InfoReady Quick Start Guide

Data Grid

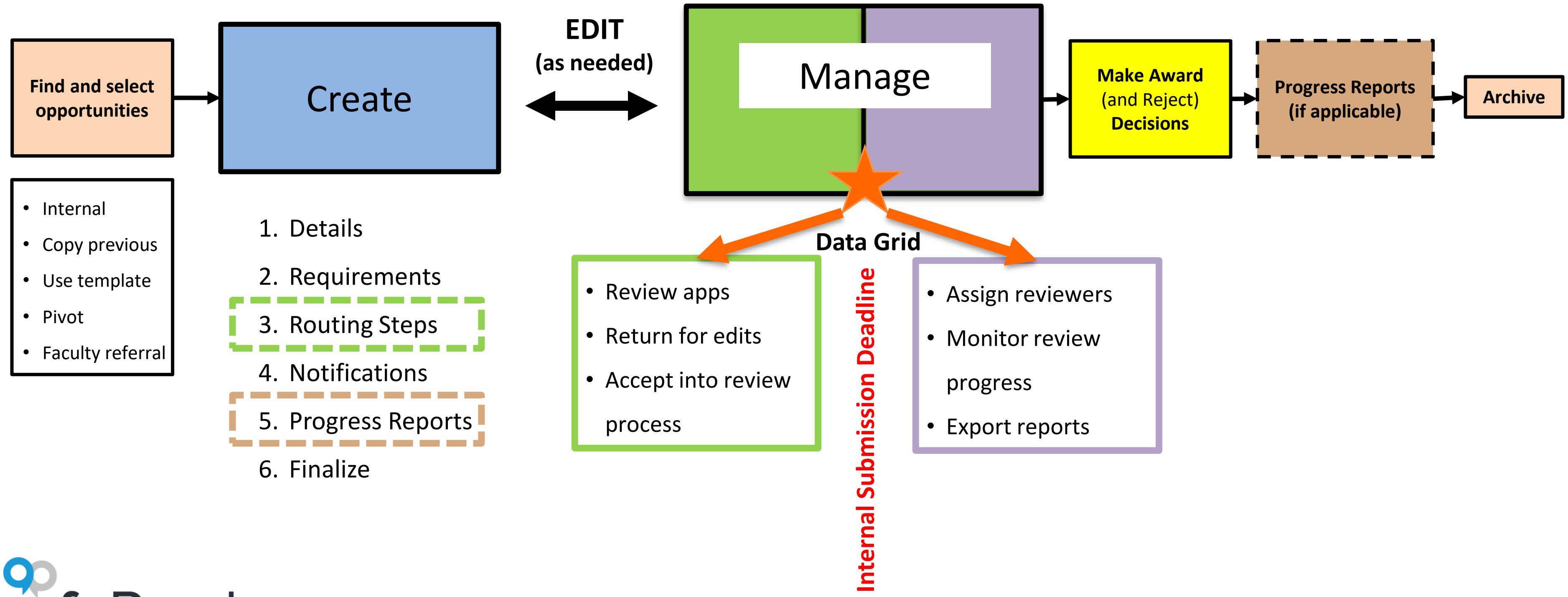
What is the Data Grid?

Main location where administrators:

- view submission information
- take action to move submissions through the process
- extract data to make decisions

