

# Leverhulme Trust Grants Management System

## System Help Notes

Please consult the following information which will assist you in using the Leverhulme Trust Grants Management System.

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### Glossary of terms

<b>Principal Applicant</b>	The person completing the application form, taking academic and organisational leadership for the research.
<b>Co-applicant</b>	A collaborator/partner in a Research Project Grant application.
<b>Institutional Approver</b>	An individual or group of individuals (usually in the research office of your institution) who has the authority to give institutional level approval to your application. This individual or group of individuals use an email account they have registered with the Leverhulme Trust to receive notifications regarding your application, including the final request for institutional approval.
<b>Participant</b>	A collaborator in an application, e.g. Co-applicant.
<b>Signatory</b>	A signatory is any individual whose approval of your application is required as part of the application process. Each grant scheme has its own application process, but signatories can include; Heads of Department, Visiting Professors and Institutional Approvers.

### Contact Us

If your query is not answered in these notes you can email us by selecting the [Contact Us](#) link within the Grants Management System. If you are experiencing any technical problems please also use this email link. The Trust will endeavour to answer all queries within 2 working days.

# 1. Registration and log in details

**LEVERHULME TRUST** Grants Management System  CC Grant Tracker

Welcome to the Leverhulme Trust Grant Management System where you can gain access to application forms and view grants you have been awarded.

Please log in below. If you have forgotten your password click "Forgotten Password" and the system will send you a temporary password. Please do NOT re-register with a different email address.

The recommended web browser for this system is Google Chrome.

Applicants from Oxford and Cambridge should select the University from the drop down list of institutions and enter their department/faculty/division in the Department field in the address section. Faculties and Departments are no longer separate institutions.

For reminders of upcoming deadlines, and other news about the Trust, follow us on twitter: <https://twitter.com/LeverhulmeTrust>

Click [here](#) to download a document showing details of enhanced functionality following a recent system upgrade.

### Existing users

Please log in to access your account.

Email

! Please enter your email.

Password

[Forgotten Password?](#)

Remember me.

### New users

Please register with us to create your account using your institutional email address, if you have one.

Please note that all new users require validation by the Leverhulme Trust prior to receiving access to the system. We will endeavour to complete this validation process as soon as possible (within standard working hours) following completion of your initial registration.

[System Help](#) 

## For applicants who have not used this Grants Management System previously

Please read the relevant pages of the website for the scheme you are applying for and also download and read the scheme Help Notes before starting your application.

Please follow the steps below to complete the registration process:

1. Click Register on the welcome screen.
2. Add your email address then confirm your email address.
  - This is the email address that will be used for all correspondence and which you will use for future access to the system. You will be able to change this in the future if required. Please note that email addresses are case sensitive.
  - If you have previously contributed to an application (e.g. as a co-applicant) or been a referee, your details may have been pre-registered for you. In this case you will be prompted that an account already exists for the email address you have provided.
  - If you are a new user click Next and complete the registration form that follows. Mandatory fields for registration are marked with a red dot. Fields marked with a yellow dot are mandatory for submission of an application.
  - You must accept the Terms and Conditions before proceeding. If you are content to do so press the Submit button. A copy of the Terms and Conditions will be sent to you when your registration has been approved.
3. Your registration requires approval by a Leverhulme grant administrator.
  - If approval is granted an email will be sent to the email address that you have registered confirming this.
  - A separate email will be sent which confirms that your registration has been successful, providing an initial password. This is a **temporary** password and will only be valid for 24 hours.
4. Log in with your email address and the initial password from the email.

- Your password is case sensitive, it may help to cut and paste this.
- You will be prompted to change the initial password. The new password **must** be between 6 and 16 characters long and can include upper, lower case and special characters as well as numeric digits.

5. Please complete a security question to retrieve your password should you forget it.

### Forgotten password

If you forget your password at any point, click on Forgotten Password from the login page. A replacement password will be issued by email if you can provide your email address and the answer to your security question. This is a **temporary** password and will only be valid for 24 hours. You will then be asked to reset your password the next time you log in.

