type column - This tells you where / what kind of variable this is. For example, "Applicant" means it's a variable pulling from the user's account information, "Application" means specific system-related data points like Application ID, Application Name, etc.
- The title column - This specifies the data point that you would pull and if applicable, where it's from. For example, "(Applicant Profile User Profile) Email Address" means that this variable is coming from the user profile and it is the placeholder for the email address value that exists there. Another example, "(Nomination Form More Fields (Demo)) Enter a Phone Number" means this is coming from the Nomination Form round, the question page More Fields, and it's the placeholder for the "Enter a Phone Number" field.

Use variables as much as you like to customize your reports, emails, and other areas in order to personalize, engage, and maximize your usage of OpenWater.

10.3 Linked Programs

Linked programs are an advanced means of allowing applicants to copy their submissions from one program to another. Perhaps you have a new program that is very similar to a previous program you've run, but it's not quite a duplicate and you would like to allow applicants to quickly resubmit while saving them some time. Or, perhaps it is a duplicate program, but you would rather have applicants manually resubmit as opposed to cloning all entries over for the next cycle. Linked programs handle these types of scenarios but require a little effort to get up and running.

Let's have you set up a sample linked program.

One prerequisite is that you have submitted at least one test entry in the program we've been working on throughout this course.

Step 1:
Go into your program via Manage, then go to Program Settings > Overview.
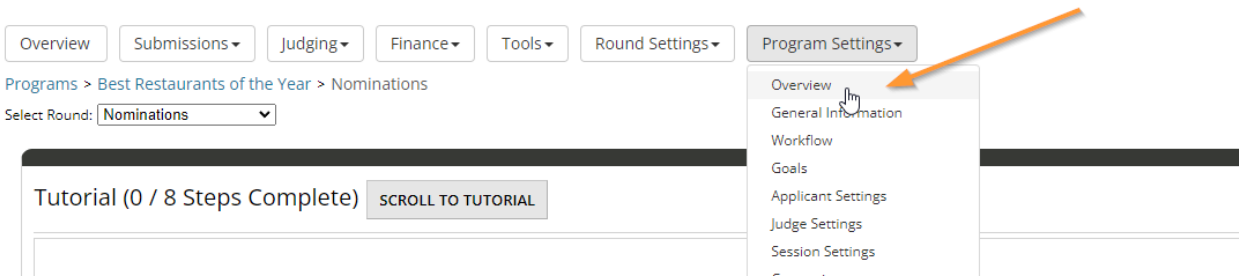
Step 2:
Scroll all the way down to the bottom of the page and click on the button called "Duplicate this program".
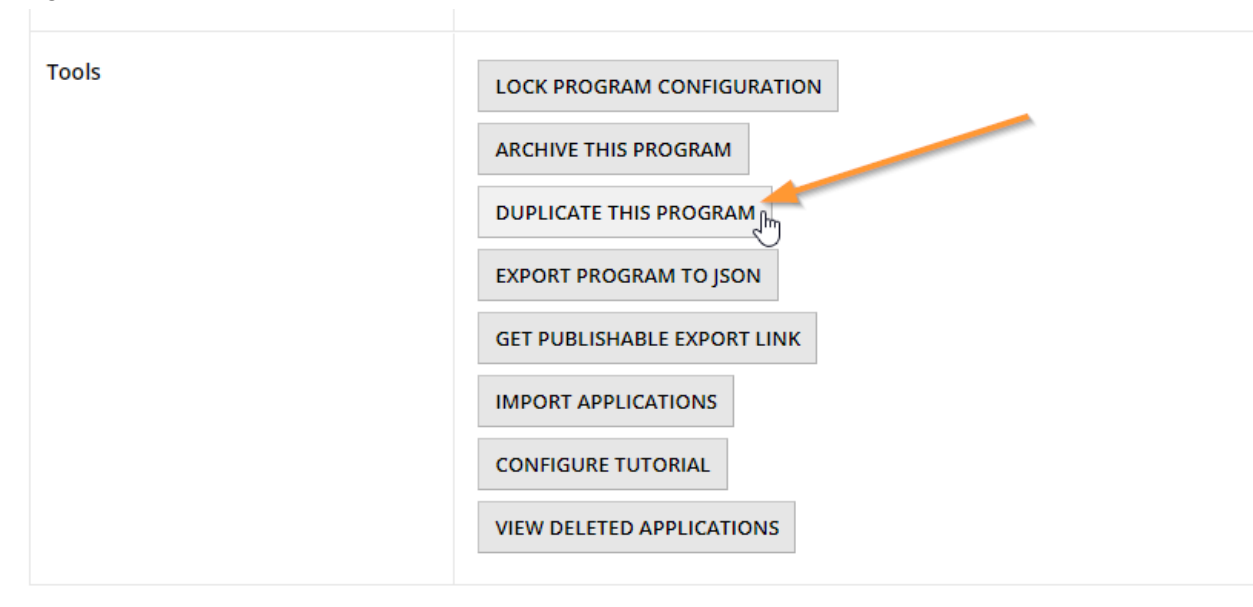
Step 3:
On this menu, adjust the Program Name to read "Best Restaurants of the Year (Linked)" and ensure you have the following option selected: Questions, Scoring Rules, Auto Scoring Rules, Price Rules and Reports. It is imperative that this option be selected as this controls duplicating your submission form, rounds, reports, evaluation settings, etc.

You should have something like this; when ready, click "Save" to start the duplication process:

Program Name *	Best Restaurants of the Year (Linked) Displayed on the home page and throughout the site
Duplicate	☐ Rules ☐ Point of Contact ☐ Managers ☐ Goals ☐ Judges ☐ Program Notes ☑ Questions, Scoring Rules, Auto Scoring Rules, Price Rules and Reports ☐ Session Settings ☐ Scheduler Settings ☐ Submissions of Round 1
	CANCEL SAVE

It may take a moment, but OpenWater will then redirect you to your newly duplicated program.

Step 4:
Set your open/close dates for submissions accordingly:

Workflow (configure)

Name	Submission Period	Judging Period	# Incomplete	# Pending Approval	# Complete	Action
Nominations	No Dates Set	No Dates Set	0	0	0	Manage
Finalists Ranking	N/A	No Dates Set	N/A	N/A	0	Manage
	Current Timezone: Eastern Standard Time					

Step 5:
Once you've done so – and of course, ensured you saved your changes – go to Program Settings > Linked Programs:

Step 6:

In this case, you should have your original Best Restaurants of the Year program available in the list. Select it by ticking off the checkbox next to it and click "Save":

Step 7:

Once you've saved, then click "Manage" next to your selection:

Step 8:
You should see our field mapping menu when the page loads and it will look something like this:

For forms that are involved with lots of fields, we have a convenient function called "Automap" above the table. By clicking it, OpenWater will attempt to find the closest matching field it can, which is particularly helpful when linking to duplicated programs that are either a 1:1 match or were modified with some original fields retained.

