Tips for getting started as a new SlideRoom Administrator

Congratulations on signing up for your SlideRoom account! We've put together a guide to help make the setup and transition process as smooth as possible.

Goals of this guide

✔ **Confirm/edit account information**

✔ **Learn how to edit your applicant portal**

✔ **Create your first form**

✔ **Create your first program**

✔ **Create your first rating set**

Confirm/Edit Account Information

When you sign up for a SlideRoom account, we pass all of the information provided into your Account Details page. However, you may want to add more information or edit your existing details. For example, you may want to specify a billing contact or contacts different from the person who signed up for the account.

This can be done from the Account Settings screen:

To access this screen, click the gear icon in the top-right corner, then click Account Settings.

When you click the "Edit Account Information" link, you will be able to edit contact names, email address, mailing address, and even your organization name.

You can change this information any time you like and as often as you like. Once you're comfortable with your account information, it's a good idea to make sure your applicant portal looks the way you would like and presents your applicants with the information you would like to present.

Learn How to Edit Your Applicant Portal

With every new account, we try to get your applicant portal set up so that you don't have to make many changes. This includes uploading a logo for you and providing some welcome text (usually from the About page on your website). But there will likely be times you want to edit your applicant portal. This is how to do it:

Click the gear icon in the top-right corner

Click Account Settings

On the left, click Applicant Portal

This page has a built-in visual editor—no HTML/CSS required—so you can make changes to the text on the page and format that text as needed. You can also add or replace your logo and change the color of your header just by hovering over the header.
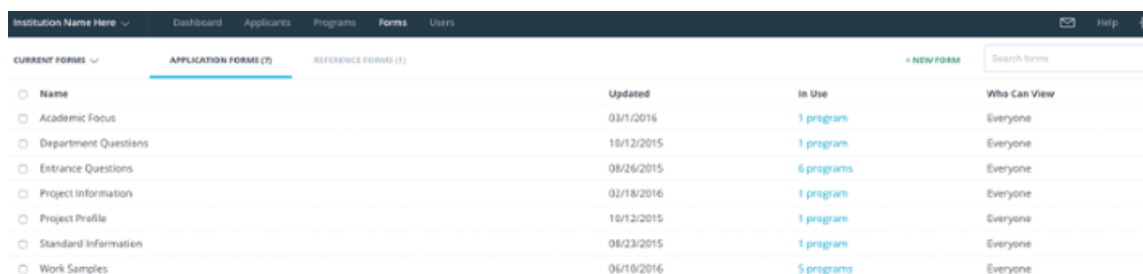

When you save your changes, everything is updated on your applicant portal immediately, so you know your applicants will instantly see exactly what you want them to see.

With your account and your applicant portal now in order, it's time to start creating your application forms.

Create Your First Form

SlideRoom offers a drag-and-drop form builder that allows you to easily create questions and collect the exact responses you'd like to collect. Forms are separate from the creation of your submission program because a form can be used across multiple programs. We don't want you to have to duplicate work if you don't have to.

To access your forms, click the **Forms** tab at the top of your dashboard.

You will see a list of previously-created forms; the date of the last time they were updated; the number of programs using that form; and who can view the form. In this screen, you can also switch between viewing application forms (those completed by applicants) and reference forms (those completed by recommenders). We're going to focus on application forms here, but here's an quick primer on the difference between the two types of forms.

To create a new form, click the New Form button in the top-right and choose Application Form.

You'll need to give your form a title here. Keep in mind, the title you provide is what your applicants will see.

You can also provide some help text, instructions, or any kind of additional information in the box below the title. Click Continue when you're ready to start

building.

The form builder is set up so that your question type options are on the left and the actual questions in your form are on the right. Drag any question type to the right to create a new question in your form.

The Export ID for a question is a unique identifier that allows you to eventually export the applicant responses to that specific form. It's possible that you have many form questions across different forms with the exact same question name. This is where the Export ID comes in. It allows SlideRoom to differentiate between questions that might have the same title.

When you add new questions, your form saves automatically. When you're done, click the Forms back arrow button in the top-left corner of your screen. Now let's build your first program.

