



InfoReady Quick Start Guide

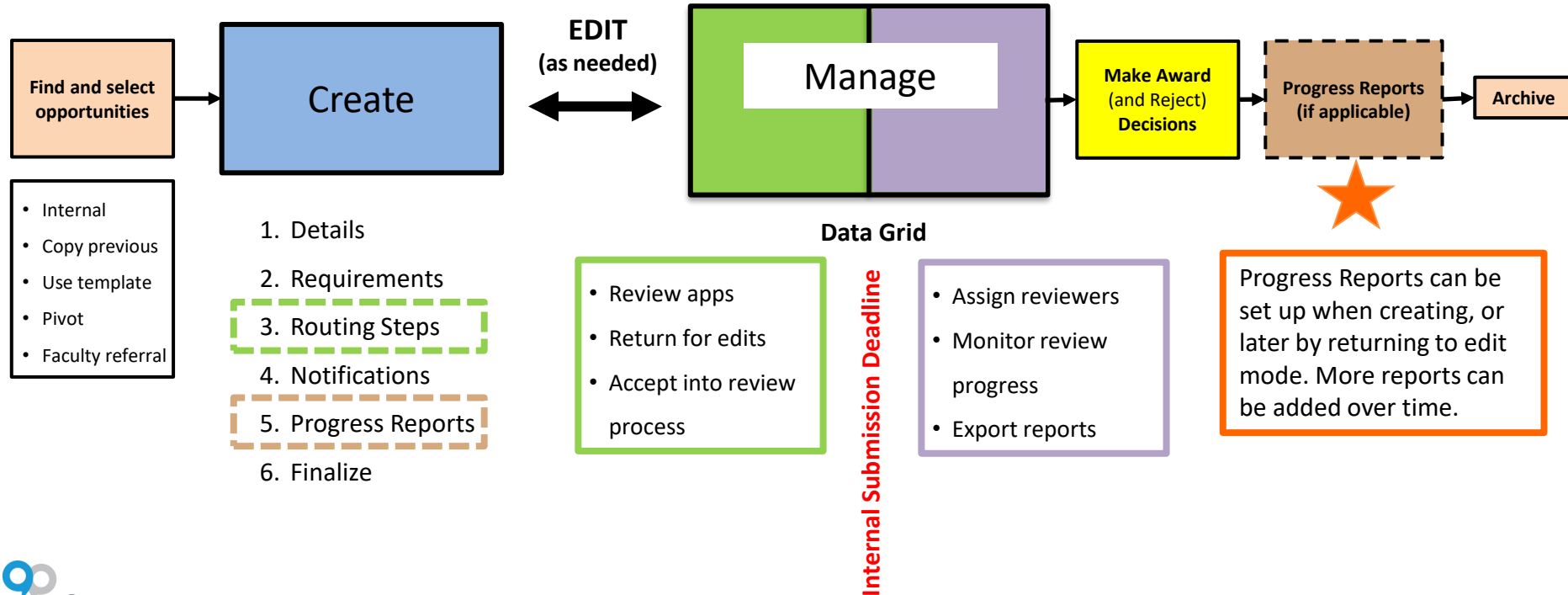
Progress Reports

What are Progress Reports (PR)?

A module in InfoReady to collect follow up reports from “Awardees” for previously submitted applications. Progress Reports are helpful for:

- Ensuring post-award requirements are met
- Measuring ROI and other outcomes
- Tracking milestones
- Surveys, data collection, and file upload submission

The Life Cycle of an Opportunity = You Are Here



How many should you set up?

- **Questions to Consider**

- Who are my stakeholders, i.e., who will want to know about the outcomes of awarded funds?
- How often do they need an update?
- Who do you need information from?
- What type of data will I need to extract?

- **Notes**

- You can wait to build progress reports after launching (and even after awarding).
- You can add more progress reports over time as needed.
- You can skip irrelevant progress reports for specific awardees.