We recommend running field automapping first to save yourself time and then adjusting or manually setting other fields where required.

What we're doing here is telling OpenWater that all mapped fields are the same, so when we point applicants to this linked program's submission form, it will allow the applicant to copy over some or all data that the applicant submitted in the origin program.

Hit the "Automap" button at the top:

Step 9:

It may take a moment, but the page will reload and you should see matching values for each row item under the Field Name column:

Best Restaurants of the Year (Linked) > Linked Programs > Best Restaurants of the Year

Page	Name	Type	Field Name
Business Information	Name of Business	ApplicationName	(Name of Business) Name of Business [title]
Business Information	Logo	FileUpload	(Logo) Logo [logo]
Business Information	In your opinion, what is this business's top qualities?	CheckboxList	(In your opinion, what is this business's top qualities?) In your opinion, v
Business Information	Why else?	Text	(Why else?) Why else? [whyElse]
Business Information	Why are you nominating this business?	MultilineText	(Why are you nominating this business?) Why are you nominating this b
Business Information	Expand the Demo Fields?	ApplicationCategory	(Expand the Demo Fields?) Expand the Demo Fields? [category]
File Uploads (Demo)	Upload a PDF	FileUpload	(Upload a PDF) Upload a PDF [uploadAPdf]
File Uploads (Demo)	Upload a Video (mp4)	FileUpload	(Upload a Video (mp4)) Upload a Video (mp4) [uploadAVideoMp4]
File Uploads (Demo)	Upload an Office Document or any other file	FileUpload	(Upload an Office Document or any other file) Upload an Office Docume
More Fields (Demo)	Fields can be made to be Required	CheckboxList	(Fields can be made to be Required) Fields can be made to be Require
More Fields (Demo)	Text Fields Can Have Character Counters	Text	(Text Fields Can Have Character Counters) Text Fields Can Have Chara
More Fields (Demo)	Text Fields can have Word Counters	MultilineText	(Text Fields can have Word Counters) Text Fields can have Word Count

In this case, everything is a 1:1 match, so we have no other work to do here. Feel free to click the "Save and back" button at the top of the table when you're ready:

Best Restaurants of the Year (Linked) > Linked Programs > Best Restaurants of the Year

Page	Name	Type	Field Name
Business Information	Name of Business	ApplicationName	(Name of Business)
Business Information	Logo	FileUpload	(Logo) Logo [logo]
Business Information	In your opinion, what is this business's top qualities?	CheckboxList	(In your opinion, wha

Step 10:

Navigate to the shortcut link for your program at the top of the menu:

Programs > Best Restaurants of the Year (Linked) > Linked Programs

Then click Manage on the right-hand side:

Programs > Best Restaurants of the Year (Linked)

Workflow (configure)

Name	Submission Period	Judging Period	# Incomplete	# Pending Approval	# Complete	Action
Nomination Form	6/1/2022 12:00 AM - 6/30/2022 11:59 PM	6/1/2022 12:00 AM - 6/30/2022 11:59 PM	0	0	0	Manage

Step 11:
In the "Market Programs" box, copy the hyperlink for "Direct to Program":

Step 12:
In a document editor, such as Microsoft Word or Notepad++, paste your link and add the following to the end:
?createFromLinkedSolicitation=True

Your link should look similar to this:

https://try.openwater.com/a/solicitations/3/home?createFromLinkedSolicitation=True

This tells OpenWater that if an applicant accesses your submission form through this link, that it should look to see if the applicant has an application in the program you mapped from. Test it out yourself with your own link in your browser, you should ultimately see something like the following:
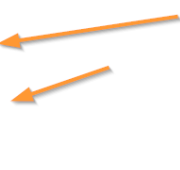
This will allow you to copy over your test entry from your first program into your newly linked program.

This is a powerful function that can help you manage your programs, but as mentioned before, just requires a few extra steps.

10.4 Pre-filling Submission Forms

In some cases, perhaps you want to have certain values within your submission form preselected by the time your applicants access the form to save them some time.

Here's an example of such a workflow:

Maybe you have different categories and you would like to have a custom page on your OpenWater domain with tile images outlining your categories – And on click of any of the images, automatically prefill the category on behalf of the applicant. It may seem like a small detail, but small details make a big impact.

In such a workflow, there are a few steps to perform in order to get your images ready.

Step 1:
Get your custom page set up with your images accordingly and embed them in the page.

Step 2:
Go back to the dashboard, select the program in the dashboard you wish to link your images to and click the "Copy Link to Begin Application" shortcut to quickly copy the link to your clipboard:

Step 3:
Paste your link in a document editor, like Microsoft Word or Notepad++.

Step 4:
Back in the OpenWater dashboard, go into your program via Manage, then Program Settings > Categories.

Step 5:

Copy the category codes and paste them in the document you have open:

In this example, we have two categories, so we need two of the same link from step 3 in your document. Paste a second copy.

Step 6:

We need one more piece of data from OpenWater before we can put our new links together. Go back to your program's overview and then Round Settings > Submission Form:

Step 7:

Once the page loads, click the option called "Developer Settings" at the top of the table:

Step 8:

Find the field with "Application Category" as the type. (Tip: On Windows, you can use the shortcut CTRL + F to search and highlight values on a page.) Then, copy the value in the Alias input area:

Paste this value in your document.

Step 9:

At the end of your Direct to Program links, add the following:
?field.category=

category is our alias value and this tells OpenWater that this is the field it should find and prefill.

Step 10:
At the end of your Direct to Program links, add the category codes from step 5.

You should now have two links that look something like this:

https://try.openwater.com/a/solicitations/3/home?field.category=00
https://try.openwater.com/a/solicitations/3/home?field.category=10

Now if an applicant goes to access either one of these links, OpenWater will automatically preselect the respective category when the applicant loads the form.

Step 11:
Go back to your custom page in step 1 and double click one of your image tiles.

Step 12:
In the menu that appears, paste your first link in the URL input. Save and close out of the window.

Step 13:
Repeat this process for a second image with your second link, save and close out of the window.

Step 14:
Save your changes to this page and open the quicklink at the bottom of the page to view your work in a new window.

Step 15:
Test it out and observe your work!

While this is a relatively simple example, you can use this function to prefill all sorts of values and multiple values within a single link. You can also mix in variables into the hyperlink in certain scenarios to make this even more dynamic. Try your hand at it and see what unique workflows you can come up with!

For additional reading, please see our help desk article which discusses how to target and prefill other field types beyond just categories: <u>Prefill Fields on an Application</u>

Module 11: Public Website Deep Dive

Table of Contents

As part of your instance in OpenWater, you will have a public website associated with it. For new clients, you are entitled to a ***.secure-platform.com domain, with the *** being any name or acronym of your choosing. OpenWater does offer the ability to have custom domains, also known as vanity domains, if secure-platform.com isn't sufficient for your team's needs. For more information on vanity domains, we recommend reaching out to your point of contact here at OpenWater.

