



Overview

The InfoReady platform can be customized to meet your needs. InfoReady comes configured with the default terminology listed as the headings below. For each term, view sample alternatives and screenshots of where they appear. Use this information to help direct your decision-making process. Ask questions like:

- Who are our primary InfoReady users?
- What types of opportunities and processes do we currently facilitate?
- Are there any we have avoided because the language didn't fit?
- How will we communicate these changes to other administrators?

A primary (Super or Global) Administrator must request any terminology changes. When you are ready, contact your Account Manager or the InfoReady Support Team at support@inforeadycorp.com. They will send you a direct link to a form to fill out your choices.

Main Platform Terms

Accept - Verb

- **Default:** Accept (paired with "Return")
- **Prompt:** What do you call the action to confirm an application is ready for consideration?
- **Suggestions:** Advance, Acknowledge, Affirm
- **Examples:**

The screenshot shows an email composition window. At the top, the subject line is "Important Application Update". Below it, the email body is being edited. The text in the body is: "Hello {applicant name}, The {application title} application you submitted to {competition title} has been advanced by an Administrator and, if needed, will enter into a review process. You will receive another email in the near future announcing the final decision on your application." The editor includes a toolbar with various icons for text formatting (bold, italic, underline, strikethrough, text color, background color) and a "Source" button. On the left side of the screenshot, there is a sidebar with a "Status" section and a list of "Advanced" items.

Applicant

- **Default:** Applicant
- **Prompt:** What do you call the individuals who submit to your opportunities?
- **Suggestions:** Submitter, Candidate, Presenter, Petitioner
- **Example:**

The screenshot shows a form titled "Select Presenter". It has a dropdown menu for "Select Presenter". Below this, there is a section titled "Presenting as a Proxy for a Presenter" with the text "I am applying as a Proxy on behalf of the following Presenter:". Below this text, there is a required field labeled "*Enter Email Address or Name:" with an input box. A note at the top right of the form states "* indicates required".



InfoReady Customizing Sitewide Terms Guide

Application

- **Default:** Application
- **Prompt:** What do you call the individual submissions/applications for your opportunities? If it was printed on paper, what would you call the form?
- **Suggestions:** Submission, Requisition, Appeal
- **Examples:**

The image shows two parts of the InfoReady interface. The top part is a modal dialog box titled 'Edit Label' with a close button (x). Inside the dialog, there is a text area containing the prompt: 'Please indicate whether you approve or do not approve this submission moving forward.' Below the text area is an 'OK' button. The bottom part is a screenshot of the 'Your Submissions' page. It features a navigation bar with links: HOME, CREATE, MANAGE, and SUBMISSIONS (which is highlighted). Below the navigation bar, the page title 'Your Submissions' is followed by a camera icon. A paragraph below states: 'All of your submissions are listed below. The search, sort and submission, details about the opportunity, and any applicable'.

Apply

- **Default:** Apply
- **Prompt:** What do you call the action of submitting for your opportunities?
- **Suggestions:** Submit, Request, Register
- **Example:**

The image shows a form field labeled 'Submit Button Label:'. To the right of the label is a text input field containing the word 'Submit'.

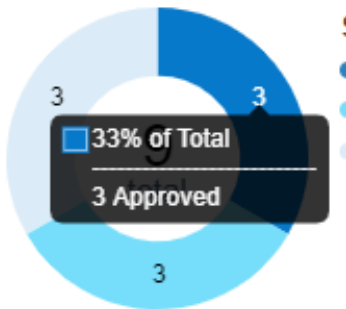


InfoReady Customizing Sitewide Terms Guide

Award - verb

- **Default:** Award (paired with "Reject")
- **Prompt:** What do you do when an individual's application is successful in an opportunity?
- **Suggestions:** Grant, Confer, Approve
- **Examples:**

▼ Overview



Approve or Turn Down Submission

Approve

Turn Down

Award - noun

- **Default:** Award
- **Prompt:** What is a selected submission called? What do you call the granted funds given to an application?
- **Suggestions:** Approval, Decision, Allotment
- **Example:**

Approval Amount

Funding Source(s):

Unspecified:

\$ 0

Total Funded:

\$ 0

Edit Approval



InfoReady Customizing Sitewide Terms Guide

Awardee

- **Default:** Awardee
- **Prompt:** What do you call the individual with a successful application in an opportunity?
- **Suggestions:** Beneficiary, Grantee, Endorsee
- **Example:**

☒ ***Number of Possible Beneficiaries:** ☒ Up to Beneficiaries (Max 500) ☐ Unlimited Beneficiaries

Co-applicant

- **Default:** Co-applicant
- **Prompt:** What do you call others who are also involved in submitting along with the primary applicant?
- **Suggestions:** Collaborator, Co-Submitter, Co-Presenter
- **Example:**

Co-Presenters

You may allow presenters to add additional individuals as co-presenters on their presentations.

Do you want to allow co-presenters?

