Alberta LAW FOUNDATION

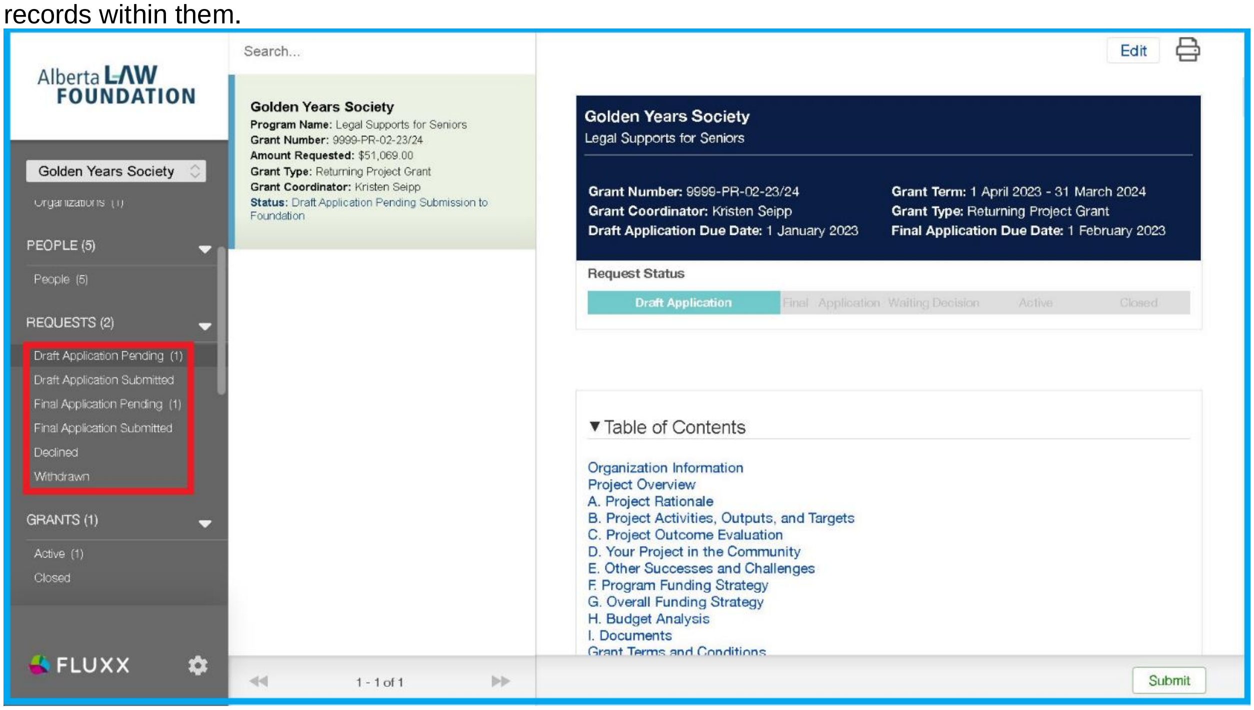
#980, 105 - 12 Avenue SE
Calgary, Alberta T2G 1A1
403-264-4701
www.albertalawfoundation.org