Default Progress Report

- **3 sections:**

- Funding
- Project
- Publications

- **Can add:**

- Fields to existing sections
- Additional sections
- File uploads

- **Other actions:**

- Include instructions at top of PR
- Add notes (instructions) for individual fields
- Make fields optional or required
- Move fields or sections (drag and drop by hovering to the right)
- Delete fields or sections

Adding Sections and Fields

- Click **Add a Field to this Section** link below any section
- Click **Add Section** button to create a new section
- Repeat as needed to modify existing or new sections

The screenshot shows a user interface for managing report sections. At the top, a text input field is labeled 'Section Title' and contains the text 'New Section'. To the right of this field is a trash icon and the text 'Drag & drop fields or sections to reorder'. Below the title field is a red-bordered button with a plus icon and the text '+ Add a Field to this Section'. Further down, there is a section header 'Add a New Section' followed by a paragraph of instructional text: 'Add a new section to this report by clicking the "Add Section" button below. You will be able to create a section title, as well as add and configure any field types. Sections can be reordered via drag and drop.' At the bottom of this section is a red-bordered button labeled 'Add Section'.

Question Field Types

The screenshot shows a user interface for adding a field to a section. A dropdown menu is open, displaying various field types. The background is a light gray panel with the title 'Add a Field to This Section'. Below the title are three labels: '*Field Type:', '*Field Label:', and 'Notes to Awardee:'. The dropdown menu is positioned over the '*Field Type:' label and contains the following options: '- Select -', '- Select -', Date, Date Range, Dollar Amount, Multiple Choice, Multiple Choice with Other, Multiple Select, Number Field, Text Box, Text Field, and Yes/No Question. Below the main panel, there is another section titled 'Add a New Section' with a brief description and a button.

Add a Field to This Section

*Field Type: - Select -

*Field Label: - Select -

Notes to Awardee:

Date

Date Range

Dollar Amount

Multiple Choice

Multiple Choice with Other

Multiple Select

Number Field

Text Box

Text Field

Yes/No Question

Add a New Section

Add a new section to this section title, as well as add

- **Date** – Pick date from calendar
- **Date Range** – Pick 2 dates from calendar
- **Dollar Amount**
- **Multiple Choice** – Pick one from a list
- **Multiple Choice with Other** – Pick one or “Other” and then type in response
- **Multiple Select** – Pick one or more from a list
- **Number Field** – Commas inserted every 3 digits
- **Text Box** – Can set character or word limit
- **Text Field** – 255-character max (one line)
- **Yes/No**

Publications Section

Administrator Creation View

Drag & drop fields or sections to reorder

Section Title

Publications



Note to Admin: The fields you include below will pertain to one publication entry. If more than one publication exists, the Awardee will have an "Add Another Publication" button which will duplicate this set of fields for the next publication entry.

Publication Title

Notes to Awardee

Option ▾

Text Field

Optional note to awardee about this field



Publication Date

Notes to Awardee

Option ▾

Date

Optional note to awardee about this field



Status

Notes to Awardee

Option ▾

Text Field

Optional note to awardee about this field



Publication Description

Notes to Awardee

Option ▾

Text Box

Optional note to awardee about this field



+ Add a Field to this Section

Awardee Submission View

Publications

Publication 1

Publication Title:

Publication Date:

Status:

Publication Description:

Words: 0, Characters: 0

+ Add Another Publication

Adding File Uploads

File Upload(s)

You may want to provide a document (file) to be completed and returned (uploaded) by the awardee and/or simply request a document to be submitted (uploaded) by the awardee.

1 Do you want to include file upload(s) with this report?
☒ Yes ☐ No

2 File Upload 1

☒ Ask the Awardee to upload a file
☐ Provide a file for the Awardee to complete and upload

*Label
3 Supporting Materials

Instructions

4

5 Will this file upload be required or optional? ☐ Required ☒ Optional

6

1. Select **Yes** to enable the file upload(s) section.
2. Choose how you would like to collect the file.
3. Add a label.
4. Add additional instructions for the Awardee.
5. Select if the file should be *Required* or *Optional*.
6. Click **Add**.

