



Administrator's Guide

Reports and Data Exports

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Terminology

The InfoReady platform can be customized to meet your needs. InfoReady comes configured with default terminology, such as “competition” and “application”, seen below. For a list of terms which can be customized and suggestions for changes to the platform terminology, contact support@inforeadycorp.com.

Opportunity Management

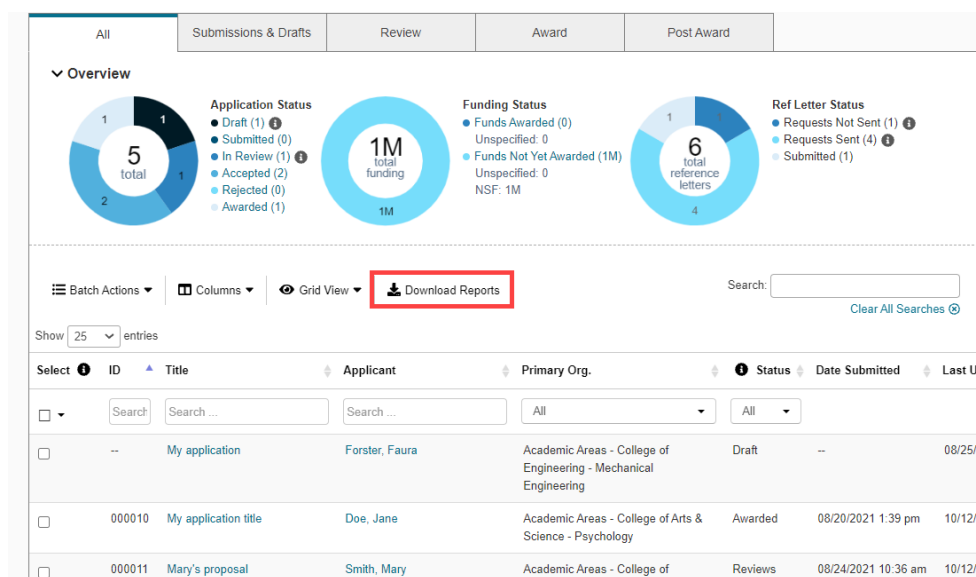
When managing an opportunity, administrators can download several types of data extracts and reports. To access, click the **Manage** tab from the global navigation bar and then click the opportunity title from the list on the page. All data extracts and reports can be accessed from the **Data Grid** at the bottom of the page.

Details

Administrators can also download a PDF of the Details for any opportunity by clicking the PDF button at the top of the page. If supporting documents were added to the Details page, they will be included in the download.

Download Reports

Every tab on the Data Grid contains a **Download Reports** link in the menu bar below the **Overview** dashboard. The available reports provide all application data, review and reviewer details, and progress report details. Each available report is described below. Some reports have multiple tabs, with each tab containing a different data set. Multiple reports can be selected at once and will all be included in the same file.



Report Types

Application & Applicant Details - Default Fields

- Tab 1: Application & Applicant Details – Data from the default columns and rows displayed on the application grid, including application information, award decision, award amount, and aggregate review data for routing steps.
- Tab 2: Reviewer Details – Granular data about reviews down to reviewer feedback for individual criteria and questions. Only submitted reviews are included.
- Additional tabs are created when Progress Reports are enabled and include a list of progress reports submitted by awardees. Each tab created for progress reports would represent a progress report form.

Application & Applicant Details - All Fields

- Everything is the same in this report as the previously described report except Tab 1 also includes data from *all* fields in the application forms.

Raw Review Data

- Only the reviewer feedback (approval decision, comments, scores, etc.) is included in this report. Each routing step will have a separate tab. There is also a column that displays the overall score the reviewer gave the applicant.

Total Application Scores by Reviewer

- A matrix layout of reviewers across the columns and applications down the rows. The report displays the total score each reviewer gave each application they reviewed. The report also includes overall score for each application, average scores, and standard deviation.
- **Note: this is only available for routing steps using Comments and Ratings.*

Rankings by Score

- Applications are sorted from highest scoring to lowest scoring.
- **Note: this is only available for routing steps using Comments and Ratings.*

Applications by Reviewer

- A list of reviewers, each application assigned to each reviewer, and the submission status of each review.

Reviewer Completion Counts

- Count of how many applications are assigned to each reviewer, plus the number submitted and number incomplete.

Application Packet(s)

Administrators can download application packets from the Data Grid:

- Select the application(s) by **checking the box(es) next to each application** or clicking the Select All option. From the Batch Actions Menu, select **Download Selected (PDF)**.
- A modal will ask which file(s) to include in the packet(s):
 - **Applications** – All contents, specific attachments, reference letters
 - **Reviews** – All submitted reviews, from specific Routing Steps, from specific Reviewers
 - **Progress Report(s)** – All submitted report(s), specific report(s)
- Another modal will ask you to choose the way you would like to download this information:
 - **Combined:** One PDF file containing all the selected information for all applications.
 - **Separate:** Each application will have its own PDF file containing all the selected information.

Progress Reports

Progress Reports allow administrators to gather post-award information from awardees and help track ROI, milestones, and other outcomes. The platform allows you to create a series of progress report forms and assign them to awardees with deadlines. For example, use Progress Reports to track multiple years of reports for seed grant programs.

