



Administrator Guide

Bronze Level

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# Introduction

## Welcome to InfoReady!

Congratulations. Your organization has invested in the best product on the market for managing internal application and review processes and other types of opportunity workflows. You can now automate any forms you collect and make decisions faster with InfoReady. Clients love using their site for a wide range of programs and opportunities.

Some of the most popular uses include:

- Abstract Review
- Awards
- Conference and Travel Approval
- Employment Opportunities
- Event Sign-ups
- Fellowships
- Graduate Admissions
- Internal Funding Opportunities (Seed Grants, Pilot Grants, etc.)
- Internal Routing of Proposals and Approval Documents
- IRB Approval
- Limited Submissions
- Poster Competitions
- Recognition Awards and Nominations
- Scholarships
- Student Advising
- Tenure, Promotion, and Sabbatical Applications
- Undergraduate Research

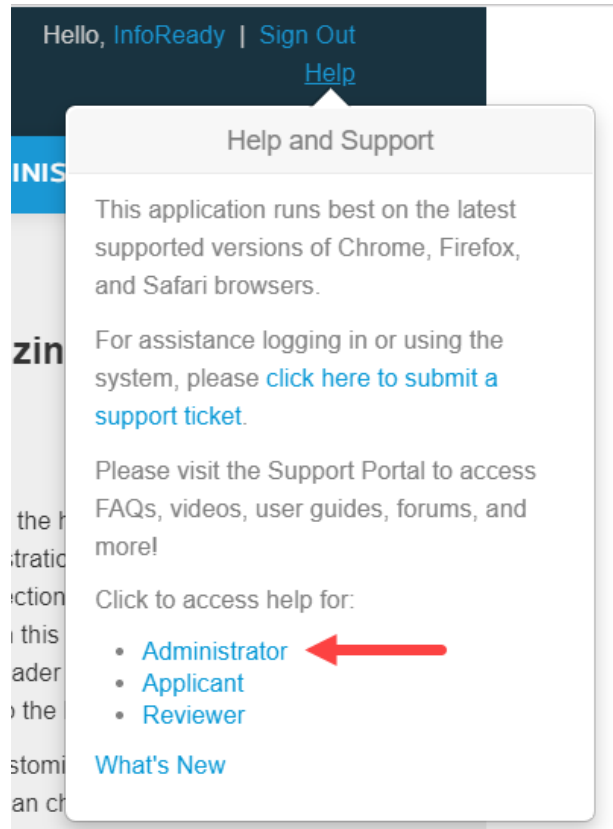
Most clients find that using InfoReady helps them significantly cut down on administrative time – some by even 95%! So get excited, you're about to have more time to wear all your hats.

InfoReady requires little training and no ongoing IT support from your institution. We recommend you keep this guide with you when creating your first opportunity. After that, you should be all set.

## Before We Begin

### Support Resources

Aside from this Administrator Guide, InfoReady maintains a Support Portal that has videos, articles, and additional user guides to help you learn and use InfoReady. To access, log in to your site, hover over **Help** in the upper righthand corner, and click **Administrator**:



You can also contact InfoReady Support by phone at (734) 929-0010 x256 or by email at [support@inforeadycorp.com](mailto:support@inforeadycorp.com). Business hours are Monday-Friday, 8:30am-7:30pm ET.

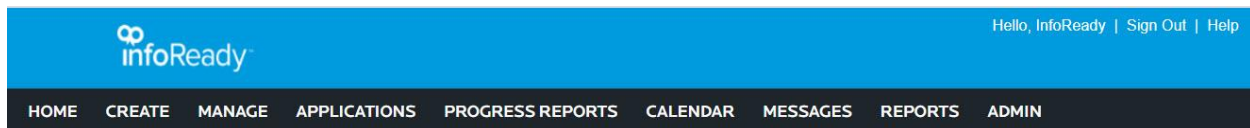
### Terminology

The InfoReady platform can be customized to meet your needs. InfoReady comes configured with the default terminology listed below. For a list of terms which can be customized and suggestions for changes to the platform terminology, contact [support@inforeadycorp.com](mailto:support@inforeadycorp.com).

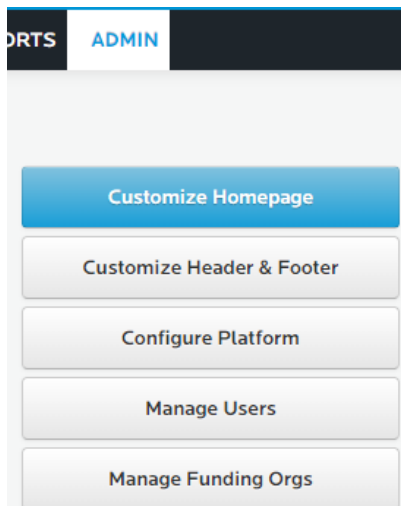
**Competition** - We say competition; you say application process, RFP, RFA, opportunity, form, grant, etc. It's hard to find common language when we work with so many different institutions!

**Template** - Structure of an application process that can be used to create similar opportunities over time. The default InfoReady templates available to you will depend on your Level of Service. From those, you can create an infinite number of custom templates for different types of use cases. All aspects of an opportunity can be saved as part of a template, saving administrators valuable time when repeating processes. Using templates also streamlines data collection and reporting. (*Note: Administrators can also copy opportunities as a means of replicating*).

**Global Navigation Bar** - The options bar along the top of your site, and right under your logo, which follows you around with navigation options. The tab options will vary based on your user role.



**Local Navigation Menu** - The tools menu that pops up on the right-hand side of your screen. The choices here change depending on where you are on the Global Navigation Bar. The example below shows the Local Navigation Menu of the Admin tab.



## Determine Administrators

Your organization has purchased our Bronze Level of Service, which means you will have 3 or 4 types of users:

- Applicants – unlimited
- Reviewers – unlimited
- Administrators – up to 2\*
- Super Administrators – up to 2\*

\*You have a total of 2 administrative seats—one of those must be a Super Administrator. The other admin seat can be assigned as Administrator or Super Administrator, whichever best fits your needs.

Before getting started, you should decide who your Super Administrator(s). Refer to the appropriate chart below to see the differences:

	<i>Administrator</i>	<i>Super Administrator</i>
<b>Creating Opportunities</b>	Can create application processes and only has access to templates that they have created or have been shared with them	Can create application processes and has access to all templates
<b>Managing Opportunities</b>	Can manage and report on application processes they have created or been added as a Co-Administrator	Can manage and report on all application processes
<b>Managing Users</b>	Can view user profiles of applicants to application processes they have created or been added as a Co-Administrator	Can manage all users
<b>Platform Configuration</b>	n/a	Can customize all platform configuration options through the Admin tab

## Other User Permissions

Aside from the user roles described above, the platform also has a few types of permissions that can be assigned to any user without changing their defined user role in InfoReady.

### *Proxy*

- The only action proxies can take is to submit on behalf of the applicant. Proxies are unable to submit reviews on behalf of other users.
- Proxies are added from the user's profile, either by the applicant or by a Super Administrator.

### *Viewers*

- Viewers can view, but not edit, the information in the data grid when managing opportunities. They can download submissions in PDF format and can extract Excel reports.
- Viewers do **not** count as Administrators in your license total, and you can have an unlimited amount.
- They show in the **Manage Users** list with whatever role they currently have when added as a Viewer.

## Registration and Logging In

### *Accessing the Registration and Login Page*

### *Accessing the Registration and Login Page*

- Click **Log In** in upper right-hand corner of the site.
- OR
- Find an opportunity on the homepage and click the **Apply** button (most common for applicants).
- Returning users should log in with their email address and password.
- First-time users will need to click **Register**. They will input their name and email address and click **Create Account**. Then they must confirm their account via an email notification sent to that email address. They will use this email address and the password they set to access the site.

*Note: If you want to share a direct URL to your site's login screen, simply add #login to the end of the URL (e.g., <https://yoursite.infoready4.com/#login>).*

### *Administrators*

New Administrators should be added by a Super Administrator in the [Manage Users](#) section of the **Admin** tab.

### *Reviewers*

Reviewers are added to InfoReady automatically when they are assigned their first review.

- If the reviewer is at your institution, they will receive an account creation email directing them to log in via SSO.



- If it is an external reviewer, they will receive an account creation email instructing them to confirm their account and create a password.

### *Applicants*

Applicants are added to InfoReady automatically when they click **Apply** for the first time to an opportunity.

