

Administrator Guide Gold 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.

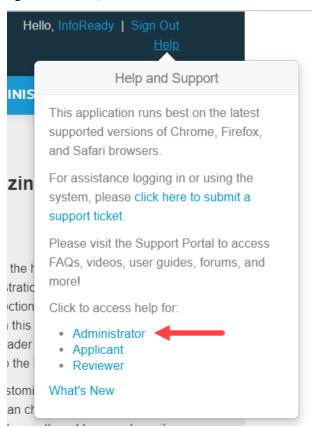
InfoReady requires little training and no ongoing IT support from your institution. We recommend you keep this guide with you when creating your first opportunity. After that, you should be all set.

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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. 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.

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!

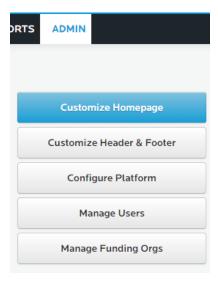
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Template - Structure of an application process that can be used to create similar opportunities over time. The default InfoReady templates available to you will depend on your Level of Service. From those, you can create an infinite number of custom 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.

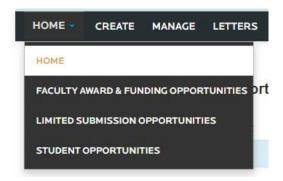


Local Navigation Menu - The tools menu that pops up on the right-hand side of your screen. The choices here change depending on where you are on the Global Navigation Bar. The example below shows the Local Navigation Menu of the Admin tab.



Microsite - Additional landing pages off the main homepage that are used to group opportunities for specific audiences. Microsites have unique content, only display opportunities associated with them, have their own URL, and have specific administrators assigned to them. The Gold Level of Service comes with 3 microsites. Users navigate among microsites from the homepage:

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Determine Administrators

Your organization has purchased our Gold Level of Service, which means you will have 4 or 5 types of users:

- Applicants unlimited
- Reviewers unlimited
- Administrators up to 25*
- Super Administrators up to 25*
- Global Administrator up to 25*#

*You have a total of 25 administrative seats—one of those must be a Super Administrator or, if applicable, a Global Administrator (see below). The other admin seats can be assigned as Administrators or Super Administrators, whichever best fits your needs.

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

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[#] Depending on your platform set up, you might also have a Global Administrator. The Global Administrator role is added when microsites have been enabled on your site.

Sites with One Landing Page - (No Microsites)

	Administrator	Super Administrator
Creating Opportunities	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
Managing Opportunities	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
Managing Users	Can view user profiles of applicants to application processes they have created or been added as a Co-Administrator	Can manage all users
Platform Configuration	n/a	Can customize all platform configuration options through the Admin tab

Sites with Microsites - (Requires one or more Global Administrators)

	Administrator	Super Administrator	Global Administrator
Creating Opportunities	Can create application processes within their assigned microsite	Can create application processes within their assigned microsite	Can create application processes for all microsites
Managing Opportunities	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 within their assigned microsite	Can manage and report on all application processes for all microsites
Managing Users	Can view user profiles of applicants to application processes they have created or been added as a Co-Administrator	Can manage all users except Global Administrators	Can manage all users
Platform Configuration	n/a	Can customize the homepage for the assigned microsite	Sets all standardized configuration for all microsites

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.

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Reference Letter Writers

- If you use the reference letter functionality (included in Gold license), letter writers will NOT have to create or activate accounts. This is most common for individuals outside your institution.
- Reference Letter Writers are visible under Manage Users in the Admin section of the platform. If a
 Reference Letter Writer does not have an existing account, they will be listed as an Applicant.
- Note that existing users who are assigned to be letter writers will be able to access an archive of the reference letters they submitted in the platform and will not have their user role changed.

Proxy

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

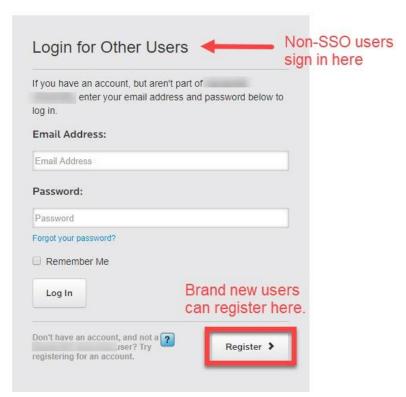
Accessing the Registration and Login Page

- 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).