Grantee Portal Training Manuals

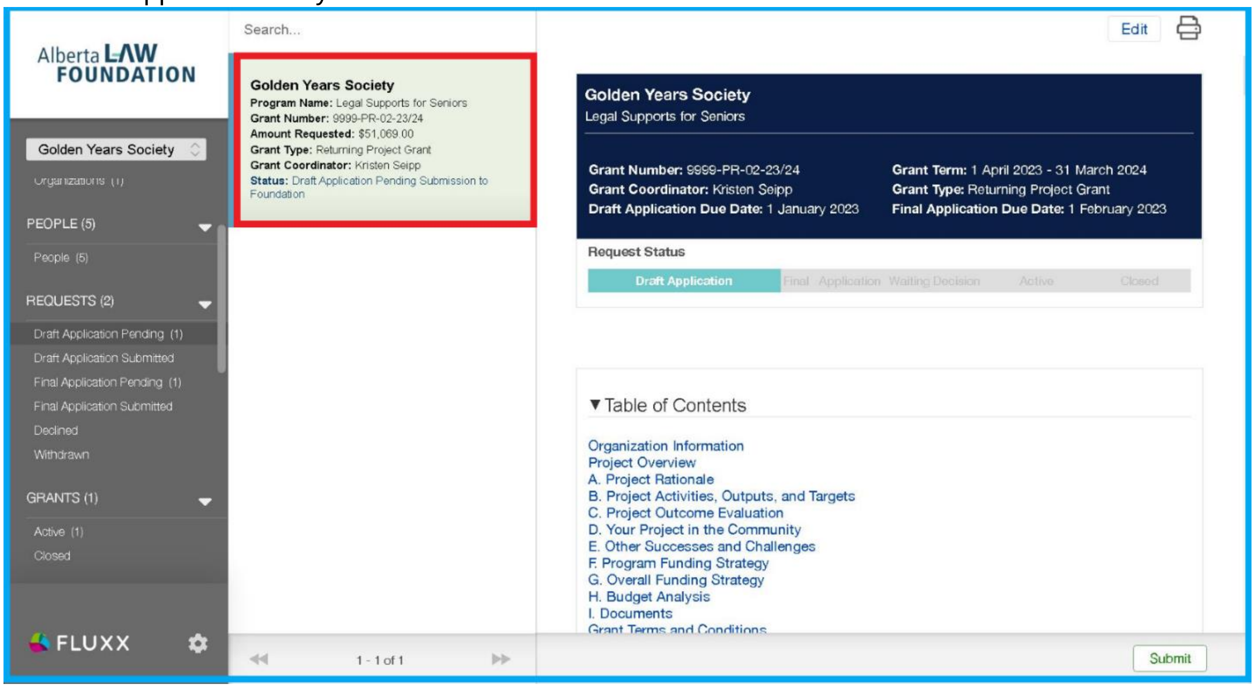
How to Grant Visibility on Applications to Other Users

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.

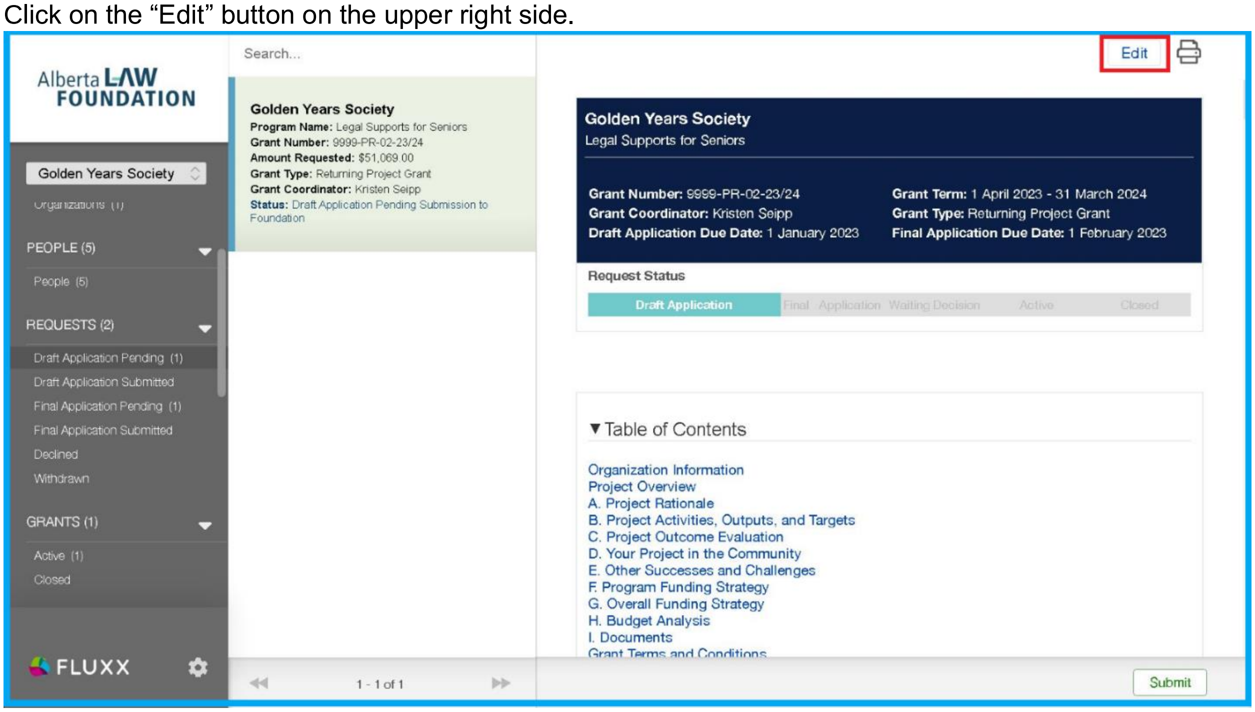
2. Click the card in which your application is in. This depends on which part of the process your application is currently in. Note that if there is a number beside the card, this indicates the number of records within them.



