BAFTA Nucleus Admin Site User Training Guide

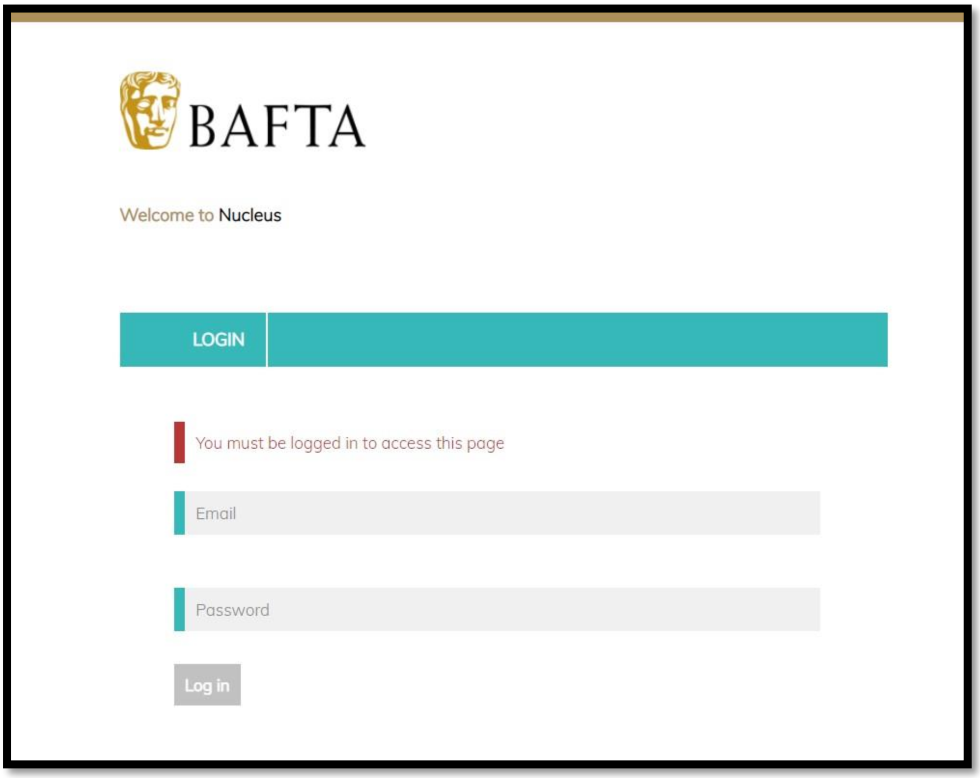
Re-Training edition

Contents

GETTING STARTED

Logging In

Enter your **Email** address and **Password** where indicated. Click **Login**.



Admin Dashboard

Once you have logged in to the Admin Site you will land on the Admin **Dashboard**.

You can use the project dropdown – as indicated by the arrow – to toggle between Dashboards for different Awards.

Each Award's Dashboard displays a useful summary of **Entries** to date, especially breaking it down between those that have been **Submitted**, those which are currently **Unsubmitted** (ie. incomplete) and those which have been **Approved** by a member of your Administrator team.

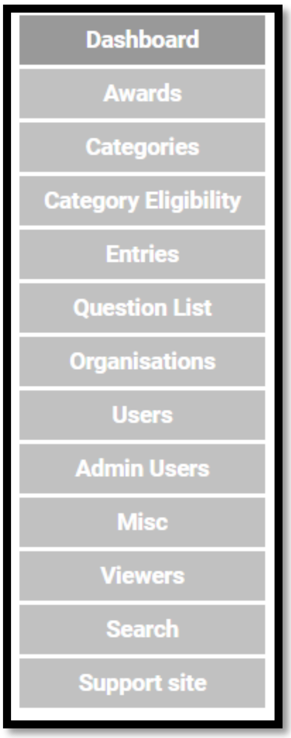
These Submitted/Unsubmitted/Approved entries are displayed according to:

- **Your Entries** – those assigned exclusively to your Administrator account
- **All Entries** – all entries assigned across your entire Administrator team
- **Entries per category** – breaking the entries down on a per category basis

Other useful information displayed includes:

- **Stats for other Admins** – summarising the tasks carried out by each member of your Administrator team.
- **Top 10 Organisations** – displaying a summary of entries of the most prolific organisations in your Award.

Actions Menu
The **Actions** drop-down that appears in the far top right corner on the Dashboard – and throughout the WHOLE of the Admin Site – is your main navigation point.



Creating an Admin User

1. Log into the admin interface
2. Go to the **Actions** menu locate at the top right of the screen and click on **Admin users**

3. Click on the add button in the top right corner of the screen
4. Complete the following fields:
    a. **First name**
    b. **Last name**
    c. **Email**
    d. **Password**
    e. **Confirm password**
5. Use the check boxes to give the admin user access to the projects. Note that if you have not created any projects it will not be possible to give users rights to them. (see how to create a project). If you want to give them access to all awards, click Select All.
6. If you wish the user to have additional user privileges, then check one of the role boxes. If the admin user is only going to be checking entries and videos, then leave this blank.
    a. **Super admin** – the user can create and edit awards, for example changing the entry submission date, create questions for the entry forms
    b. **Finance user** – able to perform all finance options
7. **Google authenticator** - is used as a 2-Step Verification process for admin users. When set up admin users will need to install the Authenticator app on their phone. When logging in admin users will need to enter their password and a six digit number that is generated by the app.

   Note that this is not a requirement of setup. If you do not wish to use this function go to step 8.

   Ensure that the admin user is present and has downloaded the Google Authenticator app on their phone.

   iPhone link: https://itunes.apple.com/gb/app/google-authenticator/id388497605?mt=8

   Android link:
   https://play.google.com/store/apps/details?id=com.google.android.apps.authenticator2&hl=en_GB#
   In the Google Authenticator section click on the **Setup** button. A QR code will appear as shown below.

Open the Google Authenticate app on the phone. You need to use the app to scan the barcode. The process works differently on both applications but look for a plus sign and/or the words **Scan barcode**. The app will request access to the phones camera. Accept this and then scan the barcode. You will then see a six digit number appear with the name of the website below. The number will change every 30 seconds. When logging into the admin site the user will need to enter their password followed by the six digit number.

IP bypass - there is an option to set up a bypass for users, for example if they are logging in from their office. It's unlikely that a hacker will have the users password and be in the office at the same time. To set this up you will need to enter the IP address in the text area as displayed below.

If you do not know your IP address click on the text that states **click here to add this**.

8. Click on **Save & close** to create the admin user.

CREATING YOUR AWARD

Creating a new award project

This section will take you thought the basic process of setting up a project, from the initial settings to building the entry form and setting up categories. Nucleus is a flexible system that has many additional options- if the functions that you require are not covered in this section please refer to the glossary. You may wish to setup your project in different ways so use this as a guide only. There is no limit to the number of projects that you can build in Nucleus.

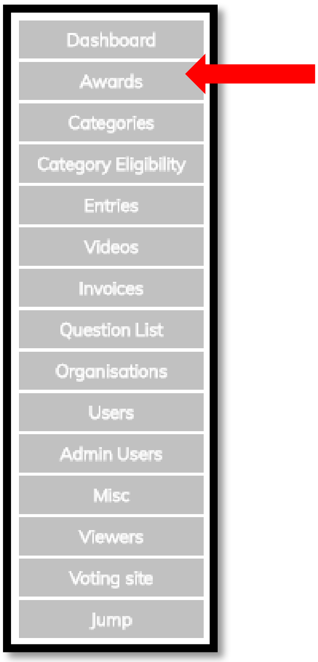
Project - the shell in which each form you build sits. Think of it as an entry form for an award, an applications submission form or a ticket booking form. Essentially if you require a different set of questions to those that exist already you will need to create a new project.

There are 4 stages to creating a new award project

1. Setting your Award Preferences
2. Creating an Entry form
3. Creating Automatic Categories
4. Setting Up Payment (optional)

Setting your Award Preferences

1. Log into the admin interface
2. Go to the **Actions** menu locate at the top right of the screen and click on **Awards**



3. To create a new project click on the **Add** button in the top right
4. Enter an internal and external name:

    Internal name - this is how admin users will identify the project

    External name - the is the name that will be displayed on the entry, viewing and voting sites

    Note this can be set the same for both fields.
5. Set **Active** to **Yes** so that the award will be accessible to entrants
6. Set **Show entries on entrant dashboard** to **Yes** so that entrants will be able to see the entries that they create on their dashboard.
7. **Order number** is the order that projects are displayed on the create entry page. If this is your first projects enter **1**. If not then you need to enter a number to correspond with the order in which the projects should appear, so 1, 2, 3 etc.
8. In the right hand column you need to set a series of dates and times:
    a. **Opens on** - date when your projects opens for entry. This must be set before the last Create date

b. **Last create date** - the last date entrants can create forms
c. **Last submit date** - the late date entrants can submit forms. This is separate to the create date as you can give users a cutoff to create new entries and then an extended date to enable users to submit their entries. The create and submission date can be the same
d. **Last pay date** - the date where all users should have completed payment. If you are not accepting payment this can be left blank.
e. **Show closed message until** - below it is possible to set three messages for entrants. After entry closes the closed message will be displayed and this date controls when the closed message will stop being displayed. Set this to appear until when you believe you will open for entries next year. This must be set in the future after the submission date

9. There are a number of preferences that can be set in the **Options section** but most of them will not stop the project from functioning and are extra tools to help you control your project. For more information, see the **Glossary**.

   Enter a from address and name for emails:

   From address for emails - the address that emails pertaining to this project will be sent form. E.g. awards@bafta.org
   From name for emails - the name that will be displayed in the email. E.g. BAFTA Awards
10. In the **Messages** section you will need to enter text that will be displayed to your entrants at various stages of the entry process:
    Entry not yet open message - displayed on the create entry page to entrants before the project opens
    Entry open message - displayed on the create entry page to entrants whilst the project is open
    Entry closed message - displayed on the create entry page to entrants after the project has closed
    Entry submission message - displayed to entrants once they have successfully submitted their entry form
10. To add **Pricing** options click the **Save** button. There are a multitude of methods of setting up and processing Pricing and payment – however, this is optional as not all awards charge for entry. For this reason, we will return to Pricing in the section Setting Up Payment (for those who require it) once we have completed the other mandatory stages.
11. When you have finished setting your other Award Preferences, click **Save and close**.

Creating An Entry Form

This section will detail how to put a basic form together. The beauty of this system is that it should enable you to ask any question. There is no need to build the basic forms as suggested here and what we are trying to achieve is to demonstrate how to create "questions" and how they fit together.

At BAFTA we have designed the form in four distinct sections and we will show you how to build it using this method. Again this is just a suggested design that works really well for us. There is no need to follow it to the letter, do what you think is right for you.

In the first instance take a look at your current entry form, be it on paper or online. Think about how you would like it to work in an idea world and ideally get a piece of paper and draw some work flow diagrams. This is how we started. Think about what information is key and the best method to ask it in. For BAFTA we decided that we didn't want entrants to spend time completing an entry form only to find out at the end that they are not eligible. So we placed the eligibility questions at the top of the form.

BAFTA forms are structured as follows:

- Awards Information
- Eligibility check
- Category select
- Basic entry information
- Category specific entry information
- Declarations

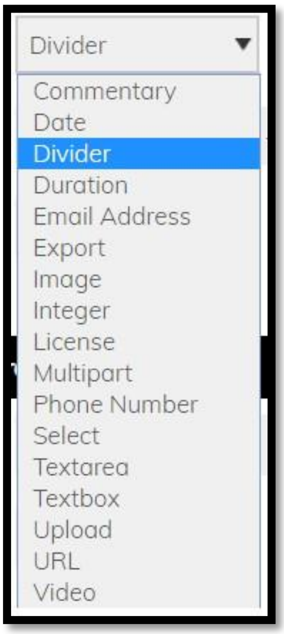
Whilst you follow the below instructions open a window to the entrant facing website and open the entry for the project we created above. It's good to check back to this form and refresh the page after you create each question so you have an idea of the form you are creating. We do this with every entry form we create/update.

1. Log into the admin interface
2. Go to the **Actions** menu locate at the top right of the screen and click on **Question list**

3. Click the **Add** button in the top right corner of the screen
4. You will be taken to the question preferences page
5. For each question you will need to define a unique internal name. This is really key as it affects how the data is stored. It's up to you to define a naming convention but it will

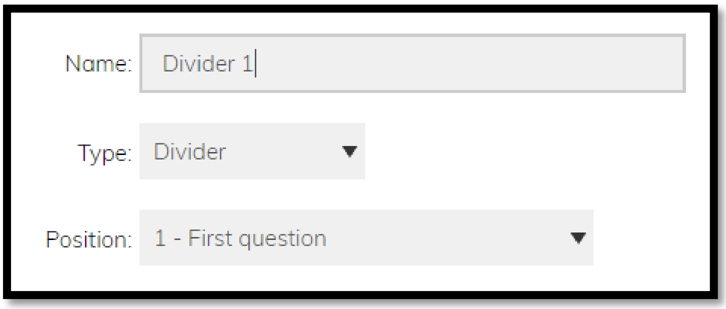
make the questions easier to find if you name them after their function. So let's call this **Divider 1**.

6. **Type** defines the type of the question that will be used.

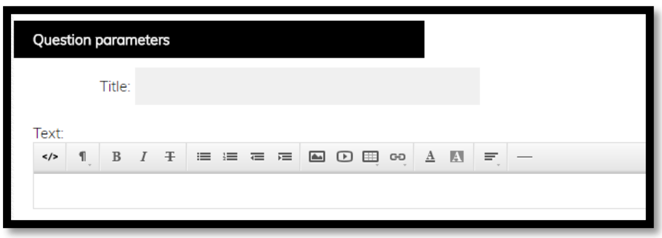


Most are self-explanatory, but for full details on each, see the glossary. For now, select **Divider**.

7. **Position** determines the position the question will appear in the question list. This is the first question that we are creating so leave this as **First question**.



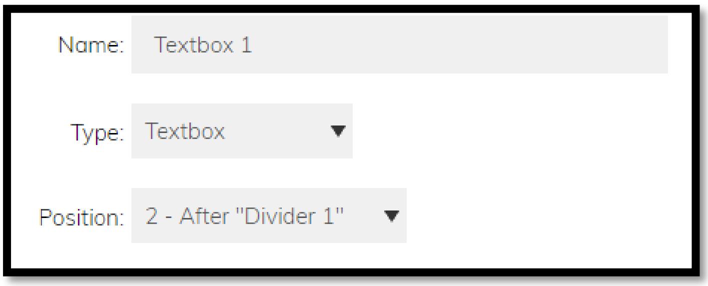
8. Under **Question parameters** we need to enter a title to appear on the page and some explanatory text.
   Title – Test Awards



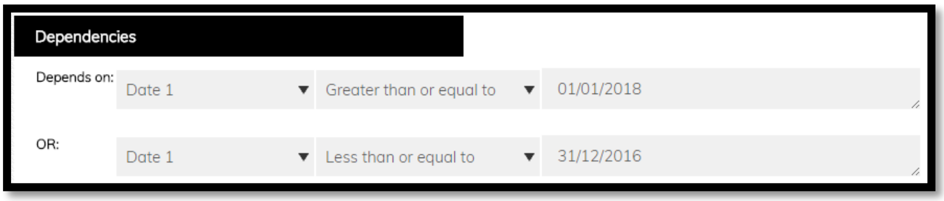
   Text – Use this area to enter any text that is relevant to the awards such as entry information, deadlines, payment information etc.

9. If required, you can enter Help text to clarify what the user needs to type: **Short Help** is a short (ideally single sentence) summary of the Help hint, while **Long Help** is the full length information that appears as collapsible on the form.
10. Click **Save and close**.
11. Click **Add** to begin a new question. This time we are going to create a text box which is probably the question you will use the most.

Name – Textbox 1
Type – Textbox
Position – 2 – After “Divider 1”

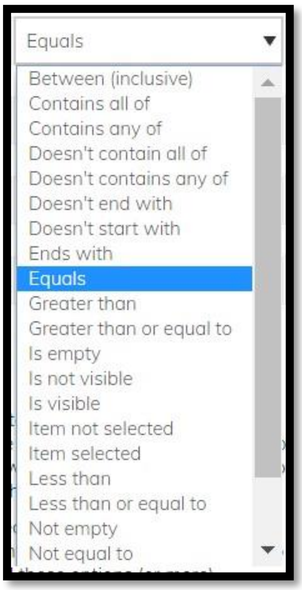


12. Under question parameters complete the following:
    Question – Textbox 1:
    Hint – If required, a short hint can be added
    Display width – 40 (this defines the width of the textbox on screen and as default I set to 40. You can of course change this to something that suites your form)
    Optional – No (if set to no it means the user must provide an answer to the question)
    Read Only – Select whether the question will be Read-Only or Read-Write for the entrant
    Max Length – 250 (this defines the maximum number of characters a user is able to enter for this question, including spaces)
    Min Length – 1 (this defines the minimum number of characters the user is able to enter for this question)
13. Click **Save and close**
14. Click on **Add** to create a new question. We will add a date question which we can use to set dependencies upon for future questions.
    Name – Date 1
    Type – Date
    Position – 3 – After “Textbox 1”
    Question – Date 1:
    Optional – No
    Earliest Date – 01/01/2010 (this is used to set the earliest date a user can select)
    Latest Date – 31/12/2020 (this is used to set the latest date a user can select)
15. Click **Save and close**
16. We want to ensure that the entries were created within a specific eligibility period. In order to do this we are going to create two questions that are dependent on the date question we created above. This means that the answer the user gives will make one of two questions appear. The first will be a commentary that informs the entrant that the entry is ineligible and the second will be the next question on the form that we wish to ask the entrant.
17. Click on **Add** to create a new question. Enter the following:
    Name – Commentary 2
    Type – Commentary
    Position – 4 – After “Date 1”
    Title – Commentary 2
    Text – The entry is not eligible as it falls outside of the eligibility dates.
18. We now need to set the dependencies, which are essentially stating that you want this question to appear on the entry form based upon a particular answer to a previous question on the entry form. In this instance we want the entry ineligible message to be displayed if the entrant selects a date that is outside of the eligibility period of 01/01/2017 – 31/12/2017 then this message will be displayed. To achieve this we need to set two dependencies based on the Date question above.



Each dependency relies upon three sections:
Question – select the question from the first dropdown that you wish this question to depend upon. It is really important that this question has been created previously.
Test – you select how the system will test the data entered by the entrant, so for example does is *equal* certain parameters
Value – is what we are testing against, so if I wanted to test that an answer to a question was equal to 01/01/2011 then I would enter 01/01/2011. If this answer was provided by the entrant then this question will appear on the entry form.

Here is a list of the different Test options you can apply. Most are self-explanatory, but for full information on each please refer to the Glossary:



In this example enter the following on the first line:

Question – Date 1
Test – Greater than or equal to
Value – 01/01/2018

This means that if the answer provided to Date 1 is on or after the 01/01/2018 then this question will appear. I am using 01/01/2018 as this is the first date outside of the eligibility period.

And then the following on the next line:

Question – Date 1
Test – Less than or equal to
Value – 31/12/2016

This is testing if the entry was released before the eligibility period. Any date selected before the 01/01/2017 will cause this message to appear.

19. Click **Save and close**
20. Click on **Add** to create a new question. Enter the following:

Name – Textbox 2
Type – Textbox
Position – 5 - After "Commentary 5"
Question – Textbox 2:
Optional – No
Max. Length – 250
Min. Length – 0
Dependency - **Question**: Date 1 **Test**: Between (Inclusive) **Value**: 01/01/2017,31/12/2017

21. Click **Save and close**

Next we are going to create a select question. There are four types of select questions that you can use: Checkboxes, Drop Downs, Radio Buttons and Pick Lists. They fall into two categories as Checkboxes and Pick Lists permit the user to select multiple answers whereas Dropdowns and Radio Buttons only permit users to select one option. When creating a select think carefully about which one best suits the form.

22. Click on **Add** to create a new question, we are creating a drop down. Enter the following:
Name – Select 1
Type – Select
Position – 6 - After "Textbox 2"
Question – Select 1:
Optional – No
Min. Selected - 1
Max. Selected - 1
Type the following in the **Options** box starting a new line for each option as follows:
_Category Select
Category 1
Category 2
Category 3

Note that the first option is preceded by an underscore. This means that the system does not read it as an option is it will be displayed in the question and not part of the drop down list.

Type - Dropdown
Dependency - **Question**: Textbox 2 **Test**: Is Visible

Use the Is Visible test for when you want the question to appear at the same time as the question above. This saves you from having to change the dependency multiple times in future should the first dependency set change.

This builds a very basic form that consists of some copy, a text box, a date and then two questions that appear depending on the answer given to the date question. A detailed explanation as to how each question works is detailed in the glossary but this should give you an idea as to how the question list works.

Creating Automatic Categories

In the above section we created a basic entry form. This means that the system is ready to collect data from your entrants, however, when the entrants submit the entry form all they are submitting is data. In order to be entered into categories we need to tell the system two things. Firstly, we need to define the categories and secondly we need to tell the system what data on the form puts the entry into a certain category. This can be as complex or as simple as you wish it to be.

There are two different Category types:

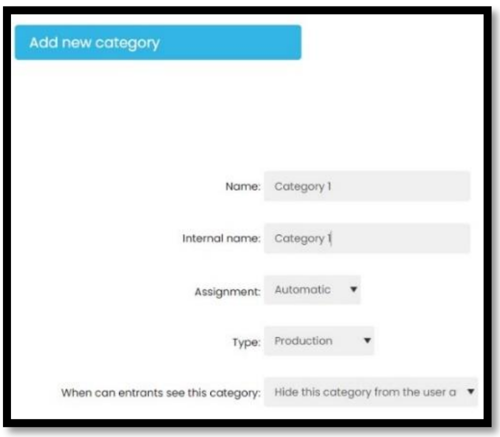
Automatic Categories = Categories that are created before your Award is open for entry. Entries will be automatically placed into these based on answers to questions they make in their form.

Manual Categories = Categories that are created after your Award is closed for entry. Admin users will create these categories and manually select which Entries go into them, using their own discretion, via a Bulk Action. We will cover these later, in the section 'Creating Manual (Instant) Categories' as these are only used much later in your award cycle (if at all).

Here is the standard workflow for creating Automatic Categories.

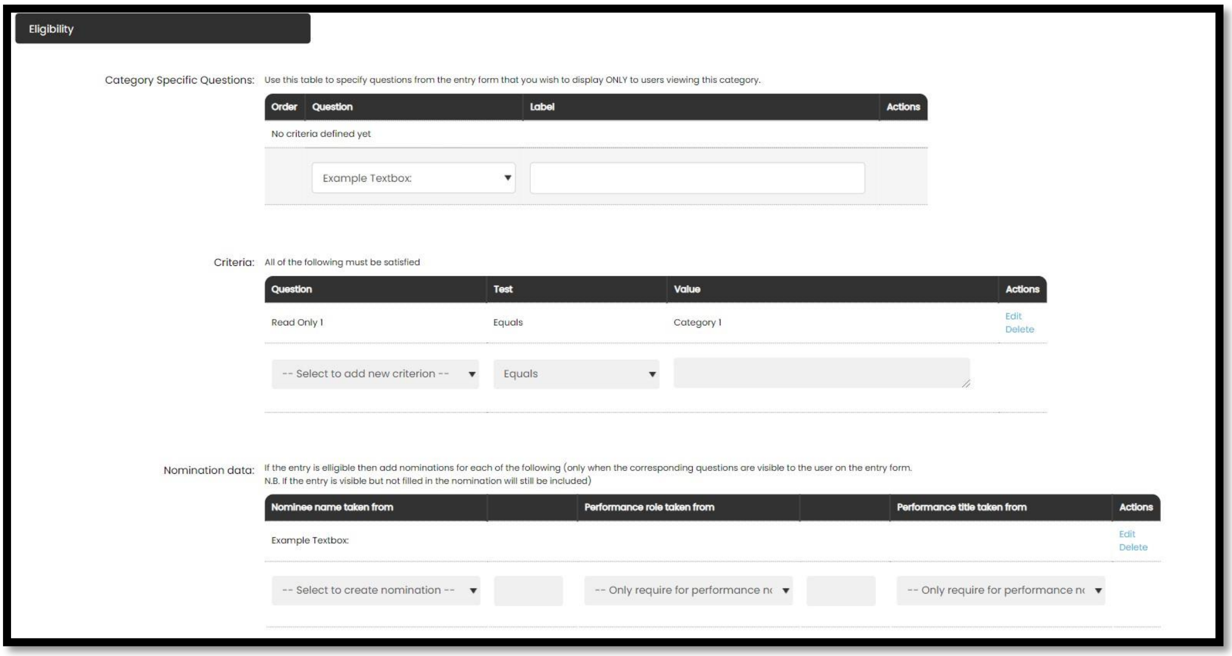
1. Log into the admin interface
2. Go to the **Actions** menu at the top right of the screen and select **Categories**

3. Click **Add** to create a new category



4. Each category needs to be given a **Name** so that it can be identified. Let's call this **Category 1.**
5. For **What to show on submission** there are three options
    a. **Nothing - hide this category from the user** - means that this category will not be shown on the submission review screen. Note that when an entrant submits an entry if all the categories are set not to be shown then the submission review screen will not be displayed to the entrant.
    b. **Show the category and eligible nominations** - both the category and the nomination data (we will set this later but it's normally the names of those being entered) will be displayed on the submission review screen
    c. **Show the category without nominations** - only the name of the category will be displayed on the submission review screen

We now need to create the rules that place an entry into this particular Category, with the **Eligibility** settings**.**



We can ignore the Category Specific Questions section for now, as this only applies to when you are setting up your Viewers (Judges) and even then, only in specific circumstances.

