

# How to organize the process of student application and student selection in EConsort

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This document provides a practical guideline for setting up the process of student application and selection. Indications on how to access the different items in EConsort in order to get everything described done are marked in green. This guideline does not explain every process in detail. Info on each process is provided on the EConsort helpdesk (<http://econsort.ugent.be> – Econsort helpdesk)

## Step 1: Setting up the EConsort instance

Setting up the EConsort instance is done by contacting the EConsort administrator (Tim Deprez). Required information is URL of the website, name of the instance (short name and long name), and administrator. Once the info is provided, an instance of EConsort can be set up within maximum 48 hours.

Note that for each instance a yearly participation price will be charged. Prices are defined in communication with Tim Deprez and the Techtransfer services of Ghent University. After agreement, a user license agreement is signed by both parties.

## Step 2: Defining administrative users in EConsort

Once the instance has been setup, one user will have administrative rights in the system (see administrator – step 1). This user can easily add new users to the system (Users – Add new user). Minimum requirement for adding a new user is first name, last name and email address. New users must activate themselves in the lower part of the instance login page. After choosing a password, an activation email is sent to the new users email address. User security settings must be set by the administrator (Users – user list – “yellow shield”). Settings can be assigned quickly by cloning the settings of already existing users.

### Step 3: setting up the public website (optional)

EConsort provides a easy but limited content management system (**management – website**). Webpages can be setup and updated online. Pages can be added using a two level menu. General website settings (**website-manage content**) can be set by entering values for a limited set of variables (colours, alignments, font, sizes, logo(s)).

### Step 4: Setting up the student database fields

Before one can start making application forms and management forms, the basic elements called fields must be designed. Note that by default a series of commonly used fields is already provided. The design of these fields cannot be edited. Fields which are specific for the management of your instance can be added easily and quickly. Note that the design of fields is an important process, as changing the type of fields after data was entered in the fields for particular students may cause unexpected errors. Most used field types are:

- Text : used for storage of any free to type kind of data up to maximum 250 characters
- Memo: used for storage of any free to type kind of data – unlimited in length
- Choice list: options to choose from can be added. Some standardized list of options are available to import.
- Option list: similar as choice list, although the options are shown by bullets instead of drop-down list
- Date: stored as dd-mm-yyyy
- Weblink: similar as text but url is displayed as interactive URL. Youtube URLs are transformed in the embedded movie.
- File: file upload up to 8 MB
- Image: File upload up to 8 MB, a thumbnail is made of the picture and shown on the form.

Beside these fieldtypes the following are used to create form elements not aimed for data entry. This can be titles, explaining comments, ...

- Line: a breaking line used to break up the form in different subsections
- Message: any piece of text that is put on the form to add more layout and information to the forms. Note that the text itself is entered in the description section of the field. HTML markup can be used to add structure to the text (eg. <b></b> to put something in bold, <br> to start a new line, <i></i> to put something in italics, <u></u> to underline a piece of text).

The last two types of fields are rather complex. 'Calculated fields' allow to store the combination of values of other fields in a new field.' Database choice list' offer the possibility to use link to lists of items which are standard available in EConsort (thesis list, summerschool list, student list, teacher list). More info on these fields are available on the EConsort helpdesk.

## Step 5: designing an application form

In the 'settings - database manager – students – manage forms' application forms can be designed. Add a new form. Add categories in the form. Each category is in the application form designed as a tab. Add fields to the different tabs. Mark required fields by checking the checkbox next to the field. Students will only be available to submit the form once all fields that are marked as required have been checked.

Once the form categories and fields have been set up, the form needs to be upgraded to an application form. Go to 'form settings' (Settings – Database manager – Manage Forms – Select form from list - Edit form settings – application form) and set the option 'application form' on yes. A series of new options is appearing. Note that all these settings need to be filled in. In case some of these fields are left empty, errors may occur during the application form.

Once the form is marked as an application form, the application form links are shown on the 'access special form settings' section. A link for the first registration is provided (in the form of 'regis.asp?id=...') and a link to the actual application form is shown (in the form of 'applicationform.asp?id=...').

The design of the form can be checked at any time by clicking 'preview form in application layout'.

## Step 6: posting the application form to the website

Use the URL's provided in the 'access special form options' (see step 5) and add a link to these URL's on the public website on the pages from where you want students to access the application form.

Make also sure that the application cohort is correctly set. Make a new cohort in the 'manage cohorts' section and mark the cohort as the cohort where applications will be stored in by ticking the checkbox next to the cohort. Note that cohorts can only be numeric!!! Spaces will not be allowed either. In case a more descriptive name wants to be given to a cohort use the option 'cohort callname' (Settings - manage cohorts – add new cohort, name it numerically) - click on pencil-icon next to cohort (callname) – enter cohort callname)- Once the URLS are posted the applications are open and students can start applying.

## Step 7: posting multiple application forms to the website

Repeat step 5 and 6 for each separate form you want to publish on the website.

## Step 8: the application process – a brief overview.

The application process is a fully automated process and in principle no extra steps need to be taken during the time the application forms are open. Below is a brief overview of all the steps of the application process that a student has to go through. Also some general occurring problems are listed with solutions.

