Using CCGT – Portal – Registration & Application

This document describes how to use the CC Grant Tracker Portal to apply for a grant.

If your query is not answered in these notes you may email us by selecting the Contact Us link within the Grant Application System.
Additionally, if you are experiencing any technical problems please use the same link. We will endeavour to answer all queries promptly.

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1. Registration

Below is the Registration and Login page for CC Grant Tracker.

1.1. New users

Only registered users of the system can apply for grants. Please click Register and follow the on-screen instructions to complete the registration process.

You may find the following notes useful:

- You will use the email address you register with to identify yourself to the system when logging in.
- The system will use this email address for all correspondence, so it’s a good idea to choose an email address you use regularly.
- When you register, an email will automatically be sent to you to allow you to confirm the registration and log in for the first time.
- Don’t worry if you move to a new email address in the future – you can change your registered CCGT email address if you need to.
• If you’re an existing grant holder, or if you’ve previously contributed to an application or review, your email address may already be registered on our system. The system will detect this automatically and will invite you to log in without needing to re-register.

• The system allows you to store the answers to security questions to assist the secure retrieval of your password if you ever forget it.

1.2. Forgotten password

If you forget your password, click the Forgotten Password? link next to the login to request a replacement password to be sent to you by email. This replacement password gives temporary access to the system, during which time you will be asked to provide a new, permanent password.

Repeated use of an incorrect password may lock your account; this is to protect you from attempts to access your account by others. If this happens you can request a new password via the ‘Forgotten password’ function.
2. Home Page

The home page is your starting point to create applications, or to update your details.

It shows a list of items that you are working on, whether just unsubmitted grant applications or tasks allocated to you, for example as a grant holder or if you are also involved in the assessment of applications for funding.

3. Creating and completing a grant application

3.1. An overview of the grant application process

1. The Lead Applicant must be the one who creates and submits the application, but the application form may be jointly completed by the Lead Applicant and any other invited participants such as contributors from the Lead Applicant’s organisation or project partner contacts at a Partner Organization.
2. When the application form is complete it must be validated prior to submission. This will highlight any omissions in the form, and allow these omissions to be corrected.

3.2. New applications

The Open Funding Rounds page lists the available applications. This is accessed from the New Application link on the home page, or by clicking the 'New Application' link on the 'My Applications' screen.

1. All the grant rounds currently open are listed. The More info link returns a description of the grant round.
2. Click Apply to create an application form; there may be some verification questions to help you to ensure that the application is a valid type for your research or circumstances. All of these must be confirmed before proceeding to the application form.
3.3. Completing a grant application

The pages of the application form are listed as a menu down the left-hand side of the screen. Each page will contain a number of questions. To complete the application all pages must be filled in.

- You can move from page to page using the Previous and Next buttons, or use the menu on the left-hand side; these actions save any changes you have made on the page.
- The Save and Close button also saves your work and sends the applicant to the initial details page for this application. Remember to save your work. You will be prompted to save your work if you leave the screen but it is always good practice to save work often in case of computer problems.
- You can save and return to the application form as often as you like.
- The system will prevent your co-applicants accessing your application at the same time as you. This stops applicants and co-applicants making changes to the same part of the application at the same time and inadvertently overwriting each other’s work.
4. Contributor & Partner Contacts

4.1. Co-applicant request email

If you are invited by the Lead Applicant to participate in an application, either as a Contributor (belonging to the same organization as the Lead Applicant) or as a Partner Contributor (belonging to one of the Project Partner Organizations), you will be informed about this by email. The email(s) will provide you with Portal account details and will require you to complete the portal registration process before gaining access to the application form and being able to collaborate in the completion of the form.

4.2. My Co-applications

If you are invited to collaborate in the completion of an application form and after you have completed the portal registration process you can access the application in the ‘My Co-applications’ section.
5. Your applications

All grant applications, and their statuses, are listed on the ‘My Applications’ section of the system.

This shows the status of each application, clicking on the application title opens the summary screen from where you can manage the application

5.1. Managing an application

If you select an application from the ‘My Applications’ page, you a summary is presented
The boxes on the right enable you to:

- **Edit** the application on return visits.
- **View the application** as a PDF. This creates a form with your latest edits for you to review or to create a paper copy. The PDF features a ‘Pre-Submission’ watermark, which disappears after the application is successfully submitted.
- **Validate** that your application is complete for submission.
- **Submit the application** – this button is only available when validation has been successfully completed.
- **Delete the application** if you wish to. **Note that this is an irreversible action**; the application cannot be recovered after deletion.

The menu items on the left:
• **View History** – shows the changes made to the application form, this can be useful for the review of changes made by collaborators.

• **Journal** - is a notepad function allowing collaborators to leave messages and/or attachments for each other.

• **Sign-off status** - reports on the progress of any sign-off process required by Contributor or Partner Contacts or any designated Signatories.

6. **Submission**

To submit an application all required questions must be completed, the last page of the application is often called ‘Validation’ and shows any outstanding requirements.

1. When the application validates the lead applicant may submit the application.

2. If the application requires approval by designated signatories it will go through an approval process (see below) before the final submission is complete.
   a. The complete application will then be routed to each of the signatories for their approval.
   b. If a signatory rejects the application the lead applicant will be notified, along with any feedback the signatory has supplied.
   c. The application can then be re-submitted; it will be returned to the signatory who made the rejection and continues through the approval process as before.

3. On completion of the final approval:
   o A grant application number is assigned to the application.
   o An email is sent to applicants and any Contributor/Partner Contacts and signatories to confirm that a submission has been made.