



InfoReady Quick Start Guide


The Application Management Process

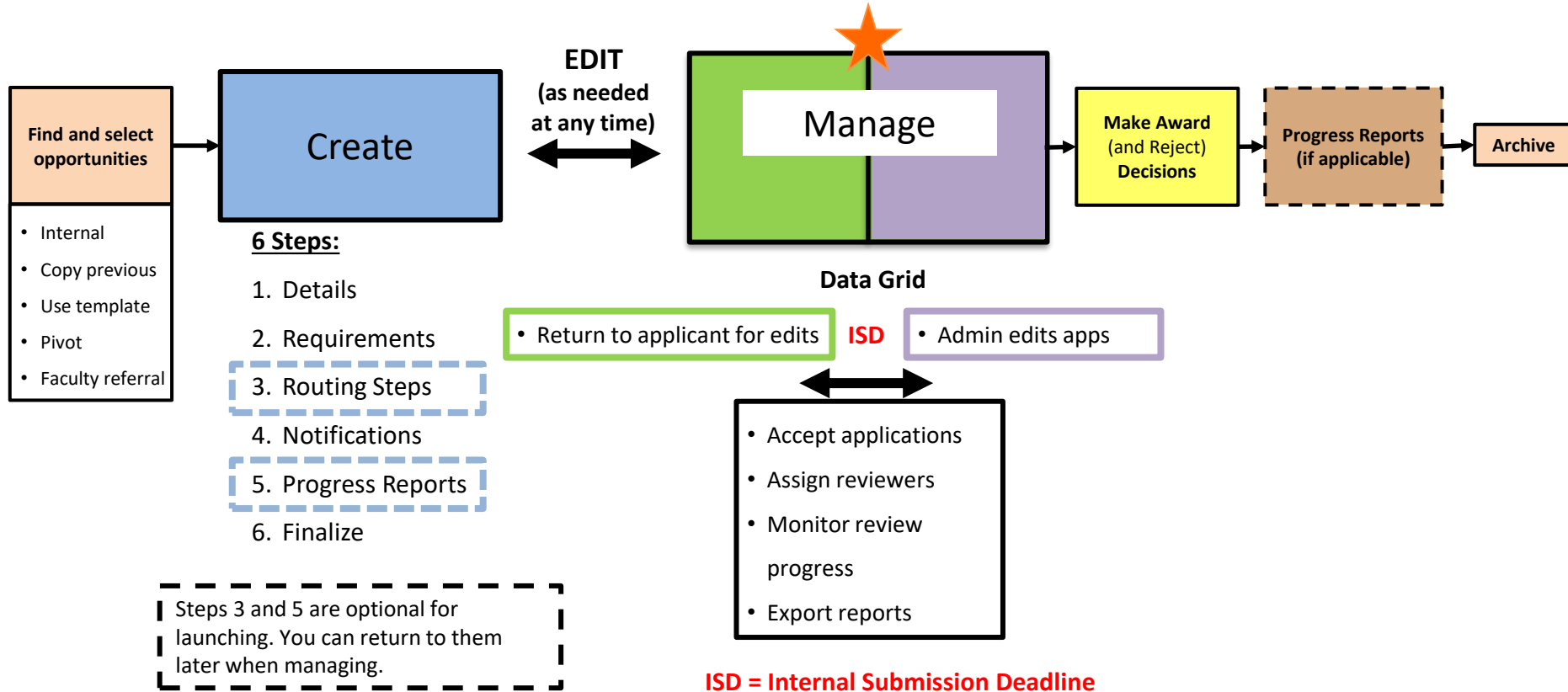
Objectives

- Walk through of how an application moves through an opportunity
- **Highlight** decision and communication points for administrators
- Identify applicant and reviewer actions at corresponding stages
- Note common hurdles and how to address them

The Life Cycle of an Opportunity

Administrator View

 = You Are Here



When can I take certain actions?

Both Pre and Post Deadline*

- Accept applications
- Assign reviewers to applications
- Export reports (show real-time data submitted at time of download)

Pre-Deadline Only

- Return applications to applicants for re-submission

Post-Deadline Only

- Admins edit apps on behalf of applicants

*You can edit the Internal Submission Deadline at any time

Before Internal Submission Deadline

Administrators

- Review applications as they are submitted
- **Decision Point*:**
 - **Accept** into review process
 - **Return** to applicant for edits
- **You can disable the Accept/Return option on Routing Steps page. Admins will then have to make any edits for applicants*
- **Enabling Applicant Driven Routing Steps on the Requirements page automatically disables the Accept/Return option*

Applicants

- Edit draft(s) and submit application(s)
- Receive automatic email notification that app was submitted
- If **Accepted**, receive email about status (if admin chose to send).
- If **Returned**, make edits and re-submit

After Internal Submission Deadline

Administrators

- **Decision Point:** Assigning Reviewers
 - Apps must be accepted before reviews can be assigned.
 - Use Batch Actions on Data Grid to assign reviewer(s) to multiple applications at a time. If there are multiple routing steps (RS), make sure to select the correct RS from the menu.
 - Click app title on Data Grid to view and take actions on an individual app.
- **Remember:**
 - You can assign more than one reviewer to a routing step.
 - Reviews can be submitted after review deadline without admin intervention. The deadline encourages timely completion by reviewers.