6. We need to set the Criteria that entries must fulfil to be placed in this Category. There are three stages to setting the entry criteria:
    a. **Question** – this is the question that we are going to test, normally a category select question
    b. **Test** – this is the test that we apply to the question, so does it meet certain parameters
    c. **Value** – this is the value that we wish to appear in the answer to the question in order for the entry to be placed into the category.
7. Enter the following:
    Question: **Select 1**   Test: **Equals**   Value: **Category 1**

    The above equates to the user selecting the Category 1 option from the drop down question we created above. If this question equals category 1 then the entry will be placed into Category 1.
8. The final item we have to set is the nomination data. This is so the system knows what information to print on screen if the category is set to display nomination data. In most cases you will simply be able to select the title of the entry which is what we are going to

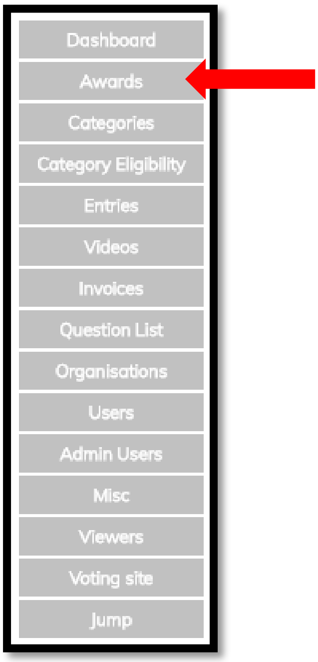
do in this case. It is really key that this information is set as users will not be able to enter the category if it is not.

9. In this instance select **Textbox 1** as to where the nominees name should be taken from.
10. Repeat the above processes for **Category 2** and **Category 3**. Then once complete log in as a user and you will be able to submit an entry form into all three categories.
11. We will ignore the rest of the preferences for now as they form part of setting up pricing, videos and viewing that will be covered in other tutorials. Click **Save and close** and repeat the process for **Category 2** and **Category 3**.

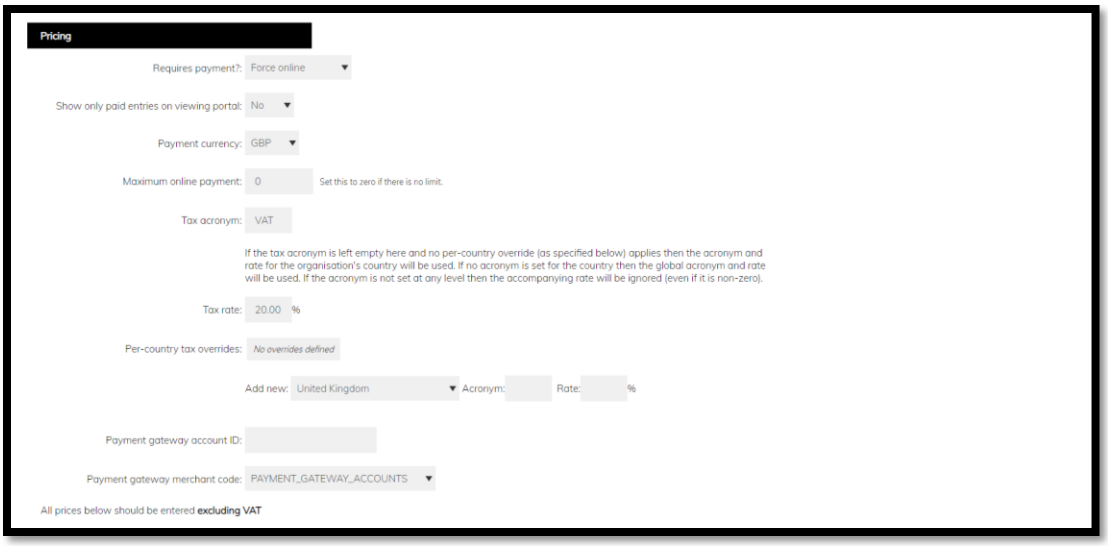
Setting Up Payment

Payments are set up in several places of the site including the awards preferences section, the question list, the category list and on the entry form. All of which are described in detail in the Glossary. This guide will illustrate how each area can be accessed and how to use them. For purposes this section of the guide will make the assumption that you have previously set up a project, entry form, categories and category eligibility as described above.

1. Log into the admin interface
2. Go to the **Actions** menu locate at the top right of the screen and click on **Awards**

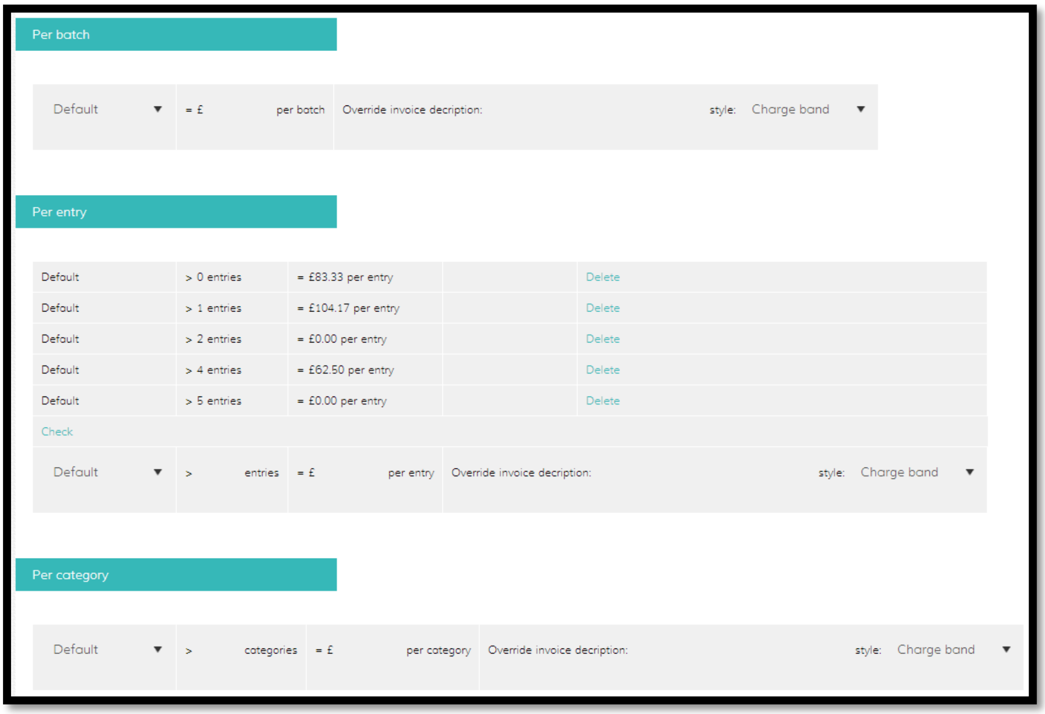


3. On the table go to the actions menu to the right of the project you wish to amend and select **Edit** to take you to the preferences page
4. Scroll to the **Pricing** section at bottom of the page



5. Select the relevant option from the **Requires payment** section. You may opt to force all users to pay online, via invoice, or allow them to choose. If you wish to make the majority of users pay online and offer select users the opportunity to pay via invoice, then this is set up in the **Organisation** section and will be detailed below.

6. Choose whether **only paid entries** or all entries can be shown on the viewing portal.
7. Leave the payment currency as **GBP**
8. You may also opt to define a maximum online payment amount which will generate an invoice for payments above this amount. Note that your online payment provider may set an upper limit separately and this has no effect on any hard limits set.
9. You may opt to set different tax rates for different territories. The base tax rate should be set to the current local tax rate (in the UK at publication this is 20%). There are a few of different options you can take and if you are unsure speak to your finance team:
    a. **All users pay the same tax rate** – type an acronym in the **Tax acronym** box, for example **VAT**. Then set the tax rate in the **Tax rate** section. This will apply the set rate to all invoices that are generated.
    b. **Users from some territories pay a different tax rate** – set up the basic tax rate as described above. Select the territories from the drop down list, next to **add new**, that you wish to pay a different rate and define both the **acronym** and the **rate**. Note that the rate can be set to 0.
    c. **All users from outside of the territory pay a different tax rate** – in this example we should assume that all users outside of the United Kingdom are not paying tax. Set the main tax rate to 0, then for the individual country override select the United Kingdom and enter **VAT** as the acronym and **20%** as the rate. This will only then charge those users who are located in the United Kingdom the rate.
    d. Use Reverse Charge VAT setting to charge all non-UK entrants 0% VAT – This functionality can be enabled across your site upon a request basis. Once enabled, you can switch it on/off on a per award basis. If switched on via **Yes**, it means that all non-UK entrants will be charged 0% VAT PROVIDED THAT upon registering (or editing their account details) they confirm that they are VAT-registered and enter their domestic VAT number (or equivalent) where prompted. This will make them exempt from paying UK VAT. NB: You should ensure that the standard **Tax Rate** field remains at 20%. This will ensure that UK registered organisations and individuals continue to be charged VAT as per normal.
    If this Reverse Charge VAT feature is not currently activated on your instance of Nucleus, please [contact us](#) and specify whether you would like it to apply to non-UK companies, individuals or both.
10. Do not change the **Payment gateway account ID** or the **Payment gateway merchant code**



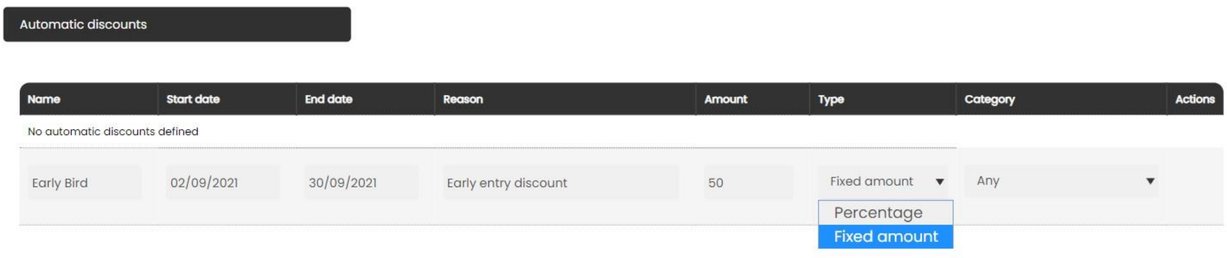
11. Payment structures can be set up using **per batch**, **per entry** or **per category** functions.

a. **Per batch** - a flat fee is paid regardless of the amount of entries submitted.
b. **Per entry** - a fee is calculated based upon the number of entries submitted at closedown. The entry fee can be set to either be flat fee per entry or to increase or decrease depending on the number of entries submitted.
c. **Per category** - a fee is calculated based upon the number of categories submitted at closedown. The entry fee can be set to either be flat fee per entry or to increase or decrease depending on the number of categories submitted.

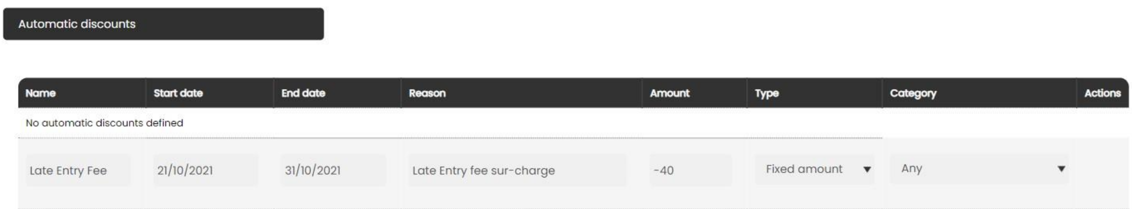
12. In this example we will charge £0 each for the first entry, £50 for the second to fifth and then £100 per entry above 5 entries. Set it up as follows you would set up as follows:
> 0 entries = £0 per entry – Override invoice description = First entry
> 1 entries = £50 per entry – Override invoice description = Second entry
> 2 entries = £0 per entry – Override invoice description = 3-5 entries
> 6 entries = £100 per entry – Override invoice description = More than 5 entries
Remember to include an invoice override description.
13. If you want to set up blanket pricing discounts or sur-charges across all categories during set periods of your award cycle – for example 'Early Bird' discounts for early entry or 'Late Fee' premium charges just before submission closes – you can use the **Automatic Discounts** functionality for this.

Type in the **Name** you want to give to this Discount (this will appear as a line item on the invoice), select the **Start/End Dates**, the **Reason for the Discount**

a) **IF YOU ARE OFFERING A DISCOUNT** eg. reduced fee for an Early Bird scenario or similar – type in the amount of money being taken off in the Discount field



b) **IF YOU ARE CHARGING AN INCREASED AMOUNT** eg. a Late Entry fee just before Submissions close – type in the additional amount to be added, <u>AS A NEGATIVE</u>, in the Discount field. So, if your regular entry fee is £100 but your Late Entry fee is £150, you should enter -50.00



Select what **Type** of discount this is – either a **Fixed Amount** or **Percentage**.

Finally, select which **Category** this discount applies to. If it is for ALL categories, select **Any**. If it is only for one, or some categories, select them from the drop-down – creating an identical discount for each applicable category.

Click **Save**.

The discount will then be applied henceforth to all entries that are made between the specified Start/End dates. It will NOT appear on the qualifying entry forms in the Discount section, but in line with other discounts it WILL appear on the invoice related to that entry. any other discounts that were applied to that entry.

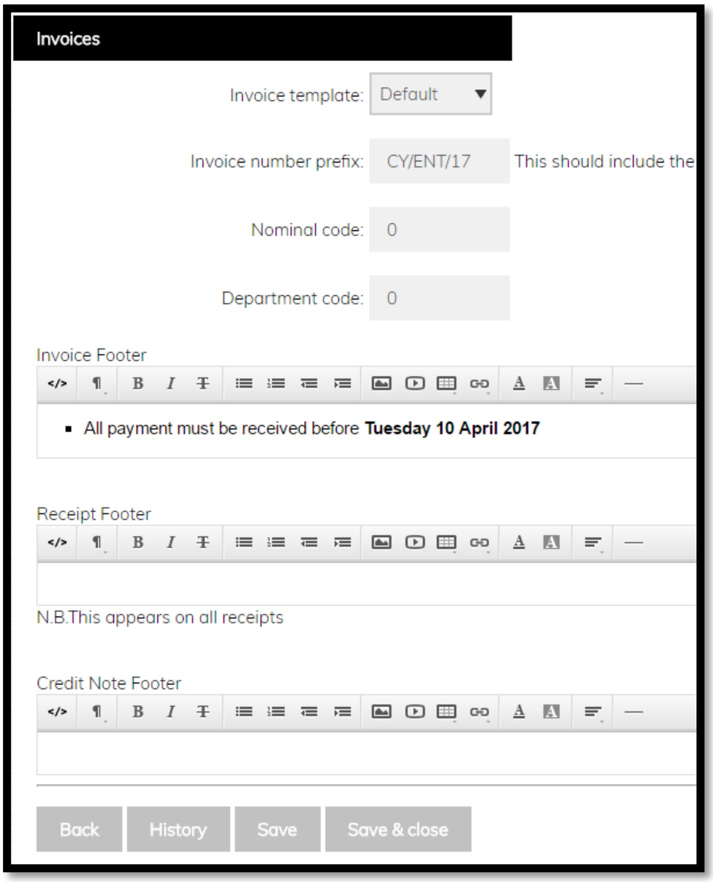
You can set up as many different Automatic Discounts over the life cycle of your Award as you like PROVIDED THAT none of them overlap concurrently. If you attempt to add a new discount that overlaps, the new overlapping discount will not be set and an error message will be flagged.

Each Automatic Discount applies from the date that an Entry was initially Submitted. It is not removed if an entrant subsequently Unsubmits their entry and then ReSubmits after the Discount End Date has passed.

Automatic Discounts will continue to apply in conjunction with other exceptions you may have to the regular pricing bands – such per Category Price Overrides, including those for certain users like Members.

You can Delete an Automatic Discount at any time, by clicking the Delete button alongside it.You can amend or updated an Automatic Discount at any time, by clicking the Edit button alongside it.

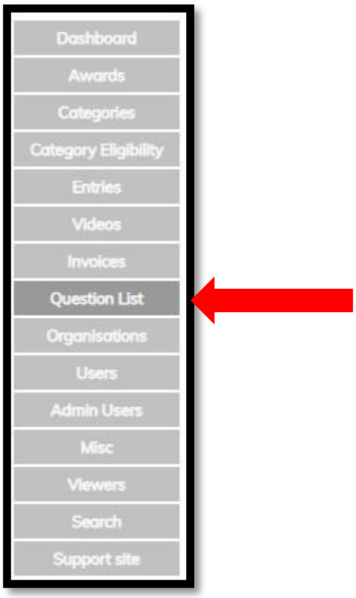
14. To set up multiple price structures for different customers then select the **Default** dropdown on the left during setup. This enables you to charge a group of users a different price structure. For example all organisations signed up to the **Broadcaster** price structure will pay that rate and everyone else will pay a default rate. The price structures will vary depending on how your local settings have been coded.



15. If your organisation is setup for multiple invoice templates select the relevant template from the **Invoice template** dropdown. Otherwise leave this set to **Default**.
16. Enter your invoice prefix number, if you are unsure contact your accounts department. Note that **/00001** will be added to the end of the invoice prefix automatically by the system. This number will increase by one each time a new invoice is generated.

17. If you wish to add text to the footer of the invoice/receipt/credit note then you may do so by using the CMS boxes. In this case in the **Invoice** Footer type **All payment must be received before Tuesday 10 April 2017** to alert users to the payment deadline on the invoices.
18. Click **Save and close**
19. Next we are going to set up a price override on one category so that all entries into the category are charged on £25.
20. Select **Categories** from the actions menu
21. Then click **Edit** next to **Category 1**
22. Scroll down to the **Pricing** section
23. Enter **25** in the **Price override** box
24. Type **Category 1 Price** in the **Price override description** area. Note that you must enter a price override description for this price to be calculated.
25. Click **Save and close**
26. A price can also be set on the answer to an individual question, so long as it contains a number. The price set in the question will then be multiplied by the number provided by the user. One way this is used is for selling tickets.

27. Select **Question list** from the actions menu:



28. Click on **Edit** next to question 6. This is a select question.
29. Scroll down to **Options**

30. Enter **100** in the **Price** box
31. Enter **Awards tickets** in the Invoice description. When the users invoice is created **£100** will be multiplied by the number they enter in the question. This will appear as a separate line on the invoice.
32. Click **Save and close**
33. The final place where we can change the pricing is on the entry form itself. Admin users can apply a discount or price increase. This will be applied as a new line item to the whole invoice after the entry price structure has been applied
34. Select **Entries** from the actions menu

35. If you have not yet created any entries log in as a user and create and submit an entry. Once complete return to and refresh the entry page
36. Click on **Edit** in the actions menu to the right of the entry and you will be taken to the admin side of the entry form
37. Scroll down to the **Invoice options** section towards the bottom of the form

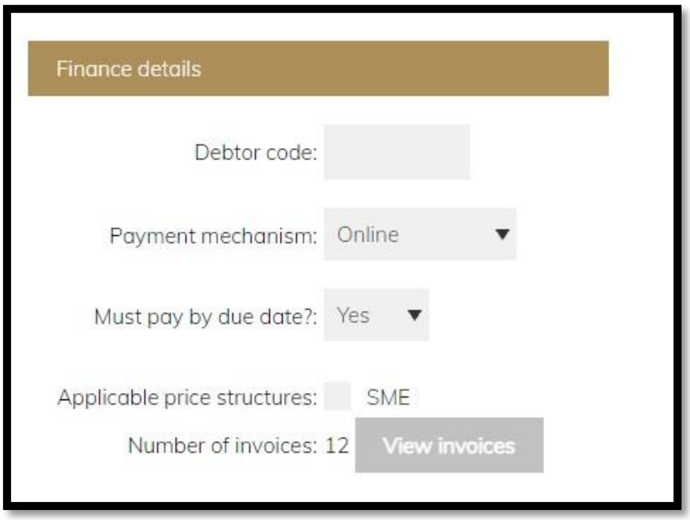
38. This function is primarily set up to give discounts to entrants, so any amount entered in the **Discount amount** text box will appears as a negative on the invoice. To discount by £100 type **£100** in the box. To increase the price by £100 type **-£100** in the box.
39. You will also need to provide a **Discount reason** so type either **Price increase** or **Price decrease** depending on what you decided to offer the entrant. This will appear on the invoice sent to the entrant.
40. Click **Save and close**

Payment functions that can be defined by organisation

There are some overrides that admin users can issue to individual organisations. These are hosted on the **Organisation** page.

1. Go to the actions menu and select **Organisations**

2. Search for the name of the organisation that you wish to edit. In this example use the organisation that you have registered.
3. Click **Edit** next to the relevant organisation name
4. Scroll down to **finance details** section and there are three options that can be changed
5. To change the default method of payment for an organisation, use the **Payment mechanism** dropdown. This will override any settings within a project. For example, if you have set the project to allow online payment only then you can permit certain users to pay via invoice if you select **Either** from the dropdown.

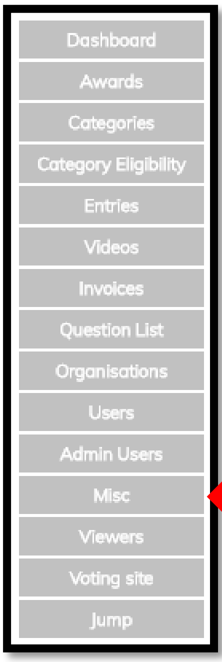


6. Entry fees must be paid in full in order for the data to be exported in the **Voting Data Download**. To enable entrants to pay after the deadline set the answer to **No**. The default is set to **Yes**. Note that you can extend the deadline to all users in the awards settings page

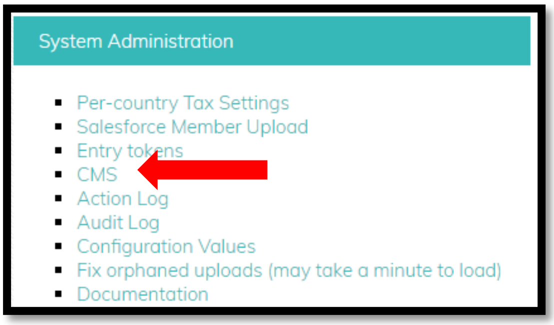
7. Admin users can set two price structures for an award and charge different companies accordingly using **Applicable Price Structures**. Upon registering for an account, all organisations are placed into the normal rate. Admin users must add them to the Broadcaster or Developer rate.

Updating CMS

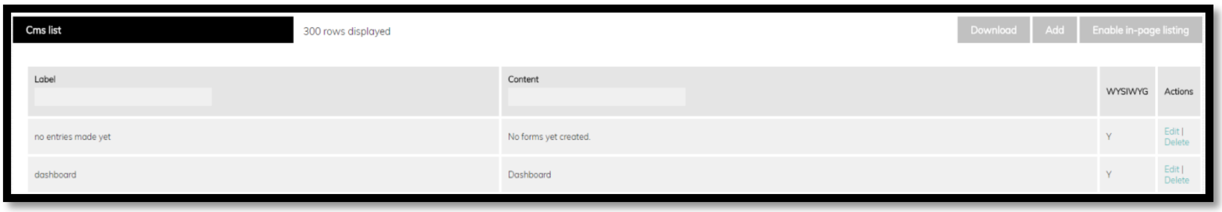
The CMS fields are the text that appears on the website. All text that appears is completely customizable. When BAFTA Nucleus is first delivered all the CMS fields feature default text. When setting up a new award, you should take some time navigate through the entrant (front end) site, check the wording suits your award's needs and edit on the Admin site where required. Details on how to do this are below:



1. Go to the **Actions** menu at the top right of the screen and select **Misc**



2. In the **System Administration** menu select **CMS**



3. The CMS list consists of a table with two main columns:
    a. **Label** – the default text provided by the CMS field
    b. **Content** – the text that is currently in the CMS field

Once we update the text for one of the fields then the content column for that CMS field will be updated.

