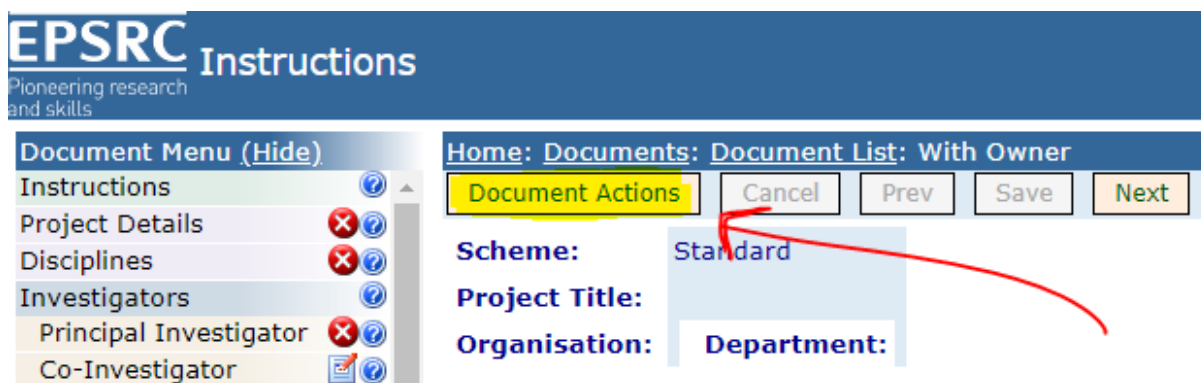


## How to grant view/edit access

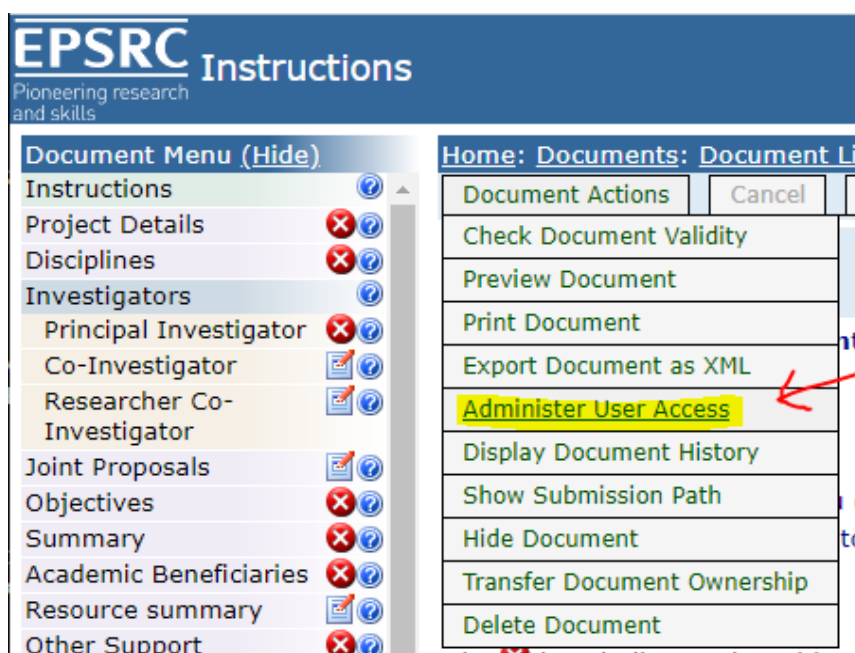
This document includes guidance for funder portals: JeS, EC, flexi-grant, & Leverhulme

### Je-S

1. Log-in and open the document that you wish to share
2. On the top right corner, hover your mouse over the box titled: 'document actions'



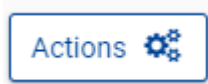
3. From the dropdown menu select: 'administer user access'.



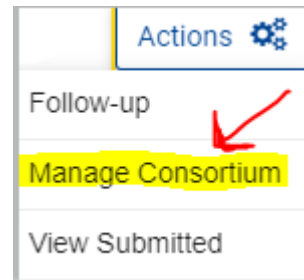
4. Please select the link: [Add editor](#)
5. Use the Search facility to enter the name of the person you wish to add and from the list of people returned, please select the relevant registered user by selecting the blue PID link.
6. Select the privilege "**view and edit**" and provide a reason for their addition to the document (i.e. RSO support). **Save** the information (button near the top).
7. An e-mail will be sent to the person who has been granted the access to the document. They will be able to access the document by logging into their own Je-S account, selecting 'documents' and opening the document from their document list.

