

## Grantee Portal Training Manuals

### How to Grant Visibility on Applications to Other Users

1. In order to allow for collaboration on applications and reports, the Grant Portal allows applicants and grantees to connect more than one user to applications and reports allowing them visibility and editing permissions in the portal. Please note that while several people can view the application at once, only one user can edit an application or report at a time.
2. Click the card in which your application is in. This depends on which part of the process your application is currently in. Note that if there is a number beside the card, this indicates the number of records within them.

The screenshot displays the Grantee Portal interface for the Alberta Law Foundation. The main content area shows details for a grant application from Golden Years Society. The application is currently in the 'Draft Application' stage, which is highlighted in a teal bar. The 'REQUESTS' section on the left sidebar is expanded, and 'Draft Application Pending (1)' is highlighted with a red box. The 'Table of Contents' section lists various report categories, including Organization Information, Project Overview, and Project Rationale.

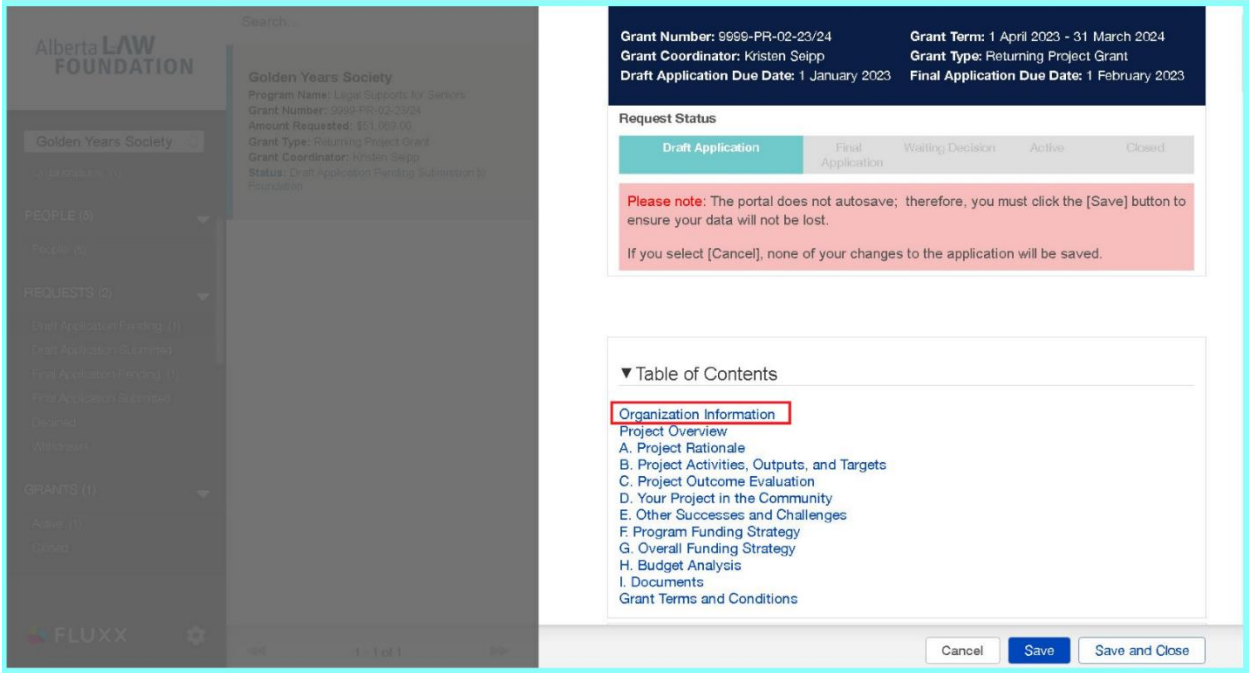
3. Select the application that you want to connect users to.

The screenshot shows the Alberta Law Foundation application interface. On the left is a sidebar with the organization's logo and navigation menus for 'Golden Years Society', 'PEOPLE (5)', 'REQUESTS (2)', and 'GRANTS (1)'. The main content area features a search bar, a red-bordered box highlighting the 'Golden Years Society' application details, and a 'Table of Contents' section. The application details include the program name, grant number, amount requested, grant type, coordinator, and status. The 'Table of Contents' lists sections from Organization Information to Grant Terms and Conditions. At the bottom right, there is a 'Submit' button.