### 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. You must request a new password via the 'Forgotten Password' function (see above).

### For Signatories

If you have received an email inviting you to access the Leverhulme Trust Grant Application System as a signatory (e.g. Head of Department, Designated Representative) and you have not used our online application system previously this will also be accompanied by an email providing registration details. Please follow these steps:

1. Log in with your email address and the initial password from the email.
  - Your password is case sensitive, it may help to cut and paste this.
  - You will be prompted to change the initial password. The new password **must** be between 6 and 16 characters long and can include upper, lower case and special characters as well as numeric digits.
2. Please enter the security question(s) to assist the retrieval of your password should you forget it.

## 2. Using the Leverhulme Trust Grants Management System

Dr A Tester	<p>Welcome to the Leverhulme Trust Grant Application System, Dr A Tester.</p>
Home	
My Applications	
Manage My Details	Please ensure that your details, including your CV, are up-to-date as these are required for the submission of an application. You will not be able to edit this information directly from an application form. To edit your details go to <a href="#">Manage My Details</a> and complete the basic information and update your CV.
Contact Us	
Logout	<b>New Grant Application</b>
System Help 	To apply for funding from one of our grant streams click <a href="#">here</a> .

Please note, that after 60 minutes of inactivity, the system will time out. Therefore please ensure that you save data entered regularly.

The Home screen is your starting point to create, edit or access an application form or to update your personal details (including your CV). Please note that you can also access a link to enter your basic information or enter/edit your CV details from within any grant application.

From My Applications you can view all applications which are in presubmission status or which have been submitted or rejected.

The Home screen also allows you to view/access the following, where relevant:

- My Co-applications – applications where you are named as a co-applicant;

- My Grants – current, completed, closed grants;
- My Approvals – applications where you have a role as an approver;
- My Reviews – applications which have been allocated to you for review.

## Manage My Details

This section allows you to maintain your personal information.

In [Basic Information](#) you can update personal details such as your name, institution, address and telephone number. If you are applying from the Universities of Oxford or Cambridge, please select the University of Oxford or Cambridge as your institution and enter your Faculty, Department or other unit under Department/School/Division. Applications from Colleges are not permitted. This basic information is used to pre-populate details in application forms.

In [Update CV](#) you can add or remove items to your CV which are carried forward to your application forms.

In [Change Email](#) you can change the email address that we use to contact you (this will also change the address that you use to log in to this site).

In [Change Password](#) you can change the password that you use for logging in to this site.

In [Security Questions](#) you can change the security questions that we hold against your account to assist with lost passwords.

## Creating and submitting a grant application

### An overview of the application process

1. The Principal Applicant creates an application.
2. Co-applicants may be included for Research Project Grants, if appropriate. On the Co-applicants page of the application form, select Add Co-applicant and search for a matching record by entering forename, surname and/or email address. If the Co-applicant does not already have a record on the system, Add a New Contact (forename, surname and email).

Automatic emails will be sent to inform them if a Principal Applicant has added them as a Co-applicant. Co-applicants must approve the application via the Grants Management System to confirm their involvement in the project before the Principal Applicant can submit this. Co-applicants will **not** be prompted to do this, and therefore Principal Applicants should liaise with them off line to do this.

3. The CV of the Principal Applicant and any Co-applicants can be updated in the Manage My Details section of their account. These details will be automatically merged into the application, where required, and so this section should be completed as fully as possible. Applications will be returned by the Trust if key details are incomplete.
4. Signatories must be selected and notified. The Notify button allows you to alert (notify) signatories that you have an application in progress and that this will require their approval for the application to be submitted to the Leverhulme Trust.
5. When the application form is complete it must be validated prior to submission. This will highlight any omissions in the form, providing a 'jump-to' function which allows you to directly access the specific question/s which needs completing or which has an error.
6. The application must then be submitted for approval, where this is a requirement. When the application is submitted you will no longer be able to make any amendments to it. Emails are sent to the signatories (in turn where there is more than one) informing them

that their approval is required. The Principal Applicant is strongly encouraged to follow the progress of the approval process on the application summary page, consulting the guidance at the bottom of the page.