If needed, click the **Add Another File Upload** link directly below the last file that was created.

To provide a file for the Awardee to Upload
Process is the same except in Step 2, you will:

- Select the file from your computer.
- Click **Upload** to attach the file.

Assigning Progress Reports (Individual)

Screenshots on next page

Application must have status of *Awarded* before any progress report can be assigned

1. From the **Data Grid**, click the **title** of the awarded application.
 - Click the **Progress Report(s)** button on the right local navigation menu.
2. Expand the relevant progress report by clicking the > or title.
3. **Choose when to send the assignment email:**
 - Automatically when the Schedule Assignment button is clicked OR
 - A customized send date and time.
4. **Choose a progress report deadline for the report for this Awardee.**

The date set here will *not* apply to any other awarded applications.
5. Review the email subject line and body, then click **Schedule Assignment**.

Assigning Progress Reports (Individual)

HOMECREATEMANAGEAPPLICATIONSPROGRESS REPORTSCALENDARMESSAGESREPORTSADMIN

Back | Manage Application: A sample competition

You made Jane Doe a competition awardee. [Rescind Award](#)

Award Cycle: Ongoing

Internal Submission Deadline: Saturday, May 15, 2021

Application Title: My really innovative proposal

Application ID: 000007

Applicant First Name: Jane

Applicant Last Name: Doe

Assignment and Reminders

Expand a report to schedule the assignment and reminder(s), as well as to set a report deadline for this Awardee. A report will only be visible and accessible to the Awardee after the report assignment email has been sent.

☐ Skip Progress Report 1 for this Awardee

2

>

Progress Report 1

TBD

☐ Skip Progress Report 2 for this Awardee

>

Progress Report 2

TBD

Application

Accept or Return Application

Reviewers

Activity

Notes (0)

Edit

1

Progress Report(s)

Delete Application

1 of 3 Applications

PrevNext

Award or Reject Application

Award

Reject

Progress Report 1TBD

Assignment and Reminders

When you're ready, configure and schedule this report assignment email to be sent to the Awardee. After the assignment has been scheduled, you will be able to schedule report reminders at any time.

Report Assignment ?

Send assignment on:

Please review the following information, make modifications if need, enter a report deadline and click the "Schedule Assignment" button to schedule this report assignment.

☒ Send automatically when the Schedule Assignment button is clicked.

3

Customized Send Date

Time

11:59 PM

*From

*Awardee(s) Email Address(es)

Separate email addresses with commas

Cc/Bcc others on this message

*Report Deadline

06/1/2021 11:59 PM EDT 4

*Subject

Progress Report Assignment

*Message ?

X Copy Paste Undo Redo Bold Italic Underline Strikethrough Link Image Table Link List Bulleted List Numbered List Indent Outdent Quote Unquote Source

Styles Format A A

Competition: A sample competition

Application: My really innovative proposal

Hello Jane Doe,

Congratulations again on your award! As part of the award for the application listed above, you have now been assigned [Progress Report 1](#). This report is due {report deadline}.

Additional information can be found by clicking the "View Report" button below and logging into the system to view the report.