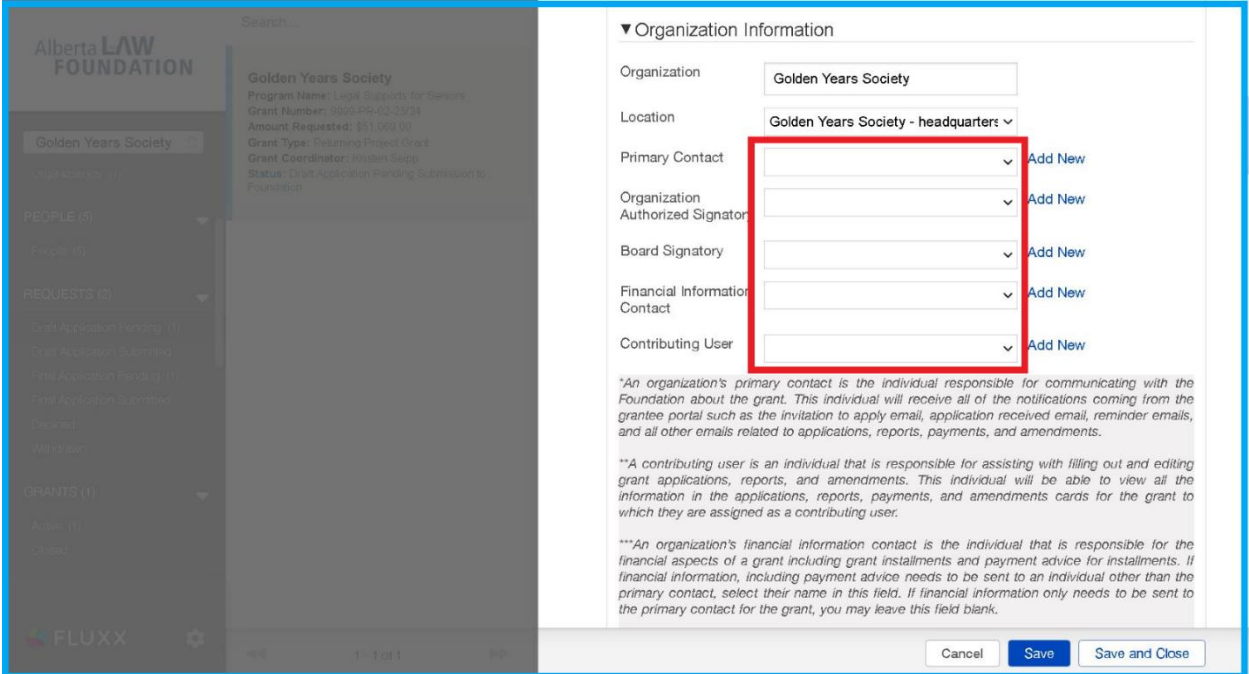
4. Click on the “Edit” button on the upper right side.

This screenshot is identical to the previous one, showing the same application interface. The only difference is that the 'Edit' button in the top right corner is now highlighted with a red box, indicating the next step in the process.

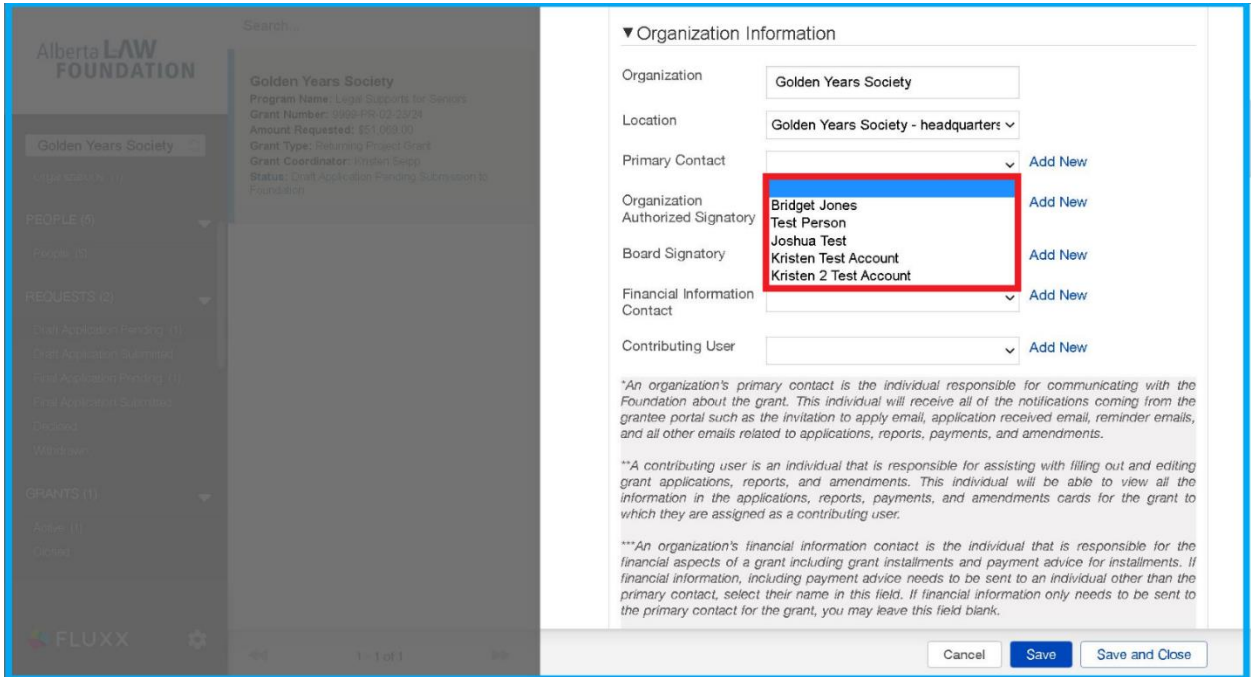
5. Navigate to the table of contents and click on "Organization Information" Clicking on the header in the Table of Contents will bring you to the corresponding section of the application. You also have the option to scroll down the page until you reach that section and then expand the section by clicking on the arrow.