For clarity, your instance in OpenWater is not your domain. Think of your instance as a house. Your "house" is standalone from your neighbors (other clients using OpenWater). You have the keys to your house, with the back door being the admin panel and the front visage / door being the public-facing components - Like your public website, application form, and judging components. Think of the visage of the house as your public website, where you dress up the outside for whatever you have inside. Think of the rooms inside this house as programs where you keep all of your data stored.

We tend to use these terms frequently, like instance, program, etc, so hopefully the house analogy helps you understand how these pieces all come together and what they refer to.

So for this module, we'll focus on your public website in OpenWater - Without it, there is no method for your applicants to access your submission form(s) and no method for your judges to access their scoring assignments. Thankfully, this is all managed in the admin panel directly.

11.1 General tab

First things first, let's access your public website.

Step 1:
From the dashboard, find the Public Settings tab in the global left-hand menu. Click on it to open the dropdown and select Website from the list:

Step 2:
Your sandbox should only have a single domain associated with it right now, so you should be brought to the Menu and pages tab:

Step 3:
We'll return to this tab later, for now select the General tab to load the settings for it:
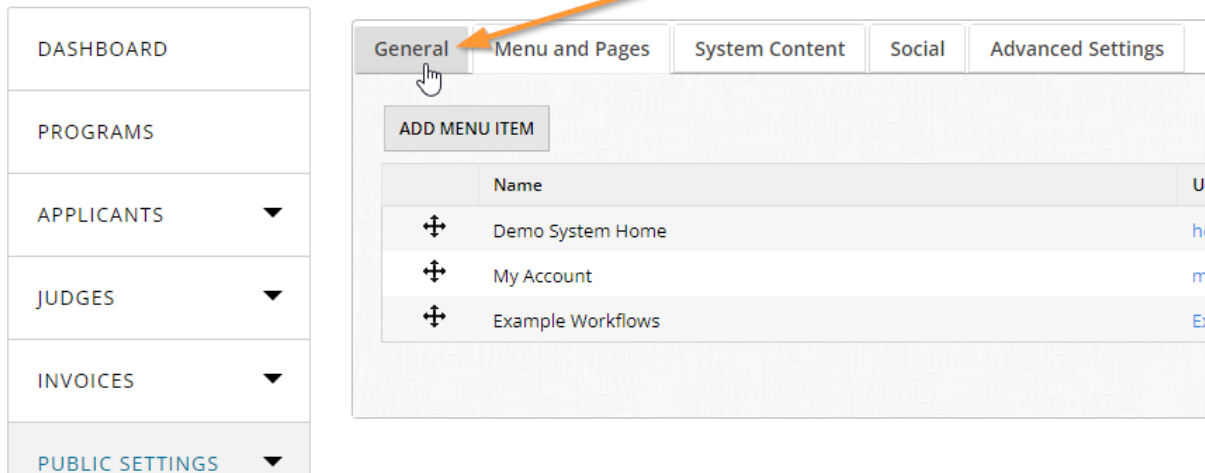
Step 4:

The General tab, as the name implies, contains some overarching general settings for the front-facing domain:

When setting up your domain in OpenWater, we highly recommend starting here first and adjusting the default values. In order, these are the settings available:

- Name - This is the name of your website which displays in search engines like Google, Bing, etc. At minimum, we recommend updating the name value to your organization's name unless there is something more specific you would like to use.
- Description - This is the description text about your website which displays in search engines like Google, Bing, etc. We highly recommend updating this with a basic blurb about your organization at minimum unless there is something more specific you would like to use.

- Redirect Root URL - This is an optional setting. OpenWater does not have an "under construction" mode for the public website's homepage, but you can use this field to put in a URL of your choosing to forcibly redirect anyone who accesses your homepage to a different page. For example, say you have a countdown clock and want this to be your homepage temporarily; you can place the URL for the countdown clock page into this area and save it. To undo it, simply remove the URL and save your changes again.
- Theme - If your instance has several themes configured, you can choose to use the default theme *or* pick from a different theme for the domain.
- Banner - If using the OpenWater default theme, you will need to upload a banner image. The banner file should be 1050 x 250 pixels in size in jpg / jpeg / png format.

For now, configure the Name and Description areas; if you have a banner image, feel free to follow the file upload prompts to upload your banner.

Step 5:
With your general settings configured, proceed to the Menu and pages tab.

11.2 Menu and pages

The menu and pages tab has two major functions:
1. It tells you what items you have in your website's navigation menu on the public-facing side
2. It functions as a sitemap with all of the different pages/items you have created for your public website

The table breaks down your menu and pages into the following columns:
- Name - The name of the menu/item which is visible to the public
- URL key - The "name" of the page for the URL itself which your browser uses to navigate to it. For your convenience, you'll notice that they are also hyperlinked, allowing you to click on and quickly view the page(s) in a new tab as needed.
- Type - This tells you what kind of menu item it is. We'll cover this a little more in depth shortly. Some menu types, like Home Page and Login Page can't be deleted or changed into a different type, but they can be hidden.
- Show in Menu - This tells you whether or not this particular menu item is set to display in your navigation menu. Yes means that this item is set to show, no means that this item is hidden.

- Action - The ability to edit a page, clone a page, add a sub-page, or delete a page accordingly.

Pages can also be reordered as you see fit by using the cross icons in the far-left column.

Let's add a new menu item and discuss the different options you have available to you there.

Step 1:
Click the "Add menu item" button at the top of the table:

Step 2:
This is the editor menu for a new menu item:

