Application System Instructions

Introduction

This document is meant to familiarize applicants to CLIR's *Digitizing Hidden Collections* program with the online application system (SurveyMonkey Apply). If you are looking for information on a certain section of the application, check the Application Guidelines. All questions, concerns, and comments should be directed to hiddencollections@clir.org.

Contents

Creating a new user account:

To create a user account, click the green Register button in the top right hand corner of the screen. Provide your name and a valid email address (only one account per email address).

Log In   Register   ⓘ ▾

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The system will send a verification link to the email address provided. Open the email and click the "Confirm email address" box to complete the user account creation process. Note: you will be unable to complete certain tasks and/or submit an application if the account is not verified.
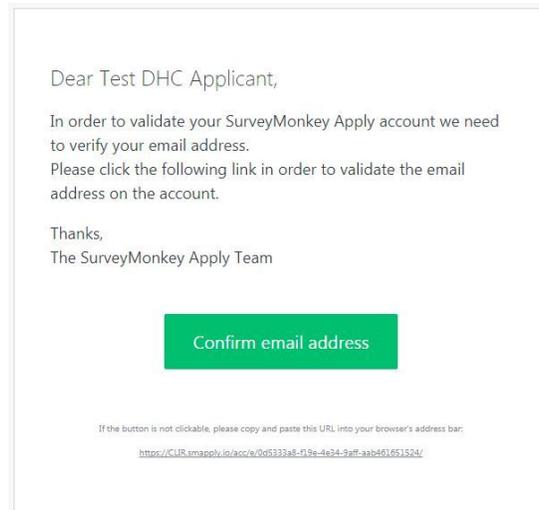

When you log into your account, you will be taken to the dashboard which will display all applications (saved and completed).

Creating a new application:

To start a new application, click "View programs" to see a list of CLIR's grant programs. Click the "More" button under the grant program in which you are applying.

This opens up more detail and allows you to begin a new application by clicking the "Apply" button on the right. If the program has not opened yet, the "Apply" button will be inactive (the opening and deadline dates are listed underneath the button).

Getting familiar with the application system:

This is the main page of the application. This page provides a useful overview of your progress. It also allows you to complete and edit individual application tasks, review the application, add collaborators, and submit. Note: You will be unable to click the "Review & Submit" button until all required tasks are completed.

You can download a copy of your application by clicking the ellipsis icon on the top right and selecting the "Download" option. The option to "Delete" your application is also presented here. Note: it is not possible to restore a deleted application, so be absolutely sure before selecting this action.

Clicking the "Preview" button will open up the application form in its entirety, complete with all uploaded documents.

"Your tasks" is a list of all the application components. To begin a task, click on the arrow at the right of the box. Tasks may be completed in any order.

Your tasks

⬭	📄 Eligibility	›
⬭	📄 Initial Proposal Phase	›
⬭	⬆ Representative Thumbnail Image	›
⬭	⬆ List of collections to be digitized	›
⬭	⬆ Representative samples of materials to be …	›
⬭	⬆ Rights, Ethics, and Re-Use statement	›
⬭	⬆ Project Plan	›
⬭	⬆ Technical Plan	›
⬭	⬆ PI Resumes/CVs	›
⬭	⬆ Digital Preservation and Discoverability Plan	›
⬭	⬆ Budget Narrative	›
⬭	⬆ Budget Detail	›
⬭	⬆ Proof of Nonprofit Status	›
⬭	⬆ Additional Information (optional)	›

Tasks with the document icon (📄), such as Initial Proposal Phase, require the user to fill in information.

Tasks with the upload icon (⬆) require the user to upload a document. To view what formats are allowed for a particular upload, click the "Show accepted formats" button (shown below).

⬭ ⬆ Project Plan   ⋯

ℹ Task instructions Hide

Upload a project plan that includes all major project activities and deliverables, including a project timeline with deliverable deadlines.

The timeline for the project should be as explicit as possible.

- The plan should identify major activities to be undertaken during each quarter of the proposed grant term and name the parties who will participate in those activities.
- The plan may include tables, diagrams, images, references, etc. at the applicant's discretion, but may not exceed the three-page limit.
- To insure clarity for reviewers, the language used to describe project activities and deliverables should be the same as that used elsewhere in the proposal, such as in the list of project deliverables or in the technical plan.