This will automatically redirect user to login page, where they can register or log in:

- Internal users should click on **blue button: Login for {institution name} Users** to sign in with their institutional credentials.
- External users will need to click **Register**. They will input their name and email address and click **Create Account**. Then they must confirm their account via an email notification sent to that email address. They will use this email address and the password they set to access the site.

## Additional Features

At our Bronze level of service, you currently have access to core InfoReady functionality. Please contact your account manager or [sales@inforeadycorp.com](mailto:sales@inforeadycorp.com) if you need additional administrative seats, Single-Sign On (SSO) integration, template options, reference letter capability, and/or if you would like to discuss purchasing Professional Services to customize your platform beyond the extent of our current product's capabilities.

## Configuration (Admin Tab)

The first thing to do once you receive your InfoReady site is to have the Super configure your settings. Click on the **Admin** tab on the Global Navigation Bar, and administration tools will appear in the Local Navigation Menu.

### Customize Homepage

Enables you to modify content on the homepage including:

- Text areas - **Welcome Message** (at top) and **Right Sidebar** (Post contact information or specific instructions here.)
- **Custom Image** - Image on main homepage. must be exactly 325 pixels wide and 280 pixels high (email [support@inforeadycorp.com](mailto:support@inforeadycorp.com) if you need help resizing your image)
- **Support Documents** - These will appear below text on right sidebar.

[Click here for Homepage tips.](#)

## Customize Header & Footer

Under Admin, click **Customize Header & Footer** to:

- Update header logo (image must be exactly 325 pixels wide and 45 pixels high (Email [support@inforeadycorp.com](mailto:support@inforeadycorp.com) if you need help resizing your image.)
- Customize header text.
- Add contact information to footer and select contact email address.
- Update footer logo (image must be *exactly* 70 pixels wide and 75 pixels high (Email [support@inforeadycorp.com](mailto:support@inforeadycorp.com) if you need help resizing your image.)

[Click here for Header/Footer tips.](#)

## Configure Platform

Except for Email Domains, these inputs standardize data critical for reporting on, sorting through, and searching for opportunities. Every time an Administrator creates an opportunity, they will need to select from the options you provide here, specifically **Category** and **Cycle**. Each section has instructions that you should read thoroughly. Sections are as follows:

### *Email Domains*

Email domain rules control who can register for an account on their own. This functionality pertains only to potential applicants and no other type of user. Administrators can always create user accounts using addresses from any email domain.

### *Single Sign-On (SSO) Domains*

If your site has SSO enabled, enter the appropriate email domain(s) here. You can also choose to force users who enter an SSO email domain to log in with their institutional credentials. If a user with an SSO email domain tries to use the **Login for Other Users** section to sign in, they will get a red error message directing them to the **blue SSO Login button** instead. Consult with your institution's IT staff if you have questions about which domain(s) to enter.

### *Manage Application Process Emails*

Allows you to set rules for the sender of automated emails sent from your InfoReady site.

- **Checking this box** is recommended. By checking this box:
  - Opportunity emails will be sent by the owner (primary administrator).
  - Login and registration emails will be sent by the contact email address listed in the footer.

- Unchecking the box will cause all opportunity-level emails to be sent from a single email address.
  - If you leave the **Select Email Address** dropdown blank, all platform emails will be sent from the contact email address in footer.
  - If you prefer, you can select an administrator's email address from the dropdown menu.

### Categories

Categories can be used to group opportunities together for better organization, submission searching/sorting, and reporting. You may want to have different categories for limited submissions, internal opportunities, etc. You can also use categories to clearly define who can apply for an opportunity (i.e., *Faculty Only - Limited Submission*).

### Cycles

Cycles are most often used to organize by time period (e.g., academic year, fiscal year). Create an *Ongoing* or *Rolling* cycle for those with no set time frame.

### Participating Organization Hierarchy

Use Participating Organization Hierarchy to create a standardized list of the offices, schools, and/or departments at your institution for quick selection by users. The organization hierarchy list can be used in several ways:

- Users identify their organization(s) in their profiles
- Serve as tag on opportunities, creating opportunity metadata
- Administrators can limit who can complete certain applications based on the org list
- When included as a submission question, Administrators can collect standardized department information

As part of your site setup, Super Administrators will work with InfoReady to construct your initial hierarchy. If you need to make adjustments later, use the **Add Level** button to add new entries or **Edit** to change the name of existing entries. The hierarchy can be up to three levels. To activate the feature, check the box labeled **Turn On Participating Organizations Functionality**. Conversely, you can deactivate the feature by unchecking the box.

An optional feature called **Department Driven Routing Steps** works with Participating Organization Hierarchy to automatically assign reviewers based on their role, the applicant's organization (i.e., department), and the selected settings in a routing step. [Click here for more information on Department Driven Routing Steps.](#)

### *Sitewide Templates*

As templates are created, they will appear here. Each will have a last updated date and three action links next to it:

- **Share** - Enter the email address of the recipient. You can share templates with other administrators at your institution, or an administrator at any other institution that uses InfoReady. This can be a great way to share use cases and best practices with your peers.
- **Edit** - Click to return to creation process for that template. Make sure to click **Save Edits** if changes are made.
- **Delete** - Remove a template from the platform.

### *Set/Change Time Zone*

Verify the time zone for your site. If your time zone is not listed, contact [support@inforeadycorp.com](mailto:support@inforeadycorp.com).

## Manage Users

Click here to see a list of all users with accounts in your site. You can sort or search the list by username, email address, department, or role. You can also filter the list by department and user role. Click **Download User List** to get a printable spreadsheet list of all the users in your InfoReady site.

To view a user's account, click their name. Their profile page will show basic contact information, as well as submission and/or review history. Super Administrators will also be able to [add proxies for a user](#).

Here you can also manually add users, which is most useful for creating accounts for other Administrators and Super Administrators. Click the **Add User** button, located on the right-hand side of the page under **Manage User Tools**.

If needed, you can also manually add accounts for reviewers and applicants, though it will rarely need to be done. Remember that most applicants will self-register or automatically log in with SSO. New reviewers will automatically have accounts created for them when reviews are assigned.

[Click here for Manage Users tips.](#)

## Manage Funding Orgs

If you use InfoReady to manage proposals that will become external submissions, you can enter funding organizations here to report on them later (data points!). You can also add internal funding sources, like an office or initiative. The **Add Funding Orgs** button is located on the right-hand side of the screen in the Local

Navigation Menu. Clicking the name of a funding organization will show a list of sponsored projects from your site for that organization. These funding organizations will be available as funding sources to include on the [Details page](#) (described in the next section).

## Creating Opportunities

After your Super Administrator has finished configuration, Administrators can start adding opportunities right away. You can run an unlimited number of opportunities (part of your license) so don't be shy! Any forms your office receives can easily be turned into opportunities in InfoReady. Contact [support@inforeadycorp.com](mailto:support@inforeadycorp.com) for help finding new uses.

To get started, click **Create** on the Global Navigation Bar. You will now be able to choose a template to use for your opportunity.

### Template Selection

You'll encounter three dropdown boxes. In the first **Template Type** dropdown, select among the 3 template source options: **Shared Templates**, **My Templates**, and **InfoReady Templates**.

**Create**

Start by selecting a template from one of the available sources and identifying the purpose. You can save your selections for next time by clicking the toggle button "on".

To learn more about each of the template options, click on the information tooltips ? below.

Save selections as default ☐

**Template Type:**  ?

**Template:**  ?

**Purpose:**  ?

Select **My Templates** to choose from templates you have saved in the past and choose **Shared Templates** to choose from templates that another administrator has shared with you.

For your first opportunity, you should select **InfoReady Templates**. Choose the **Funding Opportunity** template. This is the standard that includes fields often necessary for internal funding and limited submission competitions.

After selecting your template, the platform asks for the purpose of the opportunity in the last dropdown field. This question is solely used for InfoReady's internal research—so we can learn what types of additional templates might be useful in the future. This option will not affect how the opportunity is created.

Click **Next** to be taken to the **Details** page, with a local navigation menu on the right side of the screen. The menu will guide you through the 6-step process in creating an opportunity:

## Step 1 - Details

The information you enter under **Details** will become the posting (RFA, RFP, call for submission, etc.) for your opportunity. It should include general information about the opportunity that you want to share with applicants, reviewers, and other administrators. The Details page contains a mix of required and optional fields, and you can choose to display these items to applicants (if needed). Admins also have the capability to add custom text and date fields. Information entered in fields on the Details page will be available when retrieving high level reports from the **Reports** tab.