4. On the front page there is a button called **REGISTER** which we are going to update
5. Open up the front page so that you can see the text change
6. In the left column type **Register** and hit enter
7. Any CMS field that contains the word Register in the default label will appear, however, there should be one clear field that just contains the word register
8. Click **Edit** in the **Actions** column on the far right of the page

9. In the textarea type **Register for an account** and click **Save and close**
10. Go back to the login page of the website and refresh the page. You will see that the text has updated
11. This process can be repeated for any of the text on the website. If you have already updated the text then search the content column

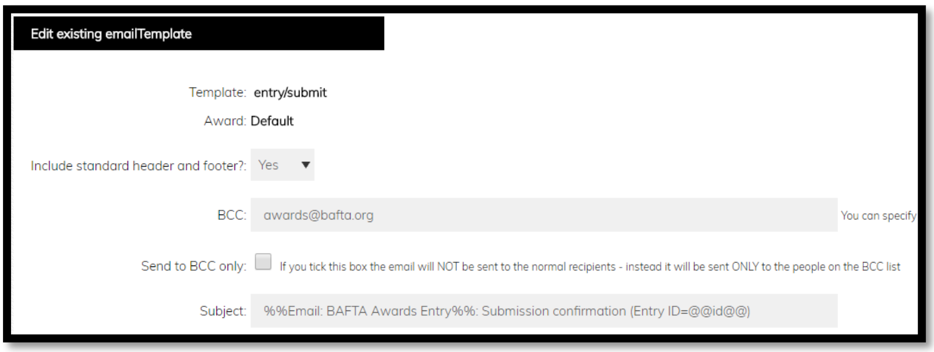
Note that there are two type of CMS fields. Some such as text in buttons you are only able to change the text. For most fields it is possible to edit via a WYSIWYG editor which means you have full control of the text, can add images, links or add code in html if you know how to do this.

How to amend the email templates

As with the CMS, Nucleus is issued with a series of automatically-generated email templates that are triggered by certain user actions (such as submitting an entry, requesting a new password) and admin actions (such as creating judges). When creating a new award, check that the default wording of these templates and edit them as you require.

1. Go to the actions menu and select **Misc**

2. Select **Email Templates**
3. Search for the template you wish to amend, for example entry/submit which is the submission email (see Glossary for full list) and click on **Default** or an awards specific template.



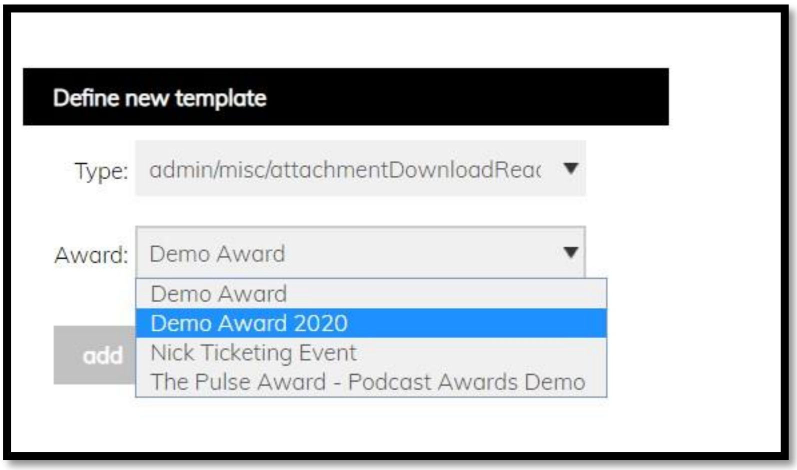
The **Edit existing emailTemplate** page will open.

4. Decide whether you want this email to be triggered automatically by the functionality it is linked to, by selecting Yes or No in the **Enabled** setting.
5. Select if you wish the standard logo to be used by using **Yes**/**No**. The logo would have been defined when the instance was launched.
6. Decide whether you want emails using this template to be added to the outgoing Email Queue automatically and queued to Send as soon as triggered OR held in the Queue until you manually release them. In the field **Add emails to queue in this state**, select **New** for them to be automatically queued to send or **On Hold** for them to be until you release them (for more details on how to release them see the section on Manually Releasing Emails from the Email Log/Queue**)**
7. If you wish any users to receive a copy of the email add them to the **BCC** section and separate each email with a comma. If you only wish the template to be sent to those specified in the BCC section check the **Send to BCC only** box.

8. Type a **Subject** line for the email. Note that an email will not send if the subject is left blank
9. Enter email content in the content section. To enter html click on the **</>** button in the top left.
10. It is possible to add special content using the following options:
    a. To add CMS use %% with label from the CMS (left hand column)
    %%login page introductory text%%
    b. To use a special value such as entry name or entry ID use @@ and the name of the special value (special values are listed at the bottom of the email template)
    @@entryName@@
    c. To use question answers relating to this entry use $$ with the internal question name
    $$Best Game Nom Can 1 Name$$
11. Click on the **Preview** button at the bottom of the page to see how the email will look to users
12. Click **Save and close** to save the template

If you are running multiple awards, and require different templates with different wording for each awards – you can create **award-specific templates** via the following process:

13. Scroll to the bottom of the **Email Template Type List**, to the section **Define new template**.
14. From the drop-down **Type**, select the template you want to create an award-specific version of.
15. From the drop-down **Award**, select the Award you want it to apply to.
16. Click **Add**. This award-specific template will now appear in your template list in the middle '**Templates defined**' column, alongside the default template. Click on it to edit the content for this specific award.

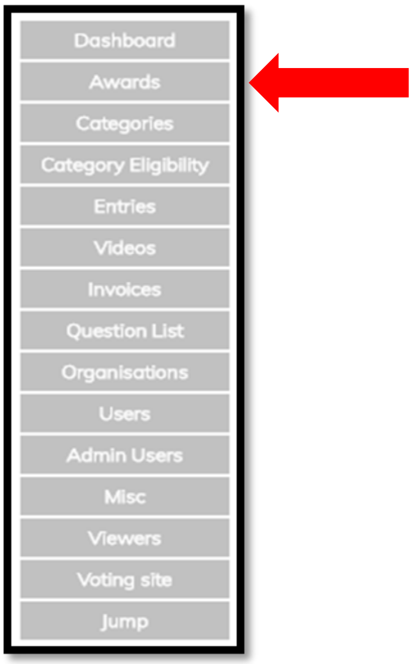


Copying An Award
If you have run this Award before, and wish to do so again entirely (or mainly) unchanged, you can short-cut many of the processes listed above by simply creating a **Copy** of the original award. This clones all of the above stages – replicating all of the following elements:

- Award Settings
- Questions
- Categories
- Category Eligibility

To copy an existing award:

1.Go to **Actions** > **Awards**



2. The **Award List** will open. Find the award you wish to copy, and in the drop down in the right column, click **Actions** > **Copy**.

3. The **Award Settings** page will open. You can adjust any of these settings that you require – but the following are **IMPORTANT**:

- **Open/Closing/Payment Dates** – which should be different from your original award
- The **Display Name** – which is how it appears to the entrants. By default it will be called '**Copy of *original award name***', so update this as you require.

4. When you have checked these Settings, click **Save and Close**.

5. Now that you have copied the award, you can – if you require – edit and update any of the copied Questions, Categories and Category Eligibilities for your new award.

Entries and emails from the email management system will not be copied across from your original award.

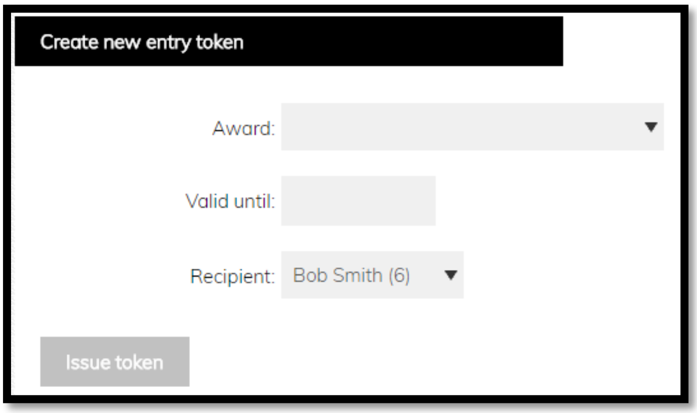
MANAGING YOUR ENTRANTS

How to send an entry token

Once your award project has opened for entry, front end users and applicants will be able to create entries from the entrant side of the site. However, there may be occasions where you need to give them special permission to do so. For example, Entry tokens are used to permit entrants to create a new entry form after the **Create** date has passed. An email with a one click only link will be sent enabling the entrant access to the entry form. The entrant will need to click save on the form as soon as they open it and the **Submission** date must be set in the future otherwise it will not be possible to submit.

1. Go to the actions menu and select **Organisations**

2. Search for the organisation whose details you wish to update by typing into the **Name** column.
3. Select **Edit** under the actions column
4. Scroll down to the **Create new entry token** section:



5. Select the relevant Award
6. Set a date when the token will no longer be used. The token will not work after the date has passed.
7. Select the recipient within the organisation who should receive the email
8. Click **Issue token** and an email will be send to the user

Important: The expiry date on the token overrides and extends the Last Create Date for an entry only. Once you have issued the token, you must also go back to the Awards set-up page and manually extend:
-**Last Submit Date** - otherwise the token holder will be able to create their entry but not actually submit it.
-**Last Pay Date** - if your award takes payment for entries, otherwise the token holder will not be charged for their entry.

How to log in as an entrant/viewer

Admin users can access entrant/viewer accounts. This is particularly helpful when troubleshooting any issues that arise. Ensure that you log out afterwards as all actions are marked as the entrants/viewers when you are logged in.

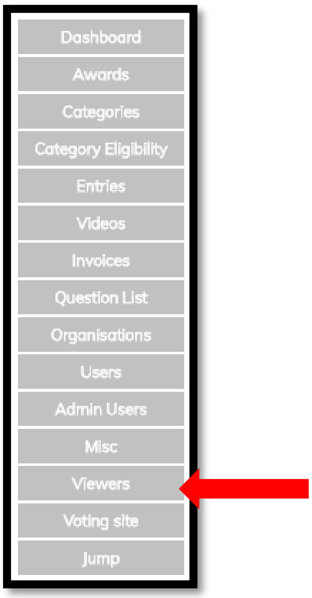
Log in as an entrant

1. Go to the actions menu and select **Users**

2. In the table search for the name of the user who you wish to login as
3. Click on **Login as** on the right of the table
4. The entrants account will open in a new tab. You will have access to everything that the entrant has access to
5. Log out using the function in the top right when you are finished

Log in as a viewer

1. Go to the actions menu and select **Viewers**



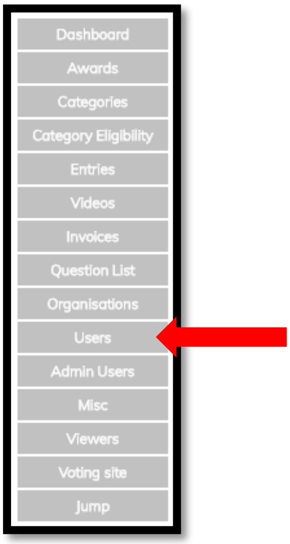
2. In the table search for the name of the user who you wish to login as
3. Click on **Login as** on the right of the table
4. The entrants account will open in a new tab. You will have access to everything that the entrant has access to
5. Log out using the function in the top right when you are finished

How to change a password for an entrant/viewer

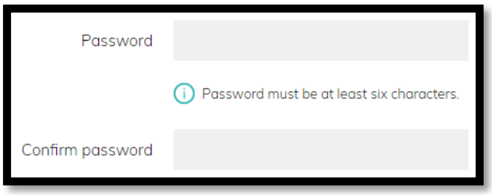
Change password for an entrant

Entrants have the option to change their password using the password reset function located under the login screen.

1. Go to the actions menu and select **Users**



2. In the table search for the name of the user whose password you wish to change
3. Click on **Edit** to be taken to the users setting page
4. Scroll down to the **Password** and **Confirm password** text boxes

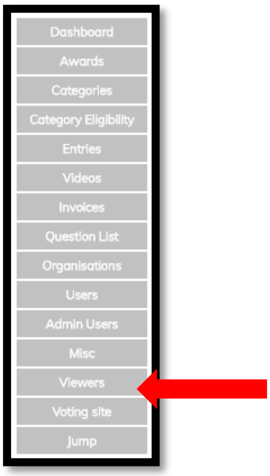


5. Enter a new password in both boxes. It must be a minimum of six characters
6. Click **Save**

Change password for viewer

Note that viewers have the option to change their password

1. Go to the actions menu and select **Viewers**



2. In the table search for the name of the user whose password you wish to change
3. Click on **Edit** to be taken to the viewers setting page
4. Scroll down to the **Password** and **Confirm password** text boxes

5. Enter a new password in both boxes. It must be a minimum of six characters
6. Click **Save**

How to edit an organisation's details

Note that entrants have the ability to update the details of their own organisation in the **Account details** section on the front end of the website

1. Go to the actions menu and select **Organisations**

2. In the table search for the organisation whose details you wish to update
3. Click on **Edit** to be taken to the organisation setting page
4. Edit the relevant organisation details
5. Click **Save**

MANAGING YOUR ENTRIES

Bulk Actions

There are a range of Bulk Action functions that you can apply to your entries.

The Bulk Action functions you have available are:

Approve – To Approve all selected Submitted entries

Unapprove – To Unapprove all selected Approved entries

Unsubmit – To Unsubmit all selected Submitted entries

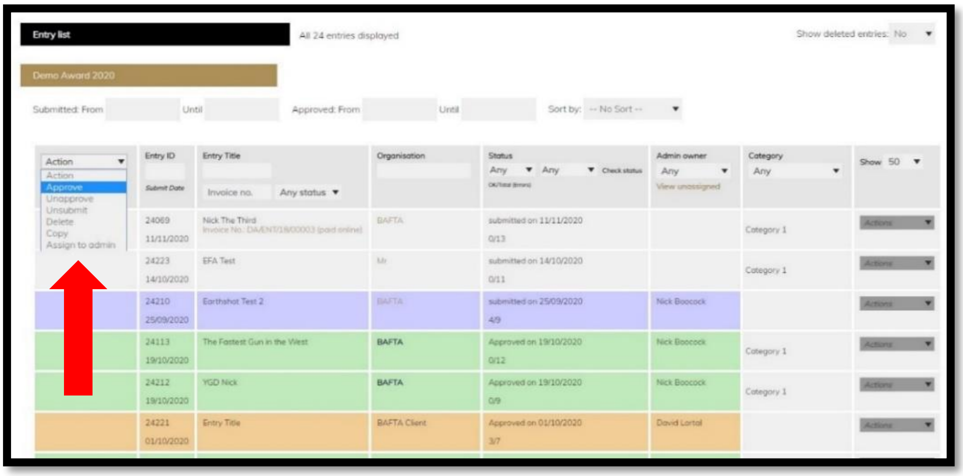
Delete – To Delete all selected entries

Copy – To Copy all selected entries to another Award or Round

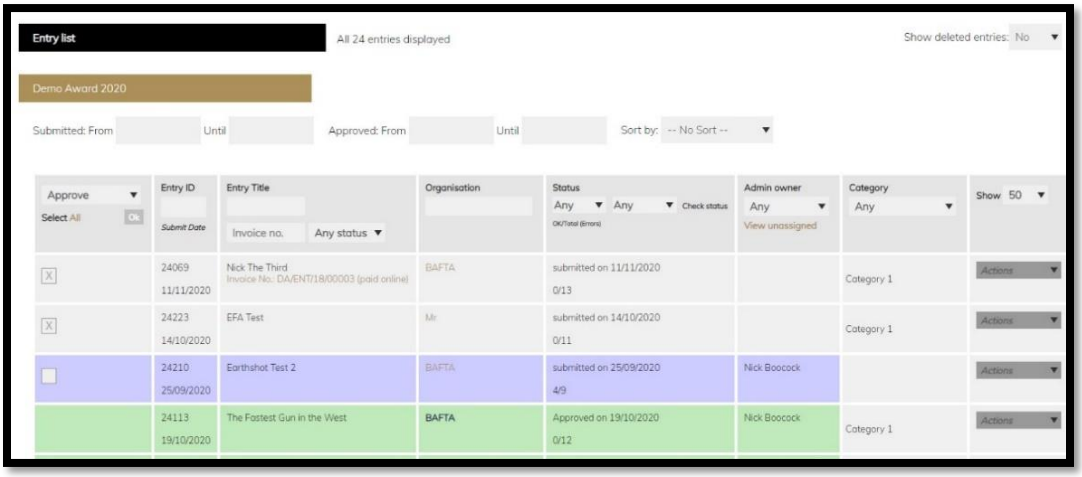
Assign To Admin – To switch the Admin Owner of all selected entries to a different Admin User

To apply any of these Bulk Actions, you should follow this process:

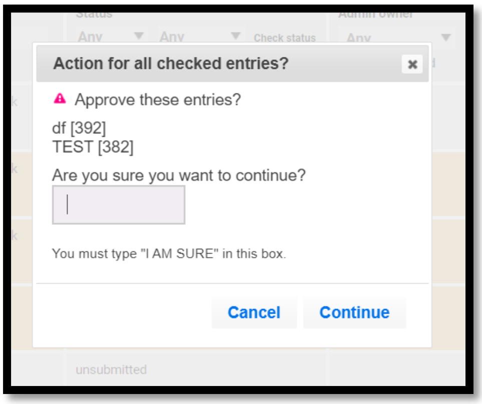
1. On your **Entry List**, go to the **Action** drop-down in the far left column of the table. Select which of the bulk actions you want to do.



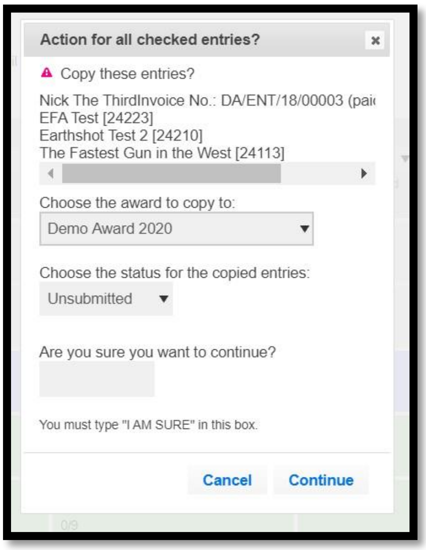
2. Once you have clicked on your Action, in this case 'Approve', a checkbox will appear in the far left column of each of the entries. If you want to Approve some of these entries (but not all) you should **click i**n the relevant ones to select them. Alternatively, if you want to Approve All of them, you should click the **All** alongside the word **Select** and all the checkboxes will be selected.

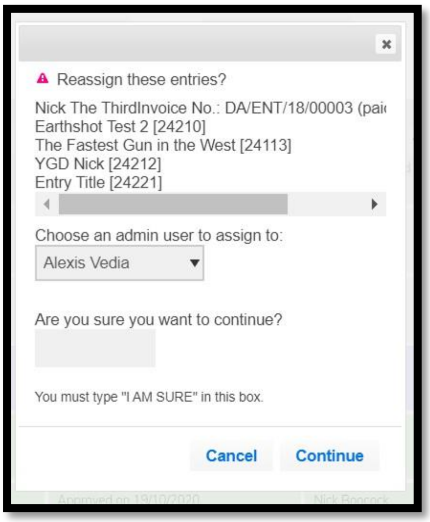


3. Click **OK** in the far left column header and you will be asked to type **I AM SURE** for your Bulk Action to proceed eg. in this example all the selected will be Approved.



The process is similar for all of the Bulk Actions available, with additional selection options available as part of the bulk **Copy** and **Assign to Admin** processes as shown below:





We will cover the **Bulk Copy** functionality in more detail in the Approving Entries section as that is an integral part of the process of screening the entries through to the judging round.

Contacting Entrants
You can contact entrants via either an **individual email** or **bulk mailout**.

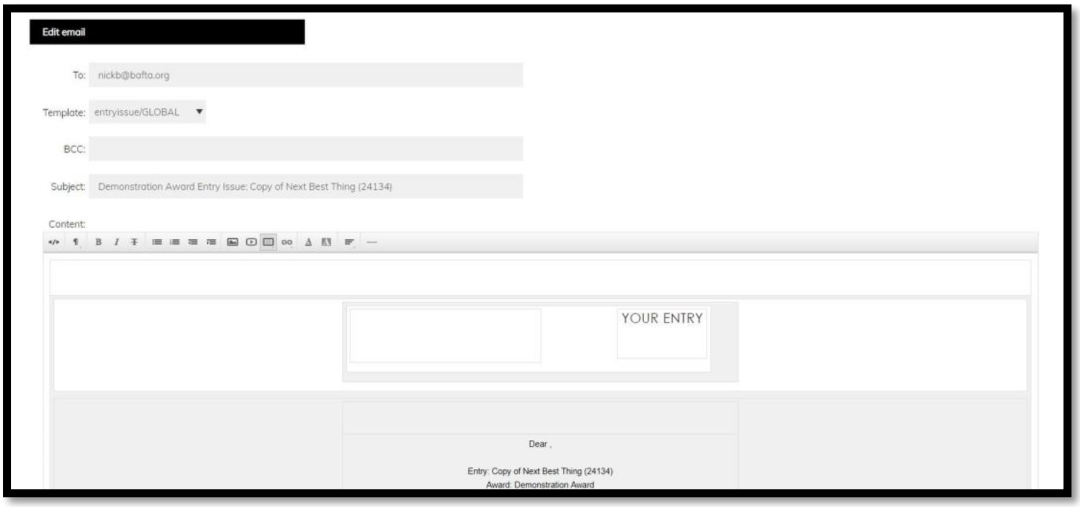
Individual contact via Email Entrant

The **Email Entrant** functionality exists for when you need to contact an individual entrant about a unique issue that relates directly to their entry - such as an uncorrected error in their submission form etc…

How does it work?

The Email Entrant functionality is controlled by an email template you have, called **entryissue/GLOBAL**. You can edit this in the usual way, by going to:

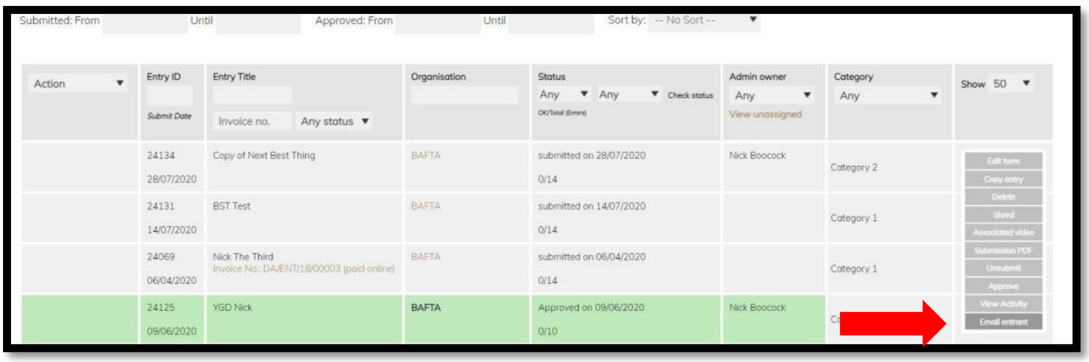
1. **MISC** > **Email Templates**
2. Scroll through your templates and click on the **Default** link in the **Edit** column
3. Edit the Template as you require
4. **Save & Close**.



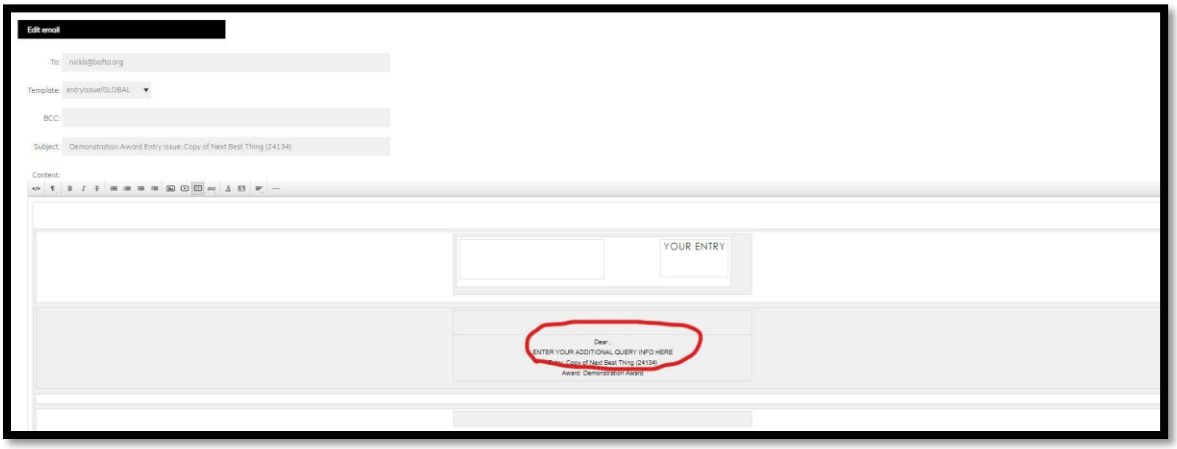
How to use it?

Once you have edited your entryissue/GLOBAL template as you require, you are ready to send it to your entrant.

1. From the main **Actions** drop-down, select **Entries**
2. Your **Entries list** opens. Find your entry in question, and from the **Actions** drop-down at the right hand side of the record click on **Email Entrant**



3.The **Edit Email** page opens up. In addition to the templated content set up in entryissue/GLOBAL, you can also edit or add to the **body copy** to include more specific details about this particular entry's issue.



