InfoReady Site Set Up Checklist

This checklist is meant to help the primary Administrator(s) make sure everything on their site is set up prior to launching their first opportunity.

Admin tab

Customize Homepage (Video instructions)

- ❑ Edit welcome message
- ❑ Edit right sidebar message (*Tip: Include sitewide contact info and instructions*)
- ❑ Upload custom image (325x280 pixels)
- ❑ Upload supporting documents (*Tip: Put Support Portal articles and/or user guides here*)
- ❑ Microsites only: Verify previous 4 steps for each microsite enabled

Customize Header & Footer (Video instructions)

- ❑ Verify correct header logo (InfoReady uploads initially)
- ❑ Edit website title or delete to have header blank with just logo
- ❑ Select footer email contact. This person will receive question/support emails from users. New account emails and Review Digest emails also come from this account.
- ❑ Edit footer org name
- ❑ Verify correct footer logo (InfoReady uploads initially)
- ❑ Edit footer address
- ❑ Select or hide referral link

Configure Platform (Video instructions: Part 1 & Part 2)

- ❑ Decide email domain(s) or allow users from any domain
- ❑ If SSO is enabled, add SSO domain(s). *Consult with your IT staff if you're not sure.*
- ❑ If SSO is enabled, decide if you want to force users with SSO domain(s) to log in with SSO.
- ❑ Verify emails under 'Manage Application Process Emails' section.

  ***Note**: Check if you would like notifications about an opportunity to come from the owner.*
- ❑ Create categories
- ❑ Create award cycles
- ❑ Verify participating organization hierarchy (InfoReady uploads initially)
- ❑ Verify time zone

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Manage Users

- ❏ Add other administrators: Administrator(s), Super Administrator(s), or Global Administrator(s)
  Note 1*: Applicants and reviewers will automatically get added to the system and sent a confirmation email when they sign-in for the first time or are assigned reviews, respectively.*
  Note 2*: The Global Administrator role is introduced when microsites are enabled on a site.*
- ❏ Microsites only: Assign Admins and/or Super Admins to the appropriate microsite.

Manage Funding Orgs

- ❏ Create funding organizations. These can be internal or external funding sources.

Create tab

- ❏ Create sitewide templates, based on need. Example may include:
  - Limited submissions
  - Scholarships or fellowships
  - Awards or nomination processes
  - Approval processes for research (IRB), travel, promotions, etc.

  Note: Each field you include becomes a data point for reporting purposes.
- ❏ Notify other administrators when and how they should use each template