☒ Yes ☐ No

Competition

- **Default:** Competition
- **Prompt:** What do you call the opportunities you offer on your InfoReady site? To what will people be applying?
- **Suggestions:** Opportunity, Project, Processes
- **Example:**

[Back](#) | **Search Open Projects**

1 to 4 of 4 results 1

Sort By:



Letter of Intent

- **Default:** Letter of Intent
- **Prompt:** What do you call the opportunities which are used to gauge interest in a project? To what process do individuals apply to get preapproval?
- **Suggestions:** Notice of Intent, Declaration of Intention, Indication of Interest

Examples:

Manage: Projects | Notices of Intent

Search Database

Enter keywords or phrases

*Is this a Notice of Intent? ☒ Yes ☐ No

Progress Report

- **Default:** Progress Report
- **Prompt:** What do you call the form you send out for feedback from the applicant about the results or outcomes after selection or awarding?
- **Suggestions:** Annual Report, Follow-up, Project Update
- **Example:**

☐ Annual Report(s) are not needed.

▼ **Annual Report 1**

Report Title

Annual Report 1

Do you want to include instructions with this annual report?

☐ Yes ☒ No



InfoReady Customizing Sitewide Terms Guide

Reference Letter

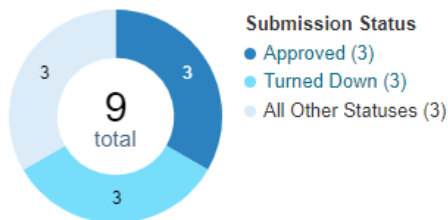
- **Default:** Reference letter
- **Prompt:** In the application process for your opportunities, what do you call supplementary materials that others may be required to submit on behalf of the applicant?
- **Suggestions:** Recommendations, Letters of Support, References
- **Example:**

Your Assigned Letter(s) of Recommendation			
Show 100 entries		Sea	
Application Title	Applicant	Status	Letter Writer's Deadline
		All	
Friend (000182)	Sylvia Sevenster	Past Submission Date	04/01/2022
Showing 1 to 1 of 1 entries			

Reject - verb

- **Default:** Reject paired with "Award"
- **Prompt:** What do you call it when you do not accept or approve an individual's application?
- **Suggestions:** Turn Down, Dismiss, Decline
- **Examples:**

Overview



Approve or Turn Down Submission

Approve

Turn Down



Rejection

- **Default:** Rejection paired with "Award"
- **Prompt:** What do you call the dismissal of an application?
- **Suggestions:** Dismissal, Withdrawal, Refusal
- **Example:**

You sent George Looney a rejection notice on Monday, April 4, 2022 at 3:03 pm.

Withdraw Rejection

Return

- **Default:** Return paired with "Accept"
- **Prompt:** What do you call it when you send a submitted application back to an applicant for additional information?
- **Suggestions:** Send Back, Decline
- **Example:**

☐ Advance Submission ☐ Send Back Submission

☐ Do not send notification

[Cc/Bcc others on this message](#)



Review - Verb

- **Default:** Review
- **Prompt:** What do you call the decision-making process as to whether an application is successful?
- **Suggestions:** Assess, Evaluate, Audit
- **Example:**

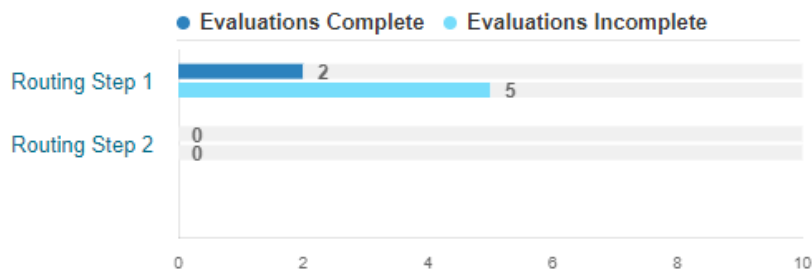




Review - Noun

- **Default:** Review
- **Prompt:** What do you call the individual decisions in the approval process?
- **Suggestions:** Assessment, Evaluation, Feedback
- **Example:**

Below is the form required to complete your evaluation.



Reviewer

- **Default:** Reviewer
- **Prompt:** What do you call the individuals who make decisions in this process?
- **Suggestions:** Committee Member, Evaluator, Arbiter
- **Examples:**

Default Evaluators:



Enter email address(es) separated with commas (optional)

☐ Automatically assign evaluations

Evaluator Instructions

You might want to include instructions for evaluators, but it is not required. If you enter instructions, evaluators will see them at the top of the evaluation form.



User Profile Terms

Each user's profile has *up to* 14 terms, 8 of which can be customized (**bolded** below).

- First Name - If using SSO, this field likely already populates in profile
- Last Name - If using SSO, this field likely already populates in profile
- **ID** - Unique alphanumeric ID (e.g., student ID, employee ID)
- Email Address - Primary email address. If using SSO, this field likely already populates in profile.
- Email Alias - List of any other email address(es) associated with the user
- Phone Number
- Title - Professional or academic title
- **Campus** - If multiple campuses exist
- **School** - Academic school or college within the institution
- **Primary Organization** – Corresponds with the Organization hierarchy in the platform
- **Secondary Organization** - Corresponds with the Organization hierarchy in the platform
- **Department**
- **Degree**
- **Major**

User Profile

* indicates required

*First Name:

*Last Name:

Id:

*Email Address:

Email Alias:

Phone Number:

Title:

Campus:

School:

Primary Organization:

Secondary Organization:

Degree:

Major: