



InfoReady Quick Start Guide

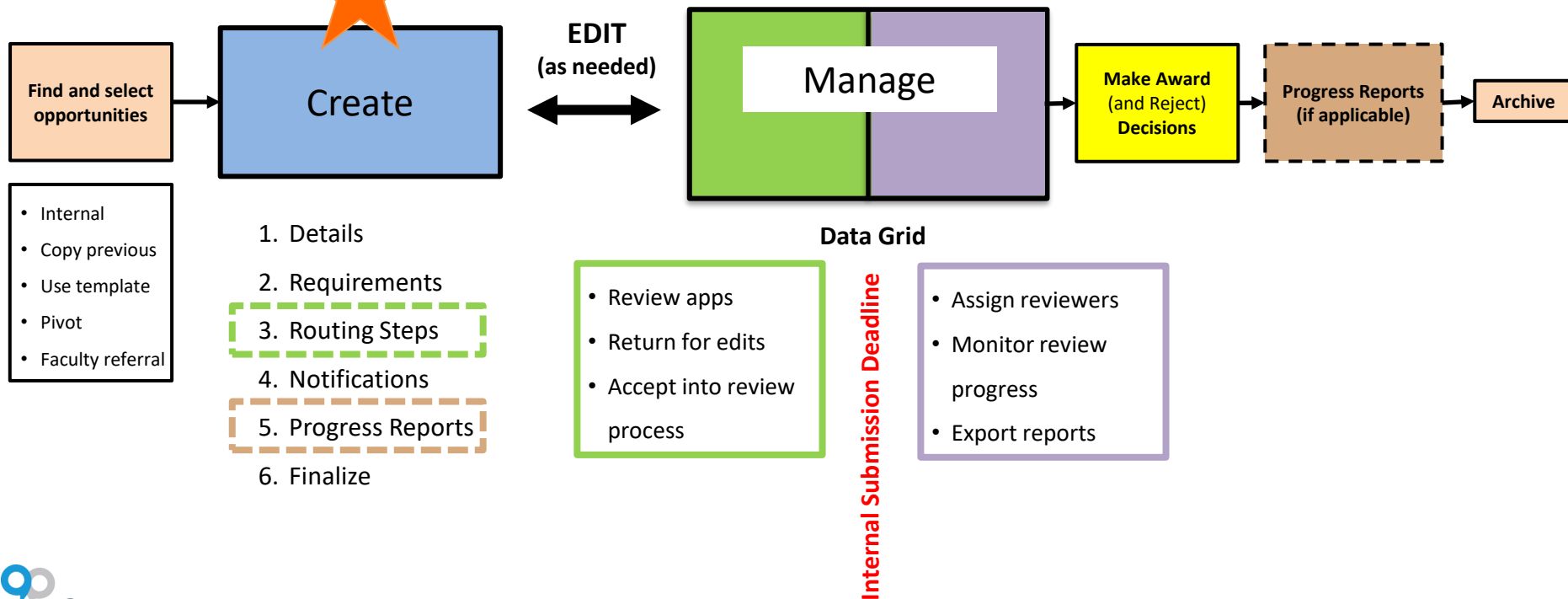
Creating Opportunities

What is a competition?

- InfoReady term for opportunity in the system
 - E.g., application process, RFP, RFA, form, grant, scholarship, etc.
- Often includes a review process
 - Can be managed entirely in platform
- Term can be changed (contact support@inforeadycorp.com for more info)

Steps 3 and 5 are optional for launching. You can return to them later when managing.

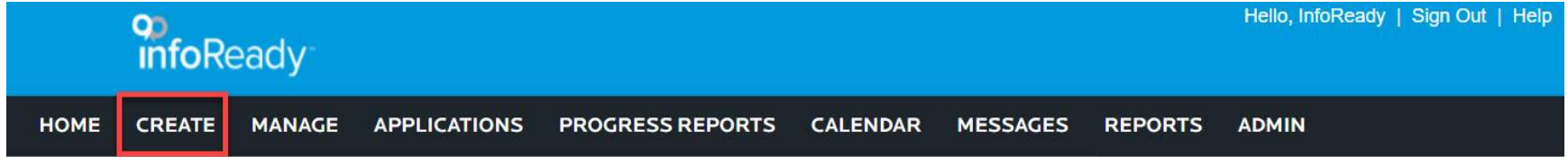
The Life Cycle of an Opportunity



Where do I get opportunity information?