### *Show or Hide Details*

You can choose which details you would like the applicant to see by using the checkbox located to the left of each field. By default, any field you fill out will be shown to applicants. Uncheck the checkbox if you do not want a detail to be displayed. Fields that are not required and are left empty will not be shown to applicants. Admins can edit which fields are displayed to applicants at any time after launching the opportunity.

### *Funding Organization*

Administrators can add a [funding source](#) to any opportunity made from the **Funding Opportunity** template. They can also identify a **Funding Available** amount. During the award process, administrators will be able to designate an award amount, which will be included in reports.

### *Assign Co-Administrators*

On this page, you can also assign co-administrators to help manage the opportunity by clicking the **Add Administrator** button. Make sure to use the email address associated with their InfoReady account. Co-Administrators have the same access to the opportunity as the Administrator who creates it.

*Note: By default, administrators can designate any other user as a co-administrator. The action will add an administrator seat to your license. This default option can be disabled by contacting InfoReady support. If disabled, only existing administrators can be added as co-admins. Any new Administrators would need to be added by a Super from the **Admin** tab, **Manage Users** section before they can be added as a Co-Administrator.*

[Click here for Details tips.](#)

## Step 2 - Requirements

When you fill out the **Requirements** section, you're building the form your applicants will see, complete, and return. These will also be the contents (i.e., questions and file uploads) that reviewers will evaluate as part of each submission.

You'll notice there are some predefined requirements on your form already. *Applicant First & Last Name* and *Proposal Title* are required, but the others you can leave as optional or exclude them from your form entirely.

**Notes to Applicant** will be shown as instructional text within the application form. Applicants will see them when they click on the field to begin answering the question, or they will appear directly above a text box.

You can add as many additional fields as you want by clicking **Add Requirement**. There are 7 different types of fields you can add to the application 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 choose to enforce character or word limits.
- **Text Field** – Plain text entry with a 255 character limit
- **Yes/No** – Applicants select either yes or no

To rearrange the fields on your form, just drag and drop them into place using the 8-square icon to the right of each field:

Req	Opt	Exc	Requirement	Form Type	Notes To Applicant
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Applicant First Name	Text Field	<input type="text" value="Note to Applicant"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Applicant Last Name	Text Field	<input type="text" value="Note to Applicant"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Applicant Degree(s)	Text Field	<input type="text" value="Note to Applicant"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Email Address	Text Field	<input type="text" value="Note to Applicant"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Primary Organization	Multiple Choice	<input type="text" value="Note to Applicant"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Phone Number	Text Field	<input type="text" value="Note to Applicant"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Primary Appointment Title	Text Field	<input type="text" value="Note to Applicant"/>

Click **Add Upload Option** to collect up to 10 document uploads. You can make each optional or required and can include instructions.

### *Applicant-Driven Routing Steps*

Enabling Applicant-Driven Routing Steps requires applicants to designate individuals (e.g., advisor or department chair) who will automatically be assigned an approval or review to complete prior to the application entering the formal review process. You can customize the label(s) for the pre-approver(s) and add instructions for applicants. Then finish the configuration in the Routing Steps section. Space for up to 10 pre-approvers can be added.

*Note: The Administrator will not need to make the review assignments. Applicants enter an email address for each reviewer, which is pre-populated into a routing step (see [Step 3 - Routing Steps](#)).*

*Note: Enabling this feature will automatically accept applications into the review process. The administrator will **not** be able to return applications to applicants for edits.*

### *Co-Applicants*

Enabling Co-Applicants allows applicants to add the names of additional applicants to their application. Administrators can choose to collect additional field information to this section to capture more details about co-applicants. This section is for administrative data-gathering purposes only. It does not grant co-applicants access to the application.



### *Applicant Acknowledgment*

You can require that applicants agree to an **Applicant Acknowledgement** statement (e.g., conflict of interest statement, honor code) before submitting their application. No need? Check the box labeled *Do not include an acknowledgement statement*.

[Click here for Requirements tips.](#)

## Step 3 - Routing Steps

Remember when you had to email applications to your reviewers? Or worse, walk around and collect signatures? InfoReady does that for you(!), and the **Routing Steps** page is where you design the review workflow. It is also where you build the form(s) that reviewers complete for their evaluation of the application(s).

*Note: Setting up routing steps is not required to launch an opportunity. If you want to start collecting applications right away, you can return to this step later. All routing steps should be finalized before assigning reviewers.*

Each opportunity can have an unlimited number of routing steps. If your opportunity does not require any routing steps, just check the box labeled *Routing Step(s) are not needed*. The default number is one, but you can add more using the **Add a Routing Step** button at the bottom of the page.

For each routing step, you will have several components to complete:

- **Routing Step Name** - Label used on administrative end (e.g., Department Review, Chair Approval)
- **Routing Step Order** - Sequence of step
- **Routing Step Type** (see below) - Type of feedback gathered from reviewers (review form/rubric)
- **Default Reviewer(s)** (optional) - Email address(es) listed here will be pre-populated into the review assignment for that routing step. However, an administrator will still need to complete the review assignment later when managing.
- **Review Instructions** (optional) - Enter special instructions for reviewers here. Display at top of review form.
- **Add Attachment** (optional) - If file is uploaded here, reviewers will have to upload something on the review form.
- **Comments to Administrator** - Yes/No option to include comment box that only admins will see.
- **Require Reviewer Acknowledgement?** (optional) - Can add a statement that reviewers will have to acknowledge by checking a box on the review form (e.g., conflict of interest)

### *Routing Step Types*

#### **Comments and Ratings**

- Up to 20 criteria - e.g., 5 Comments and Ratings = 5 comment boxes, each with its own rating scale
- Can edit the label and instructions for each question, as well as rating range
- *Note: You can't edit the rating scale once reviewers have been assigned.*

#### **Approve / Do Not Approve**

- Acts as a stage gate in the opportunity by giving a reviewer the ability to say Approve/Do Not Approve.
- Labels can be edited to provide any two choices (e.g., Advance or Do Not Advance)

#### **Committee Approval**

- Allow a single reviewer to enter the consensus committee decisions for assigned application(s)
- The administrator for the opportunity is the default reviewer, but you can change the reviewer up until the first application is assigned for review. After that point, the reviewer cannot be changed.
- The assigned reviewer and the opportunity administrators will be able to email a packet of application materials (in PDF format) to committee members.
- Default reviewer then enters consensus decision in InfoReady.

#### **Committee Ranking**

- Allow a single reviewer to enter the consensus committee rankings for each assigned application.
- The administrator for the opportunity is the default reviewer, but you can change the reviewer up until the first application is assigned for review. After that point, the reviewer cannot be changed.
- The assigned reviewer and the opportunity administrators will be able to email a packet of application materials (in PDF format) to committee members.
- Default reviewer then enters consensus rankings in InfoReady. The number of applications assigned to this step will populate the rating scale (e.g., 15 applications, 1 through 15).

#### **Document Upload**

- Allows the reviewer to upload a document.
- Supported file types are: .doc, .docx, .xls, .xlsx, .pdf, .txt, .csv, and .rtf.

The image on the next page shows what the Routing Step Type dropdown looks like on the Routing Steps page.

*Note: The number of Comments and Ratings goes up to 20.*

Routing Step 1

Step 1 - Define Routing Step

Routing Step Name: Routing Step 1

Routing Step Order: Step 1

**Routing Step Type:** 1 Comments and Ratings Combination

Reviewer Role:

Or

Default Reviewer(s):

Reviewer Instructions

You might want to include instructions that reviewers will see them at the time they review.

Add Attachment:


**VERY IMPORTANT** - You can add, edit, and/or delete routing steps at any time, even after an opportunity is launched. *However*, if you change the routing step type, you will need to re-enter question information (e.g., 4 Comments and Ratings to 5 Comments and Ratings). Also, keep in mind that if you delete a routing step that is already in progress, you will lose any associated review data.

### *Routing Step Options and Recap*

Review processes come in all shapes and sizes. **Routing Steps Options** help you manage the review process the way you need it run. Make sure to check any necessary boxes under Routing Step Options for each step (see image below). If you want routing steps to occur at the same time (i.e., review process open for reviewers on multiple steps at once), check the *Runs Concurrently With Following Step* box.

*Note: If you run routing steps concurrently, you will not be able to pass completed reviews from one routing step to another that is concurrent with it. So, if you need review feedback from one step included for reviewers in a later step, do not run those steps concurrently.*

Use the **Routing Step Recap** options to automatically share the results of a routing step with the reviewers from that step after the step has been completed.