7. Only when (final) approval is provided by the Institutional Approver, where required, on behalf of the Principal Applicant's institution is the application submitted to the Trust. A confirmation email is sent to the Principal Applicant and the Institutional Approver.

If the Institutional Approver rejects the application, the Principal Applicant will receive an email confirming this. At this point the application will be unlocked and amendments can be made. The application must then be resubmitted for any necessary approvals. Where there is more than one signatory (e.g. a Head of Department, Designated Representative), the Institutional Approver can either reject an application back to the Principal Applicant or to the first signatory, e.g. Head of Department, Designated Representative.

An Institutional Approver is someone within an organisation (e.g. research office staff) who will be required to approve and submit applications to the Trust. A generic email address should be used by the institution to allow multiple staff members to approve applications. See the explanation in the Glossary about Institutional Approvers.

## Selecting an application form

<b>Dr A Tester</b>	<b>Welcome to the Leverhulme Trust Grant Application System, Dr A Tester.</b>
Home	
<a href="#">My Applications</a>	
<a href="#">Manage My Details</a>	Please ensure that your details, including your CV, are up-to-date as these are required for the submission of an application. You will not be able to edit this information directly from an application form. To edit your details go to <a href="#">Manage My Details</a> and complete the basic information and update your CV.
<a href="#">Contact Us</a>	
<a href="#">Logout</a>	
<a href="#">System Help</a> 	<b>New Grant Application</b>
	To apply for funding from one of our grant streams click <a href="#">here</a> .

- Application forms for open rounds can be accessed from the Home screen – select the link below New Grant Application

<b>Dr A Tester</b>	<b>My Applications</b>	
<a href="#">Home</a>	You have no current applications.	
<a href="#">My Applications</a>		
<a href="#">Manage My Details</a>		
<a href="#">Contact Us</a>		
<a href="#">Logout</a>		
<a href="#">System Help</a> 		

**New Application**  
To start a new application click here:

or click the New Application button on the 'My Applications' screen.

- All of the grant schemes currently open are listed under Funding Rounds. The [More info](#) link returns brief information describing the grant round/scheme. Clicking [Apply](#) will create and open an application form. Closing dates are also indicated, where applicable. There may be eligibility criteria which limit the grant schemes that you can apply for – please refer to the relevant pages of the Trust's website. Some schemes require applicants to have an eligible employing institution. Please ensure you have selected your employing institution within the Manage My Details section of your account. Application forms for some funding schemes are only made available upon invitation and will not appear in the list. In this instance, please follow the instructions on the relevant scheme page of the Trust's website.

## Completing/editing an application form

- All application forms have a Scheme Information tab which gives detailed information about the scheme. Please study this information carefully before proceeding.

Research Project Grant Outline 59399

0% complete

Application summary

- ✓ Scheme Information
- ✗ Principal Applicant Details
- ✗ Proposal
- ✗ Proposal Summary
- ✗ Publications
- ✗ Co-Applicants
- ✗ Previous and Current Applications
- ✗ Finance
- ✗ Institutional Approval
- ✗ Validation

System Help Application Help Notes

### Scheme Information

Previous Next Save Save and Close

Scheme Information How to complete the form

The aim of these awards is to provide financial support for innovative and original research projects of high quality and potential, the choice of theme and the design of the research lying entirely with the applicant (the Principal Investigator). The grants provide support for the salaries of research staff engaged on the project, plus associated costs directly related to the research proposed.

Proposals are favoured which:

- reflect the personal vision of the applicant;
- demonstrate compelling competence in the research design;
- surmount traditional disciplinary academic boundaries;
- involve a willingness to take appropriate degrees of risk in setting research objectives.

**Value and Duration**

Research Project Grants may be held for up to five years for a maximum sum of £500,000. However, in practice, the great majority of these grants are awarded for sums of up to £250,000 over a duration of two to three years.

**Eligible Research Areas**

The Trust welcomes applications for research in any academic discipline. However, the following guidelines are drawn to the attention of potential applicants:

- Because of the substantial funding available from other sources for medical research, the Trust does not fund research which is of direct relevance to clinicians, medical professionals and/or the pharmaceutical industry.

- All application forms also have a “How to complete the form” tab, which explains key functionality.

Research Project Grant Outline 59399

17% complete

Application summary

- ✓ Scheme Information
- ✗ Principal Applicant Details
- ✗ Proposal
- ✗ Proposal Summary
- ✓ Publications
- ✓ Co-Applicants
- ✗ Previous and Current Applications
- ✗ Finance
- ✗ Institutional Approval
- ✗ Validation

System Help Application Help Notes

### Scheme Information

Previous Next Save Save and Close

Scheme Information How to complete the form

Save and Close This button will save all contents of the form and return to the previous area.

Save This button will save all content within the form and allow further editing

Next This button will take you to the next available page and save all content on the current page

Previous This button will take you to the previous available page and save all content on the current page

• This icon indicates that a question is mandatory

🔗 Clicking this icon will display help information related to this question

**How to complete the form**

You should ensure that all sections of the form are completed. Answers should be entered in the text boxes provided or a document uploaded where indicated. Please adhere to word limits where they are specified to avoid your form being returned for amendment. If abbreviations are used, please ensure these are fully explained.

When pasting from other software (e.g. Microsoft Word) into text boxes, it is possible original formatting (e.g. bullets, numbering etc.) may be altered or lost. If this happens, select the text and use the editing functions at the top of the text box to re-format.

Please do not copy and paste pictures or tables into text boxes, as these will not be rendered correctly when your application is submitted.

- The sections of the application form are listed as a menu down the left-hand side of the screen. When these have not been viewed, require completion or have errors they are indicated with a red cross
- When a section has been viewed, is complete and/or does not have any errors it is indicated with a green tick.
- Help buttons display useful information about the questions – please read these carefully.
- Each application form has full help notes, available in a PDF document. These should be consulted while you are completing the form.

- You may move from page to page using the Previous and Next buttons or jump through the form using the menu on the left-hand side of the screen.
- You can hit the Save button at any time, but when you navigate to another section/page this will also automatically save your work.
- You may Save and Close and return to the application form as many times as you require, until you have completed it.
- For some questions you may either enter text in the text box or choose to upload a file. You may not do both. The maximum word limit for text entry and the maximum number of pages for a document upload are both indicated. PDFs and Word documents are supported.
- When pasting into a text box from other software it is possible that the original formatting may be altered or lost. If this happens, enter your text, select the relevant portion and use the editing functions at the top of the text box to re-format.
- If word limits are exceeded, the number of words entered shows in red.
- The percentage bar at the top-left of the screen indicates how much of the application form you have completed.
- You can hit the Validation button at any time to check which fields need to be completed, to locate any missing mandatory fields or to find any other errors. If you click Validate this will remove any red crosses on the sections on the left-hand side of the field, unless there are still errors or unless fields still need to be completed.
- The Application Summary link at the top left of the screen allows you to see key information about the application and to download and view a PDF of your application form in progress.

### Uploading documents

- Please use the font **Arial** size **11** for all documents you upload.
- You may upload a Word (\*.doc, \*.docx) document or a PDF.
- To upload a file click Attach and Choose File to select the file from your computer, then select Open and Attach. Once the file has been attached a tick will appear by Document Attached. You can View this or Remove it if you have uploaded the incorrect file.
- The uploaded document will be embedded into the PDF of your application form and appear under the specific heading in the PDF (e.g. Programme Detailed Description or Detailed Statement of Proposed Research).

### Managing applications

Under My Applications you can see a list of applications you have created. To view more details or to update an application please select it from the grid. Once you have selected an application you will see a summary on the Details page.

<b>Dr A Tester</b>		
<a href="#">Home</a>	<b>Title</b> Test Application	<b>Role: Lead Applicant</b> Actions shown below are for your involvement as a <b>Lead Applicant</b>
<a href="#">My Applications</a>	<b>Reference</b> 72607	
<b>Research Fellowship Ref: 72607</b>	<b>Status</b> Pre-Submission	
<a href="#">Details</a>	<b>Total Requested</b> £0	
<a href="#">View History</a>	<b>Lead Applicant</b> Dr A Tester	
<a href="#">Journal (0)</a>	<b>Institution</b> Test University of Leverhulme	<b>Edit the application</b> Please click on the 'Edit' button if you wish to make any changes to your application. <input type="button" value="Edit"/>
<a href="#">Sign-off Status</a>	<b>Grant Type</b> Research Fellowship	<b>PDF the application (Print)</b> Please click on the 'View/Print' button to generate this application form as a PDF file.  Please note: if your browser blocks the file download, please follow the instructions to allow the file to be downloaded. <a href="#">PDF Formatting Problems?</a> <input type="button" value="View/Print"/>
<a href="#">My Approvals</a>	<b>Funding Round</b> TEST Research Fellowships	
<a href="#">Manage My Details</a>	<b>Closing Date</b> 20 September 2017 at 16:00	<b>Validate the application</b> To validate the application click 'Validate' and then 'Validation' within the application form. <input type="button" value="Validate"/>
<a href="#">Contact Us</a>	<b>Created On</b> 03 July 2017	<b>Submit the application</b> The application form cannot be submitted until it has been validated to ensure that all required fields have been entered, and the data meets our submission requirements. <input type="button" value="Submit"/>
<a href="#">Logout</a>	<b>Last Updated</b> 03 July 2017	
<a href="#">System Help</a> 	<b>Validated</b> Not Complete	
	<b>Submitted On</b>	<b>Delete the application</b> If you are sure you wish to delete the application form, please click on the 'Delete' button.  Please note: once an application has been deleted it cannot be recovered. <input type="button" value="Delete"/>

The boxes on the right-hand side of this screen enable you to:

- Edit the application on return visits.
- View/Print the application as a PDF. This creates a form to view with your latest edits or to save and create a paper copy. The watermark is cleared after a successful submission.
- Validate your application for submission.
- Submit your application form for approval (if required) or for submission to the Trust if the scheme allows this – this button is only enabled once validation has been successfully completed, otherwise it is greyed out.
- Delete the application if you wish to, but please note that **this is a final action**, the application cannot be recovered thereafter.

There are four possible menu items on the left-hand side of this screen:

- View History – shows the changes made to the application form;
- My Referees – shows you, where applicable, details of your nominated referees. This is only visible when you have submitted your application;
- Journal is a notepad function to make notes or attach relevant files. NB. These are not incorporated in the application itself;
- Sign-off Status reports on the progress of the sign-off process by each of the signatories.

### Status of an application

All grant applications are listed on the 'My Applications' section of the system. Information listed will be: Reference number, Title, Last Updated and Status.

Reference	Title	Last Updated	Status
59399	Leverhulme Trust Test Application	14/02/2017 16:07:56	Pre-Submission

The Status will be one of the following at any one time:

<b>Pre-Submission</b>	You are yet to submit the application for signatory approval and can edit it
<b>Awaiting Signatory Approval</b>	You have submitted your application for signatory approval
<b>Modifying</b>	A signatory has rejected your application for modifications to be made
<b>Submitted</b>	Your application has been signed off by signatories and submitted to the Trust
<b>Returned</b>	Your application has been returned by the Leverhulme Trust after submission for it to be modified.

### Submission

1. After successful validation the Principal Applicant may submit the application. It will be routed to any signatories for their approval. If there is more than one signatory, please note the order in which signatories must give their approval.
2. If a signatory rejects the application the Principal Applicant is notified by email with any feedback the signatory supplies.
3. The application can then be re-submitted by the Principal Applicant; it is then automatically re-submitted to the signatory who made the rejection so that they can provide approval.
4. When the final approval is provided, the application is submitted to the Leverhulme Trust and an application reference number will be issued. A confirmation email is sent to the Principal Applicant and the Institutional Approver, where appropriate.

### 3. Information for Institutional Approvers

An Institutional Approver is someone within an organisation/institution (e.g. research office staff) who will be required to approve and submit applications to the Trust. A generic email address should be used by the institution to allow multiple staff members to approve applications.