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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).

Single Sign-On (SSO)

Users at your institution will be able to log in with their institutional credentials to access the site via Single Sign-On (SSO.) They will <u>not</u> need to register for or confirm accounts.

Note: InfoReady can adjust most language on the login page. Contact support@inforeadycorp.com if you need to make any revisions.

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Administrators

New Administrators should be added by a Super or Global Administrator in the <u>Manage Users</u> 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:

- <u>Internal</u> users should click on **blue button: Login for {institution name} Users** to sign in with their institutional credentials.
- <u>External</u> 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.

Reference Letter Writers

Letter writers are invited by applicants to attach a reference letter to an application. Applicants enter the letter writer's email address into the appropriate section of the application form and the letter writer receives an email notification containing a link to the page where the reference letter can be uploaded. Letter writers do not need to log-in to submit the reference letter.

Additional Features

At our Gold level of service, you currently have access to an extensive range of InfoReady functionality. Please contact your account manager or sales@inforeadycorp.com if you need additional administrative seats, additional microsites, and/or if you would like to discuss purchasing Professional Services to customize your platform beyond the extent of our current product's capabilities.

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Configuration (Admin Tab)

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

In cases where there is a Global Administrator, the Super Administrator will be assigned to a specific microsite and only have access to **Customize Homepage** and **Manage Users** sections for that microsite. The Global Administrator will control all other sections for broader platform configuration.

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 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 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 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

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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.
 - o 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*).

Microsites

Each microsite has its own name, which can be edited by Global Administrators from the Admin tab, Configure Platform section. The field label 'Organizer' is synonymous with microsite and appears in various places on the site. Editing the microsite name will immediately update the name throughout the site including the dropdown on the global navigation bar, any list of opportunities, reports, and opportunities themselves. Microsite URLs must be added or edited by InfoReady support. Please contact your account manager if you would like to add a microsite.

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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 and/or Global 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.

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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 or Global Administrators will also be able to <u>add proxies</u> 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 <u>Details page</u> (described in the next section).

Creating Opportunities

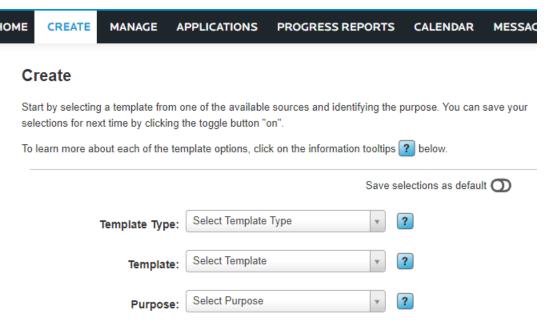
After your Super or Global Administrator has finished configuration, Administrators can start adding opportunities right away. You can run an unlimited number of opportunities (part of your license) so don't be shy! Any forms your office receives can easily be turned into opportunities in InfoReady.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

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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**.



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 from the list of default templates created by InfoReady. These include:

- Form Designer Most advanced form builder that includes ability to add pages, sections, conditional logic and has a responsive preivew
- **Funding Opportunity -** Standard template that includes fields often necessary for internal funding and limited submission competitions.
- General Fewer default fields than the Funding Opportunity template. The language is more generic, and the requirement field labels can be edited.
- **Bulletin Board** For posting opportunities that do not require the submission of an application. An *Apply* button can be displayed (optional) and linked to an external URL.
- Multitrack Multitrack opportunities have all the components of a regular opportunity, with the added functionality of being able to send applications down a certain "track", based on an initial gating question. Each track can be configured to have a different submission form, routing process, notification

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customization, and post-selection reports. Both the Funding Opportunity and General templates have multitrack variants.

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.

Note: If you are creating a Bulletin Board posting, this is the only step required. You also have the option to change the label on the Apply button.

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.

Letter of Intent Opportunity

Letter of Intent (LOI) opportunities allow you to run a two-phase submission process. If you select this option (at the top of the **Details** page), you will go through the process of creating an opportunity twice: once for the LOI phase and once for the full submission phase. (Don't worry, LOI details are imported to the second phase). Go through the steps outlined in this section to create and launch your LOI.