4. Click **Preview** to see how your email will appear.

5. Click **Send**. A pop-up will ask you if you are sure.

6. Click **OK**. The email will send.

7. A new page will confirm how many entrants this email was sent to ie. 1.

8. Click **Back** to return to your Entries table.

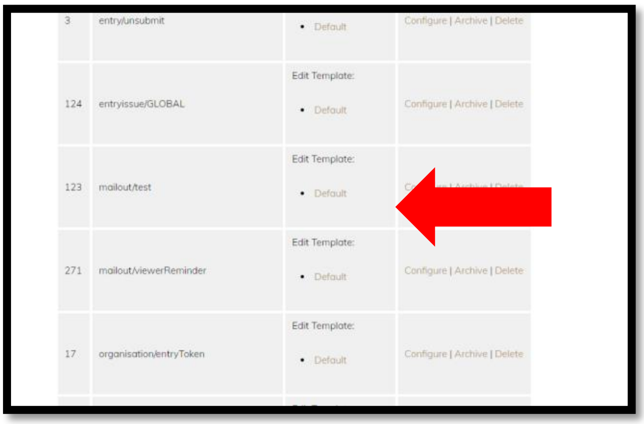
Bulk Email contact via Entrant Mailout

Entrant Mailout is a very useful function of Nucleus. It enables you to contact your entrants and viewers on a bulk basis for a wide range of reasons, which you can edit according to the 'mailout' email templates that are available under 'Misc/Email Templates'.

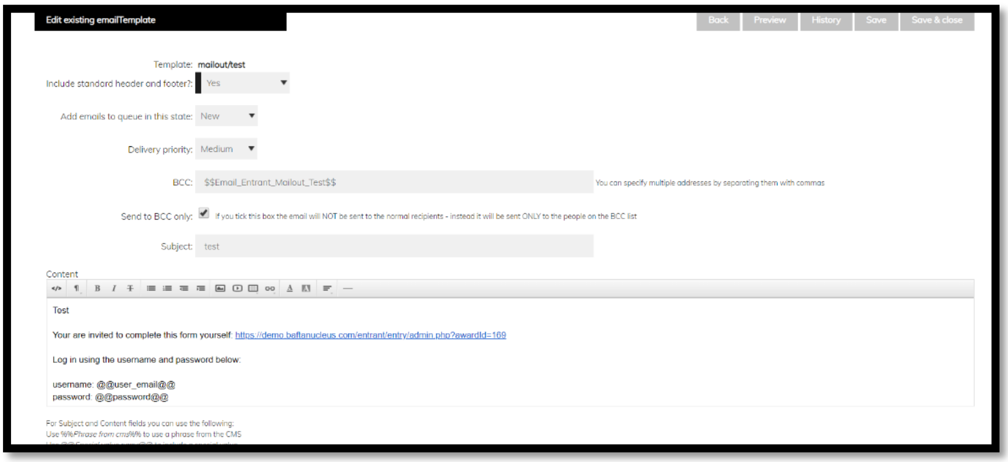
How to edit your template

Before you set up and schedule your Mailout, you should edit the template you wish to send. There are 2 default templates to work from for the purposes of bulk mailouts. These are:
-**mailout/test** which is best for emailing ENTRANTS
-**mailout/viewerReminder** which is best for emailing VIEWERS

However, you can create different mailout templates for different purposes (see below).



1. Click on **Actions/Misc**.
2. Click **Email Templates**.
3. From the table of templates, click on the **Default** link alongside the template you wish to edit.
4. The **Edit existing email Template** page will open.

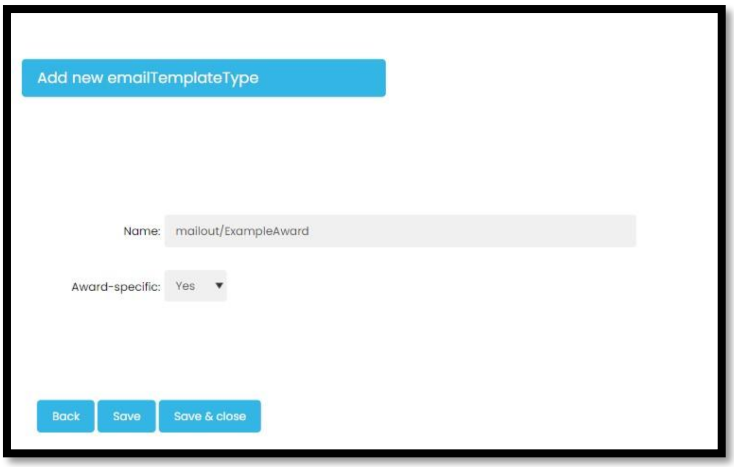


5. Ensure the '**Include standard header and footer?**' field is set to '**Yes**' to have your regular branding added to the top of your email.
6. In the '**Add emails to queue in this state**', select '**New**' for them to be queued for sending as soon as you have completed the process below OR select '**On Hold**' for them to be held until you choose to release them manually from the **Email Log/Queue** (***see below**).
7. Edit the **Subject** field as you require.
8. Edit the text in the **Content** box as required for the message you wish to send.
9. **Save & Close** when you have finished.

Setting up a new template

If you are likely to be using the Entrant Mailout to send several different types of mailout messages, it is more convenient to set up different variations of your mailout template for each different message – rather than editing your default mailout/test template each time.

1. On your **Email Templates list**, click **Add**.
2. The **Add new email Template Type** screen opens.
3. In the **Name** field, create a recognisable name for your template. It must begin with the prefix **mailout/** in order to be available in the Entrant Mailout functionality, but the rest of the name can be whatever you require.
4. Select whether you want to be able to create **Award-specific** versions of this template.
5. **Save and Close.** The new template will now appear on your Template list and be available to select when you use Entrant Mailout.



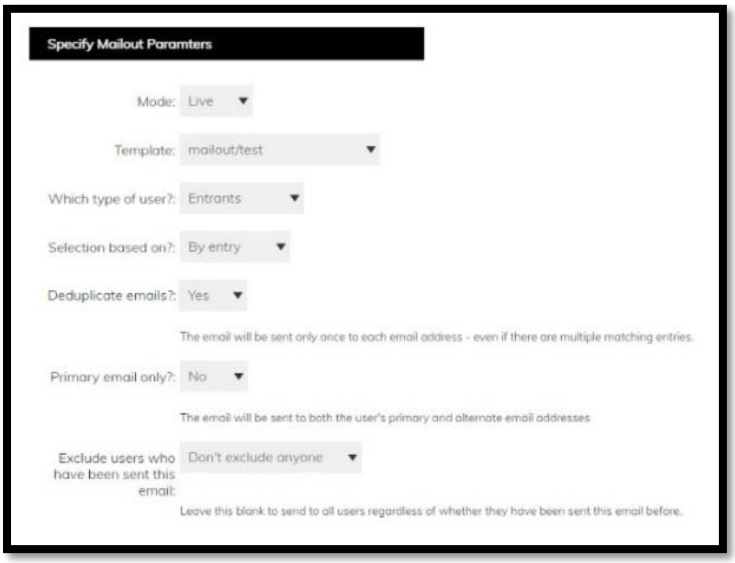
Sending your mailout

Once you have prepared your template, you can proceed to schedule your Mailout.

1. Click on **Actions/Misc**.
2. Click **Entrant Mailout**.
3. The **Specify Mailout Parameters** page opens. Your first option here is to decide if you want to send **Test email** or a **Live email**. Select **Live email**.
4. Select **mailout/test Template** OR any specific **mailout/** variation you may have created using the **Setting a new template** process above.
5. Select **Which type of user** – **Viewers** or **Entrants**. Select **Entrants**.
6. Decide what the **Selection is based on**: **By entry**, **By invoice** or **By Video**.

A) If **By Entry**:

- Select whether to **Deduplicate emails**. 'Yes' means that an email will only be sent to each address once if there are multiple entries for the same address. 'No' means that multiple entries for the same address will receive the email multiple times.
- Select whether the email will only be sent to a contact's **Primary email** address, or whether it may also be received by an email addresses they have supplied.
- Decide whether to **Exclude users who have been sent this email** already, and if so based on how many times they have been sent it before.



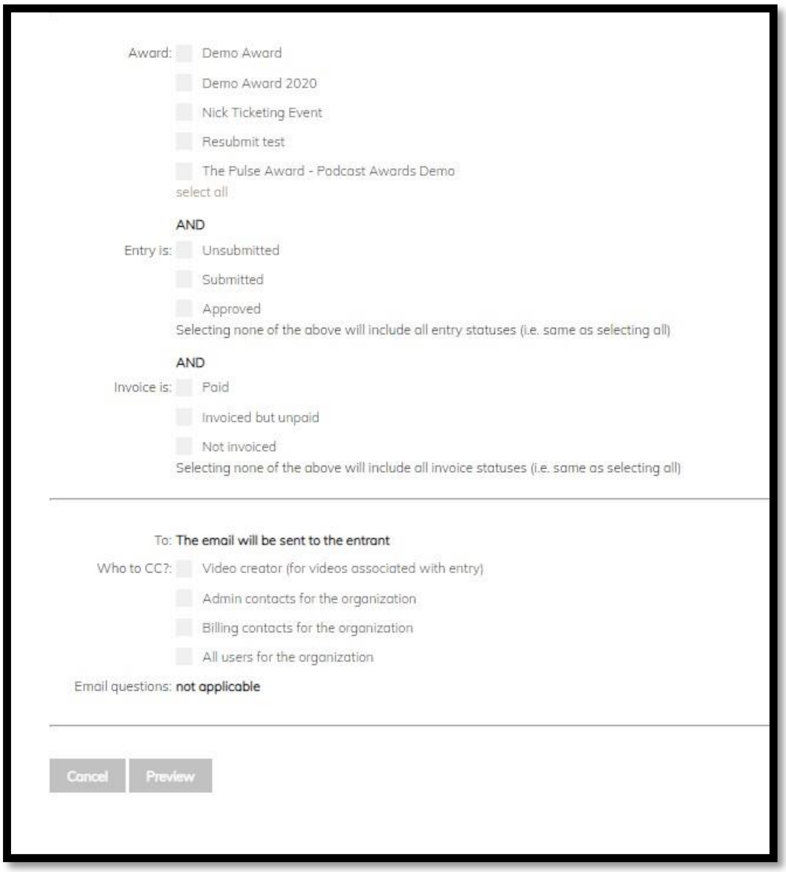
- Choose the **Award/s**, **Category/ies**, **Entry Statuses** and **Invoice Statuses** from which to select the Entrants to be contacted. (Leave all of the Invoice Statuses unchecked as your Award is does not charge for entry).
- If your entry form has a date-based question on it, you will also be asked whether there is a **Date Supplied For** to be factored into the selection - and if so, what date range to be included for this. By default this field is set to 'no date dependency'.

B) If **By Invoice**:

- Select whether to **Deduplicate emails**. 'Yes' means that an email will only be sent to each address once if there are multiple entries for the same address. 'No' means that multiple entries for the same address will receive the email multiple times.
- Select whether the email will only be sent to a contact's **Primary email** address, or whether it may also be received by an email addresses they have supplied.
- Decide whether to **Exclude users who have been sent this email** already, and if so based on how many times they have been sent it before.
- Choose the **Award/s** from which to select the Entrants to be contacted.
- Choose whether this will be for invoices that are **Paid**, **Unpaid** or both **Either Paid or Unpaid**.
- Select **Who to CC on the email** if required.
- Click **Preview**.

C) If **By Video:**
- Select whether to **Deduplicate emails**. 'Yes' means that an email will only be sent to each address once if there are multiple entries for the same address. 'No' means that multiple entries for the same address will receive the email multiple times.
- Select whether the email will only be sent to a contact's **Primary email** address, or whether it may also be received by an email addresses they have supplied.
- Decide whether to **Exclude users who have been sent this email** already, and if so based on how many times they have been sent it before.
- Choose the **Award/s** from which to select the Entrants to be contacted.
- Enter the **Dates** between which the videos had to be created to be selected (or leave blank for the creation date not to be considered)
- Choose the **Upload Status** of the videos - **Upload complete**, **Upload in progress**, **Upload not started** OR **Select All**
- Choose whether the videos have been **Associated** to entries - via **Is Associated**, **Not Associated** or **Either**

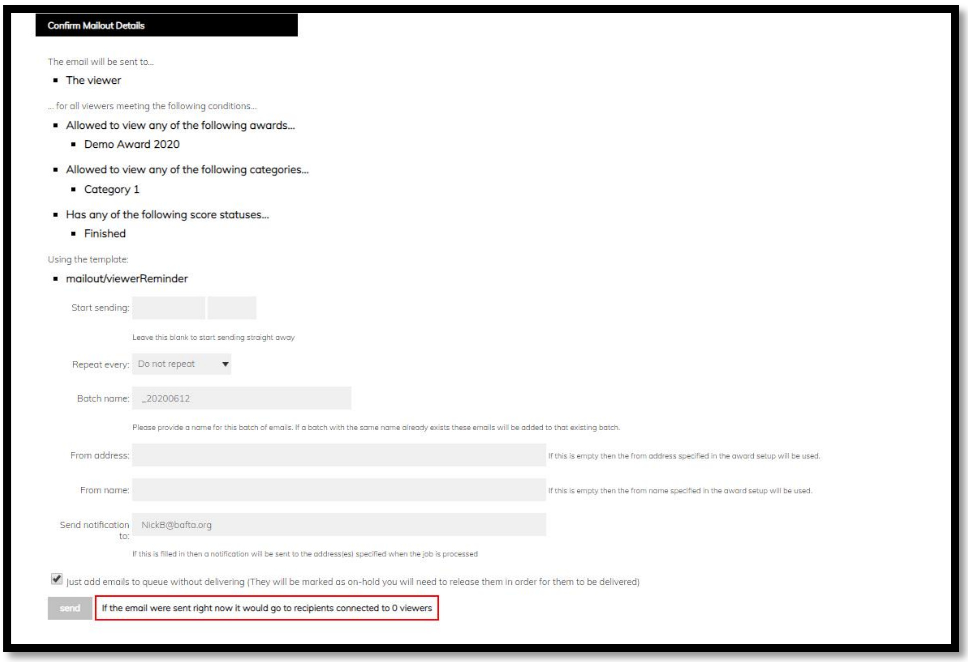
7. Select **Who to CC on the email** if required.
8. Click **Preview**.



The **Confirm Mailout Details** page opens.

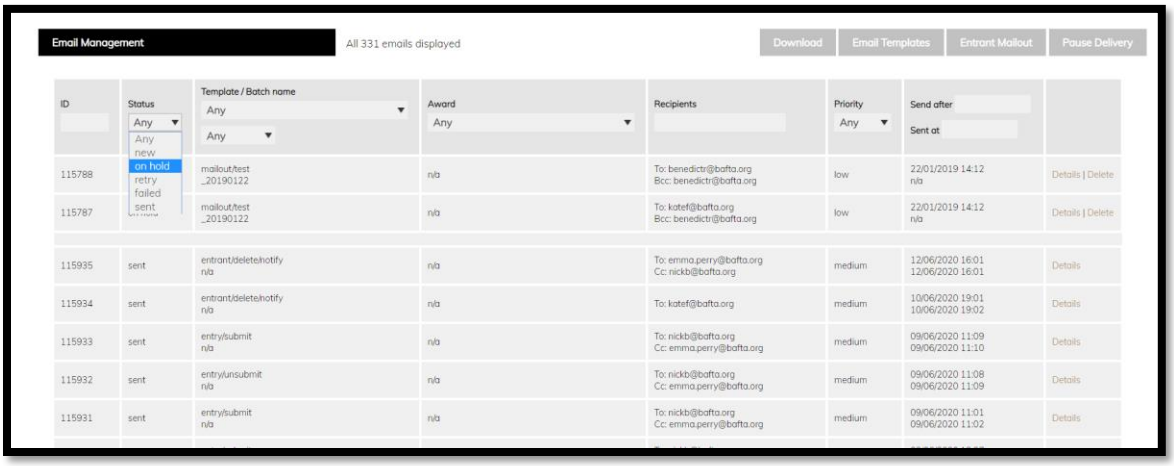
14.Enter the required Date and Time in the **Start sending** field OR leave blank to begin sending as soon as you hit Send on this page. If set more than 60 mins in the future, the job will be created but the emails will not be added to the email queue until 60 mins before the job was set to send.
15.In the **Repeat every** field, choose how frequently the email is to be sent OR select 'Do not repeat' for it to be sent once only. It is important to set an end date or the system will send the email indefinitely.

16.Enter a **Batch name** for this email. If you provide a batch name that already exists, this email will be added to that batch. If you do not wish these emails to be added to a batch at all, leave this blank.
17.Enter a '**From address**' and '**From name**'. If you leave these fields blank, the email will be sent from the address and name specified in the main Awards set-up page.
18.If you want to receive a notification of when the email is sent, enter the email address in the field '**Send notification to**', otherwise leave it blank.
19.If you prefer the email to be added to the Email Queue without sending until you manually release it, tick the box '**Just add emails to queue without delivering**'. Otherwise, leave it unticked to progress to automatic sending.
20.Click **Send** when you are ready.



***Manually Releasing Emails from the Email Log/Queue**
If you have selected your emails to be added to the queue in the **On Hold** status, this is how you release them manually:

1. Go to **Actions/Misc**
2. Click **Email Log/Queue**
3. In the **Email Management** queue, under **Status** select **On Hold**.



4. The queue will reduce to only display those emails that are currently **On Hold**.
5. Click the **Release Matching** button that now appears in the top right corner above the queue.
6. You are asked to confirm that the selected emails are those you wish to send. Click **OK**.
7. Click the **Continue** button in the top left corner above the Queue. The previously held emails will now send.

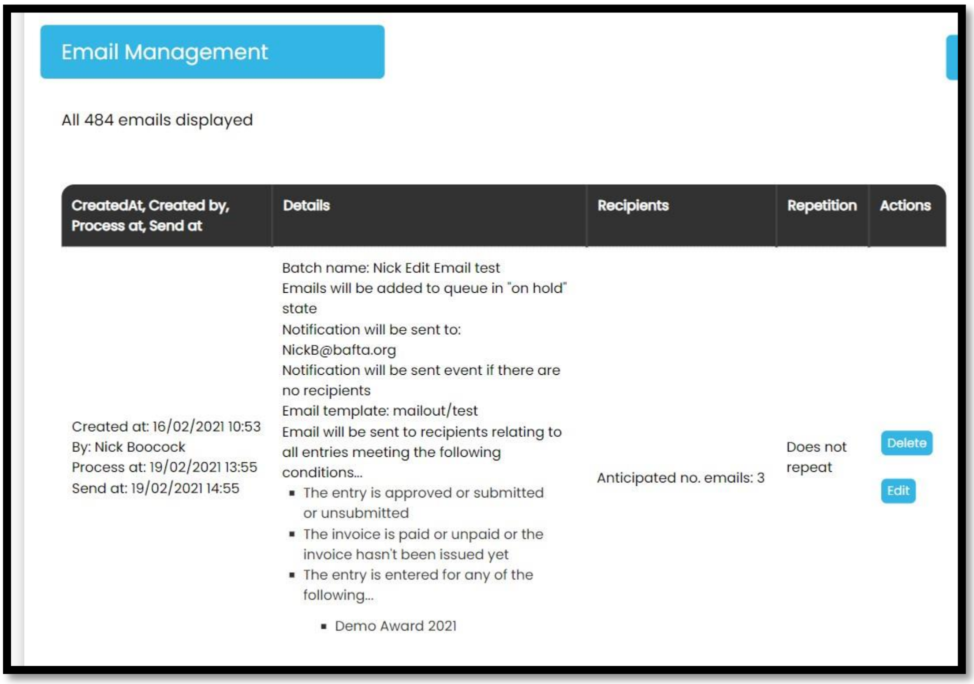
**** Editing an Entrant Mailout once it has been scheduled to send**

You can edit scheduled email jobs that have not yet progressed to the Email Queue, enabling you to adjust any of its selected settings (such as recipients, relevant categories, date/time, BCCs etc).

To use this **Edit** function on any particular scheduled email job:

1. Go to **Actions > Misc**
2. Select **Email Log/Queue**
3. Find your scheduled email job on the **Email Management** page. **Hint:** All scheduled email jobs that have not yet been added to the Email Queue appear ABOVE the Email Queue
4. Click on the **Edit** button alongside the job
5. You will then be taken through the set up pages of that job. Amend the settings as you require and click **Save** when you are done

The email job will remain in the schedule, with the new settings applied.



NB: This Edit function is available any time up until **1 HOUR BEFORE** the scheduled release time, at which point the job is added to the Email Queue whereupon Deletion is the only option available.

Reviewing Media Items

The Media Items section enables you to review all of your entrants' Media Library assets – covering Videos, Images, Audio and Documents.

Each Media Item is listed in reverse chronological order, with the most recently uploaded first. It can be filtered according to

- ID
- Media Type (Video/Image/Audio/Document)
- Title
- Status (Not Started/Uploading/Transcoding/Complete/Error or Any)
- Organisation
- Entries (whether a Media Item has been associated to an entry, none or either)

The following **Actions** are available via dropdown:

- **Edit** – which logs you in as the Entrant media owner, and gives you the option – via a pop-up window – to **Replace** / **Delete** /**Preview** the media item, as well as changing its **Title**, **Download** and **Sharing** options
- **Entries** – which enables you to see which Entries (if any) it is currently submitted with. From the **Entries** link you will then be given further **Actions** options to either **Edit Media** or **Edit Entry**

Assets in the Media Items List are colour-coded:

- **Complete** (uploaded AND transcoded) appear in Green
- **Not Started**, **Uploading** and **Transcoding** all appear in Grey
- **Error** appears in Red text

Displaying Media Items on the Entry List

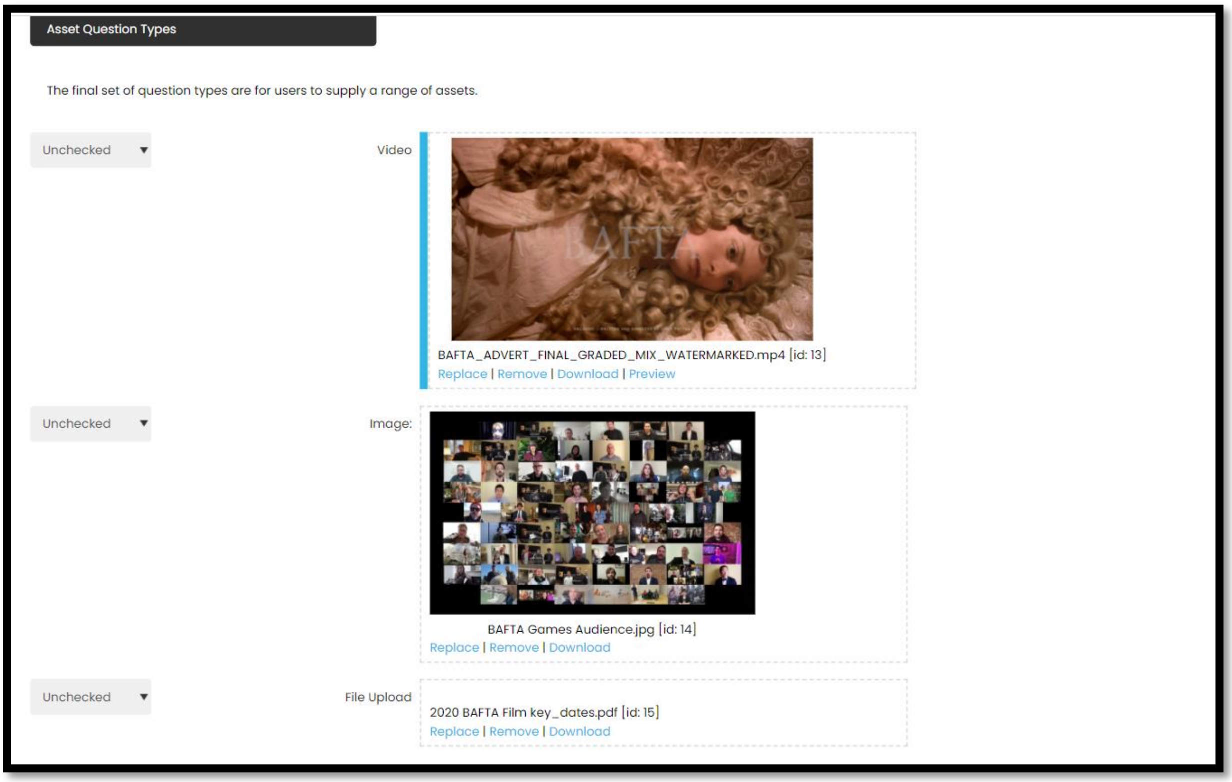
As all Media assets now exist as answers to Questions, you can check – at a glance - whether an entry's Media Item has been uploaded, on the **Entry List** itself rather than having to click on Edit Form.

To enable this, for the required Media Item on your **Question List**:

- Click **Edit**
- Scroll down to the **Options** section, and in the setting **Include On Entry List For Admin** select which column number you want it to be displayed on the Entry List.
- **Save and Close**.

Admin Reviewing and Editing options

In case they are required, there are a number of options available on the Admin site when checking the Media Items.



Admin Users can:

Replace a Media Item directly with another one, at their discretion.

Remove a Media Item entirely.