The options available to you are as follows:
- Parent - This allows you to specify if this menu item you are creating should be a top-level item in the navigation menu (i.e. Root) or if it should be nested under another
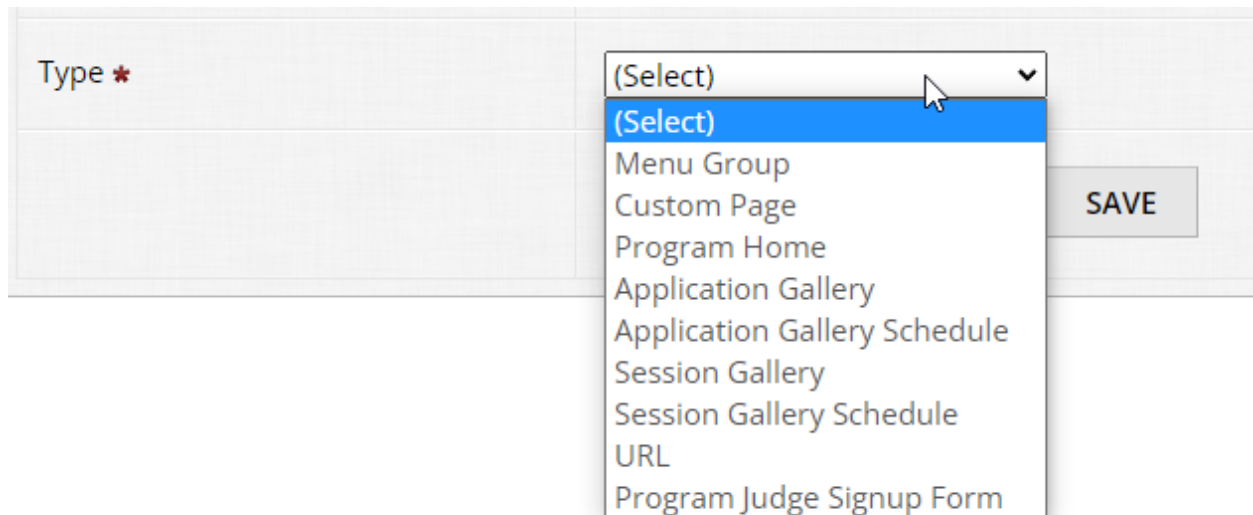
existing item. If you make a mistake, you can always adjust your website page's ordering anytime via the dropdown.
- Name - The name of the page visible in the menu and to public users.
- URL key - The "name" of the page specifically for the URL for browsers to navigate to.
- Show in menu - Whether or not this menu item should display in the navigation menu.*
- Visibility to users - This determines the behavior of how this menu item should display. Should it display publicly to everyone, regardless if users are logged in or not? Or should it only display once a user is logged in? Or should it only display if a user is *not* logged in?
- Open in a new tab - Ticking this box will make your menu item open in a new page. If you are pointing to a file or a URL off-site, we recommend enabling this feature so users don't lose their place on your OpenWater domain.
- Ordinal - This is a numerical means of telling OpenWater of which position this menu item should take in your navigation menu. Because of our drag and drop reordering function available to you, you can ignore this option as OpenWater will automatically update the ordinal for you.
- Type - This dropdown allows you to pick which type of menu item this should be.

*OpenWater does not have an "under construction" feature like say, WordPress, however if you have a page that you're working on but don't want to display it yet, you can leave "Show in Menu" turned off until you're ready.

Let's dive into the different menu item types available to you.

Click on the "Type" dropdown to open the menu:

Type *

| (Select) | ⌄ |

(Select)
Menu Group
Custom Page
Program Home
Application Gallery
Application Gallery Schedule
Session Gallery
Session Gallery Schedule
URL
Program Judge Signup Form

SAVE

Menu Group

All a menu group is, is a placeholder for nested menu items. For example, let's say you have something like:

About Us
- ● Our Mission
- ● Our History
- ● Contact Us

In this case, "About Us" would be the Menu Group item. It doesn't lead to a page of any kind, it just functions as a placeholder for the nested pages of "Our Mission", "Our History", and "Contact Us". You are likely familiar with this setup elsewhere on the web.

If you have a menu item designated as a menu group item, dragging and dropping it will also move any nested pages you have within it. If you have a menu group item set to hidden from menu, this will also hide any nested pages with it.

Custom Page

The Custom Page is likely one of the most used menu item types. As the name implies, this allows you to create custom pages of content as you see fit. Like with other areas in OpenWater we've covered in prior modules, you have a rich text editor at your disposal to format your content as desired. For those of you who are savvy in HTML/CSS and other front-end development languages, our rich text editor has a "Source" mode which allows you to modify the content of your page but from the code aspect. So if you have custom classes or scripts,

you have the flexibility to handle that there. Source mode also has color coordinating and other handy features to make modifications in this area easier on you.

Keep in mind that there is only one main variable you can utilize on a web page with a custom content box, which is {ActiveProgramsList}. If you add it into your content section, this will automatically populate a nicely formatted table on the page with information about any and all programs you have active and have chosen to display on the list (this can be enabled or disabled per program within Round Settings > Open / Close Dates).

Some other options that have populated which are available to you are as follows:

- Show login box / user navigation - This allows you to toggle whether or not the login box / user account menu displays on the page. Unless you have a customized theme, this section will display on the left-hand side of the page. If you disable this section for this page, the content will span the entirety of the container for you.
- Require user to be logged in to view page - A bit of a niche feature, but as the name implies, it forces public users to be logged in in order to view the content you have on this page. This can be useful in workflows where perhaps you have members-only content and members must be logged in via SSO to view it.
- Preview URL - Until you save your custom page content for the very first time, nothing will populate here. Once you save, a direct URL to the page will populate in this area. You can click on it to open the page in a new tab and quickly double check your work. As always, we highly recommend checking your work frequently as sometimes the visual editor may look a little different than the final output on your public website due to theme or code your team may be utilizing.

Program Home
To save you some time and steps, Program Home allows you to quickly select an active program you have in your instance and link to your program's submission form. When Program Home is selected as the menu item type, you will be prompted to select a program from the Program dropdown list like so:

| General | Menu and Pages | System Content | Social | Advanced Settings |

Parent	Root ▾
Name *	
URL Key *	
	☑ Show in Menu
Visibility to Users	◉ Show to All Users ○ Show to Logged in Users ○ Show to Anonymous Users
	☐ Open in a new tab
Ordinal *	2
Type *	Program Home ▾
Program *	(Select) ▾
	BACK SAVE AND BACK SAVE

Name *	
URL Key *	
Visibility to Users	
Ordinal *	
Type *	
Program *	Best Restaurants of the Year Best Restaurants of the Year (Linked) (Select)

BACK   SAVE AND BACK   SAVE

Select your program from the list, hit "Save", et voila! OpenWater will link up your submission form automatically for you.

Keep in mind the one caveat here with this option is that, if you are using any sort of special URL for your form (such as linked programs or pre-populating the submission form), you will need to manually drop in the URL for it with "URL" as the menu item type selected.

Application Gallery
Similar to selecting Program Home, when selecting Application Gallery as the menu item type, you can quickly link up to any application gallery you have configured in any of your programs. Galleries are a little different than submission forms in the sense that these can be accessible anytime you like and aren't necessarily bound to open/close dates like submission forms are. So say you have a winners' gallery and an entrants' gallery every year, you can link those up automatically without needing to do much else in terms of maintenance.

| General | Menu and Pages | System Content | Social | Advanced Settings |

Parent   Root ▼

Name *   [   ]

URL Key *   [   ]

                                ☑ Show in Menu

Visibility to Users   ● Show to All Users
                                ○ Show to Logged in Users
                                ○ Show to Anonymous Users

                                ☐ Open in a new tab

Ordinal *   [2   ]

Type *   Application Gallery ▼

Program *   (Select)   ▼

                                [BACK] [SAVE AND BACK] [SAVE]

Application Gallery Schedule
Similar to the Application Gallery, if you have the schedule view enabled for an application gallery (namely pertinent to event cloud usage such as sessions, workshops, webinars, etc), this functions the same. Select a gallery from the list that has the schedule view enabled and OpenWater will link to it accordingly.

