**To Request Assistance from ORSP and/or InfoReady Support**.

1. E-mail Jason Hale at [jghale@olemiss.edu](mailto:jghale@olemiss.edu) and describe your problem in detail.
2. Optionally, for faster resolution, you may CC [support@inforeadycorp.com](mailto:support@inforeadycorp.com).
3. If you have not heard back within one business day, or if your problem is urgent, call Jason at 662-259-0544.

**To Create an InfoReady Account in the Ole Miss InfoReady Review Portal**

1. If you are not already an account holder, Register for an Account in the portal by clicking the Register link in the upper ride hand corner of the portal at <https://olemiss.infoready4.com/#homePage>. Provide your first and last name, a desired password (which you’ll need to remember separate from your myOleMiss password), and your @olemiss.edu e-mail address – this will be your login – then click send.
2. You should receive a confirmation e-mail asking you to confirm. Follow the directions and then login to the Portal with your new account.
   1. If you don’t receive a confirmation e-mail, Request Assistance from ORSP and/or InfoReady Support.
   2. If you follow the confirmation e-mail instructions and still can’t log in, Request Assistance from ORSP and/or InfoReady Support—and forward us the confirmation e-mail. Sometimes, the problem is a browser compatibility issue (Google Chrome is recommended), and in these cases we can often click the link ourselves to confirm your account.

**Request Administrator Status for your InfoReady Account**

1. ORSP can upgraded your account to Administrator status to allow you to create, own, and/or (co)manage a competition.
2. If you aren’t sure of your account status, once logged in, click [your name] in the upper right hand corner, to access User Profile, and see if Role is Administrator.
3. E-mail [jghale@olmeiss.edu](mailto:jghale@olmeiss.edu) to request an upgrade to Administrator status.

**To Create a Letter of Intent Competition (or template) or Full Application Competition (or template) using the *UM Internal Competition* template**