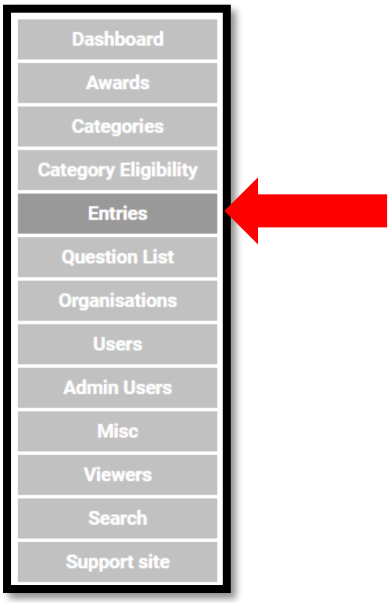
Download a Media Item.

Preview a Media Item in a pop-out player while the form remains open in the background (for Video only).

Approving Entries

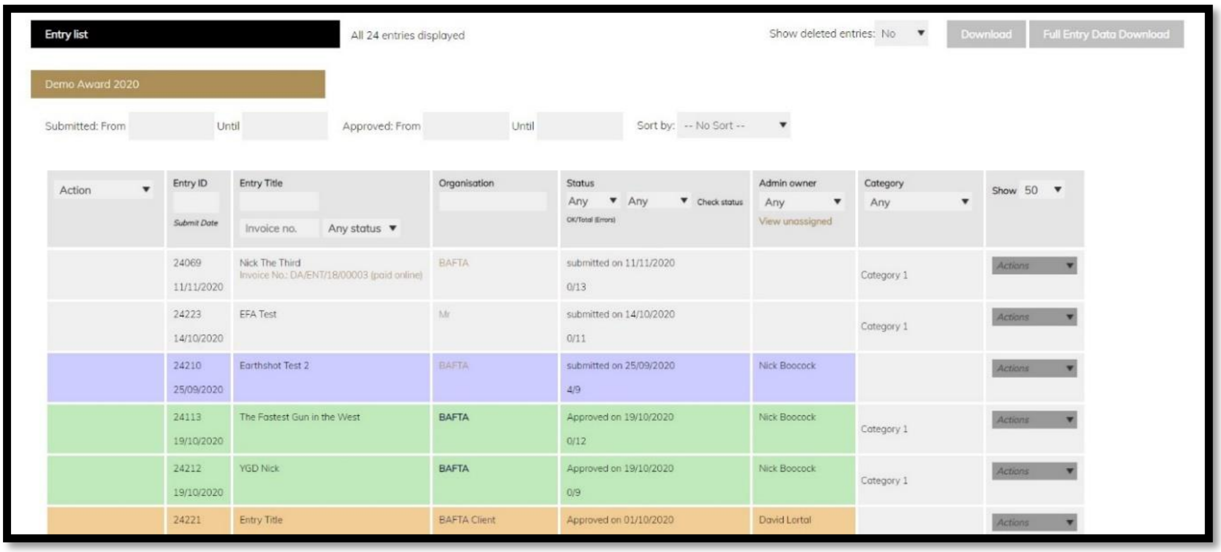
Once you have received Entries, you have a variety of options available for approving them. Approval can happen concurrently while the entry window is open, or after your Submit deadline has passed. This is your choice.

To access the Approval functionality, go to the **Actions** menu and click on **Entries**.



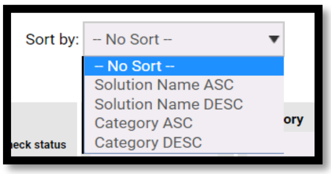
The **Entry List** will appear for the particular Award you are viewing.

Entry List



The Entry List has a number of different filtering and display options to enable you to drill down to any specific Entry, or group of Entries, you need to see.

It also has a **Sort by** functionality, which enables you to sort any selection by:



Upon creation each entry form is issued with a unique **Entry ID** which starts on 1 and cycles upwards. These numbers are issued as entries are created and do not pertain to an individual award, meaning each Entry ID is unique.

The list defaults to displaying 50 entries but this can be changed using the **Show** column on the far right.

The Entry List is populated with the most recently Submitted entries the top. The submission date will be listed below the entry ID. If an entry is resubmitted for any reason the date will change to the most recent submission date.

Static columns

The following columns are always present on the entry list: **Entry Title**, **Status**, **Admin owner**, **Category**.

Entry Title

You can search for an individual Entry by typing its Entry Title here.

Status

Entries can occupy three different statuses as follows:

Unsubmitted

An entry will be in this state if it has been created by the entrant and not yet submitted i.e. they have begun filling in the form but it is not finished; or if it has been unsubmitted by admin users. In this state entrants can edit their entries.

Submitted

Once an entrant has completed their form, they will submit it which locks the entry so that it can no longer be amended by the entrant. Submission also triggers an (editable) email to the entrant containing a PDF version of the entry form. Admin controls are only available in the submitted status so it is at this stage the entry is checked.

Approved

Entries that have been checked by admin users can be moved into the approved state. Entrants are sent an additional confirmation email (unless this template is disabled, see section on

Approval Email).

Colours

Entry status can also be filtered by colour. The colour is dependent on the checks that have taken place on the form itself (see Individual Approvals, below):

- **Red** - Admin users have flagged a Problem with the entry. Red overrules all other colours
- **Orange** - Admin users have flagged that they are querying this entry. Orange overrules green & blue
- **Green** – Entry has been approved by admin users and there are no problems
- **Blue** - Entry is in the process of being checked by admin user
- **Grey** - Entry has not yet been checked

Admin Owner

Each entry is assigned to the admin user who first checks the entry. Entries that are assigned to admin users will appear in their section on the Dashboard. They can also be filtered on the entry list by using the Admin Owner filter.

Category

Shows the admin user quickly which category the entry has been placed into. This can be filtered to only see one category at a time.

Adding more columns on the Entry List

If you need additional data – based on specific answers given on the submission form – to appear on the Entry List and any subsequent report export, you can do this by making the following adjustment to the corresponding question.

1. Go to **Actions** > **Question List**
2. The **Question List** opens. Scroll to find the specific question that corresponds to the answer/data you need to display on the Entry List. Click on **Edit** in the far right hand **Actions** column that appears alongside it.
3. The settings and parameters for that Question open. Scroll down to the **Options** section. For the setting **Include On Entry List for Admin**, select the **number** which will define which column position you want it to appear on the Entry List.
4. You will also be asked if you want the Entry List to be **Sortable** by this new data column. Select Yes if you do.
5. Click **Save and Close**. This column will now appear on your Entry List.

Checking Methods

You can check (or 'screen') Entries using either A) Nucleus's native checking tools **OR** B) by exporting the data away from Nucleus before returning to Approve the positively screened entries in bulk. We will show you both methods, so you can choose what best fits your processes.

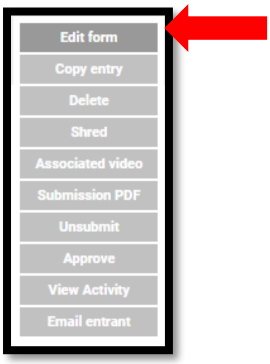
A) Native Checking on Nucleus

1.To begin, you should filter your **Entry List** to display entries that are currently Submitted but not yet Approved.

To do this, go to the **Status** column and select **Submitted**.

OR if you are looking for a specific entry, you can enter the **Entry ID** in the entry ID column or search for the **Entry Title** or **Organisation** columns.

2.From the results, select an entry you wish to check, go to the **Actions** menu to the right of the entry select and select **Edit Form**.

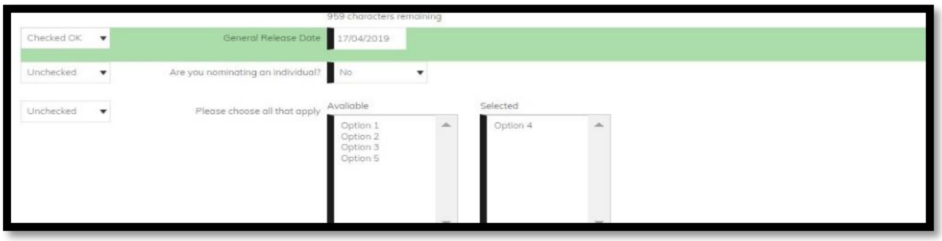


3.You will be taken to a new page where you can see the entry form in full with all of the completed fields with some additional admin functions.

4. To the left of each answer there is a drop down menu which will state that it is **Unchecked**. Clicking on this drop down will give you the ability to colour code each answer, as indicated above:

a. **Unchecked** – answer remains grey as has not been checked.

b. **Checked OK** – answer turns green. The administrator has deemed it to have been checked. This can also be achieved by double clicking on the answer



c. **Corrected** – answer turns a lighter green. Admin user has corrected information on behalf of the entrant

d. **Problem** – question turns red. There is a problem with the answer provided.

e. **Query** – answer turns orange. The admin user wishes to query something about the answer.

You can Check as many or as few of the answers as you choose. Failure to check any particular answer does not automatically disqualify it from progressing, as the Approve functionality button is the ultimate arbiter of whether or not an Entry progresses. (For example, even an Entry flagged as Problem can be Approved – although it will still be colour-coded Red on the Entry List). The Checking functionality and its colour-coding is an indicator to yourselves as Admins as to the viability of each Entry according to your own guidelines – and therefore guide you as to whether to Approve.

You should therefore set your own guidelines as to WHICH QUESTIONS must be Checked OK (ie. turned green) in order for an Entry to progress to Approval. Those questions which do not appear on that guideline list need not be Checked at all – in order to save you time and also uncertainty over whether any particular Entry is suitable for Approval.

Status on the Entry List

Once you have Checked an Entry and coloured some of its answers, this changes the colouring of the entry back on the Entry List on the previous page.

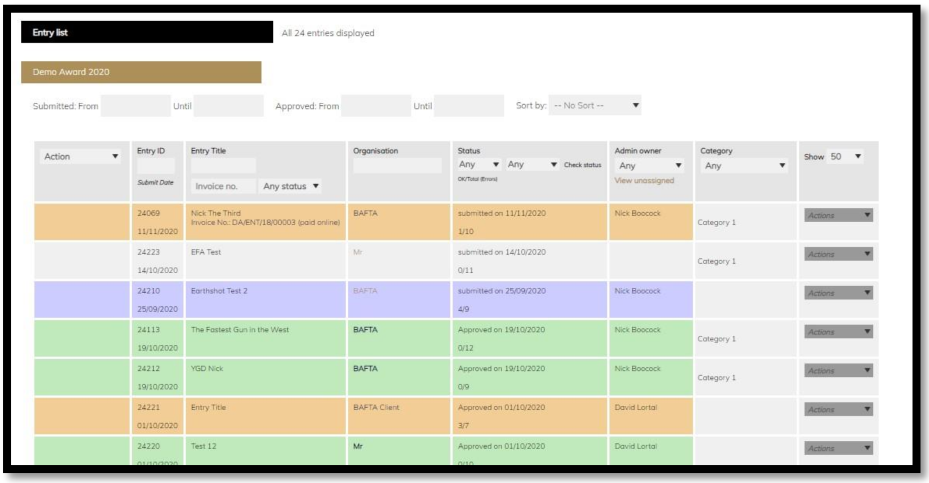
a. **Red (Problem)** - Red overrules all other colours

b. **Orange (Query)** - Orange overrules green & blue

c. **Green (Checked OK)** – Entry has been approved by admin users

d. **Blue (Checking)** - Entry is in the process of being checked by admin user, but not yet Approved

e. **Grey** - Entry has not yet been checked



Changing Admin Owner of an Entry

The first Admin user who checks an entry becomes the Admin Owner of that entry (as listed in the Entry list). It is possible to change the Admin Owner once allocated, however. To do this:

1.Scroll to the bottom of the Entry, to the **Notes** section.

2.Next to **Admin ID** you should see the current **Admin Owner**'s name listed. You can change this to another Admin Owner via the dropdown menu.

3. **Save & Close**.

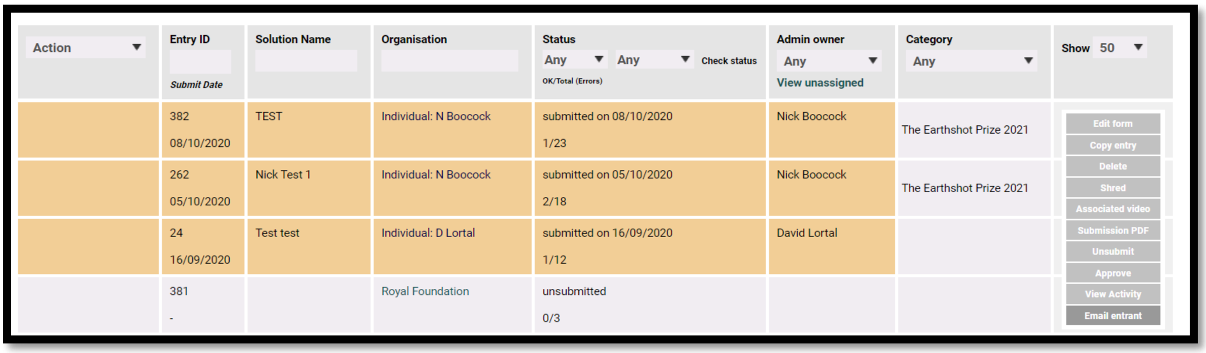
Admin Notes

If you wish to make notes about an entry then these can be recorded in the **Admin Notes** section at the bottom of the Entry page. These notes are for admin users only but any admin users who have access to the projects can see the notes.

Querying an Entry

If you have raised a **Query** on an Entry (as indicated Orange on the Entry List), you can email the entrant directly to request clarification.

1.From the **Entry List**, find the entry in question and from the **Actions** drop-down on the far right hand side select **Email Entrant**.



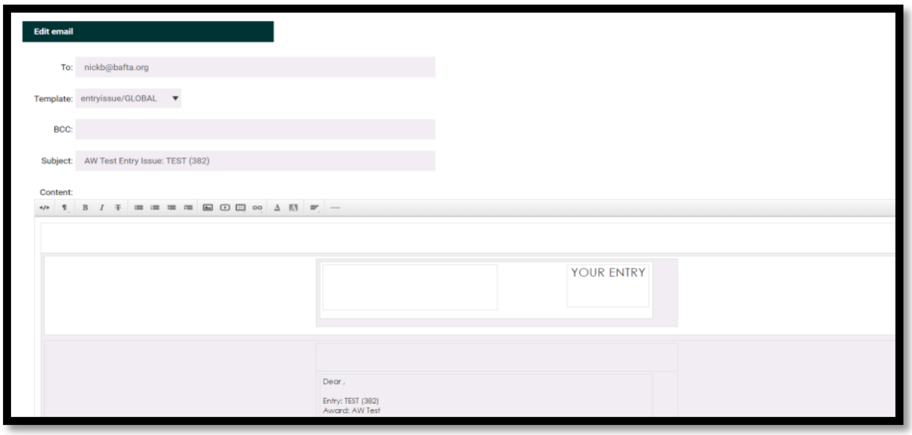
2. An **Edit Email** page will open. This contains a pre-existing template (listed as 'entryissue/GLOBAL' in your Email Templates list). The essential fields are pre-populated for you. These are:

a) **To:** - containing the Entrant's Email Address

b) **Template name** – which is entryissue/GLOBAL

c) **Subject** – which contains the Award name and Entry Number

You also have the option to enter any **BCC** addresses too.



3. The basic **Content** of the email is pre-set according to the template, but there is also the space for you to enter the specific nature of your Query by clicking in it and editing as you require. If you require there are a number of content settings you can adjust – including fonts, spacing, bullets, links, images etc.

4. When you have composed the email, click **Preview** to check it.

5. Once you are happy with that, click **Send**.

6. You will be asked '**Are You Sure?**' Click **OK**.

7. A confirmation **Email Sent** screen will confirm the number of addresses the email was sent to – which should always be 1, unless you added any further addresses in the BCC field.

8. Click **Back** to return to the **Entry List** for further checking.

Once you have heard back from the Entrant, you can then take the necessary action as you see fit – such as Approve, Unsubmit etc… (see details on both of these processes below)

Aside from editing the Content, if you need to amend the entryissue/GLOBAL email template itself you can do so. Please see the section on **Error! Reference source not found.** below.

Approving an Entry

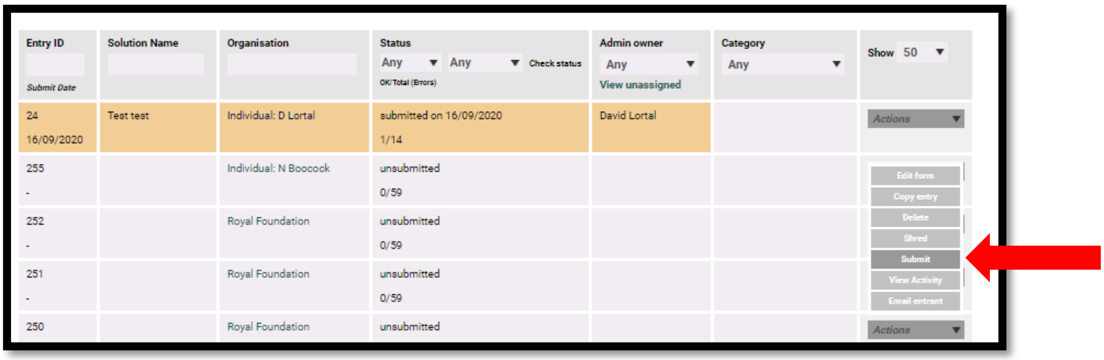
When you are ready to approve the entry click on the **Approve** button located at either the top or the bottom of the form. This action will change the status from Submitted to **Approved**.

Alternatively, you can click **Save and Close** and then Approve it on the **Entry List** by selecting the **Actions** dropdown to the right of the entry and clicking **Approve**.

Reminder: Only Entries that are Submitted can be Approved. Entries which are currently listed as Unsubmitted – such as some of those in the screenshot above – do not have the Approve option in their Actions drop-down.

Submitting an Entry as an Admin

If you have reason to, you CAN Submit a currently Unsubmitted Entry as an Admin. As per the Approve functionality, you can do this either by clicking the **Review and Submit** button at the bottom of the Entry OR via the **Submit** button under the **Actions** drop-down on the **Entry List**.



B) External Checking Off Nucleus

If you prefer, you can perform all of your Checking duties away from Nucleus by exporting all of the entry data to an Excel Spreadsheet, before returning to Nucleus to Approve all of the positively screened entries as a bulk action.

To begin this process you must use one of Nucleus's native reporting and exporting tools.

Creating Your Report

You can download the FULL DATA on ALL entries in two locations:

1) On the **Entry List**. Click on the **Full Entry Data Download**
2) Via **Actions**> **Misc** > **Entry Data Download**

In each case you are taken to a pre-export page called **Entry Data Report**. Here you can filter the Data to be pulled by three different criteria if required:

-**Entry creation date** – to ensure that no entries were begun before the Nominations Open Date or after the Nominations Close Date (such as any stray 'test' entries)

-**Entry submission date** – to ensure that no entries were submitted after the Nominations Close Date

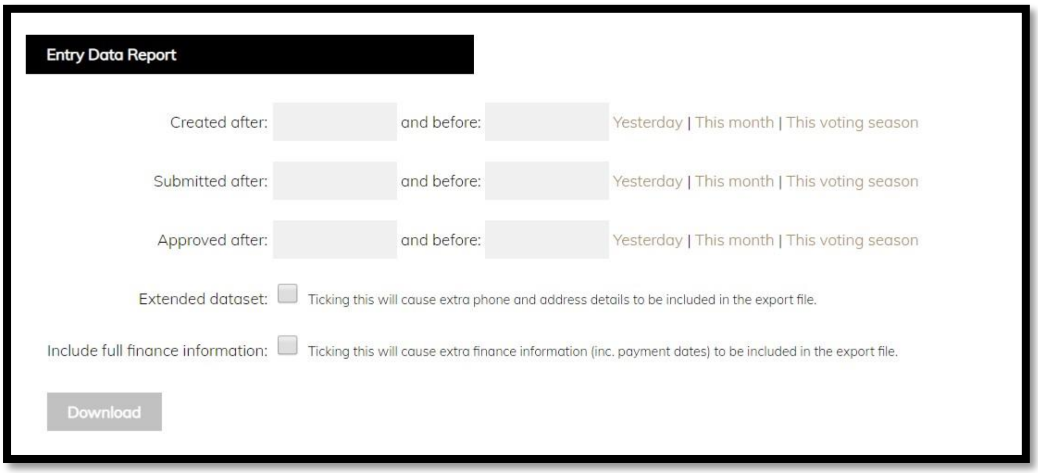
-**Entry approval date** – this will not be required at this stage as you haven't yet approved any entries. Leave this field blank

Leaving ALL these fields blank will simply pull all the data from Entries for this award.

You will also be given the option to include:

-**Extended dataset** – for additional phone and address details

-**Full finance information** – which should not be relevant for this Award, as it is not accepting payment for entry



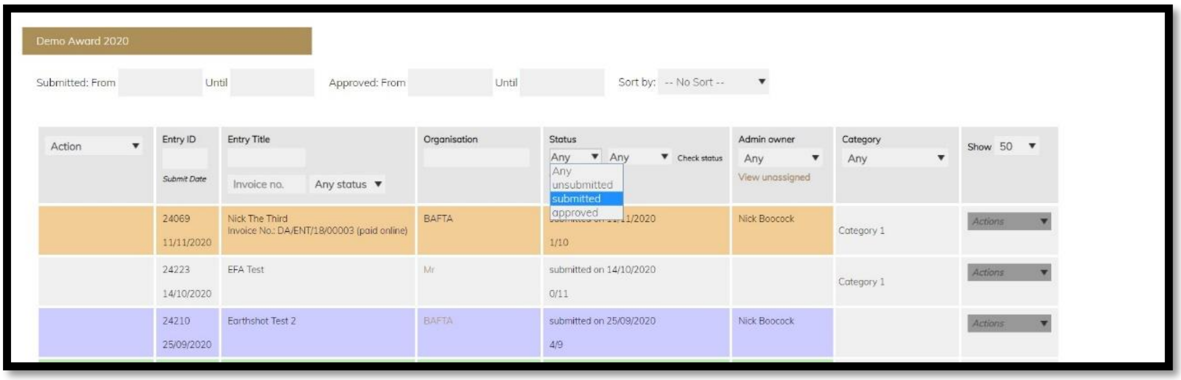
Click **Download** when you have made your selection/s. Data is exported in an .xls spreadsheet, to which you can apply all the regular functionality and formula to create the dataset you require.

Bulk Approvals

Once you have checked all of the Entries on the spreadsheet, you can return to Nucleus to **Bulk Approve** those that have been positively screened. In preparation for this, you should organise those positively screened in a convenient order eg. A-Z based on Solution Name. Once you are on Nucleus:

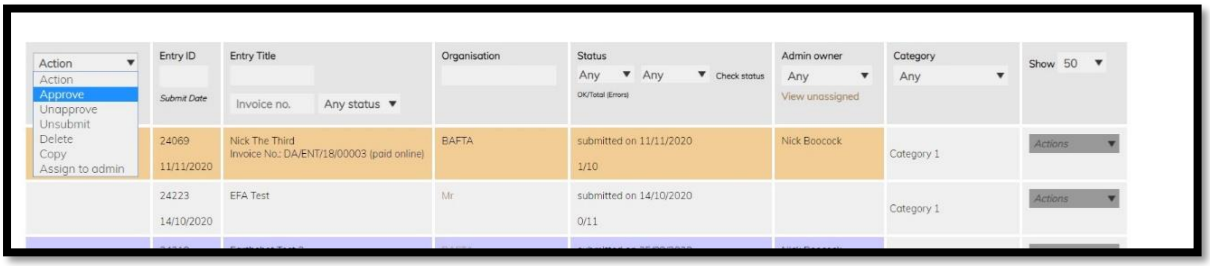
1. Go to **Actions**>**Entries**

2. On the **Entry List**, filter for the entries you need to Approve in bulk ie. those that are **Submitted** under the Status drop-down

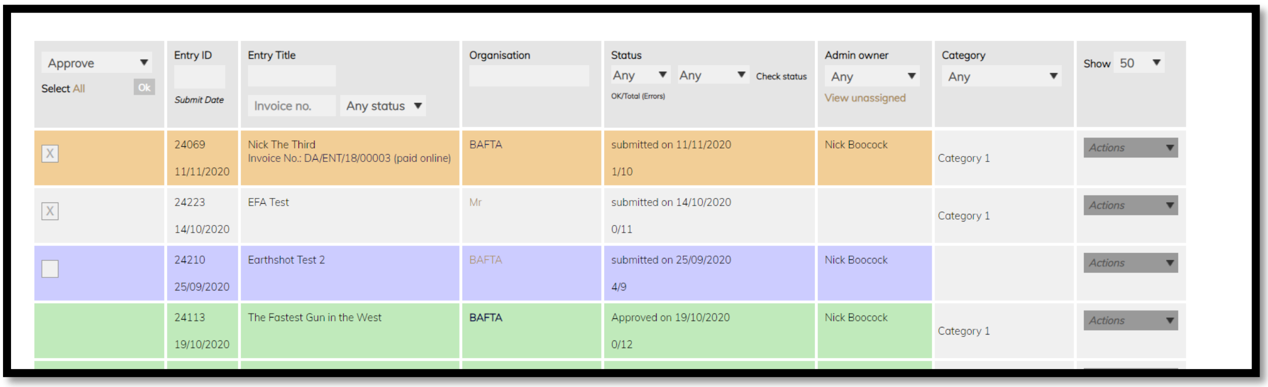


3.The List will now just display those entries that fit your selection. In order to further cross-reference them with your spreadsheet, go to the **Sort By** drop-down and select **Entry Title ASC**.