Routing Step Options	
<input type="checkbox"/>	Reviewer(s) can see the identity of the applicant.
<input type="checkbox"/>	Provide reviewers with access to all applications, not just the one(s) they are reviewing.
<input type="checkbox"/>	Pass completed reviews from this Routing Step to reviewers in the next Routing Step.
<input type="checkbox"/>	Runs Concurrently With Following Step 

Routing Step Recap	
<input type="checkbox"/>	Upon routing step completion, email all completed reviews to all reviewers assigned to this step.
<input type="checkbox"/>	Each reviewer may see the identities of the other reviewers.
<input type="checkbox"/>	If there are previous routing steps, include those reviews as well.

If you'd like to skip the Accept/Return stage of the process (occurs prior to assigning reviews to routing steps) and move directly to assigning reviews, simply check the box labeled *Disable Accept or Return Application*. **However**, disabling Accept/Return also prevents you from returning applications to applicants for edits and resubmission.

If you use [Applicant-Driven Routing Steps](#), this box will be checked, and it cannot be un-checked because reviewers are immediately assigned to the first routing step(s). **So**, if you use Applicant-Driven Routing Steps, you will not be able to send applications back to applicants for edits. Any edits will need to be made by an administrator.

[Click here for Routing Steps tips.](#)

### *Reviewer Acknowledgement*

You can require that reviewers agree to a **Reviewer Acknowledgement** statement (e.g., conflict of interest statement, honor code) before submitting their review. No need? This option can be disabled or enabled per routing step.

## Step 4 - Notifications

Use the **Notifications** section to select which actions you would like to be notified about and to customize the email templates for the opportunity. You can also add additional email addresses (Co-Administrators or others) to receive notifications. The **E-Mail Notification Messages** section has templates of both automatic notifications (e.g., submission confirmation) and messages that can be tailored for individuals during the management process (e.g., award emails).

For example, you can edit the email template for the award email in the Notifications section to have your preferred generic message AND then make ad hoc edits when awarding individuals. This provides the flexibility to save time with the email template and lets you personalize the message. Edits made to email templates are saved along with saved opportunity templates.

We will show you how to manage notifications to applicants and reviewers in the **Managing Opportunities** section.

[Click here for Notifications tips.](#)

## Step 5 - Progress Reports

Sometimes, after an opportunity has concluded, you'll want to follow up with your awardees (winners) to collect and measure outcomes to help you determine ROI of financial awards. **Progress Reports** section is where you build the form(s) your awardees will fill out. Progress Reports is one of the terms that can be customized to match your needs, should you decide to call these reports by another name such as annual reports, final reports, or updates.

*Note: If you are setting up an LOI, you won't have access to the Progress Reports page until you convert to a regular opportunity or award from the LOI.*

First, uncheck the box to enable Progress Reports. Then select the pre-defined requirements you want to make required, optional, or exclude. If needed, you can add your own sections, questions, and re-order them. Include one or more file upload options, where you can provide a template file upfront, or simply ask awardees to upload a specific document. For programs that require multiple progress reports, you can even create a series of progress reports and schedule or assign them to awardees over time.

When managing applications after the awarding process is complete, you'll assign the progress report(s), list due date(s), and set reminders to encourage report completion. View the status of various progress reports by using the Post Award tab of the Data Grid. [Click here to jump to the Managing Award Decisions section.](#)

Of course, if you don't want to collect progress reports, just check the box at the top of the page that says:  
*Progress report(s) are not needed.*

[Click here for Progress Reports tips.](#)

## Step 6 - Finalize

Congratulations, you're almost done! Select a completion option under Finalize. Options include:

- **Save As Draft** - Your opportunity has been auto-saving but if you're not quite finished, you can also save here.
- **Save As Template** - Use this option if you run opportunities like the one you have just created. That way, when you go to create an opportunity in the future, some of the work is already done. If you want to launch the opportunity you have just created, AND use it as a template, save it as a template first. Then use that template to create a new opportunity.
- **Launch** - Ready to start collecting applications? Launch now, and the opportunity will load on the calendar and home page. Applicants will be able to apply right away.
- **Set Launch Date** - Not quite ready to start collecting applications? Set the launch date for a time in the future. The opportunity will be added to the calendar immediately, and when the launch date approaches, it will automatically be added to the homepage and start accepting applications.

## Managing Opportunities

Once you launch an opportunity, the applications will start rolling in, and you can view and manage them from right inside your InfoReady site. You can manage opportunities by clicking the **Manage** tab on your Global Navigation Bar. This page will display all the opportunities for which you are the owner or co-administrator and is organized in the following sections:

- Two distinct sections on the center of the screen for *Open* and *Archived*. The table can be searched, sorted, and filtered. **Clicking the title will take you to Manage**
- On the right side: Drafts, your templates, and templates shared with you (in order from top to bottom)
- **Search Database** allows you to search all opportunities that have been launched on your site.

## Searching for Opportunities

Enter keywords or phrases to search the platform database, including opportunities for which you are not the owner or co-administrator. The search results can be sorted by a few parameters and can be filtered by Category and Cycle. To easily see all opportunities, leave the search bar empty and click **Search**. Since the

search results may include opportunities in which you aren't an administrator, opening any such opportunities will provide the limited options of viewing the Details page and previewing the application form.

## Managing Open Opportunities

Click on any **title** to manage that opportunity. You'll see a menu for managing the opportunity in your Local Navigation Menu.

**Sample Opportunity**

This is launched.

**Dates**

Internal Submission Deadline: Friday, October 1, 2021

Remove From Homepage Date: Friday, October 1, 2021

**Details**

Administrator(s): InfoReady Support (Owner)

Category: Testing

Award Cycle: Testing

Number of Applications Allowed Per Applicant: Unlimited

Number of Possible Awardees: Unlimited

Total Funding: 1,000,000

Funding Source(s): 1,000,000 — NSF

Will any funds be matched?: No

Applications Submitted: 4

Reference Letters Required per Applicant: Minimum: 1, Maximum: 2

Supporting Documentation: [Sample File](#)

**Description**

**Viewers**

[Send Review Digest Email Now](#) Next automated email is scheduled for: 10/9/2021

**Local Navigation Menu**

- Manage
- Edit
- Preview
- Share
- Activity Log
- Submit By Proxy
- Copy
- Archive
- Delete

Sections include:

### *Manage*

- **Dates, Details, & Description** - All details you entered when creating the opportunity are listed here. The Description is collapsed by default but can be expanded.

*Note: Hidden fields will not appear for applicants and reviewers, but will appear for administrators (e.g., If administrator chose to hide number of potential awardees, this info will still show on Details screen in Manage view but won't for potential applicants).*

- **Viewers** - Viewers can view, but not edit, the information in the grid. They can download applications in PDF format from the Batch Actions drop down and can extract reports from the Download Reports link. Viewers do not count as Administrators in your license total.
- **Data Grid** - Lists all submissions for the opportunity. The tabs across the top organize the process into stages. Default columns for each tab display basic information. Add columns as needed and re-arrange them to customize your view of each tab. Click **Expand Screen** to maximize the viewing area.

The screenshot displays the 'Data Grid' interface. At the top, there is a red box containing the 'Expand Screen' button. Below this, a navigation bar includes tabs for 'All', 'Submissions & Drafts', 'Review', 'Award', and 'Post Award'. The 'Overview' section features three donut charts: 'Application Status' (5 total), 'Funding Status' (1M total funding), and 'Ref Letter Status' (6 total reference letters). Below the charts is a red box containing the 'Batch Actions', 'Columns', 'Grid View', and 'Download Reports' buttons. A search bar is located to the right of these buttons. The main area shows a table of applications with columns for Select, ID, Title, Applicant, Primary Org., Status, Date Submitted, and Last U. The table lists five applications, including 'My application', 'My application title', 'Mary's proposal', 'A proposal for ABCDEFG', and 'Another application'.

Select	ID	Title	Applicant	Primary Org.	Status	Date Submitted	Last U
<input type="checkbox"/>	--	My application	Forster, Faura	Academic Areas - College of Engineering - Mechanical Engineering	Draft	--	08/25/2021
<input type="checkbox"/>	000010	My application title	Doe, Jane	Academic Areas - College of Arts & Science - Psychology	Awarded	08/20/2021 1:39 pm	10/12/2021
<input type="checkbox"/>	000011	Mary's proposal	Smith, Mary	Academic Areas - College of Engineering - Chemical Engineering	Reviews Active	08/24/2021 10:36 am	10/12/2021
<input type="checkbox"/>	000012	A proposal for ABCDEFG	McTesting, Tess	Academic Areas - School of Education - Secondary Education	Accepted	08/24/2021 10:38 am	10/12/2021
<input type="checkbox"/>	000013	Another application	Forster, Faura	Academic Areas - College of Engineering - Mechanical Engineering	Submitted	08/24/2021 1:36 pm	10/12/2021

### Edit

Click **Edit** to re-enter the 6-step creation process. Make sure to click **Save Edits** after making any changes.