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Once your LOI is launched, you can go back in at any time and choose to convert it to a regular opportunity. Under most circumstances, you will wait to do this until your work in the LOI phase has been completed. You can also choose to award directly from the LOI. We will explain how to convert an LOI or award directly from it in the Managing Letter of Intent (LOI) Opportunity section.

Advanced Funding Module

Administrators can add one or more <u>funding sources</u> to any opportunity made from the **Funding Opportunity** template. They can also identify if matching funds are available and include an award range. During the award process, administrators will be able to designate an award amount from each source (if applicable). This information 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 or Global Administrator 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. The Funding template is used as the primary example in the sections that follow. Other templates are described later in this guide.

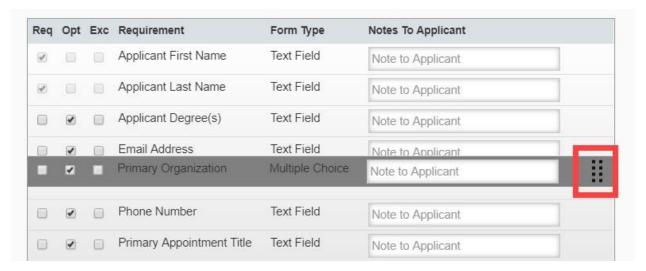
You'll notice there are some predefined requirements on your form already. *Applicant First & Last Name* and *Proposal Title* are required, but the others you can leave as optional or exclude them from your form entirely. **Notes to Applicant** will be shown as instructional text within the application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

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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:



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).

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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 coapplicants. This section is for administrative data-gathering purposes only. It does not grant co-applicants access to the application.

Reference Letters

Reference Letters can be used to collect letters (or similarly formatted information, like recommendations or nominations) from someone other than the applicant. If you choose to include reference letters, additional configuration options will populate on your **Requirements** form:

- Minimum and/or maximum number of letters
- Can applicants view letters once they have been submitted? Yes or No
- Letter Deadline Date and time field
- Additional Instructions for Applicants
- E-mail and instructions for Letter Writers

When applicants fill out this section of the form, they will enter the email address(es) of their letter writer(s). They will also have the option to write a note and set up reminders. Letter writers will get an email with messages from the applicant and/or administrator. The email will include instructions and a direct link to the platform to upload the letter. Letter writers will not need to activate an account prior to submitting the reference letter.

Administrators can re-share the direct link to the letter submission page with a letter writer or submit reference letters by proxy by editing the application. If no letter has been submitted, then the administrator can submit one. If a letter has already been submitted, the administrator can delete the existing letter and replace it with another letter. Click here for more information about editing an application.

Completed letters will be attached to application and will be visible to administrators and reviewers at the bottom of the application page in the Manage view.

The submission status of reference letters can be found in the report (<u>Application & Applicant Details – All Fields</u>) downloaded from the Data Grid.

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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
- 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)

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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)

Build my own Form

- Mix and match question types to create custom review form
- Available types are same as in the <u>Requirements</u> section

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).

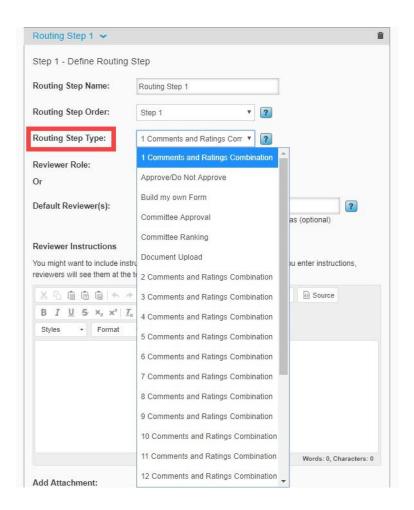
Document Upload

- 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.

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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.

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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.

Routin	g Step Options
	Reviewer(s) can see the identity of the applicant.
	Provide reviewers with access to all applications, not just the one(s) they are reviewing.
	Pass completed reviews from this Routing Step to reviewers in the next Routing Step.
0	Runs Concurrently With Following Step ?
Doutin	a Stan Basan
Kouun	g Step Recap
	Upon routing step completion, email all completed reviews to all reviewers assigned to this step.
	Each reviewer may see the identities of the other reviewers.
	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 <u>Applicant-Driven Routing Steps</u>, 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. <u>Click here for Routing Steps tips.</u>

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.