4. With the Entry List now displaying the Submitted Entries in an Ascending A-Z order based on Entry Title, you can now select in bulk those entries you have positively screened. Go to the **Action** dropdown in the far left column, and click on **Approve**.

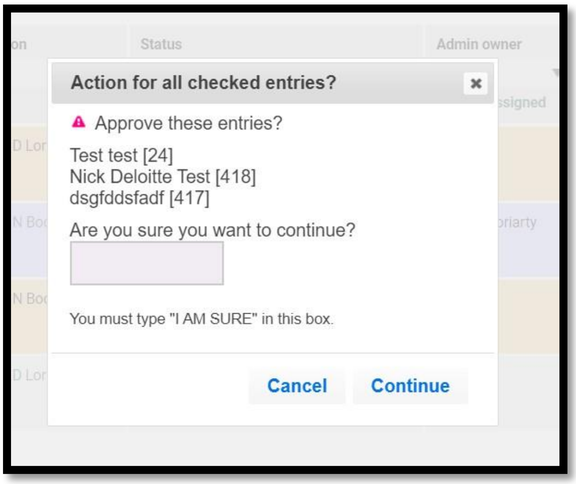


5. Checkboxes will appear in that far left column. You should cross-reference with your spreadsheet and click on the boxes that correspond with the entries you have screened to progress.



6. Once you have selected all of the required entries, click on the **OK** button that appears at the top of the far left column.

7. A pop-up will appear, listing all of those selected entries and asking you to confirm that you want to Approve them. To confirm, type **I AM SURE** where instructed and click **Continue**. Click **Cancel** to go back to step 6.



Approved Status

Whether you have followed Checking method A or B, your positively screened entries will now be marked as **Approved** in the **Status** column of your **Entry List** and are ready for further progression.

Approval Email

Upon Approval, an approval email will be triggered and sent to the entrant and contains a pdf of the entry information as approved.

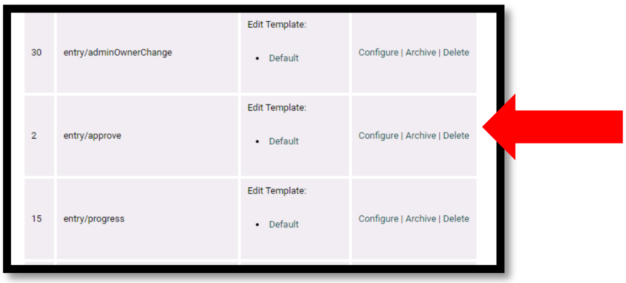
If you prefer for the entrant to NOT RECEIVE this approval email, you can disable it.

To disable it:

1.Go to **Actions**>**Misc**

2.Select **Email Templates**

3.The **Email Templates List** opens. From here, scroll to the template '**entry/approve**'. Click on the '**Edit Template: Default**' link.



4. The page '**Edit existing emailTemplate**' will open. Alongside the field **Enabled**, select **No**.

5. Click **Save and Close**. This approval email will now be disabled, and will NOT be sent to any entrants upon their entry being Approved.

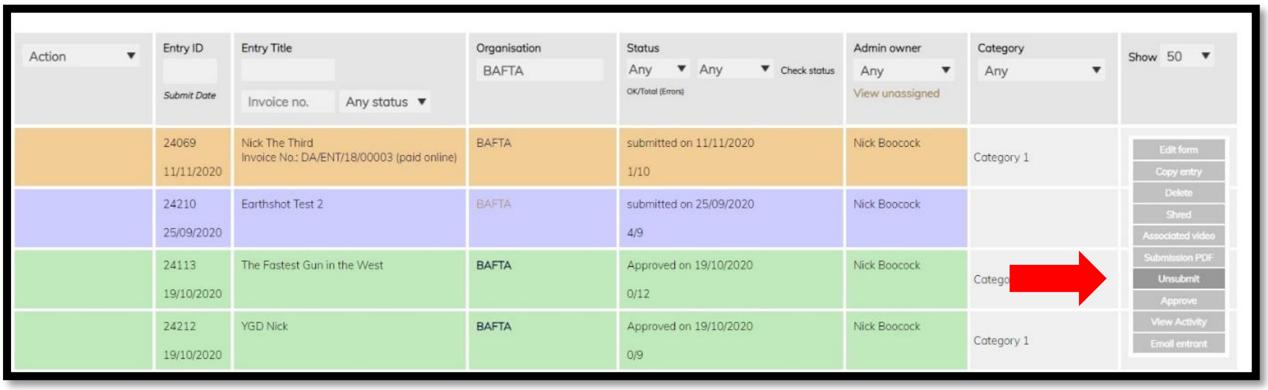
Unsubmitting Entries
You may need to Unsubmit an Entry for any reason eg. an Entrant has requested to withdraw their entry either permanently, or because you have agreed they can amend it following a Query and re-Submit it at a later date.

To do this:

1. Go to **Actions**>**Entries**

2. The **Entry List** opens. Find the Entry in question, by filtering via **Entry Title** or **Organisation**.

3. When you have found the Entry, go to the **Actions** drop-down at the far right hand side of it and click on **Unsubmit**.



4. To ensure you do not do this in error, a pop-up window will ask if you type a **Reason for Unsubmitting**. Type the reason in the box provided and click **Reject Entry**.

5. The *Status* of the Entry on the **Entry List** will now change to **Unsubmitted**. It will need to be Submitted again before you can Approve it.

Unapproving Entries

In the same way that you can Unsubmit a Submitted Entry, you can also **Unapprove** an Approved entry.

To do this you should

1. Go to **Actions**>**Entries**

2. The **Entry List** opens. Find the Entry in question, by filtering via **Entry Title** or **Organisation**.

3.When you have found the Entry, go to the **Actions** drop-down at the far right hand side of it and click on **Unapprove**.

4.The Status of the Entry on the **Entry List** will now revert back to **Submitted**.

Progressing Entries

Once you have Approved the qualifying entries, you can 'progress' them to the next round. This is a two-stage process – that involves:

-**Stage 1**: Creating the new round

-**Stage 2**: Progressing your qualifying entries to that new round

Stage 1: Creating a new round

This process essentially involves creating a copy of your original award project. The copy 'award' becomes the new round.

1. Go to your current Award, via **Actions>Awards**

2. Your **Award List** opens. In the **Actions** drop-down alongside your current award, click **Copy**

3. A 'Copy' version will now appear in your **Award List**. In the **Actions** drop-down alongside this, click **Edit**

The main settings page for your new ('Copy') Award will open. Here you will update a few key settings as follows…

4. It is important to edit both the **Internal** and **Display Names** for your Award here – for yourself as the Administrator and also for your Viewers/Judges, respectively. We suggest you use something that will be especially understood by your Judges eg. Your Award Name JURY ROUND

5. Answer NO to **Active** question. **(IMPORTANT:** When you want to view your new Award in the **Awards List**, be sure to set **Show** to '**Both**' in order to see this new, 'Inactive' Award from hereonwards).

6. Answer NO to **Show Entries on Entrant Dashboard** question, otherwise the entrant may see they have advanced before you have announced it

7. Set your **Open**, **Create** and **Submit** dates to enable enough time for you to Copy all of the entries across eg. Open should be now, Create and Submit by end of the week etc.. You can keep **Pay Date**, **Closed Message** and **Delete Data** dates as they were

8. Moving down to the **OPTIONS** section, ensure that '**Allow Mass Actions for entries**' is set to **Yes**. This will enable you to **Bulk Approve** the qualifying entries (which you have already Checked) once they are copied across from your initial Award.

9. To the question '**Show approval status on entrant dashboard**' answer '**No**' to prevent a Nominator from seeing their entry has been Approved before any progression has been publicly announced.

9. Moving down to the **VIEWING** section, for the '**Require Scores and Comments to be Submitted**', answer depending on your chosen judging process.

10. Moving down to the **PRICING** section, alongside **Requires Payment** question select **NO PAYMENT**, as you will not be charging progressing entries anything in addition to their initial entry charge.

11. **Save & Close**.

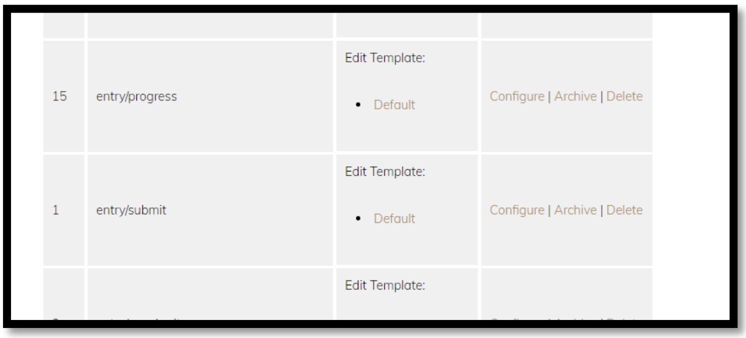
IMPORTANT: EMAIL TEMPLATES

It is **VERY IMPORTANT** that before you attempt to copy any of your progressing entries across to your new 'round', you must decide whether you want them to be automatically informed of their progression via one of the templated emails. If you do not want them to be informed, you must disable the conflicting Email Templates – **entry/progress** and **entry/submit** - to ensure that no automatic emails are triggered by the process of you advancing entries to this new round.

12. Go to **Actions>Misc**

13. Select **Email Templates** from the Email Management section

14. Find the entry/progress and entry/submit templates and edit them by selecting **Default** in the **Edit Template** column. In each email, simply delete the **Subject** line and this will disable that Email from sending.



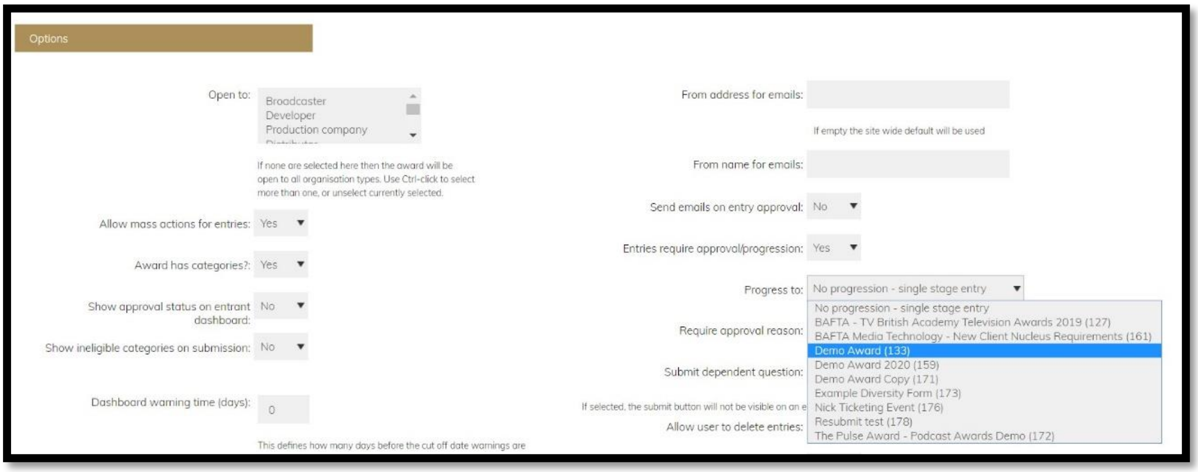
15	entry/progress	Edit Template: • Default	Configure | Archive | Delete
1	entry/submit	Edit Template: • Default	Configure | Archive | Delete
		Edit Template:	

Stage 2: Progressing entries to the new "round"

Now you can progressing your entries to your new round. There are <u>**TWO**</u> approaches to doing this – you can decide which works best for you:

Progression as an Award setting

1. Go to **Actions** > **Awards**.
2. Find your original Award in the **Awards List**, and in the **Actions** column click **Edit**.
3. Scroll down to the **Options** section.
4. To the question **Requires Progression**, select **Yes**.
5. To the question **Progress To**, select the name of your next round (as created above)
6. Click **Save and Close**.



7. Now go to **Actions** > **Entries**.
8. In the **Entry List**, you will find that when you click in the **Actions** column to the right of each entry, a new option – **Progress** – has been added.
9. To progress each of your advancing entries to your next round, click on **Progress**.
10. A **confirmation** message will appear. Click on the **Entry List** to progress further entries until done.
11. The progressed entry will have disappeared from your first award and will now appear in the Entry List for the next round.

Progression by Copying Entries

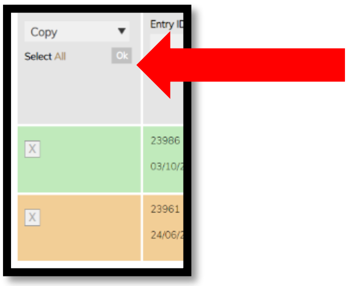
This approach enables you to use the Bulk Action of Copying entries across to your new round.

1. Go back into your <u>original</u> Award, and go to **Actions>Entries**

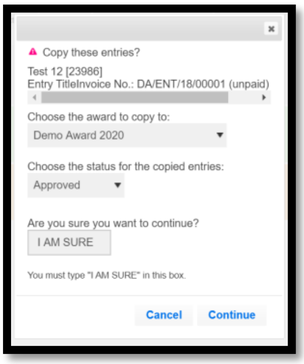
2. Find each of your progressing Entries in the list by filtering **Status** for **Approved**.

3. The **Entry List** will just show the Entries that were **Approved**. Go to the **Action** drop-down at the far left column of the Entry List and select **Copy**.

4. Checkboxes will appear alongside all of the filtered Entries, in the left hand **Action** column. To select all of these Entries for copying, click the '**All**' link that appears alongside **Select**.



5. Once you have selected all the Entries to be copied, click on the **OK** button that appears alongside **Select All**. A pop-up window will open for you to confirm the following details:



6. **Choose the award to copy to**: from the drop-down select your **new round** to copy the Entries to

7. **Choose the status for the copied entries**: select **Approved**, which ensures that they will automatically be Approved when they land in the new round (as you have already completed the Approval process above)

8. Type **I AM SURE**

9. Click **Continue**. The Approved Entries will now Copy across to your new round.

10. To confirm this, select your new round from the **Awards project selector** in the Top right corner.

Once in there:

11. Go to **Actions**>**Entries**

12. The **Entry List** for your new round will open. All of the Entries you Copied across will appear in there in an already **Approved** state.

The progressing Entries are now ready to assign to judges for further evaluation.

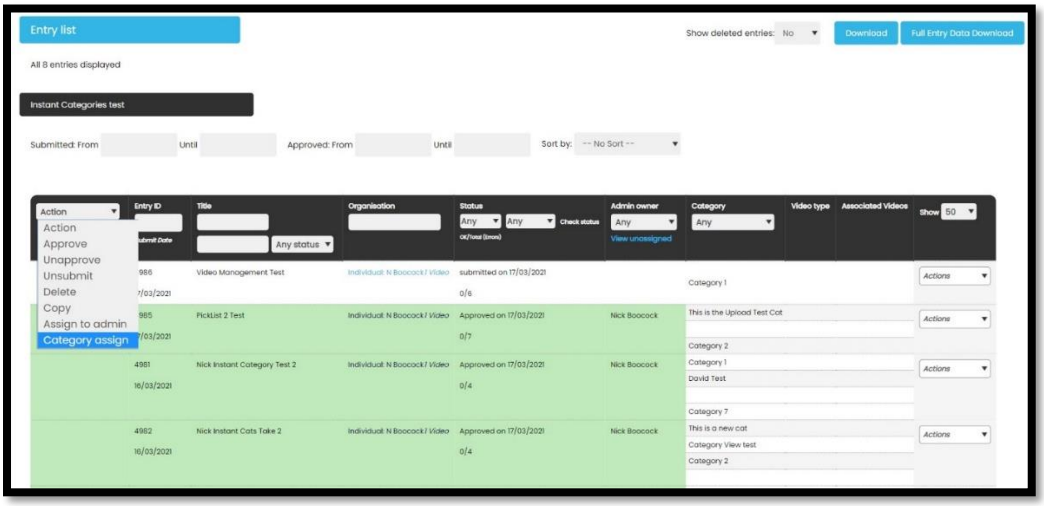
Creating Manual (Instant) Categories

Admins can create instant categories as and when required, at any time after entries have opened and, indeed, closed. This is useful for a number of scenarios, including:

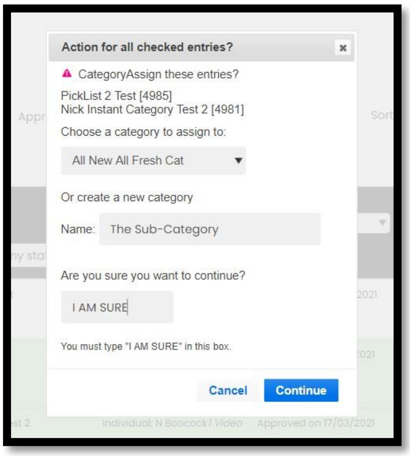
- Creating a tie-breaker or run-off category
- Creating a second (or further) round of judging – if no additional material is required
- Splitting a category with a higher than normal volume of entries into sub-categories, to spread viewing duties across different Viewers
- Creating a splinter category upon realising that many of the entries do not reflect the original category (but merit consideration nonetheless)

Entrants cannot enter these categories themselves - they can only enter the 'Automatic' categories that are specified on the entry form. The instant categories are created and allocated purely at the Admin's discretion.

1. Go to **Actions > Entries**. Your **Entry list** opens.
2. From the bulk **Action** drop-down in the far left column, select **Category Assign**.



3. **Checkboxes** will appear in that far left column, alongside each of your entries. Check each entry that you want to place in your new Category.
4. Click on the **OK** button in the column header.
5. A pop-up box will appear. It will give you two options a) To assign the entries to an existing manual Category or b) To **create a new Category**.
Option a) is covered in a separate workflow, but for the purposes of this exercise you are Creating a New Category, so type in the **Name** of your new Category in the field provided. Then type **I AM SURE** as instructed and click **Continue**.



6. Your selected entries will now be added to your new Category. This will be shown in the **Category** column on your Entry List. (They will still remain in their original Category - this is to allow for scenarios such as the instant category only being created to spread Viewing duties or Tie-Breakers, while all entries still remain qualified for the original Category).

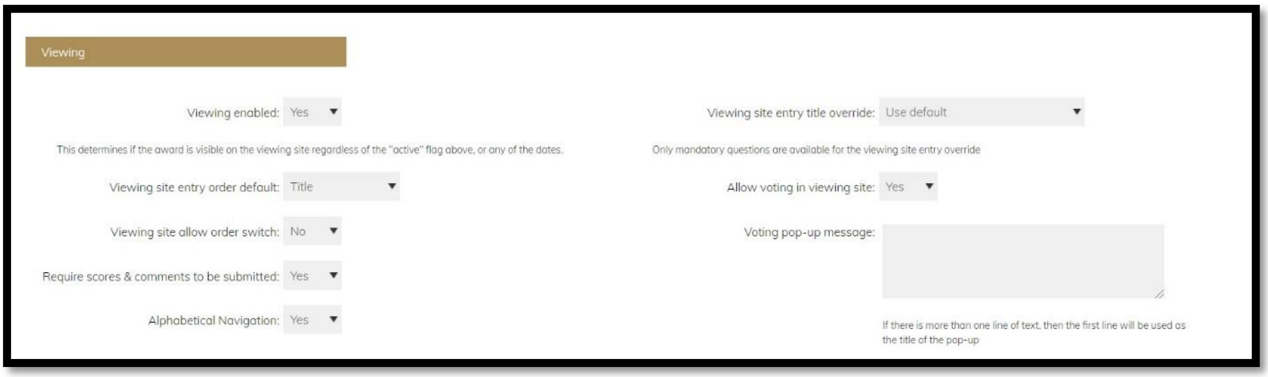
Having created the Category and assigned its entries, you need to set up its rules so that it can be Viewed accordingly by your judges.

7. Go to **Actions > Categories**. Your **Categories List** will open.
8. Find your new instant Category on the list, and click on the **Edit** button in the **Actions** column. (You will note that each of your instant Categories are labelled **Manual** in the Assignment column, while your original categories are Automatic).
9. Scroll down to the **Viewing Portal** and **Viewing with Scoring** sections to set your Viewing rules and metrics as you normally would when setting up an Automatic category for Viewing.
10. Click **Save and Close**.

SETTING UP JUDGING AND VIEWING

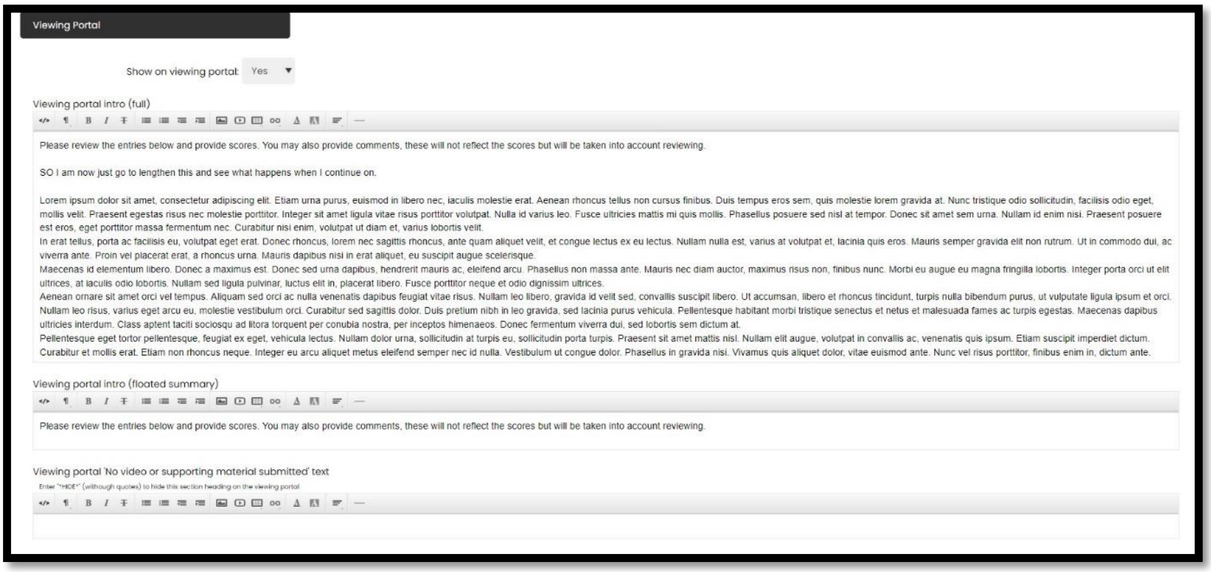
How to set up judging scores/commenting

1. To enable Scoring and Commenting, go to **Actions** > **Awards**.
2. From the **Awards List**, find the Award (and specific round, if applicable) where you want to enable scoring and commenting and in the **Actions** column on the right, click **Edit**.
3. Scroll down to the **Viewing** section.
4. To the question **Require scores & comments** to be submitted, select **Yes**.
5. You should also select **Yes** to **Allow voting in viewing site**, to enable possible ranking and short listing of the entries
6. Click **Save and Close**.



Now you've enabled scoring and comments, we're going to see how to determine the scales of those judging tools.

7. Go to **Actions**>**Categories**
8. The **Categories list** opens. To set the judging settings for each category, click on the **Edit** button in the right hand column.
9. The settings page for that Category opens. Scroll down to the **Viewing Portal** section.

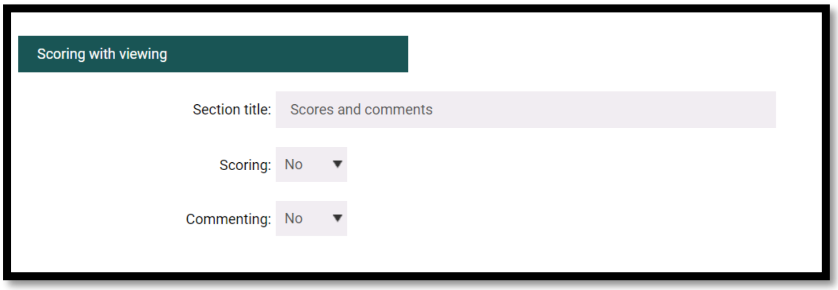


10. Answer **Yes** to '**Show on viewing portal**'.
11. For **Show entry form PDF** you can decide whether or not to show the entire entry form to Judges. This may include info/data that you may consider confidential and not essential to the judging process. If you answer **No**, you can still select key answers to display to the judges in the **Category Eligibility** section below.
12. You can enter some introductory text to your Judges in the **Viewing portal intro** – such as guidelines for judging (or external links to them) as well as details on when the Judging window opens and closes. You should enter the <u>full</u> intro text in the **Viewing portal intro (full)** panel. As the Viewer scrolls down through the entries on the Viewing portal, the intro

text will be gradually pushed off the top of the screen (although it can always be returned to for reference by scrolling back up). If there is any essential, must-see intro text that you want them to be able to view at ALL times when scrolling through the entries, you should enter this in the **Viewing portal intro (floated summary)** panel. However, you should keep this to a minimum as lengthy floated text will impinge on the amount of entry content the Viewer can see on screen and cause inconvenience.