## European Commission Participant Portal

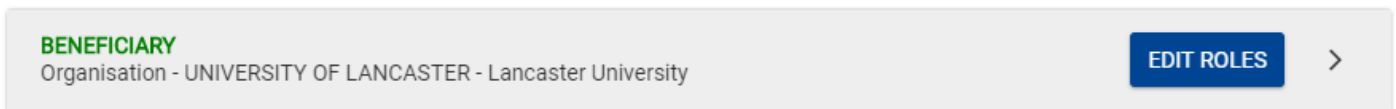
1. Log-in and open the proposal document that you wish to share



2. Click on “Actions” and then “Manage Consortium”



3. From the list of Beneficiaries find “Lancaster University” and select “Edit Roles”:



(Please note: if LU is leading the project, the link will be listed under “Coordinator” in red text)

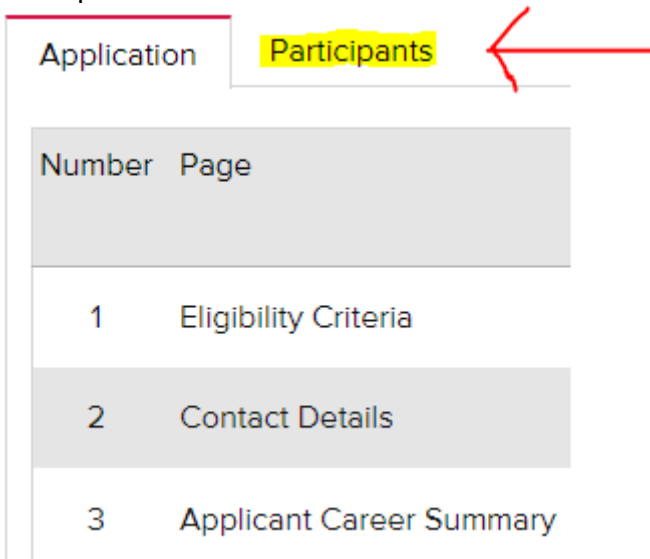


4. Click on “Add roles” and under “Role” select “**Participant Contact**”. Complete the remaining form ensuring to add the RDO’s university email address. Finish by click “**Ok**” at the bottom.
5. An e-mail will be sent to the person who has been granted the access to the document. They will be able to access the document by logging into their own portal account.

## The Royal Society (flexi-grant)

**Please note:** the lead applicant (the person who creates the application document) cannot be changed once the document is created.

1. Log-in and open the proposal document that you wish to share.
2. There is a table located on the bottom half of the page, at the top you will see two headings – click on “Participants”:




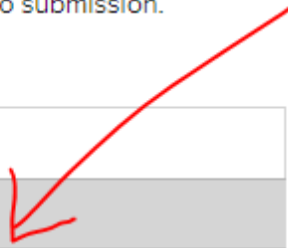
3. Please select the red "Invite" button and complete the form using your RDO's university email address:

Application    **Participants**

The Research Support role is **an optional role**, which allows you to invite an individual from the relevant UK Host Organisation research support team to review and amend the application prior to submission.

▼ Collaboration requests: Active, Pending or Required

Role	Assigned	Status
 Research Support		<input type="button" value="Optional"/> <input type="button" value="Invite"/> <input type="button" value="Not required"/>




**Please note:** If you add your RDO as 'Research Support', he/she will need to approve the costs before you will be able to submit the application. If you encounter last minute issues, then revoke this role.


4. An e-mail will be sent to the person who has been granted the access to the document. They will be able to access the document by logging into their own portal account.

## The Leverhulme Trust

1. Log-in and open the proposal document that you wish to share.
2. On the left hand side there is an application progress table, which includes "Institutional Approval"  
Please select this:

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

3. Click on the link found at the bottom of the page:

 [Notify Institutional Approver for Lancaster University](#)

4. An e-mail will be sent to main RSO-submissions account and someone within the costing team will notify your RDO.