1. If you don’t already have one, Create an InfoReady Account in the Ole Miss InfoReady Review Portal.
2. If you are not already an Administrator, Request Administrator Status for your InfoReady Account.
3. Login to the portal, and click the Create tab at the top/left.
4. Note that while the InfoReady Review Portal does provide both Letters of Intent (LOIs) and regular competition functionality, ORSP has not learned to use the InfoReady built-in LOI functionality. When ORSP wants to request LOIs (or pre-proposals) as the first step of a competition, we create a one competition to receive the LOIs, and then separate competition to receive the Full Applications. You may not want to do it this way, but these instructions assume you do. If this is going to be a recurring competition, you may want to create your own reusable template—you can do that using these steps too.
5. In the gray Template box near the top, click Change, and pick the template called “UM Internal Competition.”
6. Edit the DETAILS
   1. Put in the title you want for YOUR competition*. (Below, we will use the term “competition” generically—regardless of whether you are creating an LOI or a Full Application competition, and we will use the term “application” generically to mean either an LOI or a Full Application—depending on the type of competition you creaet.).*
   2. If desired, put in the Funding Level—this could be the maximum amount that can be asked for, for instance.
   3. Edit Awardee Options, if desired.
   4. Set the Maximum Number of Applications per Applicant.
   5. Set the Internal Submission Deadline—the date and time after which applications will no longer be accepted in the portal. (Note that the portal will enforce this deadline automatically.) *You can ignore the LOI Deadline fields if creating a separate competition for the LOI and the Full Application.*
   6. The Remove from Homepage date/time will default to right after the Submission Deadline; if desired, you can change that.
   7. You may also ignore the Funding Organization’s Deadline field.
   8. If desired, edit the Apply Button Label. This will be the button that users click to begin completing their application.
   9. In the Description box, enter any description or guidelines that you like. If there are online instructions posted somewhere else, you might want to just link to them here.
   10. Change the Funding Organization as appropriate. If the organization you want is not listed there, you can add it, or ask ORSP to add it.
   11. If there are any guidelines, an RFP, a form or template for the applicants to complete, or any other documents they will need, if you don’t have a link to them in the Descriptions box, you can upload them one at a time in the Upload Guidelines and Other Support Documentation page. Once you upload them, you can also copy links to them and paste them in the Description box.
   12. See also the Details tutorial at <https://infoready.freshdesk.com/support/solutions/articles/14000055308-create-a-competition-step-1-details>.
   13. Click NEXT when done editing DETAILS. (You can always come back and re-edit later) by clicking the Details button on the right.
7. Edit the REQUIREMENTS
   1. Here you will find a list of pre-fabricated fields for the applicant to complete. Each is defaulted one of three statuses: Required (the applicant must complete the field to advance), Optional (the applicant may complete the field but does not have to), or Excluded (the field will not be shown to the applicant). These fields are divided into two sections: Requirements (meaning fields that pertain to the applicant) and Proposal Requirements (fields that pertain to the proposal).
   2. Toggle any/all of the pre-fabricated fields to the settings you want for this LOI: Required, Optional, or Excluded.
   3. You can also add your own Additional Requirements (fields), either as Applicant Requirements or Proposal Requirements. For each that you wish to add, click Add Requirement, then choose Form Type, the Form Label, and an optional Note to Applicant (that provides explanations on what to enter, if needed). Then, click Add to make the new requirement/field populate to the form. Repeat until you have all the fields you want.
   4. If you change your mind, you can delete any of the requirements you added by clicking the trash can icon next to the requirement on the form.
   5. Customize the Upload Supporting Documentation section.
      1. The UM Internal Competition Template assumes you want to require the application just one document – a word or PDF document that the applicant will complete off-line and then upload here. It further assumes that if there are more than one such document required (for instance, a letter and then signature pages by all of the co-PIs) that you will have instructed the applicant to combine all such documents into one PDF and just upload the one combined PDF. In ORSP’s experience, this is the simplest administrative approach, as it offloads the work of managing multiple documents to the applicant.
         1. You may want to edit the Upload Option Label to something more specific for your competition.
         2. You will definitely want to customize the Upload Option Instructions to be specific to your competition—perhaps referencing a separate RFP or instructions on a web page somewhere, or maybe giving the explicit instruction here.
      2. You MAY choose to either add additional document upload requirements (as either required or optional).
         1. Click Add Upload Option and complete the fields for each additional document that the applicant can upload.
      3. Or, you May prefer to remove all of the document requirements and have the application text be provide as one gianl text box entry in the requirements above (see the Proposal Abstract prefabbed field, for example).
   6. ORSP generally recommends AGAINST using Applicant-Driven Routing steps. However, if you think you want to use it, go for it, and see the Requirements tutorials page for instructions at the link below.
   7. Set the Maximum Number of Co-Applicants, then adjust the requested fields (Required, Optional, or Excluded) for each co-Applicant. Note that all co-applicants will receive all the same notifications as the applicant.
   8. See also the Requirements tutorial at <https://infoready.freshdesk.com/support/solutions/articles/14000055307-create-a-competition-step-2-requirements>.
   9. Click NEXT. You can always come back and edit this later—so long as no applications have been submitted.
8. Add ROUTING STEPS if desired.