The Life Cycle of an Opportunity

★ = You Are Here



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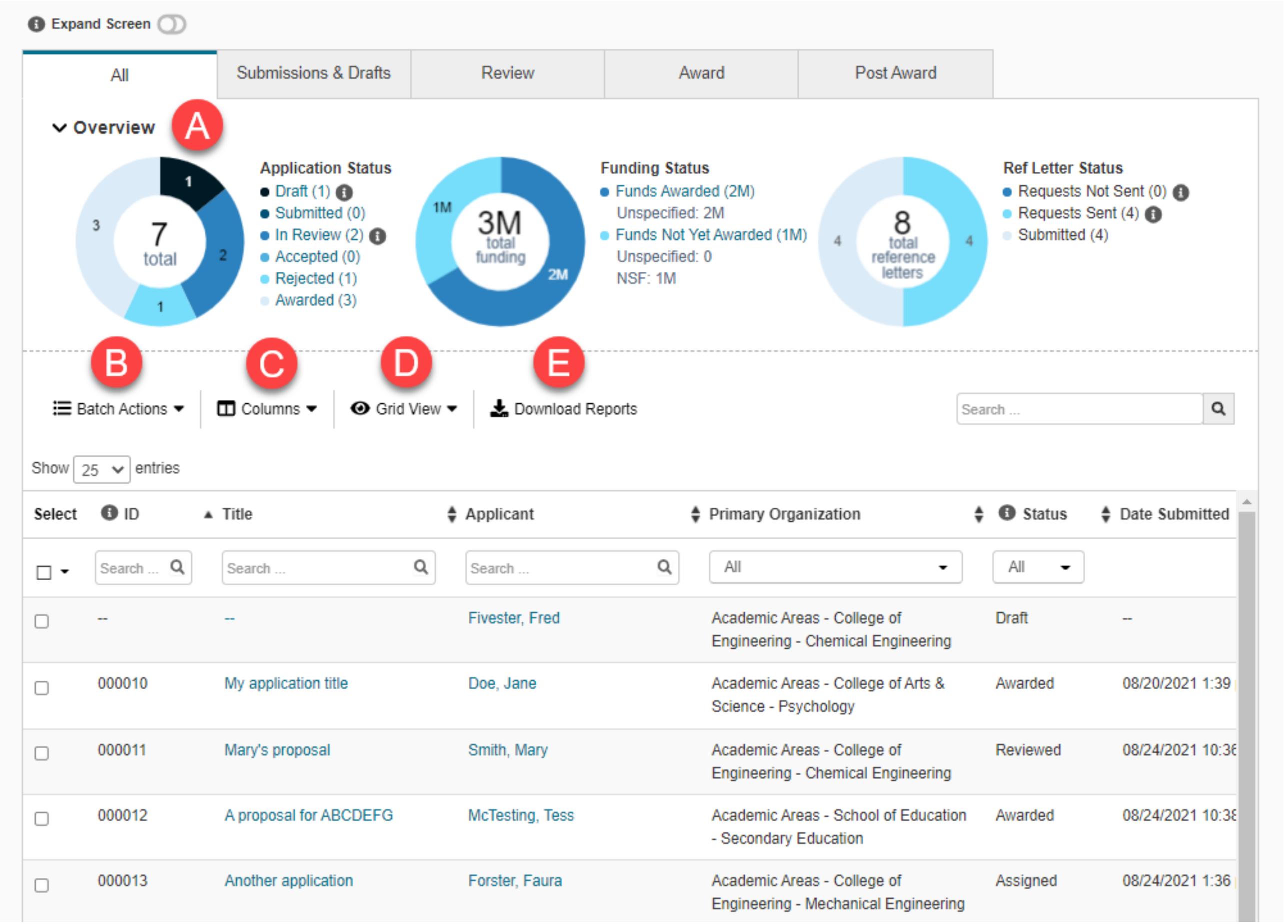
Stage Management Tabs

Applications are grouped by status into stage tabs:

- **All** - Every submission, including drafts and submissions in any stage of the process
- **Submissions & Drafts** - All applications in a status not yet assigned to be reviewed (Draft, Submitted, Accepted, and Returned)
- **Review** - All applications currently in the review process or that have been awarded/rejected (Accepted, Assigned, Reviews Active, Reviewed, Awarded, Rejected)
- **Award** - All applications where the final award is ready to be entered (Reviewed) or a decision (Awarded/Rejected) has been entered
- **Post Award** - Applications that have been awarded. Progress Report information (if applicable) appears here.


Expand Screen
All
Submissions & Drafts
Review
Award
Post Award
Overview
A
Application Status
Draft (1)
Submitted (0)
In Review (2)
Accepted (0)
Rejected (1)
Awarded (3)
7 total
Funding Status
Funds Awarded (2M)
Unspecified: 2M
Funds Not Yet Awarded (1M)
Unspecified: 0
NSF: 1M
3M total funding
Ref Letter Status
Requests Not Sent (0)
Requests Sent (4)
Submitted (4)
8 total reference letters
B
C
D
E
Batch Actions
Columns
Grid View
Download Reports
Search ...
Show 25 entries
Select
ID
Title
Applicant
Primary Organization
Status
Date Submitted
-- | -- | Fivester, Fred | Academic Areas - College of Engineering - Chemical Engineering | Draft | --
000010 | My application title | Doe, Jane | Academic Areas - College of Arts & Science - Psychology | Awarded | 08/20/2021 1:39
000011 | Mary's proposal | Smith, Mary | Academic Areas - College of Engineering - Chemical Engineering | Reviewed | 08/24/2021 10:36
000012 | A proposal for ABCDEFG | McTesting, Tess | Academic Areas - School of Education - Secondary Education | Awarded | 08/24/2021 10:38
000013 | Another application | Forster, Faura | Academic Areas - College of Engineering - Mechanical Engineering | Assigned | 08/24/2021 1:36