### Preview

Click **Preview** to see what the application form looks like to applicants.

*Note: Notes to Applicant do not appear in the preview.*



### Share

Click **Share** to send an email with the details and a link to any person or listserv. Direct link is also here and can be used to advertise the opportunity in newsletters, other websites, etc.

### Activity Log

Click **Activity Log** to view actions related to the opportunity, with the option to view by user type.

### Submit by Proxy

Click **Submit by Proxy** to submit an application by proxy as an administrator, or view an applicant's draft application. Start typing the email address of the applicant and select that applicant from this list. If their email address doesn't pre-populate, you must first add them as a user. See [Manage Users](#) section for instructions.

### Copy

Click **Copy** to create a copy of the current opportunity, with all submitted applications and reviews removed. Clicking **Ok** from the pop-up window will take you to the **Details** page of the copied opportunity. You can then work with the copy as a new opportunity that can be saved or launched on the [Finalize](#) page.

### Delete

If you make a mistake during the creation process and want to start over, or if you want to get rid of a test opportunity you created, use the **Delete** button. Deleting an opportunity removes all historical records for that opportunity.

*Note: If you accidentally delete an opportunity, email us right away at [support@inforeadycorp.com](mailto:support@inforeadycorp.com). We always wait until the next business day to complete the deletion process just in case you need to cancel the request.*

### Archive

Archiving will not allow any further actions to be taken on that opportunity. **Only archive once everything is fully completed. Progress reports can be completed once an opportunity has been archived, but new progress reports cannot be assigned after archiving.** Administrators are not able to reopen an archived opportunity. Please contact [support@inforeadycorp.com](mailto:support@inforeadycorp.com) if you need to take this action.

*Note: It is not necessary to archive an opportunity. If the internal submission date is in the past, applicants will not be able to apply to the opportunity. You will want to delete any pending reviews before archiving an opportunity.*

## Navigating the Data Grid

The Data Grid provides the options to move an application through the entire process, including managing the review process. Use the **Columns** and **Grid View** dropdowns to customize your view to take the actions you need:

- **Columns** – Select any application field, file upload, or routing step to display in the Grid, then click **Apply**. Sort, filter, or search among fields as needed, and drag and drop columns to re-order.
- **Grid View** – Default is a **Full View**, but administrators can switch to **Simple View** or save one custom view per tab. Any administrator with access to the opportunity can choose the saved view as well. To indicate your preferred view upon logging in for the opportunity, click the star to the right.

Click **Download Reports** to download opportunity data, including application, review, and progress report details. *Note: More information on each report is listed in the section.*

The next two sections introduce how applications can be managed either individually or as groups using the **Batch Actions** menu.

## Managing Individual Applications

To access an application:

- Click **Manage** on the Global Navigation Bar.
- Select an **opportunity** by clicking its **title**.
- Scroll down to the **Data Grid**.
- If necessary, sort, filter, or search to find the application.
- Click the **application title**.

**Back** Manage Application: Training Example

**Go back to Data Grid** on's application on Monday, December 27, 2021 at 10:13

Cycle: Ongoing

Internal Submission Deadline: Thursday, January 13, 2022

**PDF**

**Export all contents as a PDF**

**Application Title:** A unique application title

**Application ID:** 001217

**Applicant First Name:** Sarah

**Applicant Last Name:** Simpson

**Applicant Degree(s):**

**Email Address:** @gmail.com

**Phone Number:**

**Primary Organization:** Mechanical Engineering (ME)

**Primary Appointment Title:**

**Contact Person's Name:**

**Contact Person's Email Address:**

**Contact Person's Phone Number:**

**Co-PI(s):** --

**Submission Date:** Wednesday, August 21, 2019 at 8:42 am

**Proposal Title:** A unique application title

**Proposal Abstract:** ajdfkajdf

**Local Navigation Menu**

**Application**

Accept or Return

Reviewers

Activity

Notes (0)

Edit

Delete Application

3 of 32 Applications

Prev Next

**Award or Reject Application**

Award

Reject

**Application Files**

A SAMPLE CV.pdf

The Local Navigation Menu displays several options:

#### [Application](#)

Click the **PDF button** at the top of the page to export all application contents as one file. You can also view the full application on screen, with the file uploads located below the Local Navigation Menu in the section labeled **Application Files**.

#### [Accept or Return](#)

The first step an Administrator must take with a newly submitted application is to **Accept** or **Return** the application. The Administrator should review the application to see if it conforms to all the submission requirements.

- If the application is acceptable, leave the **Accept Application** radio button selected. You can choose to not send an email by checking the *Do not send notification* box. Or edit the email as needed and click **Send**. The applicant will receive your email, and you can now assign reviewers to this application.

- If the application requires some edits by the applicant, select **Return Application**, edit the email as needed, and click **Send**. This will return the application to a draft state for the applicant. In the email, you can instruct the applicant to make specific changes and re-submit their application.

*Note: After you return the application there will be a green message on the screen. Clicking the **Accept** button at this point will remove the returned status.*

- Applications will be automatically marked as *Accepted* if you choose to disable Accept/Return when creating the opportunity.
- Once applications are accepted into the review process, they cannot be returned. If an application needs to be changed after it has been accepted, it will need to be [edited by an administrator](#).

### Reviewers

Once an application is accepted, you can assign **Reviewers** to that application by clicking **Assign Reviewer** under each routing step. A form will pop up, prompting you to:

- Enter the reviewers' email addresses (separate each email with a comma). Email addresses will auto-populate if they were entered in the Default Reviewer field in the routing step.
- Set a review deadline.

*Note: This is a soft deadline. Reviews can always be completed after the deadline but will show as "Overdue" to reviewers.*

- Edit the email (if needed).
- Click **Send** to send an email notification to the reviewer and finalize the assignment.

*Note: Notifications about review assignments for the first routing step are sent immediately, while notifications about reviews in subsequent routing steps are sent with the [Review Requests Digest](#) email.*

Once assignments have been made, you can also use the **Reviewers** screen to:

- Edit Review
- Review by Proxy (as an Administrator)
- Resend Review Requests
- View average ratings by routing the step by reviewer.
- Delete Reviewer - *Note: this will also delete that reviewer's scores/comments.*

For more detailed ratings and comments, click **Download Report** on the [Data Grid](#). As a reminder, you can also assign reviewers to multiple applications at once using [Batch Actions](#).

### Activity

Shows an audit trail of all activity related to the application.

### *Edit*

Allows the administrator to edit the application, even after the submission deadline.

*Note: The option to **Save Edits** and **Cancel Edits** is on the right of your screen, below the Local Navigation Bar.*

### *Award*

Indicate and communicate the final award decision here. For more information, see the [Managing Award Decisions](#) section.

### *Reject*

Indicate and communicate which applications have not been awarded here. For more information, see the [Managing Award Decisions](#) section.

### *Delete Application*

Deleting an application will remove any historical record of the application.

*Note: If you accidentally delete an application, email us right away at [support@inforeadycorp.com](mailto:support@inforeadycorp.com) . We always wait until the next business day to complete the delete process just in case you need to cancel the process.*

## Managing Multiple Applications (Batch Actions)

\*To complete actions in bulk:

1. Select **check boxes** next to the applications that need action.

*Note: To select multiple at once, use the **Show\_\_ entries** dropdown to list larger amounts or even all applications. Then use the **Select** checkbox dropdown to select all.*

2. Select from the **Batch Actions** dropdown.

- **Accept Applications for Review**
- **Return Applications for Resubmission**
- **Assign Reviewers to Applications**
- **Skip Routing Step**
- **Award Applications** - When awarding multiple applications at once, you will not be able to fill in award amount. If you want to fill in the award amount, add an account/reference number, or edit the comments/ratings provided to applicants, you should assign awardees individually.
- **Reject Applications** - When rejecting multiple applications at once, you will not be able to individually tailor the rejection email. If you want to provide personal responses and/or comments/ratings from reviewers, you should reject applications individually.
- **Add Note**
- **Delete Review** Assignments (only available from 'Review' tab)
- **Download Selected (PDF)** – Exports all application materials and includes Table of Contents. You can choose to include various application contents, including certain file attachments, reviews, and progress report(s).
- **Assign Progress Report** (only available from 'Post Award' tab)

The screenshot displays the 'Review' tab of the InfoReady Bronze Administrator interface. At the top, there are tabs for 'All', 'Submissions & Drafts', 'Review', 'Award', and 'Post Award'. Below the tabs is an 'Overview' section with four donut charts: 'Application Status' (5 total), 'Funding Status' (1M total), 'Ref Letter Status' (6 total), and another chart. Below the charts is a 'Batch Actions' dropdown menu, a 'Columns' dropdown, a 'Grid View' toggle, and a 'Download Reports' button. A search bar is also present. Below these elements is a table with columns: 'Select', 'ID', 'Title', 'Applicant', 'Primary Org.', 'Status', 'Date Submitted', and 'Last Updated'. The table contains three rows of application data. A red circle with the number '1' is placed over the 'Select' column header, and a red arrow points down to the first row's 'Select' checkbox. A red circle with the number '2' is placed over the 'Batch Actions' dropdown menu.