13. You can enter a message to appear in the **Video and Supporting Material** field if the entrant does not submit either. The default text is 'No video or supporting material submitted'.

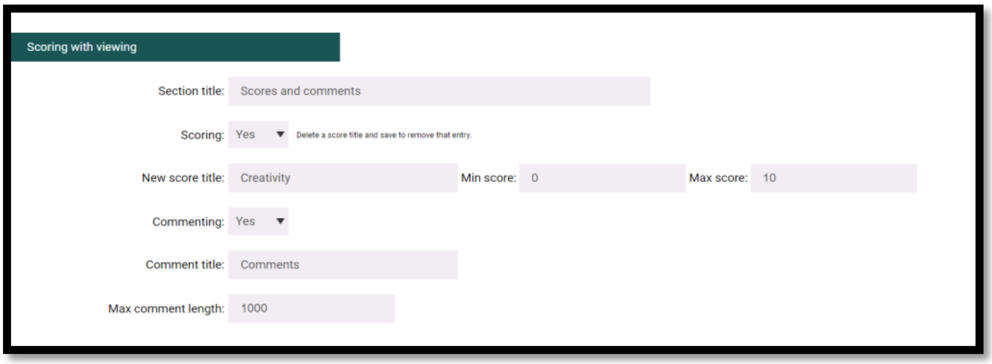
Continue to the **Scoring with viewing** section.



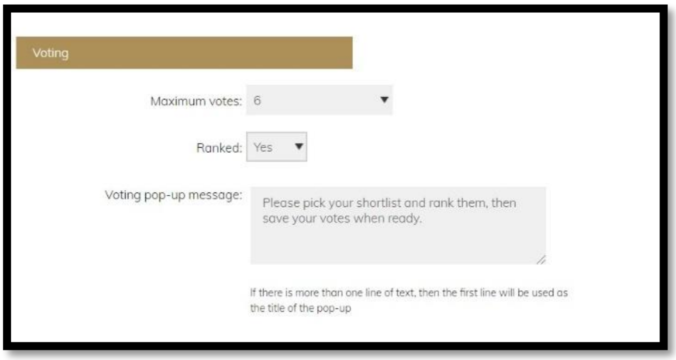
14. Edit the **Section title** of the Scoring and Comments section as you want it to appear to your Judges. (The default is 'Scores and comments')
15. Decide if you want to include **Scoring**. If you select **Yes**, some new fields will open enabling you to:
    a) Name the **New Score Title** – which may be a criteria, such as 'Creativity', 'Originality', 'Budgetability' etc
    b) Select the **Min Score** – ie the minimum score an entry may be given on a scale
    c) Select the **Max Score** – ie the maximum score an entry may be given on a scale

    You can create as many Score criteria scales as you like. To add another, simply click **Save** at the top of the screen and more will be available for you to create.

16. Once you have created your scoring scales, you will be asked if you would like to use **Commenting** as well (or instead of, if you answered No to Scoring).
17. If you answer **Yes** to Commenting, you will be asked to provide a **Comments title** for this Comments section for the Judges. (It is set to 'Comments' by default).
18. Set the **Max Comment Length** in characters.



19. When you have created your **Scoring** and **Commenting** settings, hit **Save & Close**.
20. If you want to enable **Voting** in your Category, then under the Voting section, you should select the **Maximum votes** allowed from the drop-down. Once you have selected this, you should also decide whether or not to allow the votes to be **Ranked** and also enter some text to appear as a **Voting pop-up message**.

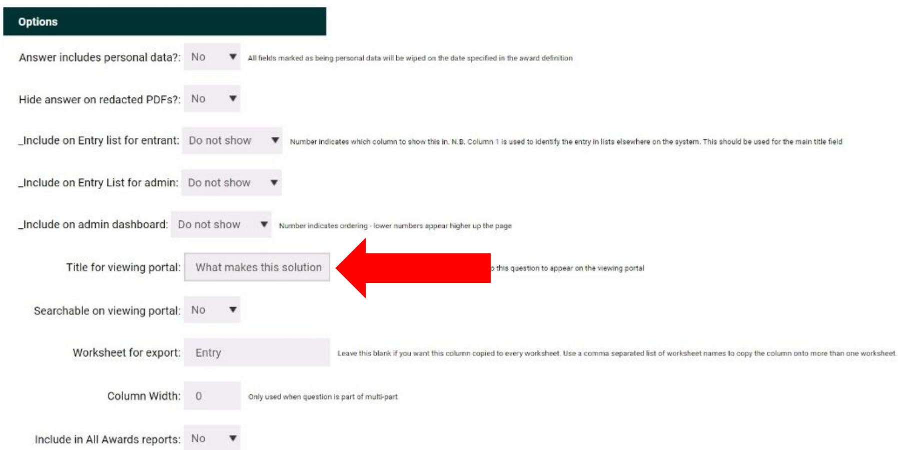


Having created your Scoring, Commenting and Voting settings, you need to do one more thing, and that is to decide WHICH answers the Judges will be shown in order to make their Scores and Comments. There are two ways to do this – dependent on whether you want your Judges to be able to view submitted answers across all Categories or if you want them to be restricted to seeing answers only in the Categories they have been assigned.

SELECTING ANSWERS FOR VIEWING VIA THE QUESTION LIST

This approach applies in most cases, where there is no crossover between entries being submitted across more than one Category and/or where the questions are exactly the same in each Category.

21. Go to **Actions** > **Questions**.
22. The **Question List** opens. Scroll down to find the Question/s that you want your Judges to evaluate the answers to. For each of the relevant Questions click on **Actions** > **Edit**.
23. In each case, the settings page for that Question will open. Scroll down to the **Options** section. In the field **Title for viewing portal** (which is blank by default) type in the Question as you want it to appear alongside the supplied answers for the Judges on the Viewing site. Hint: It may be most appropriate to replicate the question **Name** as it appears in the **Question Parameters**.

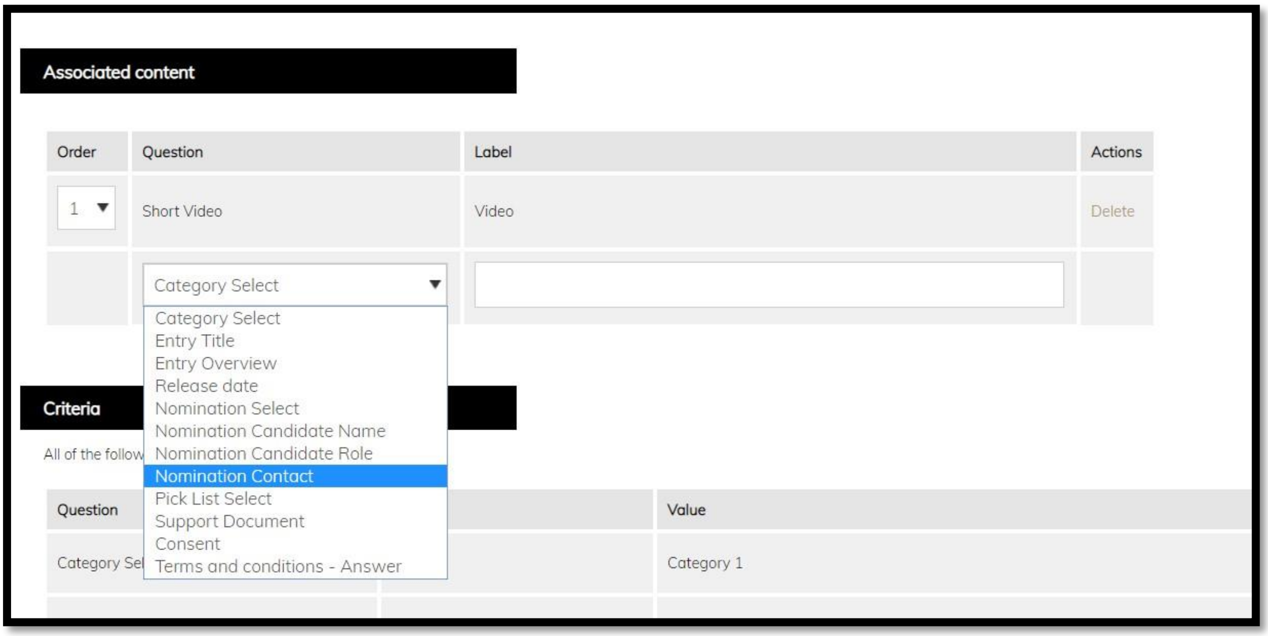


24. Click **Save and Close**.
25. This Question and its corresponding Answers will now appear to all Judges on the Viewing Site. Repeat this process for each of the Questions/Answers you want the Judges to see on the Viewing site.

SELECTING ANSWERS FOR VIEWING VIA CATEGORY ELIGIBILITY

This approach applies very specifically where the same entries may be submitted across different Categories BUT you only want the Judges to see the answers for one, some but NOT ALL of those Categories. (For example, to avoid a conflict of interest where a Judge in one category may end up seeing the answers a competitor has submitted for a different category that the judge themselves has submitted to). This approach will split and serve the answers only for the Category assigned.

26. Go to **Actions** > **Category Eligibility**.
27. The **Category Eligibility List** opens. From here find the corresponding Category for which you have just set the Scoring and Commenting and click **Edit** in the **Actions** column.
28. The Category Eligibility rules page for that Category opens. Scroll down to the **Associated Content** section.



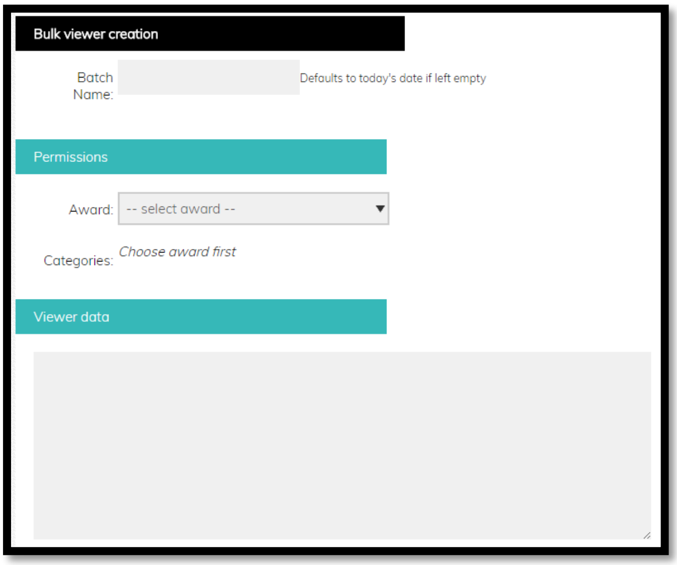
29. From the **Question** drop-down, select the Question whose answer you want the Judge to see and Score/Comment on. Then in the **Label** field type the description title that will appear alongside it (this may be the same as the Question name, or something more snappy).
30. You can select as many of these questions as possible to display. To add more, simply click **Save** after each one and complete the next. Repeat until you have created all of the Associated Content answers you need.
31. Click **Save & Close**.

How to set up a judging/viewer account

This section will define how to set up accounts for users to view the entries. To find out more about how to publish question on the viewing site see the glossary.

1. Go to the actions menu and select **Viewers**

2. Click on **Bulk create** at the top right of the page
3. On this page it is possible to create multiple accounts for viewers at a time so long as they are issued with the same permissions



4. Enter a **Batch name** for this group of users so they can be identified at a later date
5. Select the **Award** you wish them to view
6. Select the **Categories** you wish them to view
7. In **Viewer data** we need to define who the viewers are. List the users as follows placing each new viewer on a new line:

   Email, First name, Last name,
   awards@bafta.org, Robert, Smith,
8. Click on **Create viewers**
9. The viewers will be created and sent an email which contains their login details. All new viewers will be added to the viewer list.

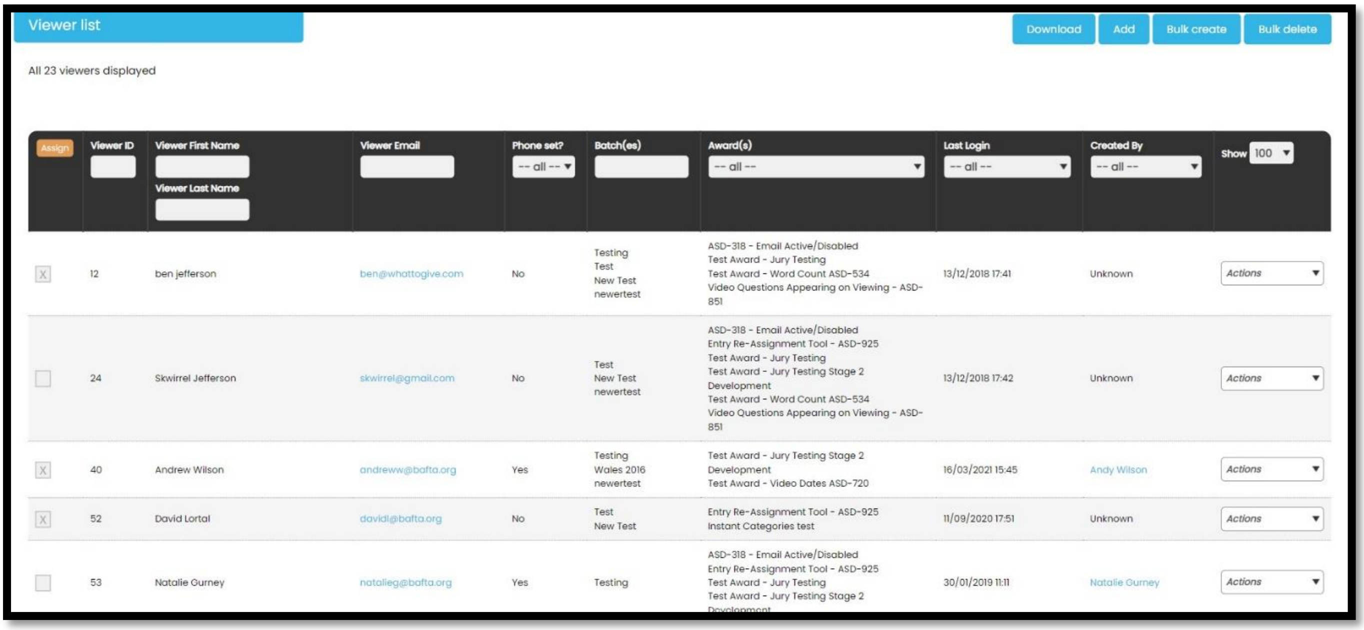
NB: If you decided, when we set up your instance, that the viewer must sign an NDA before viewing any entries – they must tick a box to Accept these upon their first login.

Bulk Assigning Additional Categories to Existing Judges/Viewers

The Bulk Create functionality above is the recommended method for assigning Viewers to Categories at the outset of the Viewing process, when you are creating Viewing batches.

However, if you want to assign a group of Viewers to Categories after the batches have already been created - mid-Viewing process, as it were - this can be done via Bulk Assign, which is much more convenient than doing it on an individual, per-Viewer level.

1. Go to **Actions > Viewers**
2. In the far left column there are **checkboxes** under the header **Assign**. Check all of the boxes for the Viewers whom you want to assign to a Category. Click **Assign**.



3.The **Bulk Viewer Assign** page will open. From the dropdown, select which Award this is for.
4.A check-box selector will show the **Categories** you can assign these viewers to. You can select as many as you require.
5. Select which **Batch** to assign these Viewers to from the dropdown, or select **None** at all. If you are setting up a new Batch, you can type its name in the **Batch Name** field provided. Or you can leave empty in combination with having selected None from the dropdown for these Viewers to not be assigned a Batch at all.

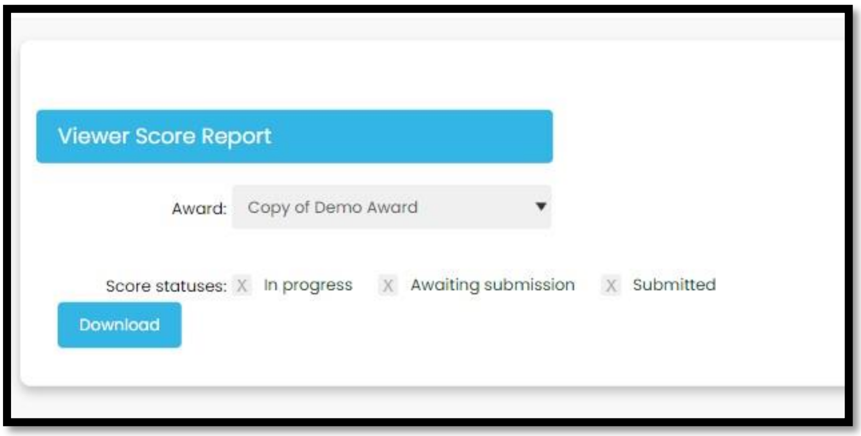
6. Click **Assign Viewers**. The Viewers will be assigned to the Categories accordingly.

Unsubmitting Viewer Scores and Comments

If one of your Viewers has submitted their Scores and Comments in error, you can Unsubmit them on their behalf.

1.Go to **Actions > Viewers**.
2. Find the Viewer in question from the **Viewing List**. Click **Edit** from the **Actions** dropdown alongside them.
3. On the right hand side of their Viewer profile page is the **Voting** column. There will be a button to '**Unsubmit Scores and Comments**' alongside the award they have Submitted their votes for. Click on this.
4. Click **OK** when prompted.
5. **Save and Close**.
The Viewer's Scores and Comments will now be unsubmitted. They can now update and re-Submit them accordingly.

Downloading Viewer Scores and Comments
At any stage during, or after, your Viewing stage you can export and download a .csv file Report of your Viewers' Scores and Comments.
1. Go to **Actions > Misc**.
2. Select **Viewer Score Download**. The **Viewer Score Report** page opens.
3. From the **Award** dropdown, select which of your Awards to report on.
4. From the **Score statuses**, select any combination of **In progress**, **Awaiting Submission** and **Submitted** – based on which Scores and Comments you wish to see.



5.Click **Download**.
A .CSV file will be prepared for you – featuring the required data. The total scores for each entry will also be automatically tallied.

NB:

If you want to add more data from different questions to your report, you can select this from any of your Questions. To activate it for any question:
-Go to **Actions > Question List**
-Find the required question, and click **Actions > Edit**
-On the Question edit page, scroll down to the **Options** section and in the field **Title for viewer score download** enter the title you want to appear as a column header on the report.
-Click **Save and Close**

Creating further rounds of judging
If you want to advance a selection of entries to FURTHER rounds of judging, then assuming that you do not require your entrants to submit any additional answers or material for this new round the best practice is to do this by creating Manual (Instant Categories). This ensures that the selected entries are safely advanced, without the entrants themselves being notified.

For the workflow on how to do this, please refer to the section on Creating Manual (Instant) Categories.

Once you have created these Categories, you should then assign them to your required judges via:

For NEW Judges: Via Bulk Create, see How to set up a judging/viewer account

For EXISTING Judges: Via Bulk Assignment, see Bulk Assigning Additional Categories to Existing Judges/Viewers

Best practice for setting up judges for subsequent awards

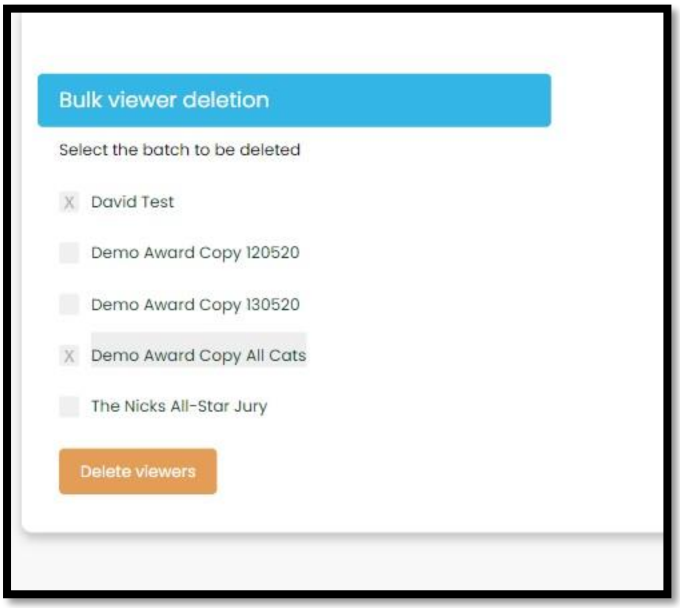
After your judging processes are complete for the current awards cycle, your judges' Viewer accounts will remain in the Viewers section of your Nucleus instance – complete with the permissions for your previous award.

If you intend to use these judges again for your next awards, you can add the permissions to their existing Viewer account **BUT** they will NOT receive the Viewer/Welcome email notifying them of this.

Therefore, as best practice we recommend that with each new award cycle you clear your existing Viewer accounts and create them again – ensuring that previous and new judges alike receive the necessary invites to receive the invite to view their newly assigned award and categories.

So, once you are ready to assign your judges to your new award:

1. Click on the **Download** button above the **Viewers List**.
2. The list of your current judges will be exported to a .csv spreadsheet, which you should save to keep a hold of the key data you may need to use (some of) these judges again eg. email address, first name, last name.
3. Click on the **Bulk Delete** button above your **Viewers List**.
4. On the **Bulk Viewer Deletion** screen, select the batches of judges you want to delete and click **Delete Viewers**.



5. You will be asked to type a unique code into a box alongside the word '**Confirm**'. Do this and then click **Delete viewers**.
6. The selected Viewers will be deleted. You should now proceed to repeat the Bulk Create process above – adding entirely new users and previous users (from the .CSV spreadsheet created above) as you require.

OTHER USEFUL ADMIN FUNCTIONS

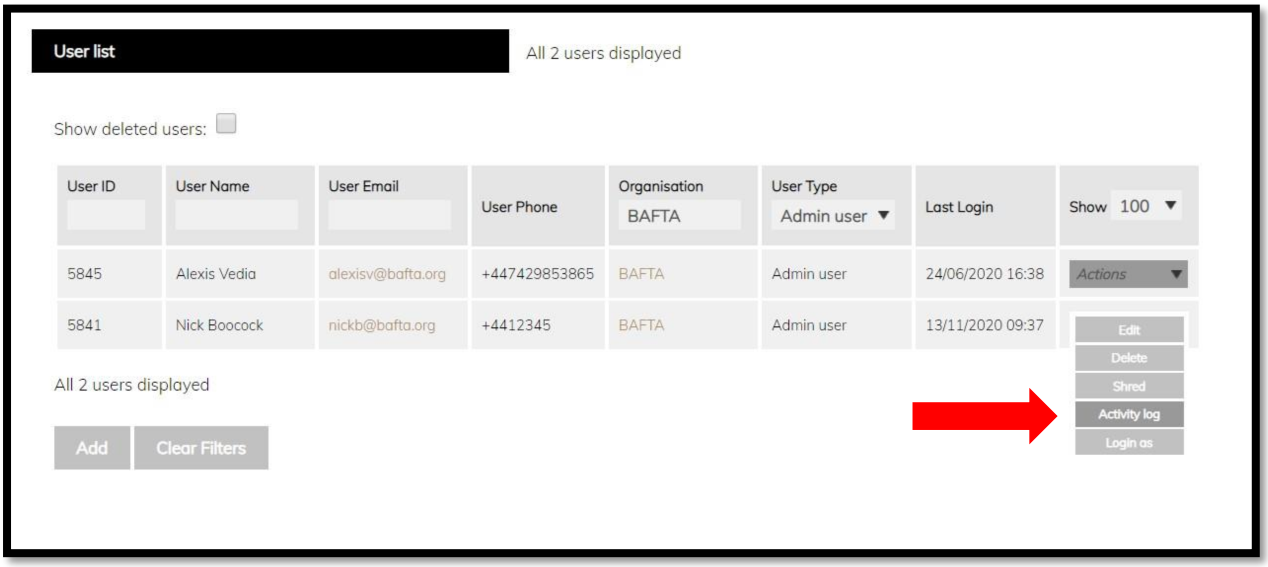
Activity Log
You can use the Activity Log to check on the actions of any User of the site. This is particularly useful if you are trying to re-trace a user's steps leading up to an error or issue OR to verify if they have carried out an action when they say they have eg. in a dispute over whether they have submitted an entry before/after deadline.

To access the Activity Log of a particular user, to the following:

1. Go to **Actions** > **Users**

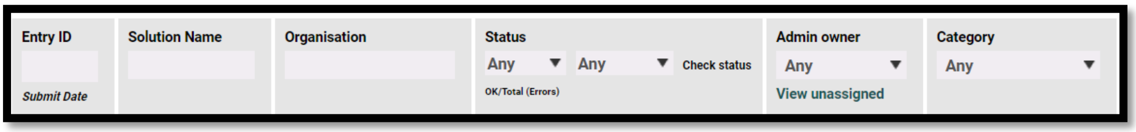
2. The **User List** opens. Find the User you require, using the column filters.