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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 <u>Managing Opportunities</u> section. <u>Click here for Notifications tips.</u>

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.

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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.

Letter of Intent (LOI) Opportunities

The options on the Finalize page will for LOI opportunities will have *Letter of Intent* verbiage for each. <u>Click here to learn more about managing LOIs.</u>

Creating with Other Templates

Form Designer Template

Starting with this template offers additional form builder flexibility, including:

- Pages
- Sections
- Conditional logic / branching questions
- Text-only boxes (e.g., for instructions)
- Responsive preview (to test out the application before you launch)

The advanced form builder is in both the Requirements and Progress Reports sections. For additional resources, make sure to visit the Support Portal section on the Form Designer Template.

General Template

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This template offers a simplified form builder and is best suited for straightforward and short forms. There are a few main differences on the General template, compared to the Funding template:

Details Page

- Internal Submission Deadline is the only default deadline listed (aside from the Remove From Homepage Date field). Other custom dates can be added.
- The Advanced Funding Module is not shown.

Requirements Page

- Only three required default fields: First Name, Last Name, and Title
- The labels for all three required default fields can be edited.

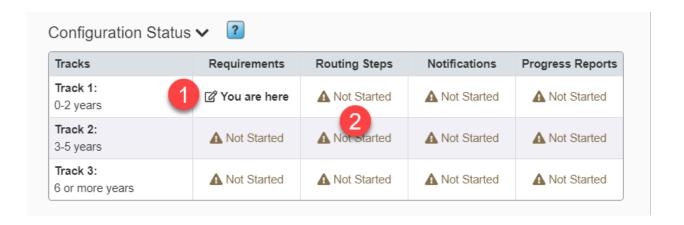
Multitrack Templates

The Details page will have an additional question to clarify how you'd like to configure the tracks:

- Primary Organization Select one or more entries from the <u>organization list</u> for each track (e.g., college, school, department)
- **Create my own** Enter a custom question for applicants and create a track for each response (e.g., primary appointment, class standing, years of service, etc.)

The next **Tracks** page is where administrators build out each track, based on the previous selection. They can also add custom instructions for applicants to help them select the correct response to the initial gating question. Track labels and options cannot be edited after launching the opportunity.

Once tracks are set up, each can be configured utilizing the **Status Table** on the next page:



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Tracks	Requirements	Routing Steps	Notifications	Progress Reports
Track 1: 0-2 years	3 ✓ Configured	☑ You are here	▲ Not Started	▲ Not Started
Track 2: 3-5 years	▲ Not Started	▲ Not Started	▲ Not Started	▲ Not Started
Track 3: 6 or more years	▲ Not Started	▲ Not Started	▲ Not Started	▲ Not Started

Status Table Labels

- 1. You are here Marks the current page you are viewing.
- 2. Not Started Still needs to be configured.
- 3. Configured All required components of the step are complete.

Note: This does not mean the step is finalized based on internal specifications. For example, a Requirements step could be configured, but an Administrator may still need to add questions to the application form.

Work horizontally across the table to fully configure the first track. Then configure other tracks. Modals in between each step will allow you to use previously configured options or create new. The Status Table will appear with green check marks and "Configured" when all pages are set up for each track. To review or edit a section, simply click on the table cell corresponding to that section.

Once every step for each has been configured, you will be able to Finalize the opportunity like any other. Select **Save as Draft, Launch**, or **Set Launch Date**, then click **Finish**.

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)
- Click the **Letters of Intent (LOI)** headline link to show Phase 1 of all your LOIs in the same type of page layout as the competitions. The **Competitions** link will include Phase 2 of LOIs.
- Search Database allows you to search all opportunities that have been launched on your site.

