About this document

This document describes how to register as a user of the CCGT Grant Application System, and how to use the system to apply for a grant, to review a grant application, or to confirm your participation as co-applicant or signatory of an application.

Contact us

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 within 2 working days.
Registration

Figure 1 - Registration and Login Page

For users new to our online applications system

Only registered users of the system can apply for grants. Please click 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 address you use regularly.
- When you register, an email will 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 a grant holder, or if you’ve previously contributed to an application or review, your email address may already be registered. 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.

Forgotten password

If you forget your password, you click the Forgotten Password? link on the Registration and Login Page, and ask for 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.

Account lock out

Persistent use of an incorrect password will lock your account; this is to protect you from attempts to access your data by a third party. If this happens you can request a new password via the ‘Forgotten password’ function.
Home Page

Online Grant Applications

Welcome to CC Grant Tracker, Rob Morris.

Please update your CV. Your CV was last updated on 21 August 2009.

Please check that your CV details are up-to-date as it assists us when assessing grant applications and assigning external reviewers. At present you have 2 degrees, 3 previous jobs, 1 previous grant award, and 1 publication.

To update your CV, go to Manage My Details.

New Grant Applications

To apply for funding from one of our grant streams click here.

You have...

| 9 | unsubmitted grant applications. | Click here |
| 1 | unsubmitted grant co-application requiring your participation to be confirmed | Click here |
| 1 | unsubmitted grant co-application. | Click here |
| 1 | review in progress. | Click here |
| 3 | awaited applications. | Click here |

Figure 2 - CCGT Home Page

The home page is your starting point to create applications, or to update your details, including your professional and academic CV.

It is also where you, as a grant holder, can manage your grants, and as reviewer can participate in the review process.

Creating and completing a grant application

An overview of the creation and preparation of a grant application

1. The Lead Applicant must be the one who creates the application, but it can be jointly completed by the Lead Applicant and any co-applicants.
2. Co-applicants may be added to the application. When a co-applicant is added, CCGT will automatically email them to invite their participation. Co-applicants can decide whether to accept their inclusion, and later to consent to the application being submitted jointly in their name.
3. Applicants and co-applicants can manage their CVs in ‘My Details’. The CVs are automatically included in the application submission.
4. 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.
5. Signatories must be selected as part of the application. Their approval is necessary to allow the application to be submitted.
6. When the application is submitted for approval, emails are sent to the signatories (each in turn where there is more than one) informing them that their approval is requested. The Lead Applicant may follow the progress of the approval process on the grant summary page.
7. When all signatories have approved the application, it will be sent automatically to be considered for funding, and a confirmation email will be sent to the Lead Applicant.

Creating a grant application

You can create a new application from the link on the home page, or by clicking [New Application] on the ‘My Applications’ screen.
The New Applications page is opened by clicking the link under ‘New Grant Applications’ on the home page, or from the ‘My applications’ screen.

2. All the grant rounds currently open are listed. The More info link returns a description of the grant round.

3. 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.
Completing a grant application

Figure 4 – Completing an application

- The pages of the application form are listed as a menu down the left-hand side of the screen. To complete the application all pages must be filled in.
- You should find the application form no more difficult to complete than a paper form - and if you’re already used to electronic forms, you’ll probably find it much easier.
- Each page has a Help button, at the top and bottom right of the page.
- You can move from page to page using the Prev and Next buttons, or using the menu on the left-hand side.
- 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.
Managing an application

Figure 5 - Managing an application

If you select an application from the ‘My Applications’ page, you can manage it, as shown above.