1. A student arrives at the website and follows the link to the application process of his interest

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2. A student register by providing first name , last name, email and a password
3. An email is sent to the student telling the student he has started up the application procedure. The email lists the username and password required to enter the actual application form. The URL to the application form is provided as well.
4. A student logs in to the application form and fills in all the fields. Filling in the fields can be done in different sessions. A students has access to overviews of the required fields that still need to be filled in before the application can be submitted.
5. Once all required fields are completed, a clearly visible submission button is displayed on the application form.
6. By clicking this button the student is guided to the submission of the form. He/She gets a clear notification that once the form is submitted, no data can be changed any longer. When clicking the submission button – the student is assigned a unique application number. The form is closed for further editing, an email is sent with the submitted application form added as PDF attachment. A notification email is sent to the general communication email address of the instance including the PDF of the application form.
7. In the database the students is from now on visible as a completed application – with indication of the date of submission and the unique application number.

Often occurring problems during the student application process:

1. A student forgets his password: open the file of the student, go to the 'toolbox', use the reset password option. The student receives an email with a new machine generated password.  
(students – list all students – \*select name of student\* - toolbox – special tools – reset password)
2. A students uses the wrong application form: open the file of the student, go to the 'toolbox', use the option change application form and mark the correct application form, thick the option to set the application form 'open' (student will be able to access it again). Send an email to the student with the URL of the application form (NOT the registration link) (described under step 5).
3. A student applies different times with a different URL: send an email to the student indicating that only one application per application form is possible and that multiple applications will be deleted. Delete the multiple entries of the specific student. Note that in case of wrong deletion, a student can still be restored (Admin settings – restore deleted students/applicant – next to the be restored student/user – select "[restore this student])
4. A student does not receive the emails of EConsort: First check whether the email address the student provided is correct (without spaces, ...). Ask the student to check the junk folder as well and ask him/her to indicate the standard instance email adres (from where emails are sent) as a safe email address (this problems occurs often with yahoo email). Add a note on this on the website?)

## Step 9: Closing the applications

Remove the links to the application forms from your website! Go to the 'settings - database manager – edit form settings' enter the settings of the form, set the option 'application form' to NO. Only when the option is set is NO the application forms are fully closed. Note that if you do not do this last step, it may happen that still new applications are coming in. Students often send the urls of the application forms by email to each other.

## Step 10: Preparation of the evaluation process

Decide the procedure that will be used to evaluate students. Two options are available in EConsort: use the standard evaluation system (allows to set a series of evaluation criteria, give each criterion a weight and possible scores) or use fields to set up a more complex way of candidate evaluation.

### Step 10.1: use the standard system

Add the evaluation criteria and possible scores (Settings – Evaluation criteria - \*follow the onscreen instructions\*). Give each criterion an importance weight. The total calculated score will be the sum of each criterion score multiplied by the criterion weight.

Only one evaluation is possible per candidate. In the future this may be extended. Evaluation scores can be displayed in the database by making a report and flagging the option 'Applications, applicants report, - \*select Isit\* - edit this report – check "evaluation display evaluation criteria'.

Adding evaluations is done by entering the file of the student and then clicking the option '.....'. Subsets of students can be evaluated by different persons using the option 'restricted' in the security tab of a user under 'application security'.

### Step 10.2: using standard database fields

A more advanced option for setting up an evaluation procedure is making use of regular forms. First design a set of evaluation fields. Preferably use choice lists with predefined options. This will allow undoubtful use of 'calculated fields' with which totals can be calculated from different evaluation criterion values.


Create one or multiple evaluation forms. Use the same procedure as described in step 5. Put all the evaluation fields on a separated tab/category. The other information can be put on other tabs. Click on the pencil icon next to the category on which the evaluation fields were put. Set the option 'special rights' to yes.

Link users to lists of students and evaluation forms.

Go to the security setting of a specific user. Set the security settings on 'applications' to restricted. Make now combinations of lists of applicants (see below how to make these), with standard evaluation forms, with 'view' rights. This implies that the user will only have access to a specific list of students. For these students he will only be able to view the file of the student through the set form (mostly an evaluation form). He will not have rights to edit data in the file of the student, except for the fields in the category where the special rights have been switched on. Other options (eg. Emailing, reporting) can be set as well.

Evaluators can now log in, and will only see the lists they were assigned. Make sure the rights on other sections of the management tool are closed as well.

## Step 11: select students

Once evaluation are finished the students will be selected or not to start the program. Students who are selected can be upgraded from 'applicant' to 'student' by clicking the icon  next to the name of the student. The list of students is now also available through the option 'students – list of students'. From now on a student will also have access to the EConsort student pages – reachable through: [URL\\_of\\_instance/student\\_file.asp](URL_of_instance/student_file.asp)

Communicate the selection results to the students by adding the selected and non-selected students to lists. Use the option 'send email to all members of this list' to inform all students at once of the selection results. Note that emails can be personalized by pasting database fields in the email message.