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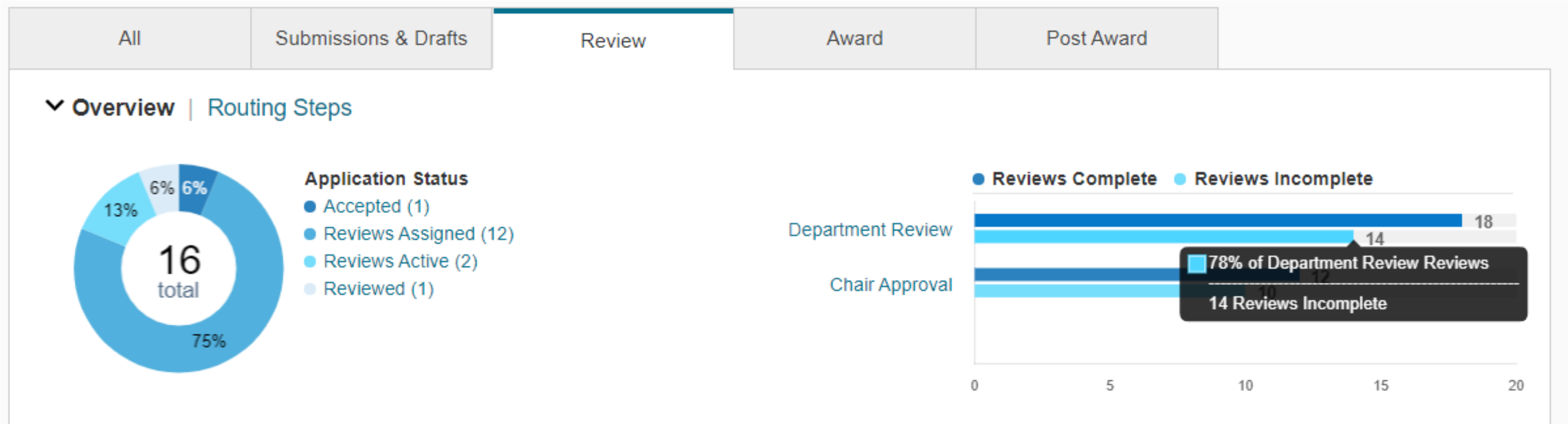
A. Overview Charts and Graphs



- Donut charts and/or bar graphs display summary information and may include application status, funding, reference letters, review status, and progress report status.
- Hover over any section or bar to view amounts as percentages of the total.

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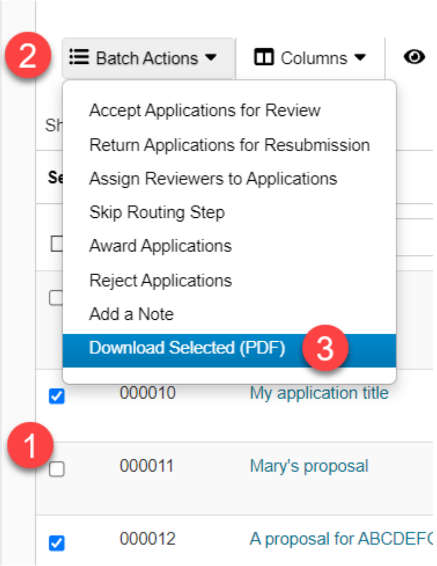
B. Batch Actions

- To take action on multiple submissions at a time, first check the boxes to the left of the desired applications.
- Click the **Batch Actions** dropdown and then select the action.
- Depending on the chosen action, a modal will display to guide the administrator through next steps.
- There are currently 11 batch actions (available on different tabs):
  - Accept
  - Return
  - Assign Reviewers
  - Delete Review Assignments
  - Send Review Digest Email
  - Skip Routing Step
  - Award
  - Reject
  - Assign Progress Reports
  - Add a Note
  - Download Selected (PDF)



Example Batch Action: Downloading submissions as PDF

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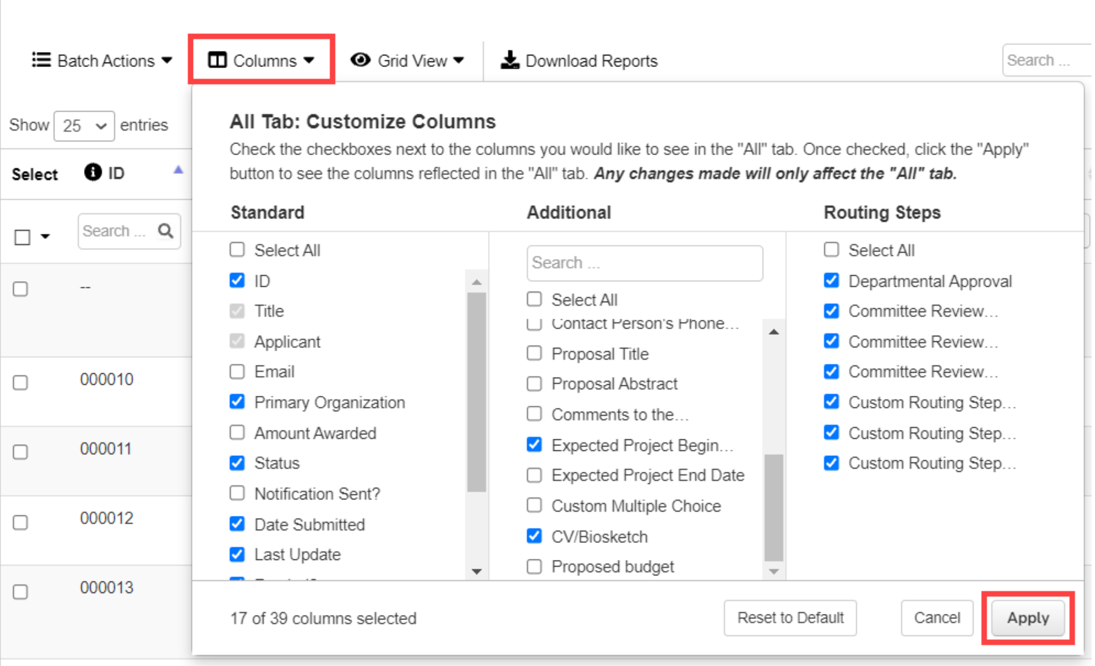
C. Columns