Select	ID	Title	Applicant	Primary Org.	Status	Date Submitted	Last Updated
<input type="checkbox"/>	--	My application	Forster, Faura	Academic Areas - College of Engineering - Mechanical Engineering	Draft	--	08/25/2021
<input type="checkbox"/>	000010	My application title	Doe, Jane	Academic Areas - College of Arts & Science - Psychology	Awarded	08/20/2021 1:39 pm	10/12/2021
<input type="checkbox"/>	000011	Mary's proposal	Smith, Mary	Academic Areas - College of	Reviews	08/24/2021 10:36 am	10/12/2021

## Managing Award Decisions and Progress Reports

When the time comes to make the final award decision(s), you have several options for communicating with applicants. Like most other application actions, you can award or reject individually or in batch. The instructions below explain how to award and reject individual applications, which allows for more customization of the email notification message(s). For bulk awarding and rejecting information, see the [Batch Actions](#) section. Here are the options you will encounter:

- Send notification? (Yes or No)
- Award Amount (only when awarding), including the amount per [funding source](#) (if applicable)
- Project Start and End Dates (extensions can be added over time)
- Account/Reference Number (only when awarding)
- Cc/Bcc
- Add Attachment
- Subject (can be edited)
- Option to *Include reviews submitted for this application*
- Email Message text box (can be edited)
- Rescind Award / Withdraw Rejection (only appears on screen after the initial decision has been made)

### *Awarding*

Click the **Award** button to bring up the award option screen. You can choose whether to send an award email by selecting *Yes* or *No*. If you choose to send the notification, you can also include reviewer feedback by checking the box next to *Include reviews submitted for this application*, which will display the anonymous reviewer feedback in the text box on the page. Sometimes, you may want to edit reviewer comments for content before sending to applicants.

Administrators can also choose to input *Award Amount* information, *Project Dates*, and an *Account/Reference Number* on this page (all can be edited after the fact). Project extension dates can be added after awarding the application. Administrators can also Cc/Bcc other relevant parties and attach files. Clicking **Send Award Email** will finalize the awardee process. If an email is not being sent, the button will be labeled **Award Applicant**. Choose **Rescind Award** to undo the decision in the platform, which will also provide the option of sending a relevant message to the applicant.

### *Rejecting*

Click the **Reject** button to bring up the reject option screen. You can choose whether to send the award decision email by selecting *Yes* or *No*. If you choose to send the notification, you can also include reviewer feedback by checking the box next to *Include reviews submitted for this application*, which will display the

anonymous reviewer feedback in the text box on the page. Sometimes, you may want to edit reviewer comments for content before sending to applicants.

Administrators can also Cc/Bcc other relevant parties and attach files. Clicking **Send Rejection Email** will finalize the awardee process. If an email is not being sent, then the button will be labeled **Reject Applicant**. Choose **Withdraw Rejection** to undo the decision in the platform, which will also provide the option of sending a relevant message to the applicant.

### *Progress Reports*

The Progress Report functionality allows administrators to set up a mechanism to identify outcomes, milestones, and ROI through standardized follow-up forms assigned to awardees. After awarding an application, you will see an additional option called Progress Report(s)\* listed on the Local Navigation Menu. After clicking this option, there are two sections:

- **Assignment and Reminders** – Expand the report name to schedule the date(s) when the progress report assignment and reminder(s) are sent, and to set the progress report deadline. Administrators can edit the content of the emails sent to the awardee in the text box on the screen. Multiple reminders and deadlines can be set per progress report, and administrators can also choose to view and delete reminders that were previously set up. If a specific progress report is not relevant for an individual awardee, you can skip that progress report.
  - o Progress Reports can also be assigned in batches via the Post Award tab of the Data Grid.
- **Progress Report(s)** - Allows you to complete a progress report by proxy and view the completed progress report(s). Administrators can also re-open the progress report(s) to enable edits and download progress reports for the individual applicant/awardee.
  - o A report of all assigned Progress Reports in an opportunity is available in the **Application & Applicant Details** report available through the **Download Reports** link on the application grid.

*\*Progress Report(s) options are only visible if progress reports have been enabled for the opportunity. Administrators can choose to enable the [Progress Report](#) functionality either when initially creating the opportunity or after launching the opportunity.*



## Reporting

Once opportunities are launched, you can download reports to Microsoft Excel in two ways:

- For individual opportunities - From the **Manage** view, click **Download Reports**.

The screenshot shows the 'Manage' view for an opportunity. At the top, there are tabs: All, Submissions & Drafts, Review, Award, and Post Award. Below these is an 'Overview' section with three donut charts: Application Status (5 total), Funding Status (1M total funding), and Ref Letter Status (6 total reference letters). Below the charts is a table with columns: Select, ID, Title, Applicant, Primary Org., Status, Date Submitted, and Last Updated. The 'Download Reports' button is highlighted with a red box.

- For multiple opportunities - From the **Reports** tab from the Global Navigation Bar. By default, Administrators will only be able to report on opportunities (and the associated applications and progress reports) for which they are the owner or co-administrator. Super Administrators can report on all opportunities and applications in a standalone site.

The screenshot shows the 'Reports' tab in the Global Navigation Bar. The 'Reports' tab is highlighted with a red box and labeled with a red circle 1. Below the navigation bar, there is a 'Reports' section with a dropdown menu showing 'Competitions' and 'Applications' (labeled with a red circle 2). Below this are several filter options: Show (All Competitions), Filter by Date Archived (Select Date Range), Filter by Administrator (Select Administrator), Search (text input), Filter by Category (Select Category), and Filter by Discipline/Subject Area (Select Discipline/Subject Area). There is a 'Refine Results' button (labeled with a red circle 3) and a 'Clear' button. At the bottom right, there is a 'Download Report' button with an Excel icon (labeled with a red circle 4).

## Opportunity-Level Reports

There are currently 7 different reports to choose from. Choose one or more from the pop-up box and click the **Download Selected Reports** button:

*Application & Applicant Details - Default Fields*

- Tab 1 (Application & Applicant Details): application title, applicant name, status, date last updated, and routing step summary.
- Tab 2 (Reviewer Details): application title, applicant name, co-applicants (if applicable), app status, routing step name, routing step number, routing step type, reviewer name, review responses (all fields)
- Tabs 3+: Progress Report information (if applicable)

*Application & Applicant Details - All Fields*

Lists everything from the Default Fields report, but also includes applicant and proposal details (any custom fields added)

*Raw Review Data*

Provides a detailed view of all submitted reviews

*Total Application Scores by Reviewer*

Lists applications in rows and reviewers in columns. The report will provide reviewer scores per application, application totals and averages, and even standard deviation.

*\*Note: this is only available for routing steps using Comments and Ratings Combination.*

*Rankings by Score*

Sorts applications from highest total score to lowest total score

*\*Note: this is only available for routing steps using Comments and Ratings Combination.*

*Applications by Reviewer*

Groups application feedback by reviewer and includes routing step number, routing step name, review assigned date, review due date, and review status

*Reviewer Completion Counts*

Summarizes review status and number of reviews assigned, complete, and incomplete by reviewer

## Competitions Reporting

Click **Reports** tab on Global Navigation Bar, select **Competitions**, set **Filters** (listed below), and click **Refine Results** to load the report.

- **Show** - All, Open or Archived application processes
- **Filter by Date Archived** - Can set specific date range
- **Filter by Administrator** - Select Administrator's name from dropdown
- **Search** - Enter keywords
- **Filter by Category** - Select a platform-wide category
- **Filter by Discipline/Subject Area** - Select from any entered on the Details page

## Applications Reporting

Applications reporting provides a comprehensive view of all the applicants and their submitted applications. Unlike Opportunities reporting, applicants can show up multiple times in an Applications report – once for each application submitted to an opportunity. Under **Reports**, select **Applications**, set **Filters** (listed below), and click **Refine Results** to load the report.