   1. For Letters of Intent, routing steps may not be required—just depends on the amount of feedback you want to give on the LOIs, and whether you will want to route the applications to those reviewers/feedback providers using the portal.
   2. For Full Applications, you will want to use Routing Steps to build the review criteria and process for routing applications to reviewers. This is too complicated for this Quick Start Guide, so, see <https://infoready.freshdesk.com/support/solutions/articles/14000055263-create-a-competition-step-3-routing-steps> for a tutorial on Routing
   3. Routing steps can always be added later—even after a competition has launched and applications have been received.
   4. In general, it is a good idea to know exactly what your review criteria are going to be, and how you are going to score them, before beginning this step in the portal.
9. Edit NOTIFICATIONs
   1. As the Main Administrator or Owner of this competition, you’ll receive notifications whenever certain events happen. You can customize how many of these you want to see here.
   2. If there are other folks you can to get these types of notification as well (for instance, an administrator or supervisor), you can add them here and customize their notifications.
   3. Certain events in the system will trigger or prompt you to send custom notifications. In ORSP’s experience, most commonly used ones are as follows (and most of the rest can usually be ignored).
      1. Review Request – the e-mail sent to someone you assign to review an application. *This e-mail template has NOT been edited for the UM Internal Competition template—it is the default one for the system. If you will be using reviewers for your competition, you’ll want to customize this. This would be a good place to put (or include a link to) very detailed instructions, including review criteria. If you want reviewers to provide constructive (but respectful) comments to the applicants, you can put those sorts of instructions here also, as well as a reminder that these comments will be viewable by the applicants (anonymously to the reviewers). Be sure to click Save Template when done.*
      2. Multiple Review Request – same as above, but this one is sent when you assign one reviewer multiple applications in the same action. *Be sure to click Save Template when done.*
      3. Your Application Received – the e-mail that is automatically sent whenever someone submits an application. *This has been slightly customized for the UM Internal Competition template. Take a look—you might want to use it as is, or customize it further. Be sure to click Save Template when done.*
      4. Return Application to Applicant – the e-mail that is sent when you send an application back to the applicant for revision. *This has been slightly customized for the UM Internal Competition template. Take a look—you might want to use it as is, or customize it further. Be sure to click Save Template when done.*
      5. Accept Application – the e-mail that is sent when you decide that an application has all the required components in the required format and nothing further is needed from the applicant. *This has been slightly customized for the UM Internal Competition template. Take a look—you might want to use it as is, or customize it further. Be sure to click Save Template when done.*
      6. Award Application – the e-mail that is sent when you decide that an application is a “winner” for this competition. What that means depends on the competition. For an LOI compeition, there may not be any winners, or maybe an LOI is a “winner” when it results in an invitation to submit an application in the next phase. *This e-mail template has NOT been edited for the UM Internal Competition template —it is the default one for the system. If you will be using the Award function, you’ll definitely want to customize this one. If you are not selecting winners in this competition, then just ignore this. Be sure to click Save Template when done.*
      7. Reject Application -- the e-mail that is sent when you decide that an application (LOI) is a “loser” for this competition. What that means depends on the competition. For an LOI, there may not be any losers, or maybe an LOI is a “loser” when it results in an explicit NON-invitation to submit an application in the next phase. *This has been slightly customized for the UM Internal Competition template. However, even still it is probably insufficient—you will probably want to customize it if you are doing Rejections in this competition. Be sure to click Save Template when done.*
   4. See the tutorial on notifications: <https://infoready.freshdesk.com/support/solutions/articles/14000069694-create-a-competition-step-4-notifications>.
   5. Click NEXT when done with NOTIFICATIONS.
10. Edit PROGRESS Reporting.
    1. It is very unlikely that you’ll use Progress Reporting for an LOI competition.
    2. You may however want to set up Progress Reporting for Full Application competitions—for example, if winners are required to submit progress reports. (ORSP does not use the Progress Reporting feature but others on campus do.)
    3. You can always add Progress Reporting after the competition has launched and applications have been received.
    4. See <https://infoready.freshdesk.com/support/solutions/articles/14000055299-create-a-competition-step-5-progress-reports> for a Progress reporting tutorial, if needed.
    5. Click NEXT.
11. FINALIZE the competition
    1. If you want to assign co-administrators, do so on this page. You might have to ask ORSP to Request Administrator Status for the account you want to assign as co-administrator—unless they already have been assigned an Administrator role before.
    2. If you want the Applicant to provide some sort of Acknowledgement, do so on this page. (ORSP rarely uses this for our competitions).
    3. Click Finish to save your changes—either by Saving as Draft, or to Launch now, or to Set Launch Date.
    4. You can also Save as Template, to make your own template out of your changes to our template—for example, to use for annual competitions like this, having your own template will keep you from starting from scratch each time. This can be a big time saver and ensure consistency from one year’s competition to the next.
    5. You can always go back and edit things later. However, once applications have been received, editing might get a little trickier.
    6. See also <https://infoready.freshdesk.com/support/solutions/articles/14000055300-create-a-competition-step-6-finalize> for a tutorial on Finalizing competitions.