



Pre-Award Research Grants & Funding Software

G-Cloud 15 Service Definition Document

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Introduction

At Infonetica, we empower the world's leading researchers with an ecosystem of software products that make their lives easier, so they can focus on delivering the groundbreaking research of tomorrow.

Supporting over 2 million research projects across 14 countries, Infonetica's products support the end-to-end lifecycle of a research project including: research grant and funding applications (Pre-Award), research governance, research ethics review, data protection impact assessments, export controls management, research project due diligence, research contracts management, clinical trial management and compliance training for researchers.

Pre-Award is Infonetica's dedicated **cloud-based Pre-Award Grant and Funding Application Management Solution** used by research-intensive universities, research hospitals, IRBs (Institutional Review Board) and government bodies.

The Pre-Award module enables its users to:

- Seamlessly manage Pre-Award processes
- Efficiently prepare proposal budgets for new projects
- Improve research grants success rate through effective management
- Gain visibility and ability to track funder rules and submission deadlines thereby reducing missed deadlines
- Realise significant time savings for Grants and Funding Administrators, Research Project Office personnel, Research Managers, Reviewers
- Optimise cost recovery through more efficient practices and more accurately costed proposals
- Eliminate paper and email correspondence
- Reduce workflow complexity
- Easily access all documentation and updates
- Easily generate reports and track performance
- Update workflow and forms at any time

Summary of Functionalities

Grants (Pre-Award)

- Overview of the pipeline of proposals, awards at each stage
- Principal Investigators and Collaborators work together to build grants and funding applications / proposals
- Build FEC costing into the grant application
- Check for completeness of application before submitting to funder
- Incorporate funder rules into your grant forms
- Set faculty based internal review and approval workflows
- Differentiate proposals and awards and track success rate
- Customize and manage funder database
- Create and configure interactive forms and workflows
- Collaborate with researchers to create grants proposals
- Centrally define overhead and inflation rates to auto-calculate project costs
- Centrally create facilities and their unit rates to auto-calculate facilities and services costs in budgets
- Build pricing templates to auto calculate Funder cost and income by scheme
- Optional integration with HR and Finance systems
- Facilitate peer and committee reviewers to collaborate for review and approval
- Automate application classification, routing and assignment
- Automate alerts for deadlines and milestones
- Provide Role-based dashboards
- Report on portfolio status and KPIs
- Audit trail on all activity
- Share standard communication templates

Workflow

- Create complex workflows branching by funder type, funding value, multi department proposal types
- Create multiple workflows within the same environment
- Create and configure interactive forms and workflows
- Update workflow and forms at any time
- Use logical branching to simplify research proposal completion

Funders

Pre-Award supports funder-specific information to be included in various types of funders, including:

- Government
- Charities
- Industry

- Research Councils
- Internal funding

Project Types

The Pre-Award module can be configured to manage any type of grants and research contract applications. Some of the type include:

- Concrete proposals
- Internal grants
- Expression of Interest (EOIs)
- Multi-stage grants
- Research Contracts
- Consultancy and Innovation research
- Regional and educational
- Continuing Professional Development (CPD)
- Knowledge exchange projects
- Studentships

Collaboration

- Set access levels for collaborators
- Researchers can collaborate on applications
- Supervisors can comment or review before submission
- Legal, compliance teams can input on contract terms
- Research office can help with the costing and funder rules
- Committee reviewers can collaborate on the review of the submitted application

Automation

- Automated classification of application type
- Automated routing to different faculties/departments and committees
- Automated notifications and emails when key milestones are met
- Automated alerts when deadlines are approaching or missed
- Automated version control with storage of previous application versions
- Automated collation of reviewer comments into template letters

Communication

- Standard communication templates
- Automated communication
- Editable letter and email templates

- Correspondence feature to allow applicants and reviewers to communicate within the system

Documentation

- Central repository of all applications and associated documents including:
 - Application versions
 - Amendment forms
- Version control

Forms

- Configurable forms with a range of question types
- Filter questions and dependencies
- Dynamic forms
- Completeness checker
- Help, FAQ and user guide functionality

Review Process

- Reviewers can be assigned to (or removed from) committees and applications
- Rule-based routing of grant applications to faculties and departments
- Review process can be configured to get sign off from Research Office
- Rule-based automatic application assignment to reviewers or committees can be configured
- Reviewers can be assigned based on workload
- Multiple reviewers could simultaneously work on the same application
- Reviewers can quickly and easily track changes between submissions
- Applications can be annotated by reviewers
- Reviewer annotation can be set as only visible to other reviewers
- Virtual review meetings can be held
- Applications can be escalated to a higher-level reviewer
- Reviewer comments can be moderated

Admin Process

- Applications can be reviewed
- Applications can be validated/invalidated
- Comments can be added
- Changes can be requested and reviewed
- Reviewers can be assigned
- Conflicts of interest can be registered

- Applications can be assigned to meetings
- Application types can be changed
- Applications may be re-routed to different committees/reviewers/faculties (escalate/de-escalate)
- Comments can be registered “closed”
- Comments may be moderated prior to feeding back to Applicant
- Decisions can be registered
- Forms and workflows can be created and configured
- The system can be personalised with custom role-related desktop views

Dashboard

- Dashboards for applicants, research administrators and reviewers
- Separate dashboards for grants/ethics/contracts
- Timeline tracker
- Reporting dashboards with data and trends on KPIs
- Personalised content, showing only applications the user is involved with

Reporting

- Reporting on any data within the system
- Reporting on actions, status, applications
- Reporting on funders, costs and budget
- Output in several formats such as pdf, html, csv, word as well as via API
- Set and share standard reports
- Schedule recurring reports

Audit

- Audit trail of all activity on applications, including:
 - Applicant changes
 - Reviewer activity
 - Timestamp
 - Identity of user
 - Emails sent
 - Alerts sent
 - API calls made
 - Documents accessed by users
 - Reports run
- Page visits by user, time and date visited

Alerts & Reminders

- Automatic alerts and reminders
- Timeline recording
- Alerts for annual reports
- Alerts for overdue reviews
- Alerts for overdue resubmissions

Interfaces

- Integration with other existing systems such as HR, finance and grants systems
- Consume and output information from/to other software through APIs

System

- Choice of an open or closed system
- Web-based, accessible from any device with a browser
- Supports single sign-on

Data Protection

- GDPR compliant

Support

Training

- Training for administrators
- Train-the-trainer sessions
- Introduction training to reporting
- Provision of training environment

Helpdesk

- Support via email, telephone and Jira online ticketing system
- 9 am – 5 pm Monday to Friday excluding bank holidays
- Defined escalation and response routes
- Appointed point of contact

Data Migration

- Facility for easy data migration of research database from other systems

Infrastructure

Service

- Hosting in the cloud to comply with data protection and sovereignty
- Redundancy and overprovisioning for a reliable and uninterrupted service
- SLA (Service Level Agreement) with 99.9% uptime
- 24x7 monitoring and alerting

Integration

- Transactional and batch REST APIs
- Bulk import service for efficient data migrations
- Single Sign-On: ADFS, Azure AD and Native SAML2 iDPs such as Shibboleth

Security

- ISO 27001 certification
- Cyber Essentials Plus accreditation
- Regular independent penetration tests and audits
- Data encryption at rest and in transit

Platform

- An integrated product suite
- Fully configurable workflow engine to support the most demanding scenarios
- Comprehensive forms authoring solution
- Extensible reporting

Updates

- Regular updates driven by feedback from the Infonetica global customer community
- Optional release preview environment
- Empowered product engineering team approach going beyond agile