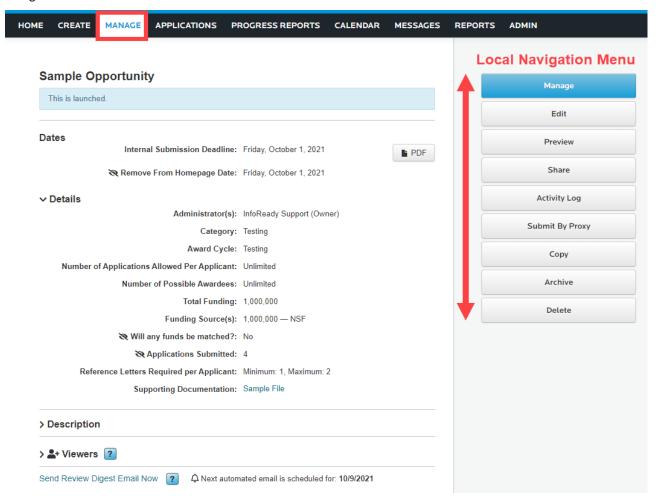
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Searching for Opportunities

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.



Sections include:

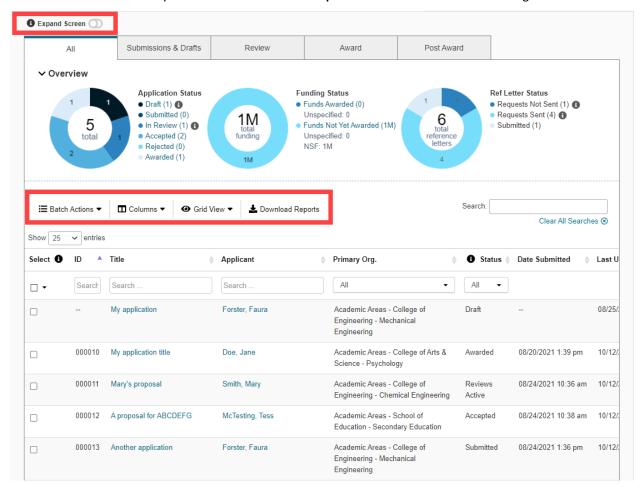
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Manage

• 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.



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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.

Сору

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 <u>Finalize</u> 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 We always wait until the next business day to complete the deletion process just in case you need to cancel the request.

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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 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.*

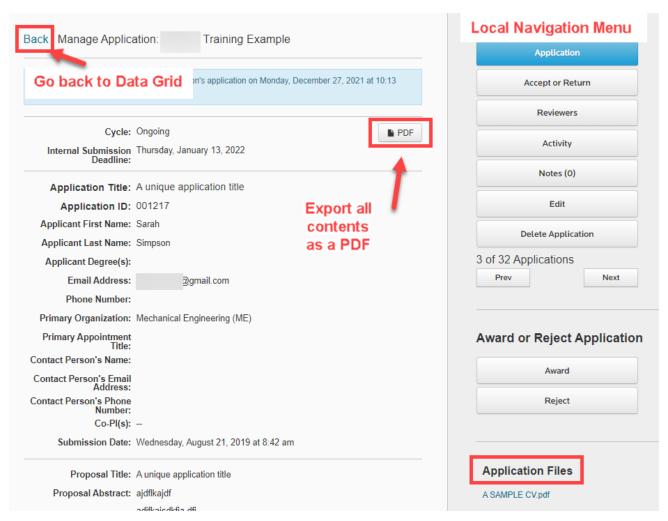
The next two sections introduce how applications can be managed either individually or as groups using the **Batch Actions** menu.

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.

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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.

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- 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 <u>edited by an administrator</u>.

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 autopopulate 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 <u>Review Requests Digest</u> 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 <u>Data Grid</u>. As a reminder, you can also assign reviewers to multiple applications at once using <u>Batch Actions</u>.

Activity

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

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Notes

Add notes and/or files to applications that can only be seen by other administrators.

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 <u>Managing Award Decisions</u> 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.

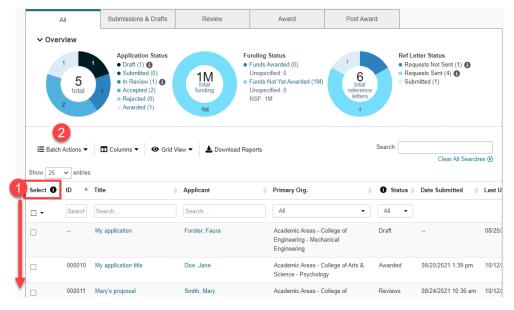
Note: If you accidentally delete an application, email us right away at support@inforeadycorp.com. We always wait until the next business day to complete the delete process just in case you need to cancel the process.

