

Enhanced Functionality – Notes for Applicants and Grant Holders

Following the upgrade of the Trust's Grants Management System, the system has a number of new features of enhanced functionality for users:

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

The screenshot displays the Grants Management System interface for a Research Project Grant (Outline 59399). The top navigation bar includes 'The Leverhulme Trust', 'Grants Management System', and 'CC Grant Tracker'. The main content area is titled 'Scheme Information' and features a progress bar indicating '17% complete'. A sidebar on the left lists various application sections with status indicators: 'Scheme Information' (green tick), 'Principal Applicant Details' (red cross), 'Proposal' (red cross), 'Proposal Summary' (red cross), 'Publications' (green tick), 'Co-Applicants' (green tick), 'Previous and Current Applications' (red cross), 'Finance' (red cross), 'Institutional Approval' (red cross), and 'Validation' (red cross). The main content area has two tabs: 'Scheme Information' and 'How to complete the form'. The 'How to complete the form' tab is active and contains a list of buttons and icons with their functions: 'Save and Close' (saves all contents and returns to the previous area), 'Save' (saves all content within the form and allows further editing), 'Next' (takes you to the next available page and saves all content on the current page), 'Previous' (takes you to the previous available page and saves all content on the current page), a red dot icon (indicates a mandatory question), and a blue question mark icon (clicking this icon will display help information related to this question). Below the list, there is a section titled 'How to complete the form' with instructions on ensuring all sections are completed, adhering to word limits, and handling pasted content from other software. A final note states: 'Please do not copy and paste pictures or tables into text boxes, as these will not be rendered correctly when your application is submitted.'

- There is a new “traffic light” system to help you monitor the completion of your application form. Each section of the form is listed down the left-hand side of the screen. When a section has not been viewed, requires completion or has errors it is 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.
- The percentage bar at the top-left of the screen indicates how much of the application form you have completed.
- You can hit the Save button at any time, but when you navigate to another section/page this will also automatically save your work.
- Where you are asked to upload a document, you can now upload a Word (*.doc, *.docx) document or a PDF. 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).
- The “jump to” function now takes you not just to the page which needs completing or where there is an error, but to the specific question/s.
- When completing an application, 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.

Users are strongly advised to download and consult the System Help notes to assist them in using the Grants Management System.