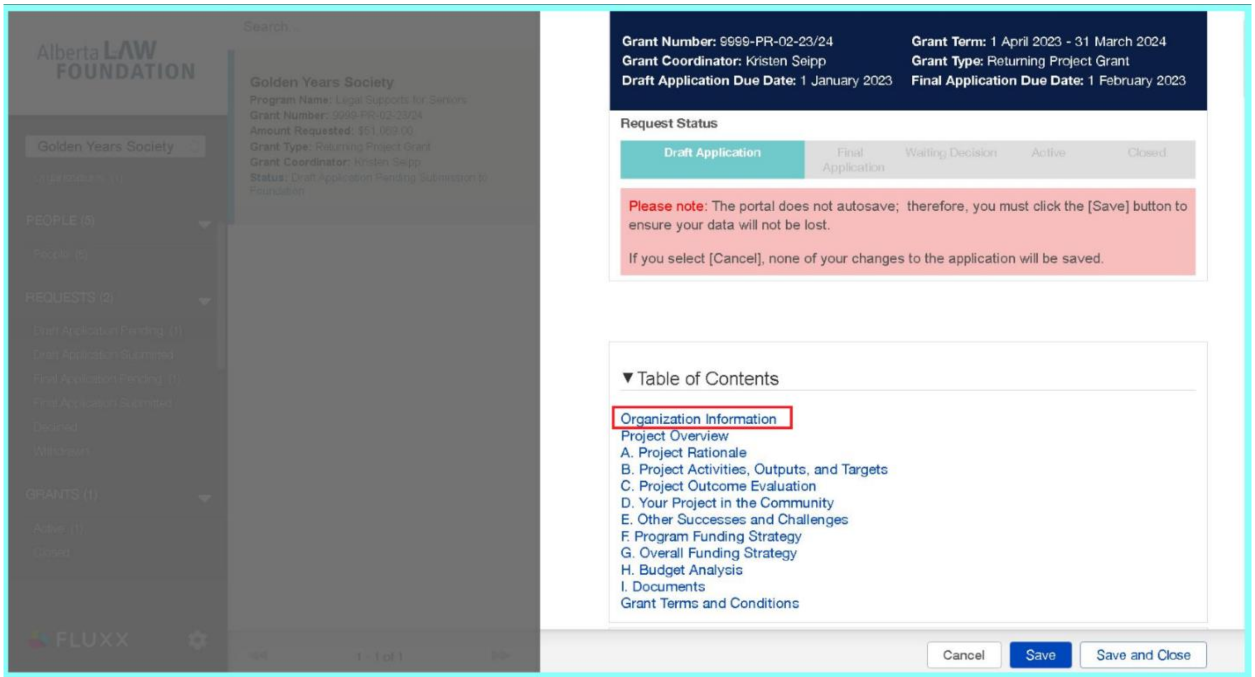
3. Select the application that you want to connect users to.