Session Gallery
Similar to the Application Gallery, this option allows you to select a Session Gallery and link up to it automatically without needing to dig for the URL. This is most pertinent to our sessions related clients, and linking to the session gallery also ropes in the applications / application gallery nested within it (if properly configured).

Session Gallery Schedule
Similar to the Application Gallery Schedule, this option allows you to select a Session Gallery which has the schedule view enabled and link up to it automatically. This is a great tool for clients using sessions in order to quickly provide a public-facing agenda to your audience without needing to worry about linking up to it manually.

URL

As the name implies, the URL menu item type allows you to drop in any URL you like. Oftentimes we see clients use this to point to a file (such as a PDF document outlining the rules of a contest or rules of entry) or somewhere off-site, such as the organization's main website for specific information like membership.

When using this menu item type, we highly recommend that you ensure "Open in a new tab" is enabled so that users who click on this item don't lose their place on your OpenWater site. It's a small detail but it helps reduce frustration for your public users and makes the experience more seamless.

Judge Signup Form
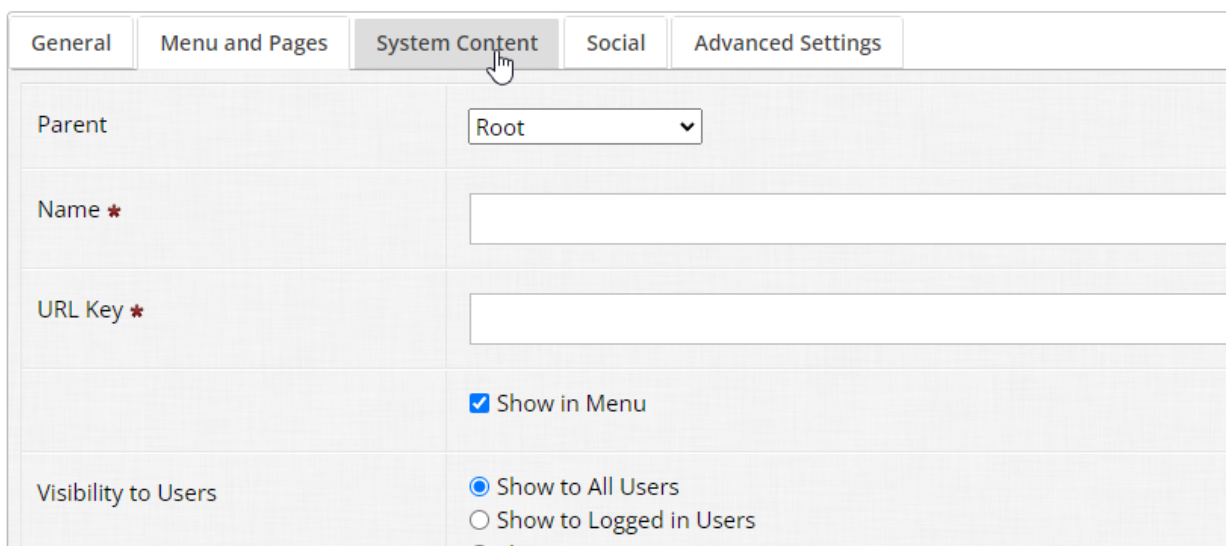
The judge signup form is a unique option that allows you, on a per program basis, to have a unique form for users who wish to volunteer to judge. If you have this configured for your program, just like with the other options covered above, this allows you to quickly link to this specific form without needing to go digging for the hyperlink.

11.3 System content

Now that we've covered your public website's menu and pages, let's hop into your system content.

System content is still related to your public website, but it's mainly for modifying certain platform-generated areas on your public website which are separate from custom pages.

Go to the tab called "System Content" to get started:

You'll notice that this table is different than your menu and pages because none of these items can be deleted, cloned, or otherwise. But, they can all be edited:

Name	Description	Action
Login Box	Set Login Box Header and Footer	Edit
Login / Register Content	Set Login Box and Registration Form Headers	Edit
Payment	Provide payment choice directions	Edit
Review and Checkout	Provide checkout directions	Edit
My Submissions	Provide generic directions to applicants on their login landing page	Edit
My Judging Assignments	Provide generic directions to judges/reviewers on their login landing page	Edit
Submission Not Completed	Provide generic directions to applicants	Edit
Applications Need Attention	Notify applicants that they allowed to enter more data to submissions or they are moved to next round	Edit

Be aware that these are global settings for the entirety of your public website, if you need custom System Content on a per program basis, you will want to enable this within your program via Program Settings > General Information.

Login Box

The Login Box page has two main areas in which you can modify:
- Header - This is the prompt text which appears above the login box prior to a user logging in.
- Footer - This is the text which appears below the login box prior to a user logging in.

Login / Register Content

The Login / Register Content area is visible to users when they attempt to access a submission form, prompting them to create an account or login. This is a different area than just the Login Box content. You have the following areas you can modify:

- Page Title - This is the header text that appears across the page.
- Login Box Header - This is the content that appears above the login inputs on the left-hand side of the page.

- Login Box Footer - This is the content that appears below the login inputs on the left-hand side of the page.
- Create Account Header - This is the header text which appears above the user profile registration inputs on the right-hand side of the page.

Payment

The Payment area only has a single input, which allows you to specify payment instructions and methods when paying for entries if your program(s) take in fees. This area appears during the checkout process in OpenWater.

Review and Checkout

The Review and Checkout area only has a single input, which allows you to specify any checkout instructions or guidance you may need to provide your applicants. This appears during the checkout process in OpenWater.

My Submissions

The My Submissions area has two inputs for you:
- Page Title - This is the header text for the page when users are looking at their submissions within their account.
- Welcome Text - This is the input area where you can specify guidance, instructions, or just a general welcome text to personalize the experience for your users.

My Judging Assignments

The My Judging Assignments area is similar to My Submissions in that you have two inputs:

- Page Title - This is the header text for the page when judges are accessing their judging assignments within their accounts.

- Welcome Text - This is the input area where you can specify guidance, instructions, or just a general welcome text to personalize the experience for your judges. We highly recommend utilizing this to provide help information to judges in case they need assistance.

Submission Not Completed

The Submission Not Completed area has three inputs you can modify:
- Welcome Text - This allows you to specify instructions or helper text when a user is attempting to start a new application but already has an in progress application within her or his account.
- Link text for "Go to Existing Submissions" - This allows you to change the text of the hyperlink which points to the user's currently in progress submissions.
- Link text for "Begin a New Submission" - This allows you to change the text of the hyperlink which points the user to the submission form to start a new entry regardless of any currently in progress applications.

