Identifying Applications for AppReview

This guide will cover:

- Creating your own personalized list view to help identify applications that are ready for the review process.
- Note: For this documentation, it’s assumed that an application is ready for review when the requirements status is at 100%, the invoice status is closed and one recommendation letter has been received.

**IMPORTANT:** Each department is responsible for defining what it means for an application to be ready for review; however, in most cases it means that all defined requirements have been 100% completed.

**Step One**

Before we begin, open up a separate tab in your browser and access Radius. Within that browser, select **Iterations** under the Applications module.

This will give you the full list of all iterations being used which will allow you to easily see what the name is in its entirety. It will help when entering this information for the first row of logic in the list view you’re about to create.
Step Two

On the original browser tab, select **Applications** under the Applications module.

*Image of Browser Tab #1*

Step Three

You will be defaulted to the **All Applications** list view. To create a new list view, click on the drop-down menu and click **Create**. The criteria builder tool will open.

Step Four

Provide the list view with a name for easy identification. Select the checkbox if you would like to set this as your default view when accessing this module.

Step Five

Be sure that **Criteria Type** is selected as **Dynamic**. In the first row of logic:

- Leave the **Module** selected as **Applications**.
- Under **Field**, select **Iteration Name**.
- Leave the **Comparator** selected as **Is**.
- Under **Value**, enter the name of the iteration you want to query.
**TIP:** Use the second browser tab opened in Step #1 to easily see the iteration name in its entirety. If you right click on the iteration name (browser tab #2) and click **Select**, you can then copy and paste into the value entry field on the list view (browser tab #1).

**Image of browser tab #2**

<table>
<thead>
<tr>
<th></th>
<th>The Common Application-Domestic Freshman-2016</th>
<th><a href="#">Open in a new window</a></th>
</tr>
</thead>
<tbody>
<tr>
<td>14</td>
<td></td>
<td>[Select]</td>
</tr>
<tr>
<td>15</td>
<td>The Common Application-International</td>
<td></td>
</tr>
<tr>
<td>16</td>
<td>The Common Application-International</td>
<td></td>
</tr>
<tr>
<td>17</td>
<td>The Common Application-Domestic Freshman-CCM-20</td>
<td></td>
</tr>
</tbody>
</table>

**Image of browser tab #1**

When searching for applications within multiple iterations, you will need to group the rows of logic together using join operators and parentheses (see illustration below).
Step Six

Click the ‡ or Add Row button to begin a new row of logic.

**TIP:** Clicking the ‡ will create a duplicate row with the field already selected. This will help if needing to query multiple iterations.

Step Seven

In the second row of logic:

- Leave Join selected as And.
- Leave the Module selected as Applications.
- Under Field, select Application Status.
- Leave the Comparator selected as Is.
- Under Value, select Applied. *(Always select Applied when creating a query to see applications that are ready for review.)*

![Logic Table](image)

Step Eight

Click the ‡ or Add Row button to begin a new row of logic. In the third row of logic:

- Leave Join selected as And.
- Leave the Module selected as Applications.
- Under Field, select Requirement Status.
- Leave the Comparator selected as “=,”
- Under Value, enter 100. *(This is indicating the requirement status is 100 % completed.)*

![Logic Table](image)
Step Nine

Click the + or Add Row button to begin a new row of logic. In the fourth row of logic:

- Leave Join selected as And.
- Under Module, select Invoices.
- Under Field, select Status.
- Leave the Comparator selected as Is.
- Under Value, select Closed.

**IMPORTANT:** Be sure to select the correct status when using the Invoice Status as part of your list view (see illustration below.)
Step Ten

Click the or Add Row button to begin a new row of logic. In the fifth row of logic:

- Leave Join selected as And.
- Under Module, select Applications.
- Under Field, select Recommendations.
- Leave the Comparator selected as Is.
- Under Value, enter 1/1.

NOTE: The value entered must be the amount of recommendation letters that should be received out of the total amount that is required on the application form based on the iteration.

The example iteration that is being used in this document only requires one recommendation letter, therefore 1/1 (1 out of 1) was the value entered. If you selected an iteration that requires more recommendations, then you will need to decide how many is needed to mark an application ready for review (i.e. 2/3 = 2 out of 3).

![Logic Row](image)

Step Eleven

Click Save.

You have now completed the steps for creating a dynamic list view to query applications ready to mark for review. Follow Steps 12 and 13 to hide this custom view from other users.

Step Twelve

Click the View drop-down and click Share. Notice that the view is defaulted to All Users are allowed to view this Custom View.
Step Thirteen

To hide this view from others, click on the radio button next to *Show this Custom View only to me.*

OR

If there are specific users that you would like to have access to this custom view, select the radio button next to *Allow the following users to view this Custom View.* You will then be able to assign specific users by entering their name.

Click **Save.**

**TIP:** It may be helpful to create a widget on your workspace using the following settings:

- **Module = Applications**
- **Custom View = Select the view you created using the above instructions.**