Post-Award 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), Post-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.

Post-Award is a comprehensive software designed to streamline the management of research awards after funding has been secured. It supports universities in maximising financial compliance, reducing administrative burdens, improving visibility across award portfolios, and ensuring funder reporting obligations are met.

The **Post-Award** module enables its users to:

- Maximise research income
- Stay on budget and on track
- Never miss a milestone
- Gain portfolio visibility

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Powering the Research of Tomorrow

Summary of Functionalities

Post-Award

- Record awarded budgets and capture final recovery rates
- Streamline setup of new awards, and map budgets to right project and cost codes
- Automatically create the award in finance systems through integration
- Set project milestones for the project from library of milestone templates
- Real-time integration with finance systems for accurate spend vs. budget visibility
- Track Awarded, Utilized %, Balance, Commitments and Remaining amounts
- Get early warnings for overspend/underspend risks
- Track project milestones, deliverables, and funder obligations in one place
- View upcoming deadlines to prioritize workload and maximize funder compliance
- Automate reminders to ensure deadlines aren't missed
- Log changes to budgets, timelines, or conditions - Time extensions, Supplements, Virements
- Manage internal approval workflows for these amendments
- Maintain full audit trails of modifications for compliance and reporting
- Task triggers for finance teams to raise claims and invoices on time.
- Visibility of pending and overdue claims to reduce revenue delays.
- Generate project and expense reports to submit to funders
- Configure automated reports for periodic reporting to leadership
- Executive level portfolio-level insights to track financial health, compliance, and risks.
- Acts as a central repository for all awards and funder terms, with version control
- Consistent information for researchers, pre-award, post-award, research offices and finance teams
- Shared workspace for PIs, research office teams to promote collaboration
- API-first architecture for seamless connection with Finance, HR and other institutional systems (including BI/Reporting tools)

Milestones

- Define project-level milestones and tasks aligned to funder, institutional, or project requirements
- Create milestones from a configurable library of templates (e.g. funder reporting, invoicing, ethics, setup)
- Group tasks under milestones to reflect project phases, deliverables, or compliance checkpoints
- Assign owners, due dates, and responsibilities to milestones and individual tasks
- Support recurring milestones (e.g. quarterly claims, annual reports) based on project timelines
- Link milestones and tasks to specific awards, applications, or finance events where required

- Track milestone and task status (in progress, completed, overdue) in real time
- View upcoming, overdue, and completed milestones to prioritise workload and reduce risk
- Automate reminders and escalations based on due dates, roles, and task status
- Trigger tasks automatically from award events (e.g. award creation, supplements, extensions)
- Support internal approval workflows for milestone completion where required
- Maintain full audit trail of milestone and task changes for compliance and reporting
- Provide portfolio-level visibility of milestone progress across projects, funders, and departments
- Enable reporting on milestone completion, delays, and workload distribution
- Support collaboration between PIs, research office, and finance teams within a shared workspace
- Surface milestone-driven actions (e.g. invoicing, claims, reports) to the right teams at the right time
- Integrate milestones and tasks with Post-Award financial tracking to align delivery and spend
- Expose milestone and task data via APIs for downstream reporting and analytics where required

Project Types

The Post-Award module can be configured to manage a wide range of grant-funded and contract-based research projects. Supported project types include, but are not limited to:

- UK Research Council grants (e.g. UKRI, Innovate UK)
- Charity-funded research (e.g. medical, health, and social research charities)
- Industry-sponsored research contracts and collaborations
- NHS and health-related research funding
- European and international grants (e.g. Horizon Europe)
- Commercial research and consultancy projects
- Knowledge Transfer Partnerships (KTPs)
- Studentships and doctoral training awards
- Sub-awards and collaborative awards involving multiple institutions
- Internal or institutionally funded research projects

Each project type can be configured with its own financial rules, milestones, reporting obligations, workflows, and approval structures, allowing institutions to manage diverse funding portfolios within a single, consistent Post-Award framework.

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