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Managing Multiple Applications (Batch Actions)

*To complete actions in bulk:

- 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)



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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 <u>Batch Actions</u> section. Here are the options you will encounter:

- Send notification? (Yes or No)
- Award Amount (only when awarding), including the amount per <u>funding source</u> (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

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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.
 - 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 <u>Progress Report</u> functionality either when initially creating the opportunity or after launching the opportunity.

Managing Letter of Intent (LOI) Opportunities

Convert LOI to Regular Opportunity

 Click Manage on the Global Navigation Bar, select Letters of Intent at the top of the page, and you will see your LOI opportunity.

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- 2. Click on your LOI opportunity, which will take you to the LOI **Details** page. Click **Edit** to return to the creation mode of the opportunity.
- 3. On the Finalize page, under Finalize Your Letter of Intent, select Convert to Competition.
- 4. Click **Yes** and you will automatically be redirected to the conversion page where you will see a list of applications.
- 5. Check the box(es) next to the application(s) you want to advance to the converted opportunity, choose **Advance Selected Applications** from the dropdown menu, and click **Submit**.
- Review the Advance Message, which is the email that will be sent to those whose applications are being advanced. Make any edits you desire and click Next.
- 7. You may choose whether to send a **Reject Message** to those whose applications are not advancing. If you choose to send the notification, you can decide whether to include reviews with each email, and you can add an attachment. Make any desired edits to the message and click **Next**.
- 8. You'll see a list of the advancing applicants and can send a summary of the selected applications to any email address(es) you choose. When you have entered the desired email addresses, click **Confirm**Conversion
 - Note: At any point before clicking Confirm Conversion, you can click **Cancel Conversion** button to cancel the process.
- 9. You can now go through the normal steps of creating and launching a competition.

 Note: On the **Details** page, you can choose whether to limit submissions to only those who were accepted in the first round.

Award Directly from the LOI

- 1. Click **Manage** on the Global Navigation Bar, select **Letters of Intent** at the top of the page, and you will see your LOI.
- 2. Click on your LOI, which will take you to the LOI **Details** page. Click **Edit** to return to creation mode.
- 3. On the Finalize page, under Finalize Your Letter of Intent, select Award Directly from Letter of Intent.
- Click Yes and you will automatically be redirected to the Award page where you will see a list of applications.
- 5. Check the box(es) next to the application(s) you want to advance to the converted competition, choose

 Award Selected Applications from the dropdown menu, and click Submit.
- 6. You may choose whether to send an **Award Message** to awardees. If you choose to send the notification, you can decide whether to include reviews with each email, and you can add an attachment. Make any edits you desire and click **Next**.

Note: You will need to remove the {award amount} sentence in the email.

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- 7. You may choose whether to send a **Reject Message** to those whose applications were not awarded. If you choose to send the notification, you can decide whether to include reviews with each email, and you can add an attachment. Make any desired edits to the message and click **Next**.
- 8. You'll see a list of the awarded applicants and can send a summary of the selected applications to any email address(es) you choose. When you have entered any desired email addresses, click **Finalize**Awarding.

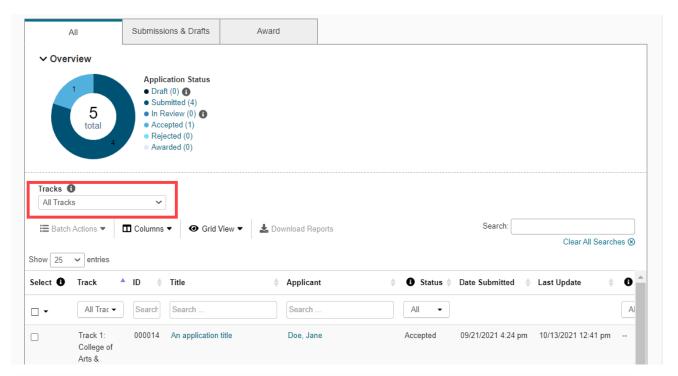
Note: At any point before clicking Finalize Awarding, you can click Cancel Awarding to cancel the process.