- Pre-InfoReady process
- Pivot (or other funding opportunities site)
- Previously created InfoReady template
- Copy past opportunity
- Faculty referral

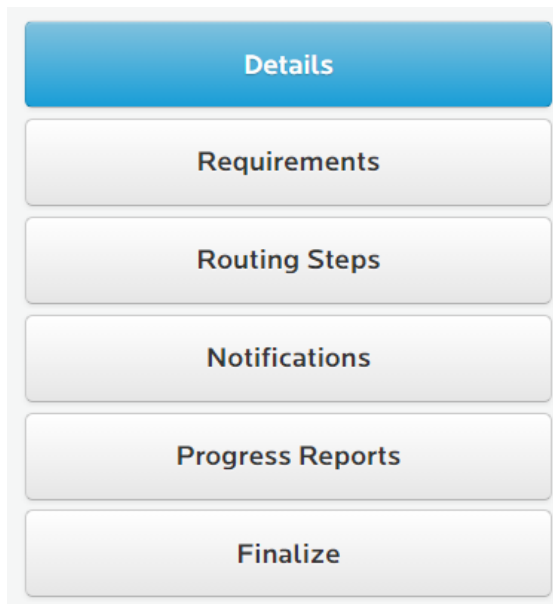
How do I create?



- Select *Create* from the home navigation bar.
- You will be taken to a screen to select a template or create a brand new opportunity.

Details

- Becomes posting for the opportunity
- General info useful for potential applicants, reviewers, and other administrators
- Can add field(s) to highlight and for reporting purposes
 - e.g., Eligibility, Award decision date
- Can upload documents that applicants will submit
 - e.g., Budget template spreadsheet
- Can limit who applies by selecting *Participating Organizations*
- Can add Co-Administrators to help manage

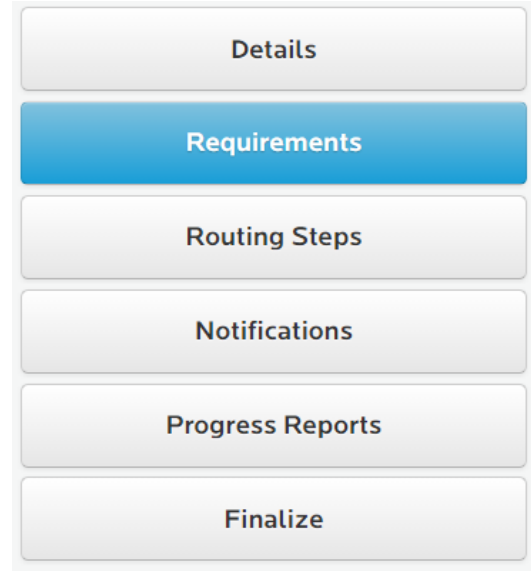


A vertical stack of six buttons representing a workflow. The top button is blue with the text "Details". The following five buttons are light gray with black text: "Requirements", "Routing Steps", "Notifications", "Progress Reports", and "Finalize".

Details
Requirements
Routing Steps
Notifications
Progress Reports
Finalize

Requirements

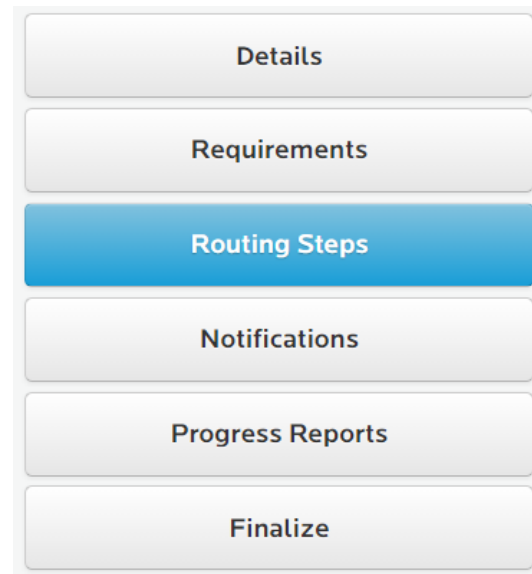
- The form that applicants fill out and submit
- Rearrange fields on form by dragging and dropping them into place.
- **Notes to Applicant** appear when applicant begins to type in field
- Add additional fields to customize form:
 - Date – Applicants can choose a date from a calendar
 - Multiple Choice Questions – Applicants select a single answer
 - Multiple Select Questions – Applicants select all answers that apply
 - Number – Applicants can only enter numbers
 - Text Box – Applicants can enter long form replies and edit format. Admins can add character or word limits that are enforced by the system
 - Text Field – Plain text entry with a 255 character limit
 - Yes/No – Applicants select either yes or no
- Collect up to 10 document uploads by clicking **Add Upload Option**.
- Let applicants identify an approver with **Applicant Driven Routing Steps** and have the system automatically route the approval request to that person
- Optional: Require an Applicant Acknowledgement statement