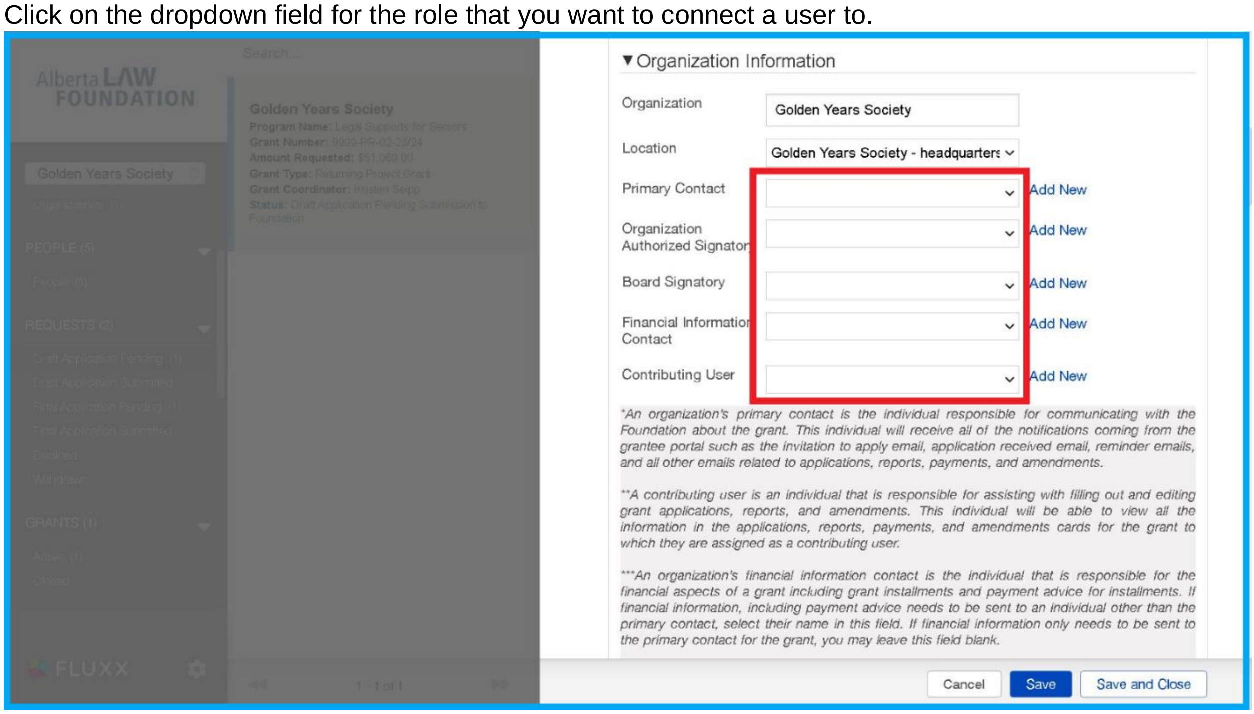
4. Click on the “Edit” button on the upper right side.



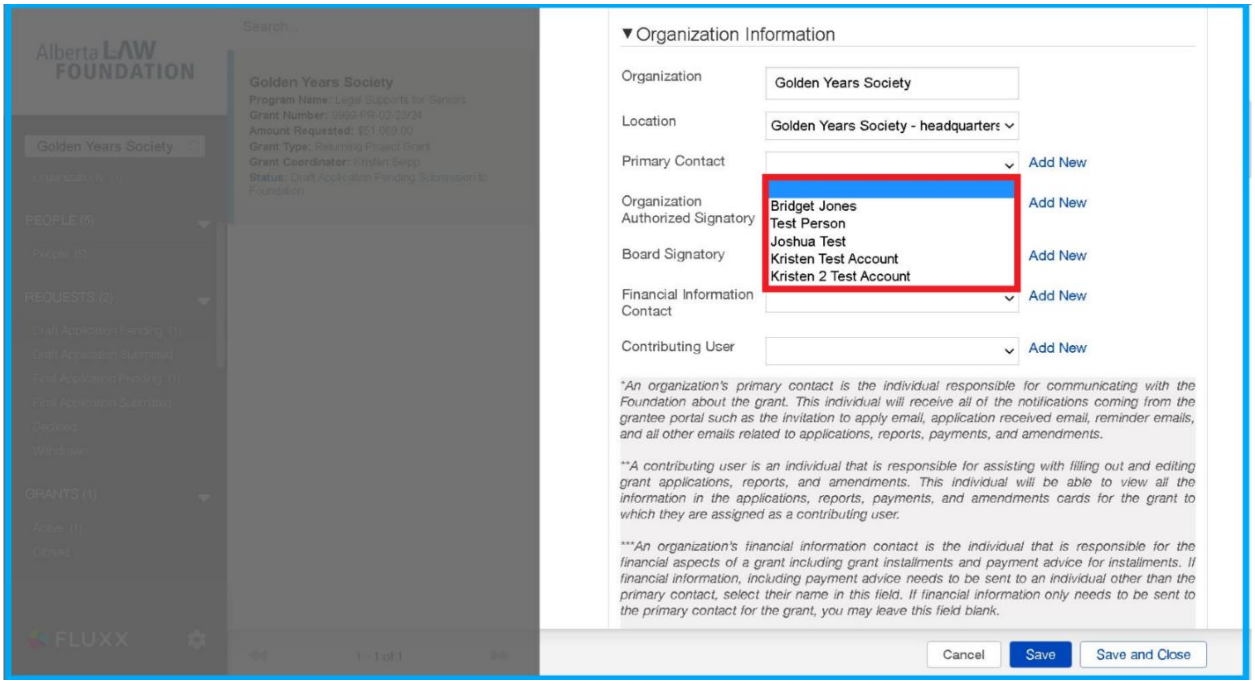
5. Navigate to the table of contents and click on “Organization Information” Clicking on the header in the Table of Contents will bring you to the corresponding section of the application. You also have the option to scroll down the page until you reach that section and then expand the section by clicking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