9. Once the Award process is finalized, the LOI is archived, and a new opportunity is created where the awarded applications are saved. You will be able to assign progress reports to the awardees from here if you choose to do so.

Managing Multitrack Opportunities

For multitrack opportunities, manage applications from the **Data Grid**.

From the **All** tab, click the **All Tracks** dropdown (below the **Batch Actions** menu) to select a track that filters the table:



Manage Multiple Applications at Once

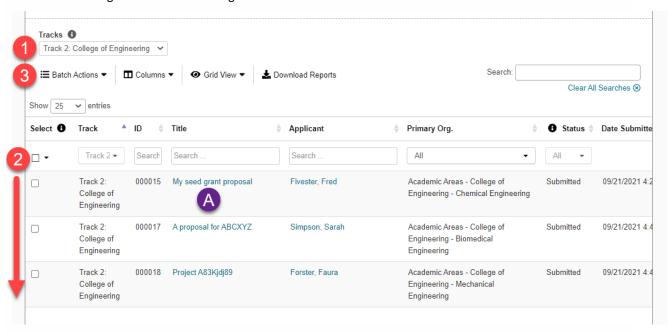
- 1. Select track.
- 2. Select the applications that correspond to the desired action.
- 3. Select an action from the Batch Actions dropdown menu.

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4. Follow instructions that appear in the modal, which will vary for each action.

Manage One Application

- A. Click the title of the application.
- B. Take action using the buttons on the right sidebar.

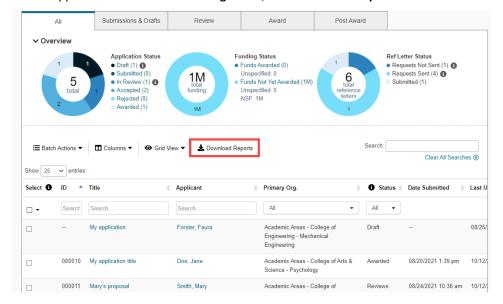


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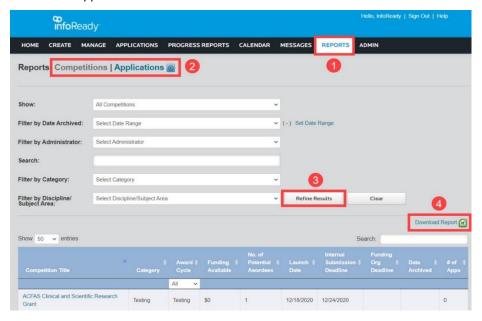
Reporting

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

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



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. If microsites are enabled, Super Administrators can
 only download information from their assigned microsite. Global Administrators can report on all
 opportunities and applications.



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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

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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 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 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.**

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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

- o All Fields Columns listed in table and any added fields to Details page
- Default Fields Columns listed in table
- o 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, Super, or Global) 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:

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Home

List of opportunities currently accepting applications. If microsites are enabled, this is also where users navigate among them.

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

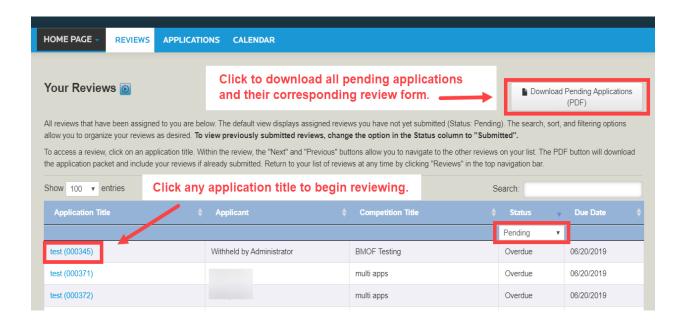
If the user has any awarded applications in the platform, clicking **Progress Reports** will provide access to a list of reports that need to be completed, their statuses, and due dates. They can also access each awarded application.