Applicants

- Waiting for decision outcome and/or reviewer feedback

Reviewers

- Receive notification(s) about assigned review(s) or approval request(s)
 - Receive immediately if part of first routing step
 - Receive as part of Mon/Thurs Review Digest email if part of later routing steps

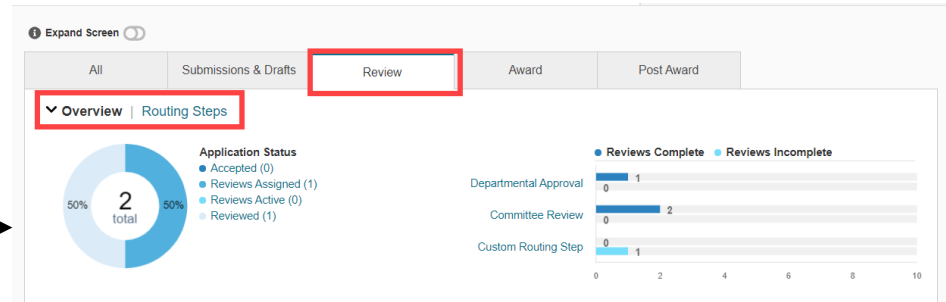
After Internal Submission Deadline (con't)

Administrators

- Monitor reviews as they come in (as needed).
- Add or delete review assignments (as needed).
- Keep track of overall review progress via *Review* tab on Data Grid. →

Applicants

- Waiting for decision outcome and/or reviewer feedback.



After Internal Submission Deadline (con't)

Administrators

- Download reports from Data Grid (as needed):
 - Summarize app contents/status
 - Greater visibility on review data
 - Pass on review data to those making final decision(s) (If you are not using a Routing Step to obtain this decision).

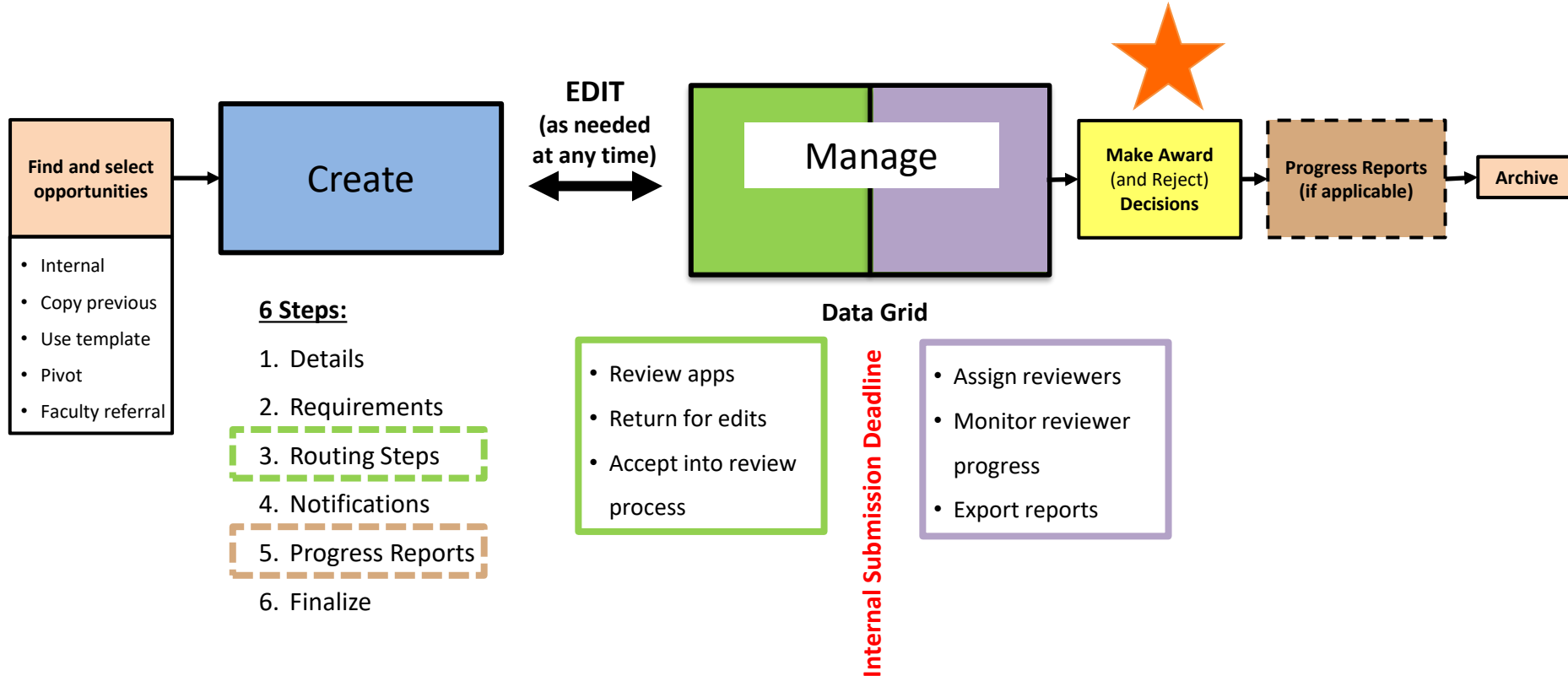
Applicants

- Waiting for decision outcome and/or reviewer feedback.