Details
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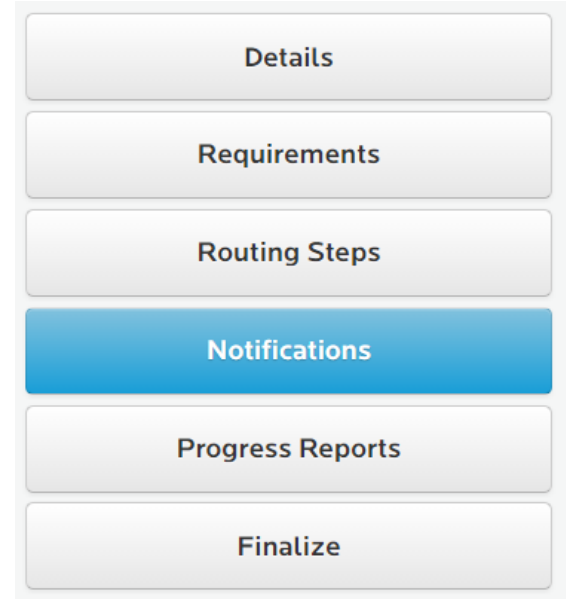
Routing Steps

- Review workflow
- Form(s) that reviewer(s) fill out
- NOT necessary for launching
- NOT where you assign reviewers
- See our **Routing Steps Quick Start Guide** for a detailed walkthrough



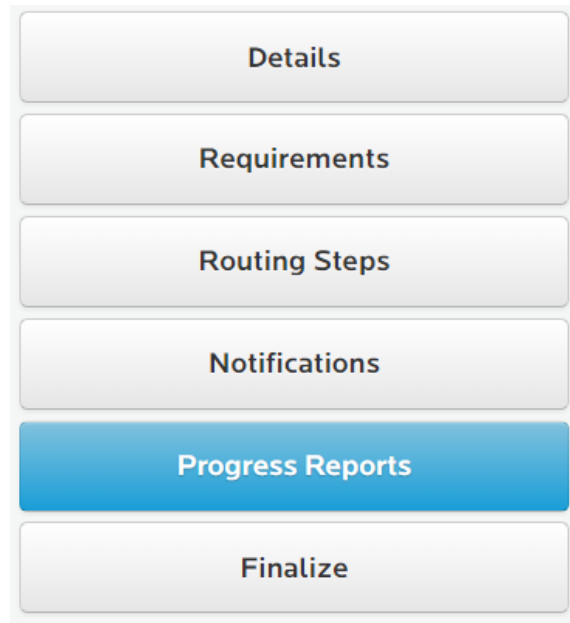
Notifications

- Select when Admin(s) get notifications
- Add additional email addresses to get notifications
- Edit and customize email templates used throughout platform
- **Can be edited after launching*



Progress Reports

- Follow up reports for awardees
- Designed to measure ROI, outcomes, and milestones
- Create multiple progress report forms for multiple reporting cycles (e.g., 6-month Report & Final Report)
- Assigned after you make award decisions
 - **Can be edited after launching*
- See our **Progress Reports Quick Start Guide** for a detailed walkthrough



Finalize

- 4 options:
 - **Save as Draft** – View drafts from Manage tab, right sidebar
 - **Save as Template** – View templates from Manage tab, right sidebar
 - To create a new opportunity using a template, go to **Create** tab first
 - **Launch** – Start collecting applications immediately
 - **Set Launch Date** – Set date for future
- If LOI, language will be slightly different

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More questions?

Visit the Support Portal

- Log in to your site
- Hover over *Help*
- Click *Administrator*

Email support@inforeadycorp.com