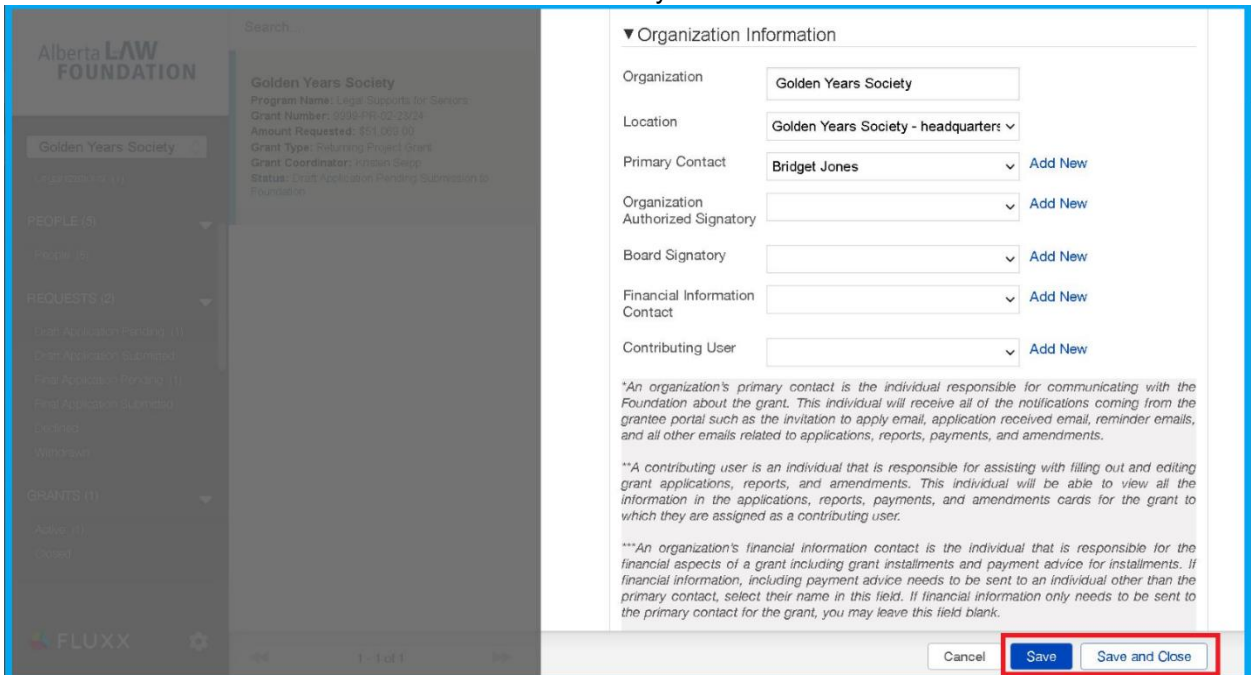
6. Click on the dropdown field for the role that you want to connect a user to.



- 7. Select the user to connect to that role.



- 8. Click on the "Save" or "Save and Close" button to save your work.



- 9. The user that you connected will now have visibility on that application and all reporting requirements connected to that application.