Words: 64, Characters: 403

5

Cancel

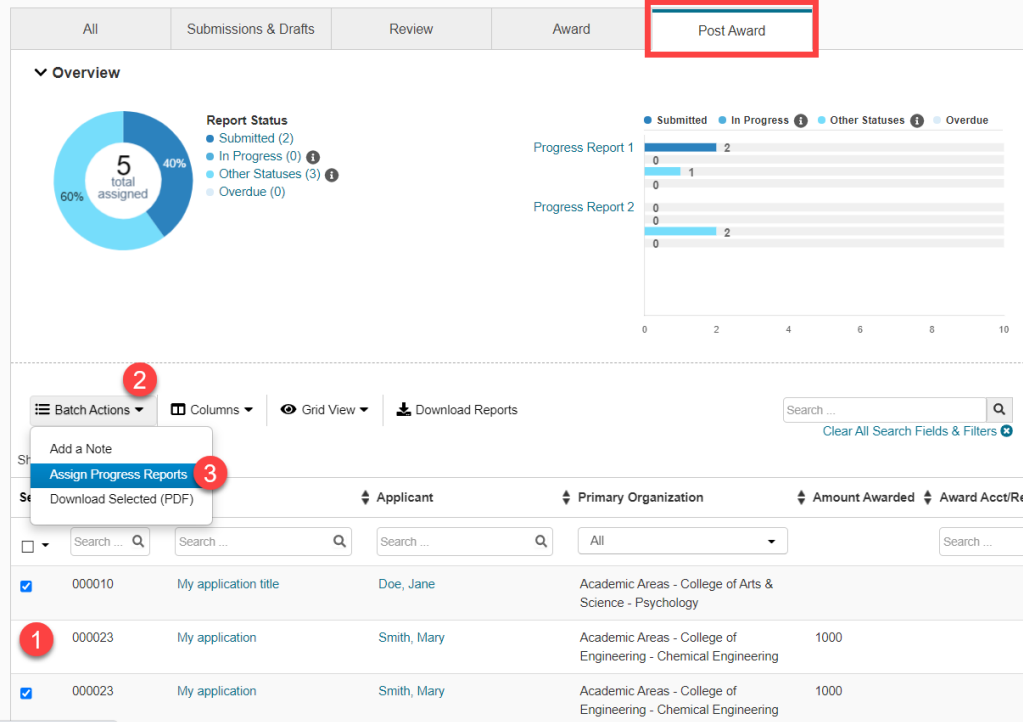
Schedule Assignment

Assigning Progress Reports (In Batches)

Screenshots on next page

- Go to the **Data Grid > Post Award tab**.
 - If there are multiple progress reports, only one PR can be assigned at a time.
 - Repeat the steps below for each report that needs to be assigned.
1. Check the boxes next to the applications that need to have progress reports assigned.
 - If there are multiple progress reports, you only have to check the box next to *one* row that lists the application.
 - You'll select the report you want to assign in a later step.
 2. From the **Batch Application Actions** menu, select **Assign Progress Report**.
 3. Click **Continue**.
 4. Select the progress report you want to assign to the selected Awardees.
 5. Set a report deadline. *(If you need to edit this deadline later, you must navigate to the individual application.)*
 6. Review the email message and make changes if needed. When the message is finalized, click **Schedule Assignment**. The email will be sent immediately.

Assigning Progress Reports (In Batches)



Assign Progress Report

*Select Report

Progress Report 1 4

*From

*Awardee(s) Email Address(es)

Separate email addresses with commas

Cc/Bcc others on this message

*Report Deadline:

06/10/2021 11:59 PM EDT 5

*Subject

Progress Report Assignment

*Message ?

Cancel

Schedule Assignment 6

Setting Report Reminders (Optional)

Screenshots on next page

Schedule additional email reminders to encourage the Awardee to complete each report.

1. Click the **Progress Report(s)** button on the right side.
2. **Expand** the relevant progress report by clicking the > or its title.
3. Click the **Schedule Reminder(s)** link.
4. Choose how to send the reminder:
 - On a specific date and time OR
 - Offset the send date by a certain time period before the deadline.
5. If needed, cc or bcc others on the message. This is optional.
6. Review the email subject line and edit if necessary.
7. Review the body of the email message and edit if necessary.
8. Click the **Schedule Reminder** button in the lower right corner.

Click the **Add Another Reminder** link to configure additional reminders for the progress report.

Setting Report Reminders (Optional)

[Back](#) | Manage Application: A sample competition

You made Jane Doe a competition awardee.

