Welcome.

This guide will help you get the most out of your InfoReady trial. You can also reach out directly to our team at support@inforeadycorp.com. If you have questions about levels of service or pricing, please contact Max Dynerman at max@inforeadycorp.com.

NOTES ABOUT YOUR TRIAL SITE

Your trial site will differ from a live site in a few ways.

Single Sign On (SSO) integration is only available on live sites. When users are added to the trial site, they will need to confirm their account and set a password. On a live site, users at your institution will be able to log in directly with their institutional credentials.

Emails are not whitelisted. Emails sent from your trial site may go to your spam folder. This will not be the case with your live site.

Trial sites are not branded. You will be able to customize your site with your individual branding guidelines. Contact us if you'd like to see more examples of color schemes and layouts.

Trial sites only have one main landing page. A live site (Gold license) can have up to three separate landing pages (called microsites), each with their own name and homepage configuration.

ADDING USERS AND LOGGING IN

Your trial site URL will be sent to you directly via our Sales team. Then we can add as many users to your trial site as you'd like, we only need their email addresses. Each user will get a confirmation email notifying them that a site administrator has created an account for them. They will need to confirm their account by setting a password for the site and logging in.

Once your primary contact has access as an administrator, they can also add other users under the Administration tab > Manage Users > Add User. Select a role for each user to test different views (e.g., Administrator vs. Super Administrator). You can even add fake email addresses to use later when testing competition functionality.

ACCESSING SUPPORT PORTAL

Once logged in, hover over Help in the upper right-hand corner and click on “Review Help” to access our full 24/7 Support Portal to get more information on features and functionality of the system. Visit the User Guides section for comprehensive Administrator manuals.

CREATE A COMPETITION

Click on the Create tab at the top of the home navigation bar to begin creating your first test competition.

- Tip: Think of a proposal or application process you currently have to make the testing process more realistic. Try a few different types (e.g., NIH grant, scholarship, faculty award) to explore the flexibility of the system.

Depending on your trial site type (Gold vs. Silver), the first page in the Create process will look slightly different:

GOLD – On the first page, select:

- Template Type: InfoReady Templates
- Template: Any (Form Designer is most popular but try out each type to see full functionality).
- Click Next
- You will then be taken to the first of six steps in the competition creation process. (See Step 1 below).

SILVER – The first page is Step 1 in the competition creation process:

1. Details: The posting. General info useful for potential applicants, reviewers, or other administrators. Also this is where you assign co-administrators (if necessary).

    - Tips: Test the Letter of Intent functionality by answering "Yes" to the first question. Assign a colleague also testing the system as a Co-Administrator so they have access to the same competition.

2. Requirements: The form that applicants fill out and submit (including any file uploads).

    - Tip: Add additional fields to view all question types.

3. Routing Steps: Form(s) that reviewers fill out and the workflow for the review process.

    - Tips: Create a routing step for each round of reviews, but multiple reviewers can be assigned to a routing step. Customize your review form using the Build my own Form type.

4. Notifications: Select variety of notification options and customize email templates.
5. Progress Reports: Create follow up reports for awardees (if applicable)
6. Finalize: Save or launch.

SUBMIT APPLICATIONS

Once your test competition is launched, you have a few options for populating it with applications to test:

- Have colleagues apply to the competition as test applicants. If they weren't already added to the system, they will have to activate their accounts and set passwords to access.
    - Tip: Use the Share button to send the competition announcement with a direct link to apply
- Submit test applications with email addresses you input into the system earlier. Go to the Manage tab > Click title of test competition > Submit Application button > enter email address of "applicant" and submit by proxy as the Administrator.
- Create separate accounts with different email addresses (e.g., institutional and personal). Set up one as an Administrator and one as an Applicant. Then log in with these accounts on different browsers to get a side-by-side view of the competition experience (e.g., Applicant vs. Reviewer).

MANAGE COMPETITION

Once applications are submitted, you test even more features of the Manage view of the competition via the Date Grid:

- Moving applications through process:
    - Manage one app by clicking on its title
    - Manage multiple apps using the Batch Actions button
- Return applications or Accept for review
        - Applications must be accepted in order to assign reviewers.
- Assign reviewers: Utilize colleagues to test your routing steps. They will get email notifications to complete reviews, with direct link(s) to the application(s).
- Award or Reject: You can notify applicants or not, as well as customize review feedback per application.
- Competition Reports: Click the green Excel icon in the upper right corner of the grid to download competition data in a variety of ways.