- **Show** - All Applicants or Only Awardees
- **Filter by Date Archived** - Can set specific date range
- **Filter by Administrator** - Select Administrator's name from dropdown
- **Search** - Enter keywords
- **Filter by Category** - Select a platform-wide category
- **Filter by Organization** - Select a participating organization from your hierarchy (if enabled)

## Filtering and Sorting Your Refined Results

Once you have refined your results to display only the information you want in your report, you can filter and sort the results table.

*Note: Filtering out certain information within the table will not remove that information from your report. It is just a way to quickly view a subset of your report on the screen. If you don't want something in your report, you'll need to use the filters at the top of the screen and click **Refine Results**.*

## Downloading Reports

InfoReady displays a select set of fields per competition on the **Reports** tab in the table at the bottom of the page, but you can also extract a report on all information that has been collected in the platform. When you click **Download Report**, you can select the appropriate information for your needs:

- **Competitions**

- All Fields – Columns listed in table and any added fields to Details page
- Default Fields – Columns listed in table
- Reviewer Summary – Review names, email addresses, opportunities, and review status
- **Applications**
  - Progress Reports – Progress report fields across opportunities
  - All Fields – Columns listed in table and any fields added to the Requirements page (application form)
  - Default Fields – Columns listed in table

## Applicant and Reviewer Experience

### Registration and Logging In

Remember, applicants and reviewers will likely have accounts automatically created for them when they start an application or are assigned a review, respectively. If it is their first time visiting the site, reviewers will have to confirm their account via email before logging in. Any internal user should log in via the **blue SSO Login button** with their institutional credentials. External users will use an email address and password to log in.

### Using the Global Navigation Bar

In InfoReady, a user can have multiple roles, and often does. It's common, for example, for someone who is a reviewer for one opportunity to have applied for a different opportunity. The tabs on the Global Navigation Bar help users quickly navigate to the respective area in the platform containing a history of their different types of activities. For example, the **Applications** tab contains their applications, and the **Reviews** tab contains their reviews.

*Note: You may also have Administrators (Regular or Super) who act as applicants or reviewers. This just means they will see the **Applications** and/or **Reviews** tab in their Global Navigation Bar, in addition to other administrative options.*

Once logged in, all users will see the following tabs in their Global Navigation Bar:

*Home*

List of opportunities currently accepting applications.

*Calendar*

List of all opportunity deadlines, including internal deadlines and external deadlines (when applicable)

## Applications

If the user has any applications in the platform, clicking **Applications** will provide access to all their personal draft applications and completed applications. Applicants will be able to view opportunity details and the application form for each of these. Completed applications will no longer be editable (except those that were returned for edits).

## Progress Reports

If the user has any awarded applications in the platform, clicking **Progress Reports** will provide access to a list of reports that need to be completed, their statuses, and due dates. They can also access each awarded application.

Reviewers will also see a **Reviews** tab:

## Reviews

If the user is a reviewer for any opportunities, clicking **Reviews** will allow the reviewer to see all the applications for which they have been assigned to review (active), as well as all completed reviews. There is a **Download All Unreviewed Applications** button that will export application contents and review forms in PDF format:

**Click to download all pending applications and their corresponding review form.**

**Download Pending Applications (PDF)**

All reviews that have been assigned to you are below. The default view displays assigned reviews you have not yet submitted (Status: Pending). The search, sort, and filtering options allow you to organize your reviews as desired. **To view previously submitted reviews, change the option in the Status column to "Submitted".**

To access a review, click on an application title. Within the review, the "Next" and "Previous" buttons allow you to navigate to the other reviews on your list. The PDF button will download the application packet and include your reviews if already submitted. Return to your list of reviews at any time by clicking "Reviews" in the top navigation bar.

Show 100 entries **Click any application title to begin reviewing.** Search:

Application Title	Applicant	Competition Title	Status	Due Date
test (000345)	Withheld by Administrator	BMOF Testing	Overdue	06/20/2019
test (000371)		multi apps	Overdue	06/20/2019
test (000372)		multi apps	Overdue	06/20/2019

Clicking on an **application title** will open a Local Navigation Menu with options for viewing the application and submitting the review form:

HOME PAGE - REVIEWS APPLICATIONS CALENDAR

Application Review PDF

Application Title: A title  
Application ID: 000588  
Review Deadline: Thursday, April 30, 2020

To start your review, click "Show Application Details" below to view the application.

Show Application Details

Instructions from administrator:  
You can (and should!) put reviewer instructions here.

\* indicates required

\* What is today's date?:

\* A question:

\* Please list comments:

1 Application and Input  
2 Details  
3 View Other Reviews  
4 View All Applications

Showing Review 2 of 10  
Previous Next

Application Files  
A sample CV.pdf

- **Application and Input** - View application contents and input their review feedback. The reviewer can view the application or print all contents as a single PDF by clicking the PDF button. Reviewers will enter feedback, based on specifications outlined for the routing steps by the administrator. *Note: Reviews are not automatically saved. A reviewer must proactively save their responses by clicking **Save as Draft** at the bottom of the page. Reviewers must select **Submit Review** when they are finished.*
- **Details** - View opportunity details like administrator names(s), cycle, and description
- **View Other Reviews** - (must be configured by administrator): See reviews from previous routing step
- **View All Applications** - (must be configured by administrator): Read-only access to view all applications that were submitted to the opportunity

## User Profile and Proxies

When a user clicks on their name at the top right-hand side of the screen, they will be taken to their **User Profile**. Information completed here will pre-populate on all their applications. Users will be directed to the User Profile if they have not filled out the **Primary Organization** field in their profile and they are applying to an opportunity limited to only people affiliated with a certain part of the organization (e.g., College of Natural Sciences).

In their User Profile, an applicant can also designate one or more proxies to complete applications on his/her behalf and can manage the list of proxies. Each proxy will get an email notification that they have been

assigned as a proxy. When viewing an opportunity, they will see an **Apply as Proxy** button. From the dropdown, the proxy will be able to select the applicant and then continue filling out the application.

Super Administrators can add or remove proxies on applicants' behalf from the Admin tab, [Manage Users](#) section.

## Deadlines

**Application deadlines are hard deadlines. Once an opportunity deadline has passed, applicants will not be able to submit an application to the opportunity.** If needed, an administrator can [submit on behalf of an applicant](#) after the deadline.

**Conversely, review deadlines are soft deadlines. Reviewers can submit reviews after the deadline has passed.** The fact that reviewers can submit after the deadline is not communicated to them. The Reviews tab marks reviews whose deadlines have passed as *Overdue*.

## Email Notifications

*Applicants will receive notifications at the following times:*

- Registration (if a non-SSO user)
- Submission of an application
- Upon acceptance of an application. A notification is sent by default, but administrators can choose not to send a notification.
- Upon return of an application
- Upon award or rejection of an application. A notification is sent by default, but you can choose not to send a notification.
- Initial assignment of a progress report (for awardees only)
- Reminder(s) to complete progress report(s) (for awardees only)
- When a progress report is submitted (for awardees only)
- Upon conversion of an LOI to a regular competition
- If another user has added them as a proxy

*Reviewers will receive notifications at the following times:*

- When they have been assigned an application to review. If you batch assign a reviewer to multiple applications at once, they will only receive one email.

- If they've been assigned to the first routing step, the notification email will be sent immediately.
- If they've been assigned to any other routing step, the notification will come as part of the [Review Requests Digest](#).
- All reviewers with pending reviews made available within the past 30 days will receive a single [Review Requests Digest](#) email every Monday and Thursday morning.
- Reminders sent by the administrator
- [Routing Step Recap](#) (if enabled by the admin)

## Review Requests Digest

The Review Requests Digest is a systemwide notification email to reviewers that comes from the email contact in the footer of the site (the **Email us** link next to *QUESTIONS?*). They are sent twice a week, on Monday and Thursday morning to any reviewer who has a pending review assigned within the past 14 days. The Review Requests Digest will include a list of any opportunity in which a reviewer has pending reviews and will indicate the number of reviews per opportunity with due dates.