3. Alongside the User, go to the **Actions** drop-down to the far right side of their record and select **Activity Log**.



4. The **Activity Log** for that User will open, listing every action they have taken on the site – with a full **Date & Time stamp**, accurate to the second.

Selected Data Reports
As well as the Full Data Download reporting you can use for your checking and screening process, you can also create and export reports on more specific data, by filtering direct from the **Entry List**. To do this, use the column **Filters** as you require from the Entry list. You can filter according to the below criteria:



You can remove your Filters at any time, by clicking **Clear Filters**. You can also use the **Sort** functionality to order your filtered/unfiltered list as required.

Once you have filtered the Entry List as you require, click **Download**. Data is exported in an .xls spreadsheet, to which you can apply all the regular functionality and formula to create the dataset you require.

Custom Reports

Custom Reports, which contain specific data fields not available in the Entry List, can be requested as an additional piece of development. This will be subject to an additional cost, which will be quoted once you have specified the exact fields you require in the report.

To find out more, please contact your BAFTA Nucleus account team or raise a Support Ticket.

You can request as many different Custom Reports as you require. The total cost and development timeline will be quoted accordingly.

Once your own Custom Reports criteria have been developed and added to your instance, to access them:

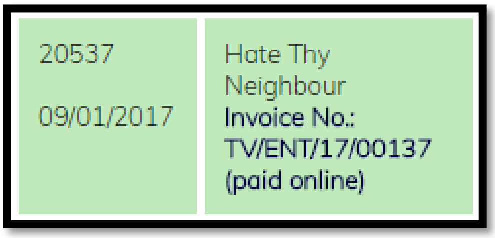
1.Go to Actions > Misc
2.Click Custom Reports.
3. Your Custom Reports list will open. To use them just click on the **Run** link alongside the relevant Custom Report.
4. On the following page, select the required **Award/s**, **Filters** and **Output Data** where prompted. If you select a single award you will be able to select the specific Output Data you want to include. But if you select multiple awards you will only be able to select Fixed Output Data ie. key personal data.
4. Click **Run**.

Invoice generation

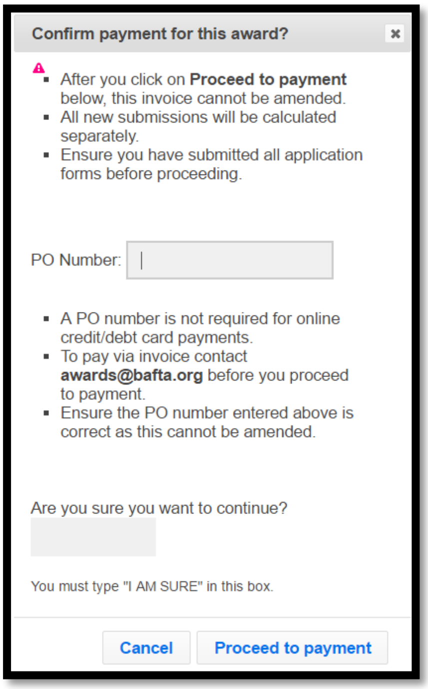
Entrants can auto generate their invoices from their dashboard but there may be occasions when you will wish to generate an invoice on the entrant's behalf. Note that when you do this it is not possible to add more entries to the invoice and any new entries created will be calculated separately on a new invoice using the pricing structure.

1. Go to the actions menu and select **Entries**

2. On the entry list below the title you will see if an invoice has been created for an entry if it has an invoice number along with its payment status as illustrated below:



3. If there is no invoice number then an invoice has not been generated
4. In the **Organisation** column, click on the name of the organisation
5. You will be taken to the relevant organisation page
6. Scroll down to **Entry summary for this organisation** and you will see a table detailing the projects and number of unsubmitted, submitted and approved entries for each organisation. You will need to generate an invoice for each project separately.
7. To generate an invoice, click on **Closedown**, which is located to the right of the table. Note that any unsubmitted entries will not be included on the invoice
8. The next page will contain a table that details the invoice total
9. Click on the **Continue to Payment** button in the bottom left
10. A box will pop up giving you the opportunity to enter a PO number. If you do not wish to enter one leave blank

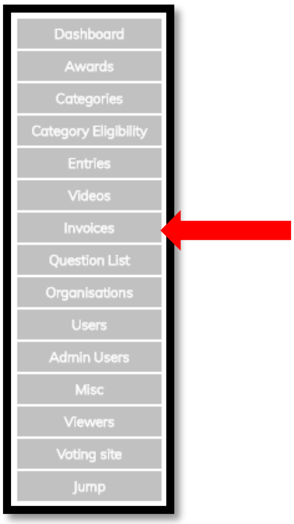


11. Enter **I AM SURE** in the second text box
12. Click on **Proceed to payment**
13. You will be taken to a screen which will confirm that the invoice has been generated and emailed to the entrant. All entries on the invoice will now contain the invoice number. Also the entrant can now find the invoice on their dashboard and it will appear in the invoice list for admin users.

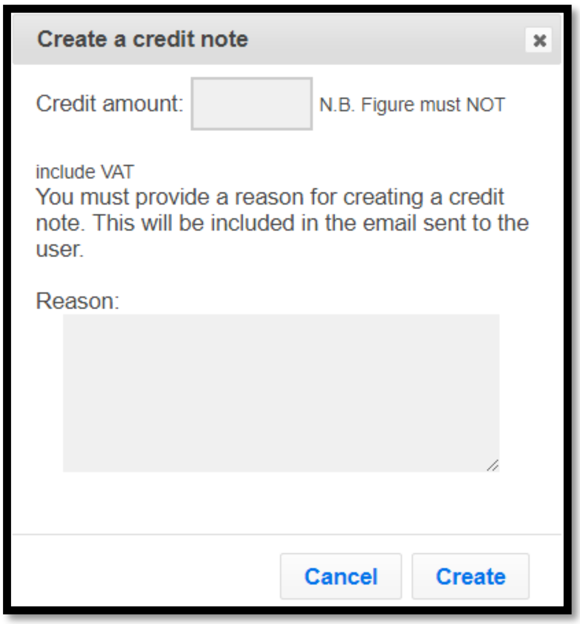
Revoking and issuing credit notes

The system permits admin users to issue credit notes and to revoke invoices

1. Go to the actions menu and select **Invoices**



2. Search for the invoice for which you wish to revoke or create a credit note
3. Go to the actions menu on the right next to the invoice and select either:
   Revoke Invoice – this option is only available when the invoice has not been paid. Revoking the invoice will create a credit note for 100% of the invoice amount and detach the entries from the invoice. This means that you can generate a new invoice for the entries which must then be paid.
   Issue Credit Note – appears even if the invoice has been paid. Use to generate a credit note against the invoice. The entries stay attached to the invoice.
4. When revoking the system will give you an option to confirm your selection. One you click **OK** the system will automatically email a credit note for the full amount.
5. For credit notes you must specify the amount you wish to credit and click **Create**. Note that the amount cannot be higher than the original value of the invoice and should not include any tax, as this is automatically added by the system. A credit note will be generated by the system and emailed but no refund will automatically be processed. Your accounts team will need to manually process the refund.



How to update invoice address/details

After the invoice has been generated admin users can change the company name, address, PO number and billing contact. All of these except the PO number are set in the organisation details.

Changing Name & Address Details

1. Go to the actions menu and select **Organisations**

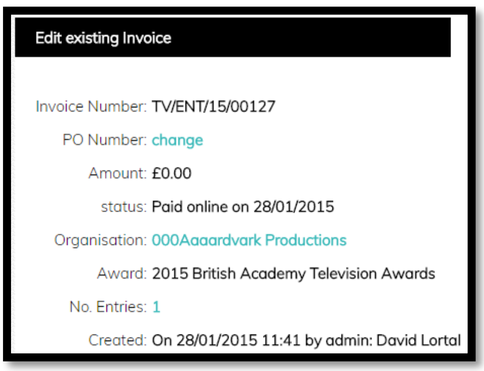
2. Search for the organisation whose details you wish to update by typing into the **Name** column.
3. Select **Edit** under the actions column
4. Amend the details that you wish to update. The billing details will be used on the invoice unless left blank in which case the organisation details will be used.
5. Click **Save**
6. Click on the **View invoices** button
7. Locate the invoice that needs updating and select **Details** from the actions menu on the right of the table
8. The **Invoice Details** will open. Click on the **Regenerate Paperwork** button and the invoice will be regenerated with the new contact details.

Changing a PO Number

1.Go to **Actions** > **Invoices**.

2. From the **Invoices List**, find the invoice you need to adjust by using the filters – then in the **Actions** column, click **Details**.

3. The page **Edit existing invoice** opens.



9. Click on **Change** next to the **PO Number**
10. A warning will pop up. Click **OK**.

11. A text box will appear to the right of the PO number. Updating the contents of this text area and clicking save will generate a new invoice using the new organisation details. To add/amend a new PO number type in the new number. To update address details click in the text area and type a space and select save.
12. Click **Save**.
13. A new invoice will be generated and emailed to the entrant. The previous invoice will no longer be available.

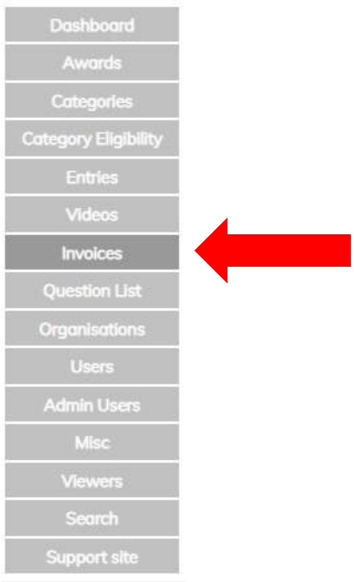
Invoice Reporting

There are numerous different permutations for your finance team to generate reports on invoices. These are available from TWO main locations:

From the Entry List

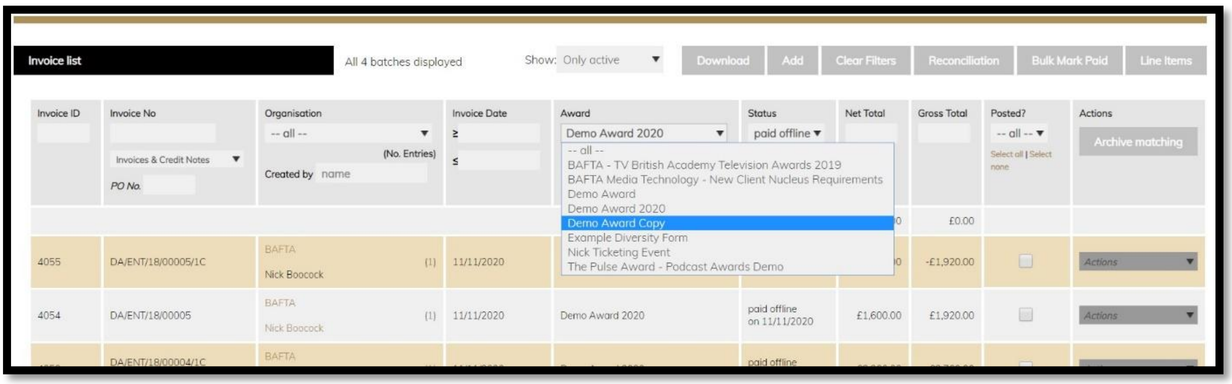
For reports that refer specifically to the items that your user/s are paying for (eg. awards entries, awards ticket purchases) this information is readily available to export from the Invoice List.

1.Go to Actions > Invoices.



2. The Invoice List for ALL of your award projects opens.

3. Use the Filters and Show functionalities to pare down the Invoice List to show just those invoices you are interested in eg, by Award, by payment Status etc.



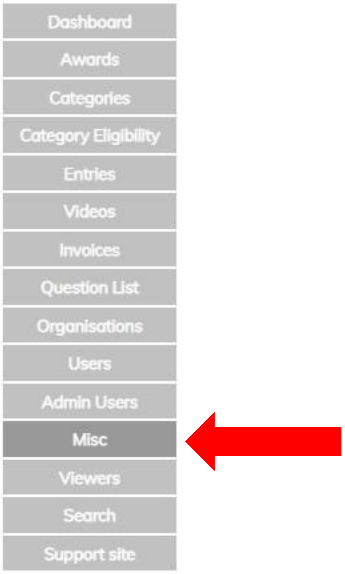
4.Once you have completed your filtering, click on the Download button.

5. Your report will be exported as an .xls file and available for you to open.

From Invoice Data Export

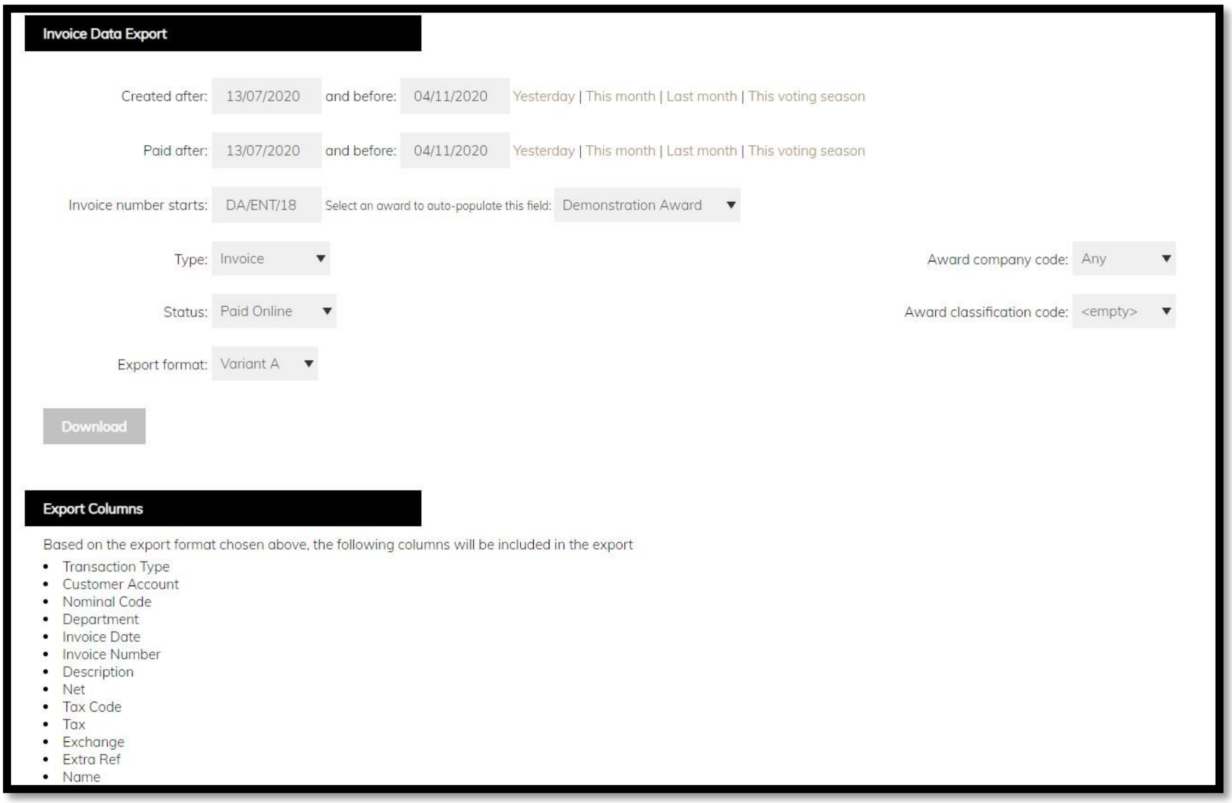
For reports that cover more organisation specific details – such as finance data like each organisation's Tax Codes, supplied Company codes etc. – you should use the **Invoice Data Export** functionality.

1.Go to **Actions** > **Misc**



2. In the section **Reports**, click **Invoice Data Download**.

3. The **Invoice Data Export** page opens.



4.In the fields **Created after and before** enter the dates of corresponding dates of the invoices you want to select. Alternatively, you can select the pre-set date fields of **Yesterday**, **This month**, **Last month** or **This Voting Season** OR leave the fields blank to select all invoices.

5. In the fields **Paid after and before** enter the dates of corresponding dates of the invoices you want to select. Alternatively, you can select the pre-set date fields of **Yesterday**, **This month**, **Last month** or **This Voting Season** OR leave the fields blank to select all invoices.

6. In the field **Select an Award to auto-populate this field** select which Award you want to narrow this selection down to (if at all). The field **Invoice Number Starts** will then auto-populate with the invoice prefix you have set for that award.

7. In the **Type** field, select whether you want to view **Invoices**, **Credit Notes** or **Any** payment documentation.

8. In the **Status** field, select whether you want to view invoices according to whether – and how – they have been paid.

9. Select your **Award Company Code** and **Award Classification Code**, if they are applicable.

10. In the field **Export format**, select one of the **Variants A-D** to display on your export .xls. As you toggle through these Variants, the exact data that will be displayed for each will be listed under **Export Columns**.

11. Once you have selected your chosen variant, click **Download** and your export .xls file will be made available to you.

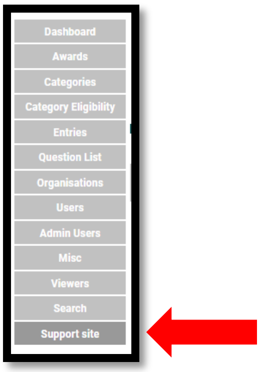
Support Site

For issues that you cannot resolve yourself, you have a Support account which enables you to raise a ticket with the BAFTA Media Technology (BMT) team. It is important that you use this system rather than emailing a member of the BMT team directly. This ensures the whole team is across your query and it will be dealt with by the most suitable team member.

Accessing Support

You can access the site via the URL support.bafta.org and login from there.

Alternatively, if you are logged in to Nucleus already you can access it directing by going to the main Actions menu and selecting Support Site.

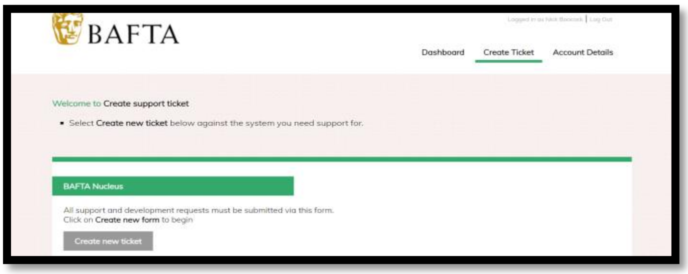


Raising a Support Ticket

Once you have logged into the Support site:

1.Click on the **Create Ticket** tab in the top menu

2. You will be given the option to **Create New Ticket** under each of the BMT software packages. You should click on Create New Ticket under **BAFTA Nucleus**.



3. The **Ticket Details** page will open. You should fill in all the mandatory fields (indicated with a green bar to the left) in as much detail as possible, and select a Severity Level on the following basis:

SYSTEM CRITICAL: Use for emergencies only, for example if the system has ground to a complete halt
HIGH: Use for more important requests, where the issue is not affecting the whole system
NORMAL: You will receive a response from a developer within time frame stated in your contract
LOW: An immediate response is not required

Although not mandatory (as it is not always practical, depending on the nature of your issue) it is helpful where possible to include a Screenshot.

4. When you have finished, click **Submit Support Ticket**.

5. Your Support Ticket will be issued across the whole BMT team and you will receive a **confirmation email** of this.

Configuration Values

Admin Editable
In the Misc section of the Admin site, that you as an Admin User can configure a range of values to apply to all Awards and their Users.

To access and set these, go to **Misc** and under **System Administration** click on **Configuration Values**.
There are 30+ configurations to amend here. From these, pay particular attention to the following upon initial set up:

1. **Admin Password Maximum Age** – Enables you to set a maximum period until each password expires and the user must set a new one. Set this to '0' if you do not want to set a maximum.
2. **Admin Minimum Password Length** – Enables you to set the minimum number of characters for users' password. Set this to '0' if you do not want to set a minimum.
3. **All email bcc** – enables you to set an email address to be bcc'd in on ALL emails sent by your Awards site.
4. **Billing Address on Registration** – Enables you to decide whether or not new registrants must be asked to enter a billing address at the point of registration (if you enter "no", they will be asked at a later stage eg. upon payment, or submission).
5. **Disable Caps Lock Prevention** - Entrants are prevented from using the caps-lock on the entry forms. This can be changed by using this setting.
6. **New Sign-Up Email Alerts** – this functionality allows for an email to be sent to a designated Admin address, alerting them to each newly-registered sign-up. Leave the 'value' space blank if this is not required.
7. **Shortcut icon** – this ensures that your preferred favicon appears. It's location will appear in the 'value' field.
8. **VAT rate** – enables you to set the default VAT rate for the site, EXCEPT for where you set it to be overridden by a particular country of origin, or particular Awards programme.

Developer Editable
In addition to the above, there are also a further series of Configuration Values that are not directly accessible to the Admin User but can be adjusted upon request by a Developer. Please raise a Support Ticket in the first instance to request any of the following:

1**. Manage Users for Entrants** – Switching this on enables a Manage Users section to appear on your Entrants' Dashboards. This allows your Entrants to be able to edit/delete/add their fellow Users' profiles from their Organisation.

2. **Video Download Suppression** – Switching this on prevents the ability for Videos to be downloaded across the entire instance, meaning they can be viewed only by streaming. (This suppression may be helpful for awards with entries that contain IP-sensitive and embargoed content).

3. **Enable Entrant Copying** – Switching this on enables entrants to be able to Copy their entries, which may save time when they are making multiple entries that are identical or are similar and just require minor editing.

4. **Viewer 2-Factor Authentication set up** – Switching this on enables mandatory 2-Factor Authentication for Viewers upon creation of their account. (Please note the Viewer will be charged for the SMS that is sent for this process).

5. **Viewer Terms/NDA Acceptance** – Switching this on means that upon the first login to view your award entries, Viewers will be presented with a series of Ts & Cs or NDA that they must consent to before gaining access to the entries.

6. **Allow Entry Form in Viewing Portal** – Enables Viewers to be able to view and download each entries complete PDF entry form, in addition to the specific data and answers you have selected for them to view.

7. **Enable Reverse Charge VAT** – Enables non-UK entrants to avoid being charged UK VAT on entry fees. Once enabled, this setting can then be switched on/off on a per award basis. If switched on, the entrant will need to declare on their Personal Details page that they are exempt from paying UK VAT once they have stated they are based outside the UK and will need to enter their domestic VAT number (or equivalent) of evidence of that.

8. **Invoice List Award Filter** – If switched on, this enables you to filter your Invoice List by Award in an overview setting (above the Invoice List). If switched off, you will still be able to filter by Award via a column within the List table.

9. **Viewer List Award Filter** – If switched on, this enables you to filter your Viewer List by Award in an overview setting (above the Viewer List). If switched off, you will still be able to filter by Award via a column within the List table.

10. **Entry/ID Title on Invoice** – If switched on, Entrants can opt to have all their entries named on their invoices – and it can be decided whether they are identified via their Entry Title or Entry ID.

11. **Entry Download for Entrants** – Allows Entrants to be able to download all their entries as a CSV file from their Dashboard.

12. **Transfer Entry Form Ownership** – Allows ownership of an entry form to be transferred from one user to another (including from a different organisation) upon Approval. This is useful if you are running an award with an initial external nomination round, with the ownership of the entry being transferred to the Nominee themselves upon progression.

13. **Email attachment deletion** – Sets a length of time after which attachments to automatic emails will be deleted from the system.

14. **User Deletion trigger** – Sets a length of time after which a User will be automatically deleted if they have not logged into the entrant site for a continuous period. By default this is set to 18 months, but can be adjusted. Each User who approaches this deadline will be sent two warning emails advising them to log in if they want to preserve their account. NB: Once the last user for an Organisation is deleted, that Organisation itself will be deleted.

Appendix i : Data deletion rules

Nucleus runs several hard-coded automated tidy up rules in order to prevent the data stored on the server becoming too large and crashing the server.

1. Front end users who have not logged in for 18 months will be deleted. The user will be sent an email to inform them, providing this has been set up by system admin users, to log into their account. Upon login the time will be reset. If the user fails to log in then their entry account will be deleted and any corresponding entries will also be deleted, along with the organisation if the user was the only user within the organisation at the time of account deletion. The 18 month period for account deletion can be extended or reduced at any time - BAFTA Tech will discuss this with you in the scoping calls and in future this request can be made via the support site.
2. There are also automated scripts to delete videos uploaded via video management which is 9 months from the point of a successful video file uploaded. This period for video deletion can be extended or reduced at any time - BAFTA Tech will discuss this with you in the scoping calls and in future this request can be made via the support site. For Video Questions videos will be deleted when the entry is deleted, either by the user, an admin user or by the automated scripts. There are no automated deletion scripts for Video Questions.
3. Assets will remain in Nucleus for 12 months after the entry has been deleted fully by the system - this includes all documents uploaded by the entrant and the entry submission summary pdf and approval summary pdf.
4. The Audit Log and Actions log records all actions for the past 5 years. Any actions performed over 5 years ago will not be retained in the system.

There are no Admin-facing settings within Nucleus for customers to adjust these themselves, however if you wish to we can change the time on the deletion rules in points 1 and 2. Please contact your Nucleus account manager to discuss if required.