Within an opportunity, Progress Reports can be retrieved from three locations:

[Batch Actions – Download Selected \(PDF\)](#)

- As described above, select the appropriate applications, and then pick the relevant progress report(s).
- If files were included as part of the report(s), they'll appear in the download.

[Application & Applicant Details Reports](#)

- The spreadsheet will contain one tab per progress report form.
- Each tab will contain the submitted progress reports in rows and the report fields in columns.

[Progress Report\(s\) Button](#)

Open an application from the applications grid and click the Progress Report(s) button on the menu.

- Click the **Download Reports** link next to the Excel icon.
- The spreadsheet will contain one tab per progress report form.

- Each tab will contain a section with the application details and a section with the progress report details.
- Assigned progress reports can also be seen in the interface on either the **Post Award** tab of the Data Grid or the **Progress Report(s)** menu of an application.

Progress Reports for all opportunities can be exported from the **Reports** tab on the Global Navigation Bar and will be discussed in the next section of this guide.

Reports Tab

Once you have opportunities running, you can select **Reports** from the Global Navigation Bar to run real-time reports, which can be easily exported to Excel. By default, Administrators will only be able to report on ones they have created (or been given access to) and the applications and progress reports associated with those opportunities:

- Super Administrators can report on all competitions and applications for the site.
- If microsites are enabled:
 - Super Administrators can report on all opportunities and applications *within their microsite*.
 - Global Administrators can extract reports for the whole site.

The screenshot shows the InfoReady web application interface. At the top is a blue navigation bar with the 'infoReady' logo and user links. Below it is a dark navigation bar with tabs: HOME, CREATE, MANAGE, APPLICATIONS, PROGRESS REPORTS, CALENDAR, MESSAGES, **REPORTS** (highlighted with a red box and callout 1), and ADMIN. The main content area is titled 'Reports' and contains two sub-tabs: 'Competitions' and 'Applications' (highlighted with a red box and callout 2). Below these are several filter sections: 'Show:' with a dropdown set to 'All Competitions'; 'Filter by Date Archived:' with a date range selector; 'Filter by Administrator:' with a dropdown; 'Search:' with a text input; 'Filter by Category:' with a dropdown; and 'Filter by Discipline/Subject Area:' with a dropdown. To the right of these filters is a 'Refine Results' button (callout 3) and a 'Clear' button. At the bottom right of the filter section is a 'Download Report' button with an Excel icon (callout 4). Below the filters is a table with columns: Competition Title, Category, Award Cycle, Funding Available, No. of Potential Awardees, Launch Date, Internal Submission Deadline, Funding Org Deadline, Date Archived, and # of Apps. The first row of data shows 'ACFAS Clinical and Scientific Research Grant' with various details. The table has a 'Show 50 entries' dropdown at the bottom left and a search bar at the bottom right.

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 Organizer** - Select a microsite (if enabled)
- **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 Competitions 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 Organizer** - Select a microsite (if enabled)
- **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

The platform displays a select set of fields on the **Reports** page, but you can also report on all information that has been collected in the platform. When you click **Download Report**, you can select **All Fields** for all information or **Default Fields** to export the fields displayed in the chart.

User List

From the **Admin** tab, click **Manage Users** to see a list of all users with accounts in your site. You can sort or search the list by user name, 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 the platform. The report will only include active users and not any accounts that are pending or have been deleted.

Applicant Experience

Applicants in InfoReady have the capability to download a PDF of any of their applications. Here's how:

1. Click the **Applications** tab from the Global Navigation Bar. Sort, filter, or search to find the application.
2. Click the **application title** to open the application.
3. Select the **My Application** button from the local menu on the right.
4. Click the **PDF button** to generate a PDF of the application form and any files included with the application. *Note: Reference letters and reviews will NOT be included.*

Applicants can also download a PDF of the *Details page* by going to the opportunity and clicking the PDF button at the top of the page.

Reviewer Experience

Reviewers can download a PDF of the applications assigned to them for review (either all pending or individual applications) and any of the reviews they have submitted.

To download a PDF of all pending applications assigned for review:

1. Click the **Reviews** tab from the Global Navigation Bar.
2. Click the button labeled **Download Pending Applications (PDF)**.
3. A PDF will be downloaded that contains a table of contents and each application packet (application forms, file uploads, and reference letters).

To download a PDF of one application assigned for review:

1. Click the **Reviews** tab from the Global Navigation Bar.
2. Click the **application title** of the desired application to open the application.
3. Click the **PDF button** to generate a PDF of the application form, any files included with the application, any reference letters, and a copy of the review form.

To download a PDF of a submitted review:

1. Click the **Reviews** tab from the Global Navigation Bar.
2. Change the **Status** column from **Pending** to **Submitted**.
3. Click the **application title** of the desired application
4. Click the **PDF button** to generate a PDF of the application form, any files included with the application, any reference letters, and a copy of the review form.

Reviewers can also download a PDF of the details by clicking the opportunity title and then the PDF button at the top of the page.

Conclusion

Do you need more assistance with exporting data from InfoReady? Have ideas for other reporting capabilities you'd like to see? Contact support@inforeadycorp.com or call 734.929.0010, ext. 256 during normal business hours (Monday-Friday, 8:30am-7:30pm ET).