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 ‘Working Copy’ watermark, which disappears after the application is successfully submitted.
- **Validate** that your application is complete for submission.
- **Submit the application** for approval – 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:

- **Change 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 the sign-off process by each of the *signatories*. *(See Co-applicants and signatories below for more information)*
Monitoring the status of an application

<table>
<thead>
<tr>
<th>Reference</th>
<th>Title</th>
<th>Last Updated</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>1575</td>
<td>Project Alpha</td>
<td>04/02/2010 17:11:16</td>
<td>Pre-Submission</td>
</tr>
<tr>
<td>1574</td>
<td>Project Beta</td>
<td>30/06/2010 18:34:12</td>
<td>Pre-Submission</td>
</tr>
<tr>
<td>1573</td>
<td>Project Gamma</td>
<td>25/03/2010 15:31:45</td>
<td>Round Closed</td>
</tr>
<tr>
<td>1567</td>
<td>Project Delta</td>
<td>25/03/2010 18:24:47</td>
<td>Round Closed</td>
</tr>
<tr>
<td>1564</td>
<td>Project Epsilon</td>
<td>04/02/2010 16:21:54</td>
<td>Round Closed</td>
</tr>
<tr>
<td>1563</td>
<td>Project Theta</td>
<td>20/01/2010 11:58:14</td>
<td>Round Closed</td>
</tr>
</tbody>
</table>

**Figure 6 - Application Statuses in ‘My Applications’**

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

**Submission and beyond**

1. After successful validation the lead applicant may [Submit](#) the application. It will then be routed to each of the signatories for their approval.
2. If a signatory rejects the application the lead applicant will be notified, along with any feedback the signatory has supplied.
3. 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.
4. On completion of the final approval:
   - A grant application number is assigned to the application.
   - The application automatically enters the process of being considered for funding, which begins after the grant round closes.

**Feedback from peer review and the funding decision**

Following the closing date of the grant round, submitted and approved applications for that round will be peer reviewed to decide their suitability for funding, and lead applicants will be informed of the outcome of this process in due course.
Invitations, reviews and panel meetings

You can manage your invitations, reviews and panel meetings directly from within CCGT, in the ‘My Reviews’ section.

Figure 7 My Reviews

Invitations to review

If you are invited to review an application, you will receive your invitation by email, as shown in Figure 8. Invitation emails contain a link which allows you to accept or decline the invitation.

Bypassing invitations

It may be that you work with an organisation which simply sends you details of reviews, bypassing the invitation process. In this case, your involvement will start at the Carrying out a review stage, as described below.
Responding to an invitation

You can accept or decline an invitation, or alternatively you can tentatively accept the invitation - if you would like to carry out the review but for some reason you are not confident you will have the time or opportunity to do so.

If you respond tentatively, this means you permit the grant-making organisation to send you the review if they choose (for example, if they have difficulty finding another suitable reviewer). At this point, if you still cannot do the review, you may indicate this.

Peer reviews and panel reviews

If you accept an invitation to review an application, or if you have agreed to participate in reviews generally for an organisation, you will be sent details about the review(s) by email.

Carrying out a review

As a reviewer, you will be asked to examine the application in detail, and give your assessment of the application’s potential. In the example in Figure 10, the reviewer is being asked in particular to: provide remarks; give a recommendation; and suggest the names of two independent referees.
Panel meetings

You may also be asked to attend a panel meeting to discuss a number of applications. Again, you will be notified of requests to attend via email.

As a meeting attendee, you may be asked to judge the applications involved. The example in Figure 11 shows the list of current meetings which the reviewer is being asked to attend; Figure 12 shows the applications for one of the meetings.

Figure 11 - Review Meetings

Figure 12 - Applications in a panel meeting

Points to note:

- Attendees can view documents describing each application, as well as any prior review outcomes for the application, for information.
- The set of applications and reviews for the entire meeting may be downloaded using a link at the bottom of the page.
• Your access to the materials for a particular application may be restricted, where conflicts of interest have been identified.
• If required for this panel comments may be recorded for each application using the links on the right of the grid.
Co-applicants and signatories

Co-applicant / signatory request email

If you are invited to participate in an application as co-applicant or signatory, you will be informed about this by email, as shown in Figures 13.

If you click on the link in this email, you will be taken to a page where you can accept or decline this invitation.

My approvals

If you are invited to participate in more than one application, you can manage your invitations in the ‘My Approvals’ section, as shown in Figure 14.

Figure 14 - My Approvals section
Responding to an application

To respond to an application, select it in the My Approvals section. You will then be able to examine the application’s details, to allow you to decide how to respond. When you have made your decision, click Approve or Reject as appropriate.

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