Applications Needs Attention

The Application Needs Attention area has two inputs which you can modify:
- Warning panel text - When you have a workflow where there is at least one additional round where applicants can provide additional information, OpenWater will display a red banner on your public website a call to action prompting the user to provide additional information. This requires a program with more than one round of submissions (i.e. interaction from the applicant) and the application has been moved into this additional submissions round.
- Link text for "Go to submissions which require attention" - This allows you to change the text of the hyperlink which sends the user to the application(s) that have more information awaiting completion.

11.4 Social

Under the Social tab, you can easily enable social following and sharing for your OpenWater domain. It's a quick and easy way to boost your organization's marketing efforts around your programs. You can either enable social following, social sharing, or both at the same time. Once you've enabled a setting, a variety of social network inputs will appear. Follow the prompts to add your organization's social follow links and desired verbiage for social sharing et voila, that's all there is to it!
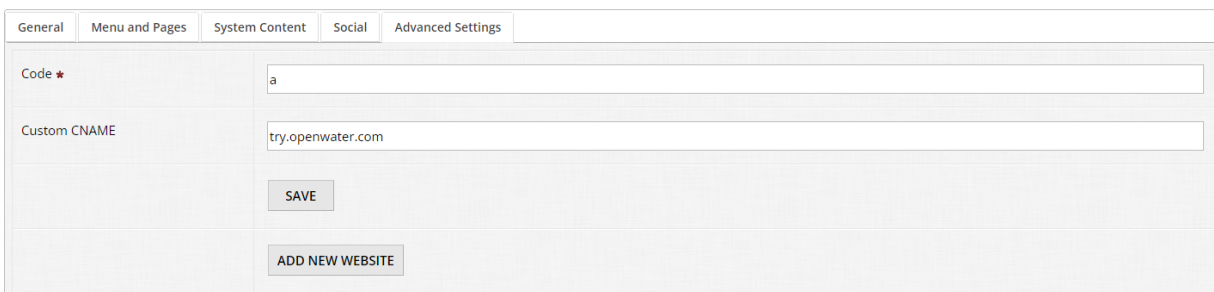
| General | Menu and Pages | System Content | Social | Advanced Settings |

☐ Enable Social Follow

☐ Enable Social Sharing

SAVE

| General | Menu and Pages | System Content | Social | Advanced Settings |

☑ Enable Social Follow

Facebook follow URL

http://

Twitter follow URL

http://

LinkedIn follow URL

http://

Google Plus follow URL

http://

Newsletter follow URL

http://

☐ Enable Social Sharing

SAVE

| General | Menu and Pages | System Content | Social | Advanced Settings |

☑ Enable Social Follow

Facebook follow URL

http://

Twitter follow URL

http://

LinkedIn follow URL

http://

Google Plus follow URL

http://

Newsletter follow URL

http://

☑ Enable Social Sharing

Link to share

http://

leave blank to share current page

Sharing title

leave blank to use current page title

☐ Enable sharing via Facebook

☐ Enable sharing via Twitter

☐ Enable sharing via LinkedIn

☐ Enable sharing via Google Plus

☐ Enable sharing via Email

SAVE

11.5 Advanced settings

This is likely an area you may not need to bother with much, but if you would like to have multiple domains with the same prefix, this is important to be aware of:

The "Code" input allows you to specify what we call a "path". When you specify a path, this allows you to change the suffix of your domain and have different websites/editors/content all within the same prefixed domain.

For example:

try.openwater.com/a/home - The 'a' denotes a path, ergo one website. If we added: try.openwater.com/awards/home - The 'awards' denotes a different path, ergo a different website to manage in the website settings editor. You would then be able to set up different content, banners, themes, all while having the same prefix domain which in this example is try.openwater.com

In this case, we also have a custom CNAME (also known as a Vanity URL) so instead of try.secure-platform.com we have try.openwater.com. If your organization would like to utilize a custom CNAME, please reach out to your point of contact here at OpenWater for more information.

Generally though we recommend utilizing our path functionality as opposed to having different prefixed domains, simply because it's easier to manage and easier for your stakeholders to remember the URL to access it.

Module 12: Import / Export Program from Template Gallery

Congratulations on making it to the end of the OpenWater Essentials!

You're almost to the finish line. The last module for this course is utilizing our template gallery, populating sample data, and exporting any finished products you may have to your main production instance.

Step 1:
Find your desired template.

From the dashboard, go to the Programs box and click the "Add Program" button:

Step 2:
Any and all templates ready for use will populate in the table below. For your convenience, the table is broken up into a few columns:

- Template category thumbnail - For quick and easy visual identification, each template will have a thumbnail image with text outlining what type of template it is, such as awards, survey, nominations, etc.
- Name - This is the name of the template program available.

- Description - This is a short synopsis as to what the template program is used for and the intended audience.
- Action - You can either view more details about the template prior to install, or if you know which template you need, you can install it right away.

Step 3:
Let's preview a template first before we install it. Find the "Best Places to Work" template in the list and click "View":

Step 4:
Additional information about the template will populate in a new window. For your convenience, each template will have a slideshow walking you through major features and functions within the template, as well as a written component below:

If you like, you can request a demo, install the template from here, or go back to the list of available templates. For this module, simply close this tab when you are finished.

Step 5:
For this module, install the very first template in the list, the try.openwater.com template. Click "Install" on the right-hand side:

Step 6:
If you would like to rename any of the template's values, such as Program Name, First Round Name, etc, feel free. When you've finished, you can also select "Install with Sample Data". This is highly recommended if you are trying out a template in order to save yourself some time from creating your own test entries to double check the public-facing components (i.e. submission form, evaluation form). When you've finished, click "Install":

Programs > Select Program Template > Install New Program from Template

Program Name ✱	try.openwater.com - Sample Program
	Displayed on the home page and throughout the site
First Round Name	
	Leave blank if you only have one round
Public Website Base Url	☐ Force Base Url
	☑ Display on Website Programs List
	☑ Install with Sample Data
	CANCEL INSTALL

Step 7:
Sit back and wait for OpenWater to install your template. Depending on the size, complexity of the template as well as installing sample data, it may take a few minutes:

Programs > Select Program Template > Install New Program from Template

Program Name ✱	try.openwater.com - Sample Program
	Displayed on the home page and throughout the site
First Round Name	
	Leave blank if you only have one round
Public Website Base Url	☐ Force Base Url
	☑ Display on Website Programs List
	☑ Install with Sample

Background Task Processing ✖

Installation in progress.
Don't close or refresh the page.
You will be redirected automatically after the installation finishes.

