

SmartyFile (Optional Tool)

SmartyFile is a free data repository that allows applicants to view, search, manage and sort all their grant submissions from multiple funders in one convenient location. It also enables collaboration with other project team members on SmartyGrants submissions.

Once you start a submission in SmartyGrants, you can continue working on it individually or assign it to an organisation—such as Gold Coast Health—within SmartyFile. You can then share the submission with your chosen team members, granting them viewing and editing permissions through the organisation profile.

Please Note: The SmartyFile organisation profile for Gold Coast Health has already been created. To access it and set up your permission levels, please contact the Grants Administrator. You may be prompted to join the organisation when you open SmartyGrants, or you can reach out directly.

	Description	Explanation
Step 1	Login	If you are an existing SmartyGrants user, login to SmartyFile using your SmartyGrants email and password. If a team member does not currently have a SmartyGrants login, they will be prompted in SmartyFile to register and create a login.
Step 2	My Submissions <i>(For those with prior submissions or once you have commenced a submission in SmartyGrants)</i>	If you are an existing user with previous submissions, once logged in, select my submissions and you will be able to view all submissions under your profile.
Step 3	View Submissions / forms <i>(For those with prior submissions or once you have commenced a submission in SmartyGrants)</i>	Each submission will be headed with the submission ID, name of the funder (Gold Coast Health) and the grant round . By clicking on the submission ID, a window will pop up with submission details. The link to the submission form and other forms related to the round will be displayed in this pane along with the status of those forms. Alternatively, in the main submission pane, by selecting the downward arrow, a dropdown to forms will also appear.
Step 4	Hamburger Icon <i>(For those with prior submissions or once you have commenced a submission in SmartyGrants)</i>	Click on the hamburger icon to the top right of the submission pane. This provides the options to Archive the submission, Delete the submission or Assign it to an organisation (once assigned to an organisation, the submission owner will then have the option to 'share' with team members).
Step 5	Obtaining Organisation User permission	Before assigning submissions to an organisation, you will first need to be provided with organisation User Access and permissions by the Organisation Administrator . The below table describes the permission levels available. The Administrator will designate Author permission with limited access to the Applicant (Lead / Co-Lead CI). Collaborating team members nominated by the applicant will be granted Contributor permission for limited viewing and editing unless otherwise advised by the owner (Lead CI).

If you are not prompted through SmartyGrants, you can contact the 'organisation' Grants Administrator for user permissions as an applicant (Lead CI) and to nominate team members for access.

Please ensure you and your team members have created login details for SmartyGrants/SmartyFile prior to requesting permissions. Email address details for each user will be required to set up access and permissions for 'organisation' access.

Permission Levels

	Administrator	Author	Contributor	Viewer / Analyst
Manage Organisation	✓	-	-	-
View Organisation Profile	✓	✓	-	-
Create / Start Items	✓	✓	-	-
Edit Items ⁽¹⁾	All	Limited ▾	All / Limited	-
View Items ⁽¹⁾	All	Limited ▾	All / Limited	All / Limited
Submit Items ⁽²⁾	Optional	Yes ▾	-	-

(1) Limited - Access to submissions owned by, or shared with, the user
All - Access to all submissions within the organisation

(2) No - Cannot submit items on behalf of the organisation
Yes - Can submit items on behalf of the organisation

Step 6

Assigning your submission/s to an Organisation

Once you are provided user access, if you select '**Assign to org**' from the hamburger icon, you will be directed to a pane asking you to assign your submission to an organisation. The '**select option**' arrow will display Gold Coast Health and any other organisations powered by SmartyGrants where you have made previous submissions. It is within this pane that you **assign your submission** to the organisation (Gold Coast Health).

You will now see the name of the organisation (Gold Coast Health) appear on the submission pane above the submission owner name.

By assigning your submission to the **organisation**, you will now be able to share the submission with those project team members you nominate.

Step 7

Sharing Submissions

Once you have organisation permissions and assigned your submission to the organisation, you can commence sharing. Select the hamburger icon again. This provides you with the additional options to **Share** and **Change Owner**. Submissions can also be **Removed** from

		the organisation by the Administrator (once removed, the owner is the only one in control of that submission).
Step 8	Refer to the SmartyFile help guide	Please refer to the applicant help guide for SmartyGrants and SmartyFile. http://applicanthelp.smartygrants.com.au/help-guide-for-applicants/
	Links and contacts	SmartyFile Access and login SmartyGrants/SmartyFile help guide Grants Administrator details: P: 5687 0663 E: grantsgoldcoast@health.qld.gov.au