

How to give access to your application form to project collaborators

Purpose: This quick reference guide shows you how to delegate access to collaborators to your application on the Synto platform and how to delete delegate access.

Where to find more information

- [Important dates and deadlines](#)
- [Which funding stream is right for you?](#)
- [Key application elements](#)
- Adjudication Rubrics
 - [Rubric SoTL Main.pdf](#)
 - [Rubric DI Main.pdf](#)

Audience: All University of Calgary employees who are [eligible](#) to apply for a Teaching and Learning grant.

Please note this is a new platform and new process and we welcome any feedback you have to help us continue to improve our program. You can send your feedback to TLgrants@ucalgary.ca



Step 1: Go to your application

1. Under **Application space**, **Grants**
2. Click on relevant application

The screenshot shows the Synto interface. At the top left is the University of Calgary logo and name. Below it is a navigation menu with 'Application space' selected. A red box labeled '1.' highlights the 'Grants' option in the dropdown menu. To the right, the breadcrumb trail reads 'Home > Application space > Grants > Applications'. Below this is a text box: 'Hover the mouse over a portion to see the full text. Click on a portion to filter the list of applications.' A large orange circle is overlaid on the right side of the page. Below the breadcrumb trail, the word 'Applications' is displayed in a large font. Underneath, there is a 'Description' section with a 'Filter by application id' input field. A red box labeled '2.' highlights a specific application entry: '50- Director Senior - - Test_12 Dec 2022' with a sub-description 'Development and Innovation (D&I) / DI-Session 2022'.

Step 2: Add a delegate

1. In the **General Information** panel on the right side of the screen click on, **Delegations**

The screenshot shows the 'General Information' panel. It lists the following details: ID: 50, Title: Test_12 Dec 2022, and Principal investigator's name: Megali Leong. There is a 'More' button with a dropdown arrow. Below this is a table titled 'Applications' with columns: Task, Role, Last update (dd-mm-yyyy), and Print Pdf. The table contains one row: 'Complete and submit form' (Task), 'Principal Investigator' (Role), '09-12-2022' (Last update), and a PDF icon. A red box labeled '1.' highlights this row. Below the table is a 'Delegations' button with a dropdown arrow, which is highlighted with a red box. Below that is a 'Documents' button with a dropdown arrow.

2. Click, **Add**

The screenshot shows the 'Delegations' panel. It has a title 'Delegations' and a sub-header 'No delegations found'. A red box labeled '2.' highlights a blue 'Add' button at the bottom right of the panel. Below the 'Delegations' panel is a 'Documents' panel with a dropdown arrow.



- 3. Enter the **Email** address of your delegate
- 4. click on **Validate** (this confirms that the email address is connected to a Synto account)
 - *The delegate must have a Synto account before you can add them to your application*

Add delegation **3.**

* Email

4.

- 5. Under **Select task to be delegated** choose **Complete and submit form**

Add delegation

* Email

* Name **5.**

* Select task to be delegated

- 6. Under **Which sections of the form should be shared?** Check all the application sections you would like to share with the delegate

* Which sections of the form should be shared? **6.**

- Select all
- A. Terms and conditions
- B. Eligibility
- C. Applicant
- D. Project Information
- D.i. OER Area of Focus
- E. Project Description
- F. Research Teams
- G. Timeline
- H. Budget
- I. Leadership Approvals
- J. Submission

7.

* From (dd-mm-yyyy)

* To (dd-mm-yyyy)

8.

- 7. Enter the start and end date of their access

- 8. Click **Save**

Step 3: View or Delete a delegate

- Under **Application space, Grants**
- In the **General Information** panel on the right side of the screen click on, **Delegations**

1. To the right of the delegate click on the on the vertical ellipsis ⋮
2. Click **View** or **Delete**

General Information

ID
50 (2301-50)

Title
Test_12 Dec 2022

Principal investigator's name
Megali Leong

More

Applications

Delegations
Add


Email	Name	Sharing from (dd-mm-yyyy)	Sharing to (dd-mm-yyyy)	Action
tisrdirector@ucalgary.ca	Senior Director	15-12-2022	16-01-2023	⋮

View
Delete

Documents

Next Steps

- The delegate will receive an email notifying them of their access to your application form
- The delegate can access the delegated application in the **Application space > Grants > Application > General Information**



**UNIVERSITY OF
CALGARY**

Application space

Grants

CV

Home > Application space > Grants > Applications

Hover the mouse over a portion to see the full text. Click on a portion to filter the list of applications.

Deleg

Applications

Description

Filter by application id

50- Director Senior - - Test_12 Dec 2022
Development and Innovation (D&I) / DI-Session 2022

General Information

ID
50 (2301-50)

Title
Test_12 Dec 2022

Principal investigator's name
Megali Leong

More

Applications

Task	Role	Last update (dd-mm-yyyy)	Print Pdf
Complete and submit form	Delegate	09-12-2022	PDF

Documents

Need help? TLgrants@ucalgary.ca