OK

Step 8:
Once the process has finished, you'll be brought to the overview page of the newly installed template program. Ausgezeichnet, you've successfully installed your very first template:

Programs > try.openwater.com - Sample Program

Workflow (configure)

| Name	Submission Period	Judging Period	# Incomplete	# Pending Approval	# Complete	Action
Nomination Form	No Dates Set	No Dates Set	0	0	4	Manage
	Current Timezone: Eastern Standard Time					

Program Settings

| General Information Configure	try.openwater.com - Sample Program **Rules:** Not Set **POC:** Not Set **Passphrase:** Not Set **Program Code:** Not Set **Program Tag:** Not Set **Payment Configuration:** Default **Website Domain:** Default **Email Configuration:** Default **System Phrases Configuration:** Default
Goals Configure	**Target # of Applications:** Not Set **Target # of Applicants:** Not Set **Target Revenue:** Not Set

Step 9:
Once you've finished modifying your template program, you will likely want to export your final work into your main production instance. It is always cleaner and easier to use a sandbox for building as well as testing new programs before rolling them out into your main instance, so we recommend following this process as a general rule of thumb.

To export your program, from the overview page, scroll all the way to the bottom to the Tools section:
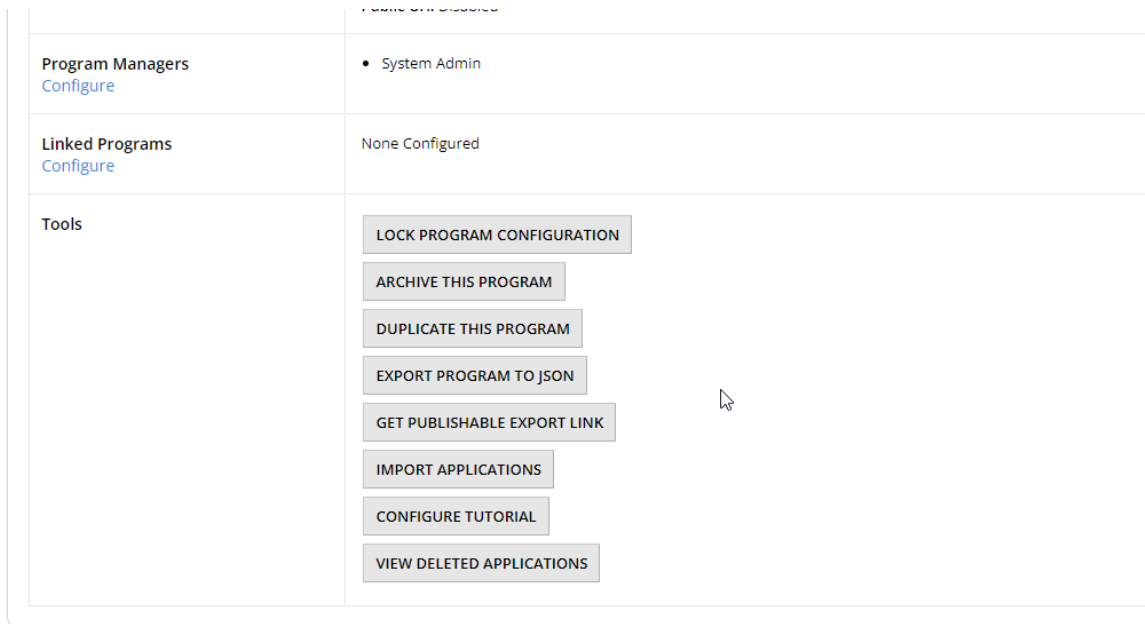
Step 10:

There are two main ways on exporting your program. One method is exporting program to JSON. Click on the "Export program to JSON" button:
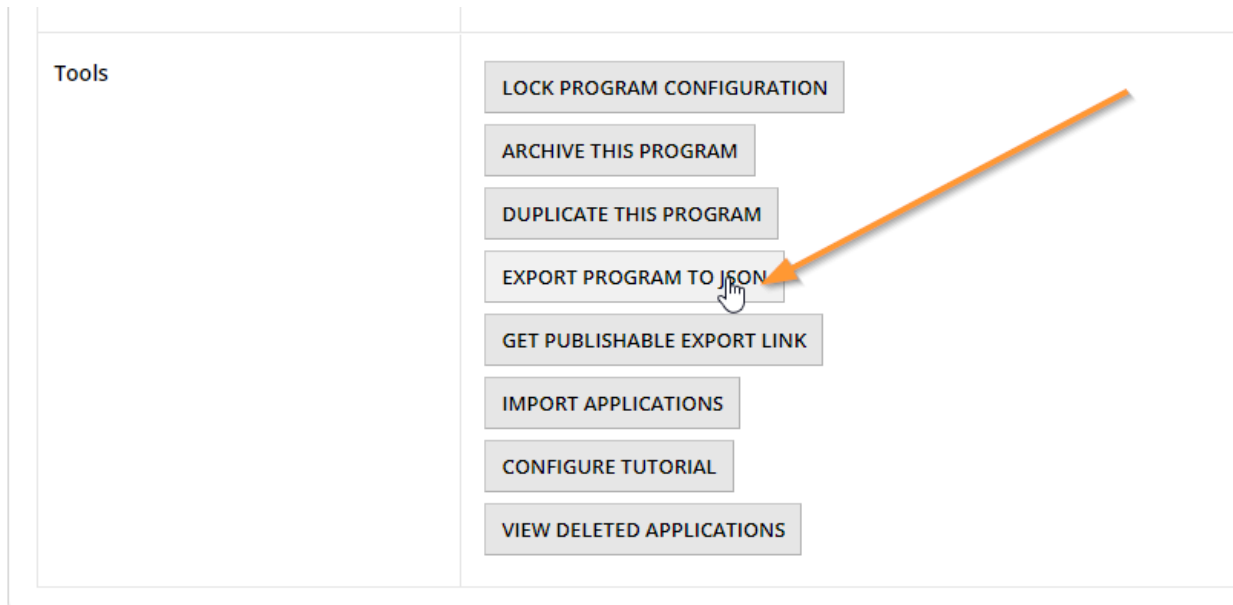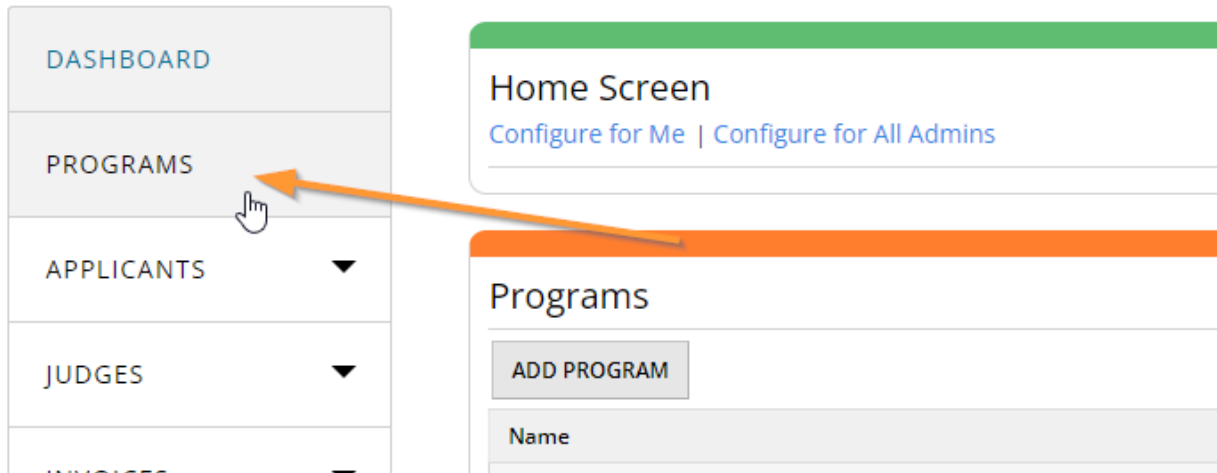