(max. 3 pages)

⬆

ATTACH FILE

Show accepted formats

Max file size: 2 MB   MARK AS COMPLETE

If you have already consulted the Application Guidelines, you may notice that upload tasks are handled outside of the main application form (aka the Initial Proposal Phase task). For instance, the Project Plan (seen above) belongs to Section 6 of the application form, though you are required to upload this document as a separate task outside of the form. It is important to note that Application Guidelines group all tasks (including uploads) by their appropriate section, while the application system separates upload tasks from the main form for the sake of a more organized layout and workflow.

While working on a task, you can always hit the "Save & Continue Editing" button at the bottom of the screen. This allows you to log out of the system and return to the task at a later time.
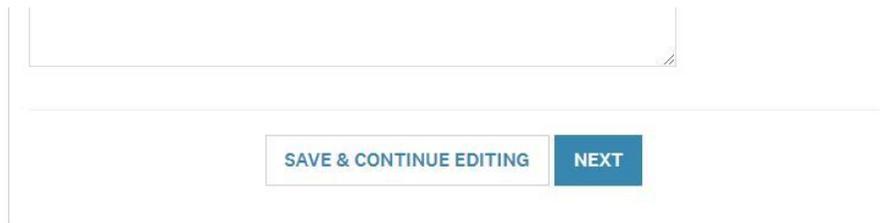
When you have completed each section of a particular task, you can click the "Mark as Complete" button at the bottom of the screen.

Note: after clicking "Mark as Complete" or "Save & Continue Editing," the system will give an error message if any parts of the task are incomplete or incorrectly formatted.


Scroll down through the form to find the errors. The system will provide helpful notes on how to resolve the error.
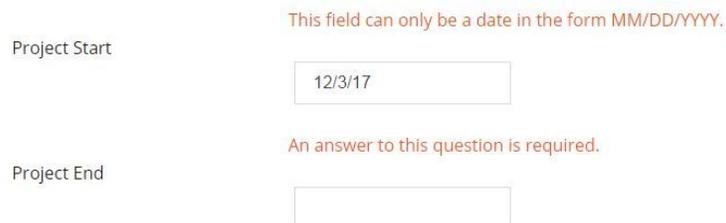
If you see a "Next" button instead of "Mark as Complete," it means that there are more sections to finish before this task can be completed.

After clicking "Mark as Complete," a green check mark icon will appear next to it in the "Your tasks" list. Note: prior to submission, you can always reopen a completed task to edit information--just click the arrow icon and select Edit.
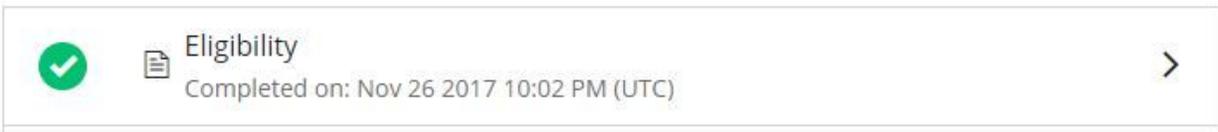

A task that is incomplete (i.e., you filled out some sections, selected "Save & Continue Editing," and then logged off) will be marked with a half-filled green circle.
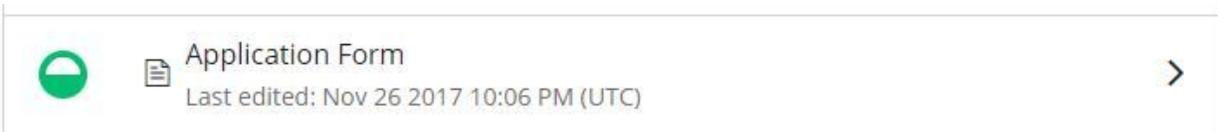
Adding a collaborator:

To add a collaborator, click the "Add collaborator" button on the left side of the main application page. You will need to provide a valid email address (multiple addresses can be entered if they are separated by a comma) and select the type of access given to the collaborator ("View & Edit" or "View Only"). After clicking "Send Invite," a notification email will be sent with information on how to log into the system.

Collaborators are able to edit the application and upload documents; however, only the initial creator of the application can submit it.

Continuing a saved application:

After logging back into the system, all saved applications are visible on the dashboard. Click the "Continue" button to reopen the application.