



InfoReady Review Applicant Guide

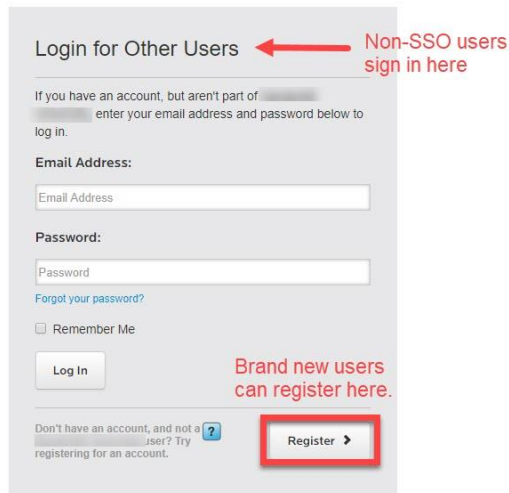
For a detailed walkthrough, watch the [Applicant Experience video](#).

Registration and Logging In

Internal Users - do not need to register and are able to log in with their institutional credentials. Click **Log In** in the upper righthand corner and click the blue button with your institution's name. You will be taken to your institution's login page and redirected to InfoReady Review once authenticated.

Note: Single Sign-On (SSO) must be activated on the site to use this authentication method. Most clients have SSO enabled on their sites.

External Users and Non-SSO sites - External users and internal users for sites without SSO enabled need to register, activate the account via the confirmation email, and log in.



Viewing Opportunities

- Open opportunities are visible on the **homepage** (login not required to view).
- The **Calendar** contains all opportunities, both open and closed, and all dates/deadlines associated with the opportunities (login not required to view).



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Click the opportunity title to view the details:

Not logged-in view

Apply button appears on the right side of the screen.

Clicking the button will take you to the login screen.

Logged-in – 2-5 buttons appear on the right (depending on settings and application status)

Details – Shows the details of the opportunity

Apply – Displays the application form

My Applications – Shows your applications/drafts for this opportunity

Apply as Proxy – Appears if someone has designated you as a proxy

Progress Reports – Post award reports assigned to you

Submitting Applications and Saving Drafts

- Click the **Apply** button to display the application form.
- Fields marked with an asterisk (*) are required, others are optional. If the admin has associated files with the opportunity, then the files will appear on the right in the **Competition Files** section
- A pop-up box may appear when clicking on a field. This occurs if the admin has added instructions associated with the field.
- **Save as Draft** and **Submit** buttons are located at the end of the application form.
- Proxy experience (If you are submitting on behalf of another person)
 - Click Apply as Proxy.
 - From the dropdown, choose the applicant for whom you are applying
 - Fill out the form and submit
 - Please note that the applicant will have had to designate you as a proxy

Application History

Your application history can be accessed by clicking the **Applications** tab from the Global Navigation Bar at the top of the screen.

- The list can be searched, filtered, and sorted.
- Click the **application title** (first column) to view your application/draft.
- Drafts can be deleted by clicking the **trash can** in the last column.
- Progress reports can be accessed by clicking the **sheet of paper** in the last column.



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Always view draft applications from this tab.
To open a draft, click the title.
To delete, click the trash can.

Application	Title	Status	Due Date	Organizer	Category	Award Cycle	
		All		All	All	All	
TITLE	Reference letter request text	Draft	02/09/2019		Testing	Testing	
Name not specified	Expand/Collapse	Draft	04/05/2019		Testing	Testing	
TITLE (000968)	Doc upload test	Accepted	02/08/2019		Testing	ZZZZZ	
TITLE (000959)	3 applicant driven routing steps concurrent	Accepted (by Proxy)	05/09/2019		Testing	AWARD CYCLE	
Title (000946)	Competition Reports Demo	Submitted	01/10/2019		Testing	Testing	
TEST (000950)	Document Upload Requirement	Submitted (by Proxy)	02/16/2019		Testing	Testing	

Showing 1 to 6 of 6 entries

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User Profile and Designating Proxy User

- Click your name in the upper right corner to access your user profile
- Basic user details and password (for external users) can be updated here.
- Designating Proxies – opportunity to identify people who would be able to submit applications on your behalf
 - Click the **Add Proxy** button and enter the email address(es) of the desired proxy user(s).
 - The designated proxies will receive a notification informing them of the proxy designation.

Progress Reports

The progress report is a post-award report assigned by the administrator to the awardee. It is a way for the institution to streamline the process of collecting final reports and measuring outcomes for award decisions.

- Awardees will receive an email notification when a progress report is assigned. You may also receive reminders related to the report.
- Another way to access progress reports is by going to the **Applications** tab and clicking the sheet of paper icon next an application selected as an awardee.

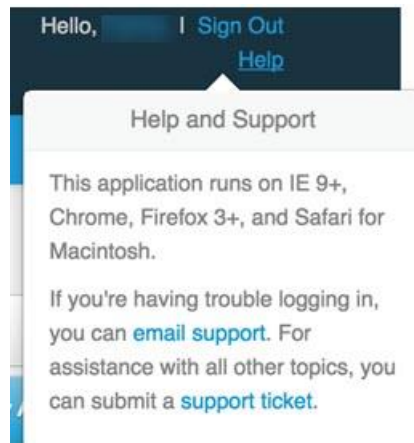


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- Administrators may also assign a series of progress reports to be filled out over several months or years. There will be multiple tabs on the progress report page when multiple reports have been assigned.
- Please contact the opportunity administrator if you have submitted a progress report and need to make edits.

Support Resources

- The site administrator can be emailed by clicking the **Email us** link in the footer of the site.
- The administrator for the specific opportunity you are applying to is on the **Details** page.
- InfoReady Support can be contacted by hovering over **Help** in the upper right corner. You will find two links here:
 - **Email Support** – opens an email that you can send to InfoReady Support
 - **Support Ticket** – takes users to the Support Portal page where a ticket can be submitted



- The Support Portal can be accessed by clicking **Support Ticket**. Find FAQs for applicants by clicking the **Solutions** tab once you are in the Support Portal.