When an applicant commences an application he or she should click the Notify button to alert the Institutional Approver that there is an application in progress and that this will require approval for the application to be submitted to the Leverhulme Trust. Institutional Approvers can view a copy of the application in progress but cannot edit this. To view, approve or reject applications from your institution, log in to the Grants Management System and navigate to My Approvals.

When the applicant has completed and validated the application this must then be submitted for approval, where this is a requirement. Emails are sent to the signatories (in turn where there is more than one) informing them that their approval is required.

If the Institutional Approver rejects the application, the Principal Applicant will receive an email confirming this. At this point the application will be unlocked and amendments can be made. The application must then be resubmitted for any necessary approvals. Where there is more than one signatory (e.g. a Head of Department), the Institutional Approver can either reject an application back to the Principal Applicant or to the Head of Department.

Only when (final) approval is provided by the Institutional Approver on behalf of the Principal Applicant's institution is the application submitted to the Trust. A confirmation email is sent to the Principal Applicant and the Institutional Approver. Please note, Institutional Approvers are urged to check both the content and financial details (where relevant) of any application they approve. If

errors are found you should reject the application back to the Principal Applicant to ensure that these are rectified prior to submitting the application to the Leverhulme Trust.

## 4. Managing Grants

Grant holders must provide their annual and final reports via the Grants Management System. They can also upload published outcomes arising from an award.

### Progress Reports

Grant holders will receive an email notifying them that a progress report is required. The specific guidelines can be downloaded from the Trust’s website under the Grant Holders section, detailing when the report is due and what the content of this should be.

Reference	Title	Last Updated	Status
RPG-2016-5036	test	31/01/2017 14:54:50	Active
RF-2016-017	Test Leverhulme Grant	08/12/2016 14:02:01	Active

To upload a progress report go to My Grants, select the relevant grant from the grid (this shows active, completed and closed grants). You can only upload progress reports for active and completed grants.

The Details page shows a summary of the grant, including which progress reports are overdue, scheduled and completed. Overdue reports are indicated with a red cross.

If reports are due, click on Reports under Progress Reports. Once a report is at either the **Required** or **Requested** status, you will be able to upload the progress report. Additionally, and where the grant type permits, you will be able to upload a summary for Final reports that are Required or Requested. Any progress reports previously submitted to the Trust can also be viewed from this screen.

**Click Upload to provide your report.** Use the Choose File button to select the file you wish to upload. You can either upload a Word or PDF file for an annual or final report but this should not exceed 2MB (if the report does exceed this limit an error message will appear). Click Upload and this will submit the report to the Trust. Please note that if a final summary report is required for your

grant type, you can only upload a Word document, and this must not exceed 500 words. When the Trust has processed your report you will receive an email acknowledgement of thanks or notification informing you that the report requires amendments: you will then have the opportunity to upload a revised version. Please note that you cannot overwrite a report once it has been submitted.

## Published Outcomes

To upload published outcomes arising from an award, go to My Grants, select the relevant grant from the grid (this shows active, completed and closed grants). On the left-hand side select Published Outcomes and Add.

Year of publication is the only mandatory field, but it is helpful if you can complete as many of the other fields as possible. To upload a file select Add New, enter a description for the file if wish to do so, Choose File, Upload Document and hit Save. This will submit the file/published outcome to the Trust. You will also be able to view details of files you have submitted from this screen.

Please add the following information for the published outcome you would like to add

<b>Title:</b>	<input type="text" value="Test Publication"/>
<b>Year:</b>	<input type="text" value="2016"/>
<b>Author:</b>	<input type="text"/>
<b>Publication:</b>	<input type="text"/>
<b>Reference:</b>	<input type="text"/>
<b>Notes:</b>	<input type="text"/>

**Uploads** There are no files associated with this paper.

[Add New](#)

Browse to files you want to attach for this Paper submission, and click on **Upload Document** to upload them.

<b>Description:</b>	<input type="text"/>
<b>File:</b>	<input type="button" value="Choose file"/> No file chosen
	<input type="button" value="Upload Document"/>