Step 10a:

On click, your browser should download a .json file. Hang on to this as you will need it.
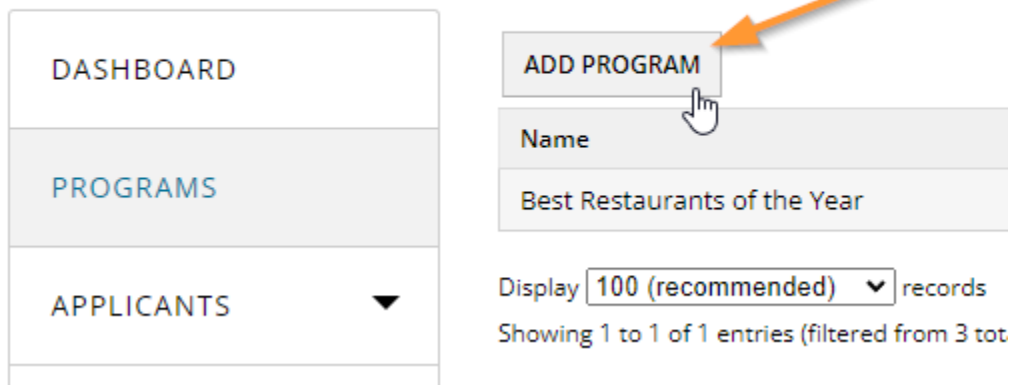
Step 10b:
Log in to your main production instance and go to the Programs option in the left-hand menu:

Step 10c:
Click the "Add Program" button:

Step 10d:
Click the "Import" button:

Try OpenWater

DASHBOARD	Programs > Select Program Template
PROGRAMS	## Select Program Template
APPLICANTS ▼	START FROM SCRATCH IMPORT
JUDGES ▼	**Name**
INVOICES ▼	try.openwater.com - Sample Program

Step 10e:
Fill out the program details which are required, ensure "Import from JSON Template" is selected and you've uploaded your .json file from step 10a. Once you've finished, click "Import":

Programs > Select Program Template > Import New Program

Program Name ✱	try.openwater.com
	Displayed on the home page and throughout the site
First Round Name	
	Leave blank if you only have one round
	⦿ Import from JSON Template ○ Import from URL
Upload Json Template ✱	try.openwater.com - Sample Program.json 🗑
	✅ Display on Website Programs List
	CANCEL IMPORT

And tada, you've successfully exported and imported your work between instances.

Step 11:
The second method of exporting and importing your program is via URL. In the Tools section, click the "Get publishable export link" button:
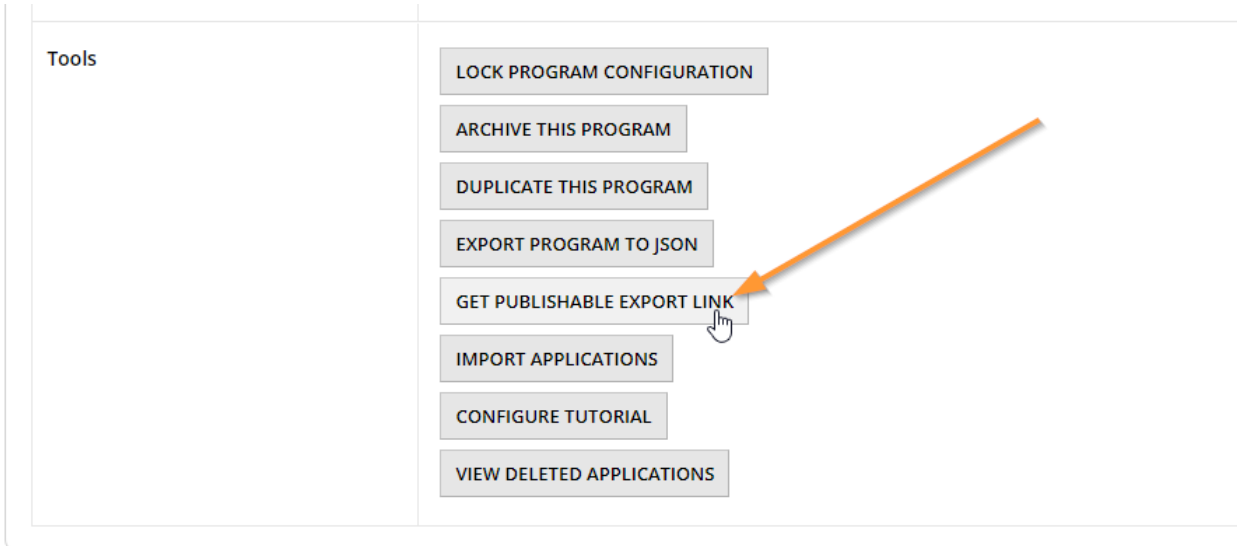
Step 12:
Select what should be exported. You should **always** select at minimum "Questions, Scoring Rules, Auto Scoring Rules, Price Rules and Reports" as this contains all your settings for round structure, submission form, evaluation form, reports, and so on:

Once you've finished making your selections, click "Save and Activate".

Step 13:
Some new options should appear, namely the "Deactivate link", "Update and save", and URL areas:

Export	☑ Rules
	☑ Point of Contact
	☑ Questions, Scoring Rules, Auto Scoring Rules, Price Rules and Reports
	☐ Session Settings
	☐ Scheduler Settings
	DEACTIVATE LINK UPDATE AND SAVE
Link	https:/._____secure-platform.com/admin/solicitations/33/exportasync?signature=_____ Copy

You can deactivate this export link at any time, or refresh the URL via "Update and save". In this case, click the "Copy" hyperlink next to the Link text area to copy the URL to your clipboard.

Step 14:
Repeat steps 10b through 10e. Instead of selecting "Import from JSON", ensure you select "Import from URL" and paste the URL you copied in the previous step. Once you've finished, click "Import" and the remainder of this process will be the same; wait for your template to install and off to the races you go.

Congratulations, you've officially made it through the OpenWater Essentials training!