- Click the dropdown to display all available fields to add to the grid.
- Select the checkboxes next to the columns you would like to see, then click the **Apply** button.
- Drag and drop columns to re-arrange their order.



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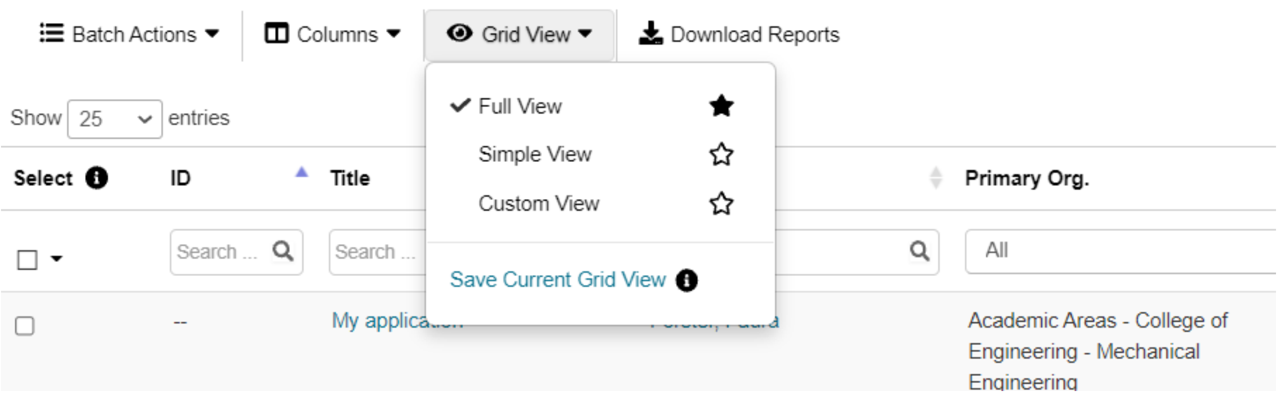
D. Grid View

- By default, each tab displays a **Full View**.
- Switch to **Simple View** to view the basic information for that tab (or if you preferred using the *Original Application Grid* in the past).
- You can save one custom view per tab.



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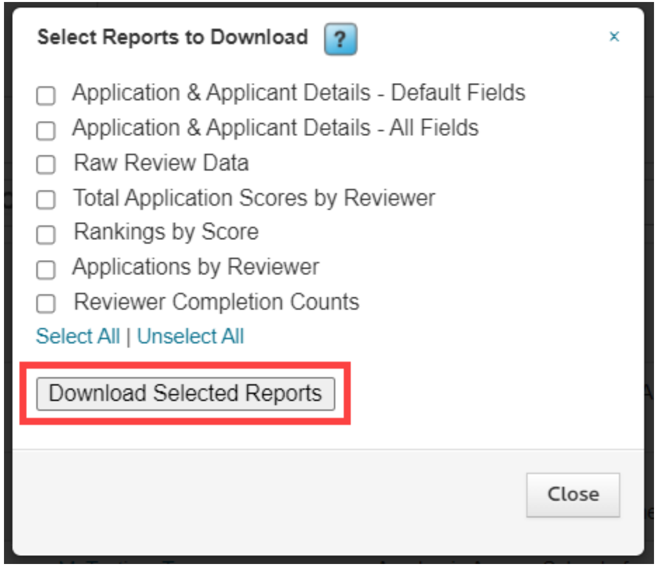
E. Download Reports



- Click to display a menu of reports.
- Select the appropriate report(s) and then download.
- All reports come on one Excel workbook, with different reports on each sheet.
- There is not a way to select applications upfront that are included in the report(s).

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More questions?

Visit the Support Portal

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

Email support@inforeadycorp.com