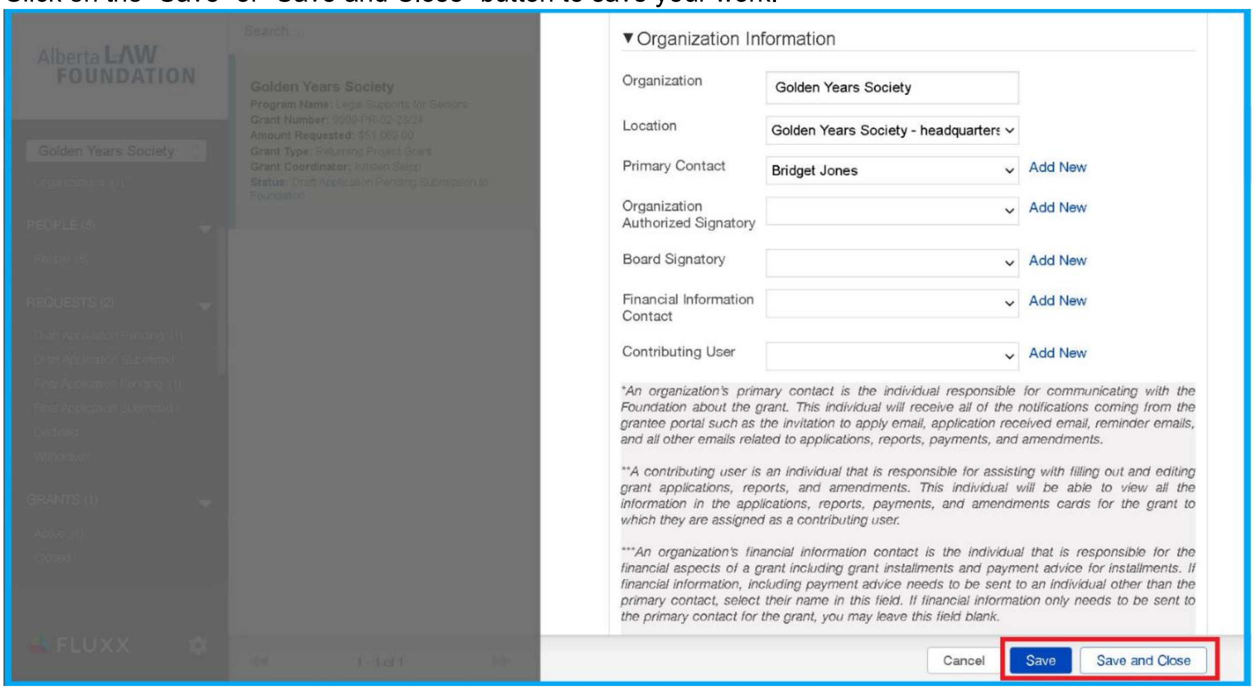
6. Click on the dropdown field for the role that you want to connect a user to.



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.