



# Opportunities 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.

**Infonetica Opportunities** is a dedicated cloud-based funding discovery and horizon scanning solution, designed to help research-intensive universities, research hospitals, IRBs and public sector organisations identify, track and act on relevant funding calls more effectively.

Opportunities enables institutions to centrally manage **external and internal funding opportunities**, improve early visibility of relevant calls, and seamlessly transition from opportunity discovery into pre-award application workflows without switching systems.

The **Opportunities** module enables its users to:

- Discover relevant funding opportunities faster from a single interface
- Centralise external funder calls and internally published opportunities
- Reduce time spent monitoring multiple funder websites and databases
- Improve early awareness of funding calls to increase application success
- Personalise funding discovery using saved searches and alerts
- Ensure researchers never miss relevant funding deadlines
- Enable a smooth transition from opportunity discovery into proposal preparation
- Increase research office visibility across funding pipelines
- Reduce administrative effort associated with manual horizon scanning

## Summary of Functionalities

### Funding Opportunities

- Centralised view of all available funding opportunities
- Automatically sourced opportunities from selected public funder websites
- Optional integration with existing third-party funding databases
- Support for both external funder calls and internal funding schemes
- Structured opportunity records including funder, deadline, scheme and eligibility
- Keyword search and advanced filtering by research area, funder, deadline and funding value
- Save, share and bookmark opportunities

### Horizon Scanning & Alerts

- Create and manage saved searches based on research interests
- Receive automated alerts when new relevant opportunities are identified
- Monitor upcoming deadlines and newly published calls
- Reduce risk of missed opportunities through proactive notifications

### Internal Funding Management

- Publish and manage internal funding opportunities alongside external calls
- Apply consistent structure and governance to internal grant schemes
- Control visibility and eligibility criteria for internal funding calls
- Reduce administrative overhead for research offices

### Transition to Pre-Award

- Start a proposal directly from a funding opportunity in one click
- Automatically transfer key opportunity details into the pre-award application
- Maintain traceability from opportunity discovery through to submission and award
- Enable reporting on conversion from opportunity to proposal and award

### Collaboration

- Enable researchers to share opportunities with colleagues
- Support collaboration between researchers and research development teams
- Improve alignment between research offices and academic communities
- Increase engagement with internal funding schemes

## 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

- Track funding opportunity pipelines across departments and research areas
- Analyse which funders and opportunity types convert into proposals and awards
- Provide portfolio-level visibility for research leadership
- Support evidence-based decision-making around funding strategy

## 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