The Life Cycle of an Opportunity



= You Are Here



Make Final Decision(s)

Administrators

- **Decision Point:**
- **Award**
 - Send email notification or simply record decision in the platform
 - Include or exclude reviewer feedback
 - Can be edited before sending
 - Add funding amount and/or reference number (available in reports)
- **Reject**
 - Send email notification?
 - Include or exclude reviewer feedback
 - Can be edited before sending

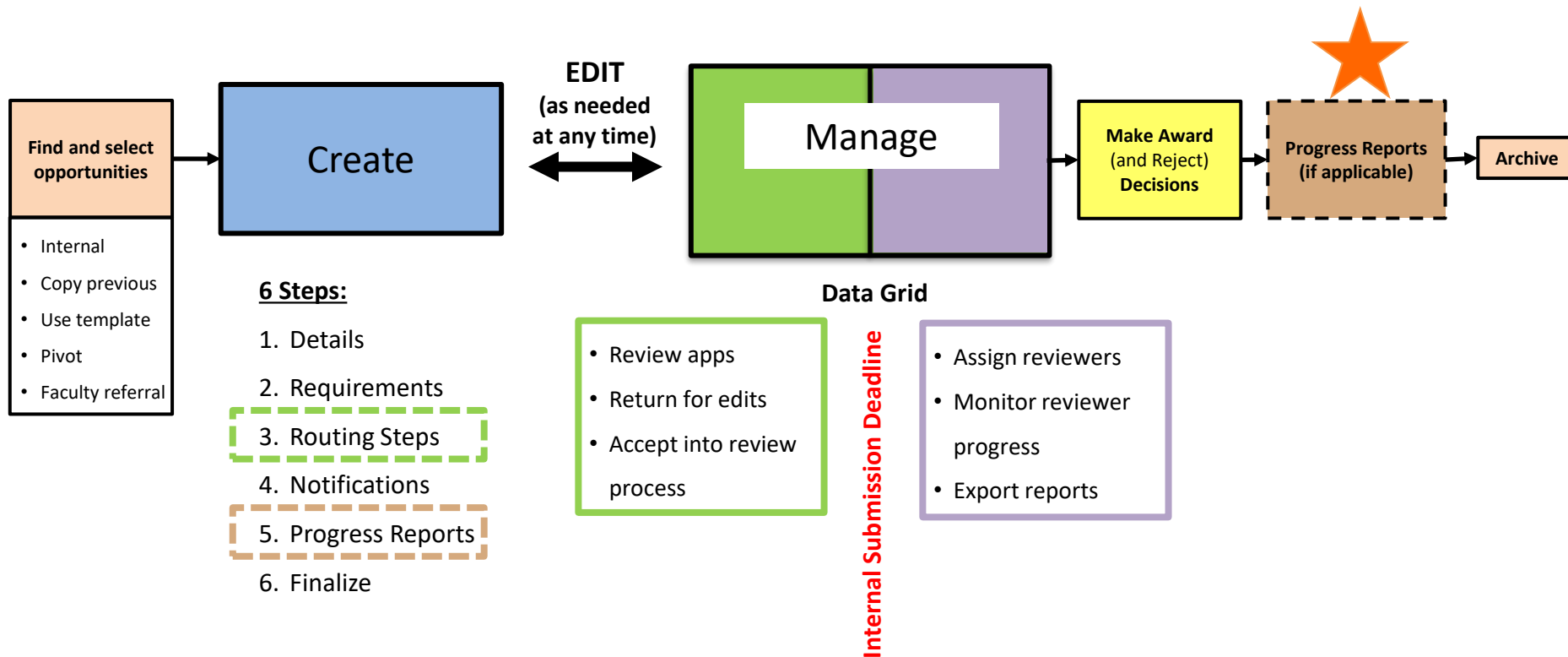
Applicants

- Receive notifications based on Administrator's choices
- Evaluate feedback (if included) to inform future activity, actions, and applications

The Life Cycle of an Opportunity



= You Are Here



Track Progress for Awardees

Administrators

- Create and assign progress report form(s) as needed
 - Edits can be made any time
- Set Report reminder(s) and deadline(s) to instruct awardees to complete progress report(s)
- Receive notifications when Progress Reports are submitted
 - Edits can be made after submission
- Download list of all progress reports from Data Grid (select “Application & Applicant Details”)

Applicants (Awardees only)

- Receive email notifications and follow link in email to complete progress report(s).
- Submit progress report(s) by deadline(s).

More questions?

Visit the Support Portal

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

Email support@inforeadycorp.com