Build Your First Program

Program is the SlideRoom term for any application opportunity: admission to an educational program; a call for entry; a contest or award; an employment

opportunity; etc. To access your programs, click the **Programs** tab at the top of your dashboard.

Name	Category	Start	Deadline	Fee	Status
Fall 2017		08/1/2015	12/31/2016	$10	Live
Spring 2017		06/1/2016	12/31/2016	$10	Live
Summer 2016		09/15/2015	01/31/2016	$10	Closed
Winter 2018		12/1/2014	10/31/2016	$0	Live

If you have previously created programs, you will find them all here. You'll quickly be able to see the program's name, start date, deadline, fee, and status.

To create your first program (or a new program), click the New Program button in the top right. There are three steps to creating a program. The first is completing the Program Settings section:

Programs

SETTINGS > REQUIREMENTS > EVALUATION

Program Settings

Program Name*

Description

Optional text to help applicants learn more about this opportunity

0/2000 characters

Start Date*   Deadline*   Grace Period ? (days)

mm/dd/yyyy   mm/dd/yyyy

ON ⬤ Show deadline to applicants ?

ON ⬤ Show program in applicant portal ?

Give your program a name. If you run programs based on application cycles and plan to run this program again next year (and the next, and the next), we recommend indicating the appropriate application cycle in the title. For example, "Fall 2016" or"Spring 2017." This helps for easier identification of past programs and past applicants.

Enter a start date and deadline. The grace period is the amount of time you'd like to give applicants who have started an application by your deadline to complete it after the fact. Note: The grace period does not apply to anyone who has not yet started an application by the time your deadline hits. Applicants cannot begin

an application after the deadline has passed. The deadline is always 11:59pm of the deadline date in your organization's time zone.

The next step is to set up your Program Requirements:

The Requirements step is made up of five parts. You may or may not use all five:

Forms
References
Media
Attachments
Submission Info

If you're interested in how each section of the Requirements step works in detail, check out our Program Requirements support documentation.

The final step of creating a program is configuring your Evaluation Settings:

If you know the rubric you'd like to use to evaluation submissions when they come in, you can include that here in the Rating Set section. If you don't yet know how you'll evaluate submissions, no problem. You can update this section any time.

We mentioned previously that your reviewers can be assigned to a program and receive access to all the submissions that come into that program. The Evaluation Settings step is one of the places where you can assign reviewers to a program. Click "add reviewer" and you'll be able to select whichever reviewers you'd like to assign.

When you click Publish, the program will become live if you set the start date as the current date or a date in the past. If you set your start date for some date in the future, the program will be scheduled to automatically go live on your website on its start date. There's nothing else you need to do to make sure it opens on that date.

In the event you know your evaluation rubric, let's create your first rating set so that you can apply it to your program.

Create Your First Rating Set

Rating sets are the criteria according to which you want your reviewers to evaluate submissions. The criteria can be measured against both a numerical scale or by simple voting (Yes/No). To set up a rating set, click the gear icon in the top-right corner of your dashboard, then click Account Settings. On the left, click Evaluation Settings.

Click "add rating set" to get started. You'll need to give your rating set a name, set the evaluation scale if you're creating numerical criteria, and specify how you'd like SlideRoom to calculate the combined rating for a submission. You may choose between taking a simple average, a weighted average, or adding individual criteria scores for a cumulative score.

If you'd like to set up a simple Yes/No voting criterion, you can do so in conjunction with the numerical scale or as a stand alone criterion.

Once you've created your rating set, all you need to do is apply it to your program. To do so, click the Programs tab at the top of your dashboard, click the name of the program, click the Evaluation Settings Tab, then click Edit Evaluation Settings. Here you'll be able to associate the rating set you just created by clicking the dropdown below the words "Rating Set."

When you save your rating set, you and your reviewers will be ready to start evaluating submissions when they come in.

Additional Resources

We hope this helps get you started, but there are plenty of additional resources available for you. These include:

[SlideRoom Help Center](http://info.slideroom.com/admin-tips#forms)

[SlideRoom Website](#)

[SlideRoom Blog](#)

[Add new users to your account](#)

[Test your program as an applicant](#)

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