If you would like to change the frequency, please contact [support@inforeadycorp.com](mailto:support@inforeadycorp.com) with the following information:

- Day(s) of week you'd like the Digest sent.
- If you would like it sent every week or every other week.
- *Note: This is a sitewide change, so we will need permission from a Super Admin to make the change.*

The digests will stop when:

- The reviewer completes all pending reviews assigned within the past 14 days, and/or
- No new assignments have been made within the past 14 days

If Administrators want to stop digests for a given reviewer, they can:

- Delete their pending reviews assigned within the last 14 days.
- Complete their pending reviews assigned within the last 14 days by proxy.
- Wait 14 days for the email prompt to expire.

### *Other notification points:*

- Account creation
- Password reset (triggered by user)
- Applicant-driven routing step requests (Pre-approver requests)
- Opportunity announcements that are shared



## Tips


### Platform Configuration

#### Homepage

- You must proactively save changes by clicking the **Save** button below each section in **Customize Homepage**:

**Custom Image**

Choose an image to create the face of your homepage. Image dimensions cannot exceed 325 pixels in width and 280 pixels in height. Acceptable file types include jpeg, jpg, gif, png, and bmp.

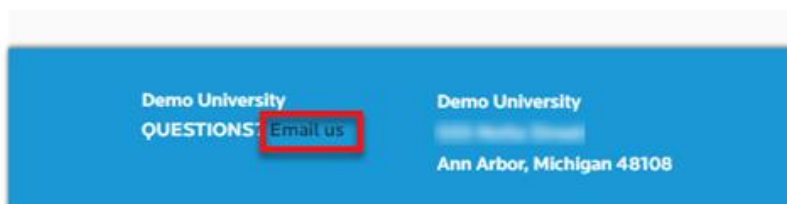


- In the **Support Documents** section, utilize documents from the [Support Portal](#) (e.g., Reviewer Guide, Applicant Guide) or create your own specific to your institution.

[Return to Customize Homepage section.](#)

#### Header/Footer

- The email used in the footer will serve as the default “from” email address on all platform communications and [Review Requests Digest](#) emails sent from InfoReady. This email address must belong to an Administrator that is already in the platform. Specific communication related to an opportunity will be sent from the admin managing the respective opportunity.

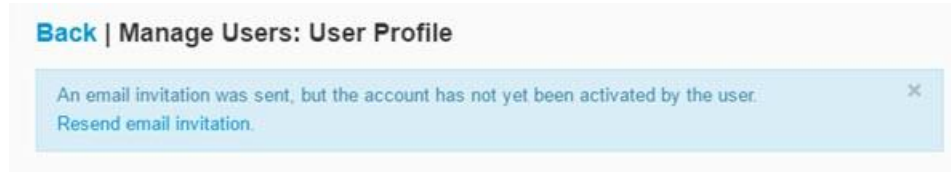


- Footer address: Use the first two lines for a departmental address and the third line for a phone number or web address.
- You must proactively save changes by clicking the **Save** button below each section in **Customize Header & Footer**.

[Return to Customize Header & Footer section.](#)

### Manage Users

- Manually added users will receive a confirmation email. If you need to resend the confirmation email, click the user's **name** and it will display their **User Profile**. You'll see a link to resend the email in a blue box at the top of the screen.



- If reviewers can't see their assigned reviews, check **Manage Users** first for duplicate accounts. Remember, review assignments should always be made with the SSO email address (when applicable).

[Return to Manage Users section.](#)

## Creating Opportunities

### Step 1 - Details

- Limit who can apply to the opportunity by checking the box under **Participating Organizations**. If Participating Organizations have not been set up, contact your Super Administrator.
- You may want to add additional fields to the Details page for reporting purposes. For example, if you want to run a quick report that shows only faculty opportunities, add a field where you enter that information on all your opportunities. If you save this opportunity as a template, you can use it from then on when building an application process, so you don't forget to add that field in the future.
- Collecting budget spreadsheets? No problem. Upload your template document under **Supporting Documents**. Applicants will be able to download it, complete it, and upload it along with their application.
- Need an additional category? Contact a Super Administrator.
- Once the Internal Submission Deadline passes, no applications can be submitted. You can, however, edit this deadline after launching the opportunity if you need to extend it. From the **Manage** view, go into **Edit** mode and change the internal deadline. The Internal Submission Deadline defaults to an *All-Day Event*, meaning that on the date selected, applicants can submit right up to 11:59 PM. If you want a different time for the deadline – say, 5 PM – you can uncheck this box and edit the time.
- By default, an opportunity will be removed from the homepage on the same date as the Internal Submission Deadline. If you want it removed either before or after this deadline, simply select a different **Remove from Homepage** date.

- Want to make an opportunity hidden or private? Make the **Remove from Homepage** date in the past, and the opportunity won't show on the homepage. Then share the direct URL with invitees only.

[Return to Details section.](#)

### *Step 2 - Requirements*

- Include the Primary Organization(s) question to get a standardized data point for the applicant's academic area or department. It is listed as a multiple-choice question, about halfway down the Applicant Requirements box.
- Include instructions with each Upload Option, such as what file type to use (.doc vs. .pdf), how to title, and page limits.
- If using the Co-Applicants feature, change the label of the field to align with your organization's terminology (e.g., Co-PI instead of Co-Applicant). Edit the field labels to be more specific if needed, such as changing *Email* to *Campus Email Address*.

[Return to Requirements section.](#)

### *Step 3 - Routing Steps (RS)*

- Administrators always have access to all applications and reviews, so they do not need their own routing step(s). For example, if the first "step" you need is an administrator verifying correct application contents, this can be done with the **Accept** or **Return** actions within the **Manage** view and should not be a routing step.
- Multiple reviewers can be assigned to a RS. You do not need to have a separate RS for each reviewer.
- Multiple review criteria do not require multiple RS. You can include up to 20 criteria within one *Comments and Ratings* RS, each with its own rating scale and comment box.
- If you need different types of feedback for same review round, create multiple RS and run concurrently.

[Return to Routing Steps section.](#)

### *Step 4 - Notifications*

- If you added a Co-Administrator, don't forget to set up their notifications in this step.

- E-mail templates are organized by the recipient of the message. Each has mail merge fields that can be used to save time when setting up custom messaging. A full spreadsheet with details on each template is in the Support Portal: *Notification Email Templates List*.

[Return to Notifications section.](#)

### *Step 5 - Progress Reports*

- The first default report has sections and several fields typically needed for progress reports. You can make each field **Required**, **Optional**, or **Exclude**, or you can choose to delete the section/field entirely. If you add an additional progress report, you will add only the fields you need using the **Add a Field to this Section** link.
- If you add a field and then no longer need it, simply mark it **Exclude** or delete it. It will not show on the form awardees fill out.
- For the **Publications** section, the fields included 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.

[Return to Progress Reports section.](#)

## Managing Opportunities

- Map out your process ahead of time to decide if/when you will accept or return applications, assign reviewers, consolidate and evaluate review information, and make the final award decision.
- If you need to make any edits to [Routing Steps](#), make sure you do them before assigning any reviewers, even to a test application.
- Many actions in the Manage view can be done before or after the Internal Submission Deadline. However, applications can only be returned for edits before the deadline. After the deadline, administrators will have to make edits on behalf of the applicant. (You can also edit the Internal Submission Deadline at any time).
- To streamline communication, make sure you've edited appropriate templates in the [Notifications](#) section before taking action on applications.
- Use the [Submit by Proxy](#) button to view any draft application. Simply type the user's email address and select from the dropdown.
- Forgot to save your opportunity as a template before launching? No worries! Simply click the [Copy](#) button, which opens a new instance of the opportunity. If you want it to be available as a template in the future, skip to the Finalize step and save the copy as a template.

[Return to Managing Opportunities section.](#)

## Conclusion

Thank you again for choosing InfoReady to simplify your application and review processes and save valuable time. We hope this guide was helpful in creating and managing your first opportunity. This document is updated about every 6 months, but new features and enhancements are released every 3-6 weeks. **Release Notes** are always posted as an alert on your site's homepage (The message says: *Click here to learn about the latest features and enhancements.*), and the most up-to-date information can be found in the **Support Portal**. Simply hover over **Help** in your InfoReady site to access the full list of resources:

- **User Guides** - For applicants and reviewers, and topical Quick Starts for administrators
- **Videos** - In-depth walkthroughs of each component of this guide
- **Articles** - Brief explanations of functionality and answers to FAQs

You can also reach out to us anytime at [support@inforeadycorp.com](mailto:support@inforeadycorp.com) or at 734.929.0010, ext. 256 during normal business hours (Monday-Friday, 8:30am-7:30pm ET). We always love hearing your feedback, so if there's anything you think is missing from this guide, let us know!