[Rescind Award](#)

Award Cycle: Ongoing
Internal Submission Deadline: Saturday, May 15, 2021
Application Title: My really innovative proposal
Application ID: 000007
Applicant First Name: Jane
Applicant Last Name: Doe

Assignment and Reminders

Expand a report to schedule the assignment and reminder(s), as well as to set a report deadline for this Awardee. A report will only be visible and accessible to the Awardee after the report assignment email has been sent.

☐ Skip Progress Report 1 for this Awardee

> **Progress Report 1** Due: 06/8/2021

☐ Skip Progress Report 2 for this Awardee

Application

Accept or Return Application

Reviewers

Activity

Notes (0)

Edit

Progress Report(s)

Delete Application

1 of 5 Applications

Prev

Next

Award or Reject Application

Award

Progress Report 1

Due: 06/8/2021

Assignment and Reminders

When you're ready, configure and schedule this report assignment email to be sent to the Awardee. After the assignment has been scheduled, you will be able to schedule report reminders at any time.

Report Assignment ?

> Assignment was sent on: 05/10/2021 2:53 pm [Edit Deadline: 06/8/2021](#)

Report Reminder(s) ?

+ Schedule Reminder(s)

+ Add Another Reminder

What will awardees see?

infoReady

Hello, Jane | Sign Out | Help

HOME APPLICATIONS PROGRESS REPORTS CALENDAR

Your Progress Reports

All of your Progress reports are listed below. The search, sort and filtering options allow you to organize your Progress Reports as desired. Click the Report Title to access your Progress Report, along with details about the opportunity, and your submitted application.

Show 100 entries Search:

Application Title	Competition Title	Report Title	Report Status	Deadline
			All	
My sample proposal	A sample PR competition	1-Year Report	Submitted	01/1/2022
My really innovative proposal	A sample competition	Progress Report 1	Submitted	06/8/2021
My really innovative proposal	A sample competition	Progress Report 2	Not Yet Assigned	
An application title	A sample competition	Progress Report 1	Overdue	05/11/2021 at 11:00 am
An application title	A sample competition	Progress Report 2	Not Started	12/1/2021

Showing 1 to 5 of 5 entries Previous 1 Next

- **Progress Reports** tab (must be logged in)
- Click **Progress Report Title** to view a specific report
- **Status** and **Deadline** columns help Awardees prioritize report completion

Continued on next page...

A sample competition

Application Title: An application title

Progress Report 1: Due: 05/11/2021 (Overdue)

Progress Report 2: Due: 12/1/2021

Progress Report(s)

Excel

Progress Report 1

Due: 05/11/2021

Progress Report 2

Due: 12/1/2021

* Indicates required

Progress Report 1

Funding

Have you received funding?

Yes

Funding Date Range:

Start Date

Direct Funding:

\$

Indirect Funding:

\$

Publication Description:

Rich text editor toolbar with icons for undo, redo, bold, italic, underline, link, unlink, list, indent, outdent, and source. Below the toolbar are dropdown menus for Styles and Format, and a text area for the description. The status bar at the bottom indicates "Words: 0, Characters: 0".

[Add Another Publication](#)

File Upload for Progress Report 1

Upload File

Select File

Upload

Save as Draft

Submit Report

- Any assigned report will display at the top with its due date.
- Report content (including title) will vary, based on the administrator's configuration.
- Awardees can save as draft if needed.
- When ready, they click **Submit Report**.

Downloading Progress Report Data

- **Individual report** – Click Excel icon on Progress Report(s) screen of application
- **Opportunity-Level** – Download *Application & Applicant Details* report from Data Grid
 - Each progress report shows on its own tab
 - Section headers and file names display
- **Across multiple opportunities** – Reports tab > Applications > Download Report > Progress Reports

More questions?

Visit the Support Portal

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

Email support@inforeadycorp.com