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

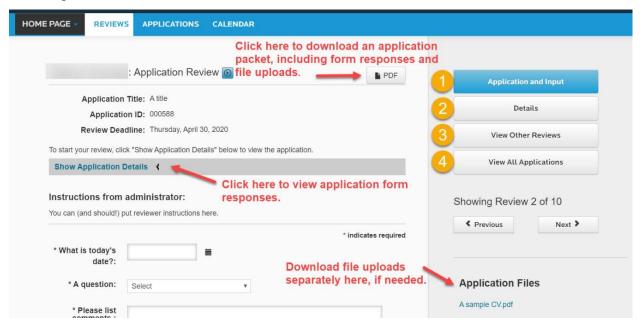
Reviews

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:

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



- 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

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- 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, or Global Administrators when microsites are enabled, 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.

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- 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
- When each reference letter is submitted (if applicable)
- When all reference letters have been submitted (if applicable)
- 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 <u>Review</u>
 <u>Requests Digest</u> 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 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 (or Global Admin if microsites are enabled) to make the change. This setting cannot be customized per microsite.

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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)
- Reference Letter requests
- Applicant-driven routing step requests (Pre-approver requests)
- Opportunity announcements that are shared

Optional Features

Department Driven Routing Steps

If you want to automatically assign specific reviewers to a routing step based on the applicant's department, you can do so with Department Driven Routing Steps (DDRS). The feature maps designated reviewers to different levels in the organization (e.g., Department Chairs).

To set up DDRS

- <u>Participating Organization Hierarchy</u> must be enabled, and you must have created a hierarchy list of your organization.
- InfoReady will do the initial upload, and you can edit anytime at the Admin tab, Configure Platform.
- Contact <u>support@inforeadycorp.com</u> and ask us about enabling Department Driven Routing Steps for your organization.
- We will send you instructions for providing us with a list of reviewers by organization level (e.g., Department Chairs, Deans, Provost)
- Once we have received your list, we will set up the feature for you and let you know when it is ready.

To use DDRS

When creating the opportunity:

Make the Primary Organization a required field on the Requirements page.

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- On the Routing Steps page, use the dropdown menu for Reviewer Role to select which type of reviewer should be assigned from the department. (e.g., Department Chair, College Dean, Provost)
- Set the review deadline.
- The review will be immediately assigned when the application is accepted.
- You will choose how many days to give the reviewer to complete the review after is it assigned.

The feature in action:

- Applicants submit their applications.
- Applications are accepted into the review process by an administrator.
 - Administrators can choose to disable the Accept/Return option on the Routing Steps set up page, which will result in applications automatically being assigned to the appropriate review upon submission.
- When the application reaches a routing step where DDRS has been activated, the application will be automatically assigned to the appropriate reviewer based on the applicant's department and Reviewer Role selected for the routing step.

Keywords

Super (and/or Global) Administrators

- Create and manage a list of keywords (e.g., MeSH keyword list) in the Admin tab
- Add individual keywords with unique identifiers and include the keywords in a hierarchy
 - Keywords can be added, edited, and deleted
 - The keyword list can be searched, sorted, and filtered

All Administrators

- Add the keyword field to the application form so that applicants can add relevant keywords to their application
 - Go to the Requirements step to activate for the form
 - If activated, the field can be optional or required
- Include instructions to the applicants on the application form
- Access keyword information in Reports
 - The opportunity report includes a column for the keywords

Applicants

- Use keywords on the Application Form
 - Type-ahead search allows displays drop down list of possible matches
 - Applicants can add as many keywords as necessary
- Keywords selected by the applicant are visible any place where the submitted application is accessible.

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Tips

Platform Configuration

Homepage

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



 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 <u>Review Requests Digest</u> 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.



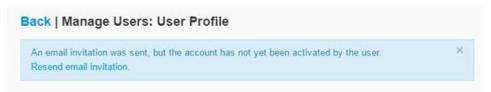
- Footer address: Use the first two lines for a departmental address and the third line for a phone number or web address.
- You must proactively save changes by clicking the Save button below each section in Customize Header &
 Footer.

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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 (or Global
 Administrator, if applicable).
- 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 your Super (or Global) 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.

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- 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. In the Funding Opportunities template, it is listed as a multiple-choice question,
 about halfway down the Applicant Requirements box. In the General template, it can be added as a
 Special Requirement.
- 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.

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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 <u>Routing Steps</u>, 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 <u>Notifications</u> section before taking action on applications.
- Use the <u>Submit by Proxy</u> button to view any draft application. Simply type the user's email address and select from the dropdown.

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• 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, reviewers, and letter writers, 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 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!

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