Getting started with the CFI Awards Management System

An overview document for institutional administrators

December 2014
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1 DEFINITIONS

**Institution** refers to the Canada Foundation for Innovation (CFI)-eligible institution or an authorized representative acting on behalf of the institution.

**Institutional administrators** refer to individuals responsible for managing CFI projects on behalf of the institution. These individuals are responsible for pre-award and post-award activities.

**Post-award activities** encompass all activities related to managing the successful projects including award finalization, amendments, project progress reports and financial reports. This also includes managing the institution’s Infrastructure Operating Fund (IOF) allocation and IOF annual reports.

**Pre-award activities** encompass all activities related to applying for CFI funding, uploading supporting documents, collaborating with researchers to submit proposals, and viewing the funding decisions and review materials for proposals.

**Project leaders** refer to individuals mandated by the institution to lead CFI-funded projects.

**Reviewers** refer to individuals who participate in the review process of proposals submitted to the CFI.

2 REFERENCE MATERIAL

This guide is intended for institutional administrators who use CAMS to manage pre-award and post-award activities. Other guides are available, depending on your role and the type of activity you perform in CAMS.

**Researcher:** If you are a researcher, please refer to the document *Getting started with CAMS: An overview document for researchers.*

**Reviewers:** If you are a reviewer, please refer to the document *Getting started with CAMS: An overview document for reviewers.*

**Project progress reports:** If you are an institutional administrator or a researcher involved in preparing and submitting project progress reports, please refer to the document *Instruction manual for completing Project progress reports.*

3 WHAT IS CAMS?

The Canada Foundation for Innovation Awards Management System (CAMS) is the secure online portal that allows universities, colleges, research hospitals and non-profit research institutions to apply for CFI funding and assists them in managing the full lifecycle of a CFI-funded project.

CAMS allows institutional administrators to manage pre-award and post-award activities related to CFI funding. It also allows researchers to prepare proposals for internal submission to the institution, as well as have access to information related to the projects they lead. Finally, CAMS gives reviewers access, in a single location, to the information and documentation necessary to assess the proposals assigned to them.
4 ACCESS TO CAMS

4.1 Accounts and access privileges

The CFI account administrator and CFI liaison are responsible for determining the system access privileges for each institutional administrator. This is done using the Institutional users access form. The form must be used when requesting the creation of a new account in CAMS or when requesting changes to the access privileges of an existing CAMS account holder, including the removal of access privileges. The completed form can be sent to the CFI by either the CFI liaison or the CFI account administrator via email to accountmanagement@innovation.ca.

The institution can grant different access privileges to each institutional administrator for every module. The institution will generally be able to choose from the following access privileges:

- Read only,
- Data capture (no submission capabilities)*,
- Submit (includes data-capture and submission capabilities)*,
- No access.

* Available only for modules that involve the completion and submission of forms and reports.

Accounts will be created or modified by the CFI. Following the creation of a new account, an automated email notification (from notification@cfi-fci.ca) will be sent to each user to activate the account. The accounts must be activated within 30 days of receipt, so please ensure that the CFI’s automated activation messages will not be blocked by your institution’s firewall.

Note that the above form must not be used to create new accounts for project leaders or to modify their access privileges. Project leaders can create new accounts online. Their privileges related to post-award modules can be set in CAMS by the CFI liaison or the CFI account administrator (refer to section 5.3, “Setting project leaders’ access to post-award modules”). In addition, this form must not be used to notify the CFI of any changes to the CFI liaison, CFI account administrator or authorized signatory. To change these designates, the institution can forward a revised Institutional agreement to the CFI.

The CFI account administrator and the CFI liaison are responsible to inform the CFI of changes required to institutional account privileges. To help manage this process, a list of institutional users can be accessed in CAMS. This list should be consulted on a regular basis to ensure it is up to date and no changes are required.
Note: Users should have only one CAMS account. If a user is both a researcher and an institutional administrator, he or she can have access to both the researcher dashboard and the institutional dashboard with a single CAMS account. Please notify the CFI of such situations when forwarding the Institutional users access form by including a mention to this effect in your email.
4.2 CAMS sign in page

Once your CAMS account is created and the appropriate privileges assigned, you can access CAMS as follows:

- Navigate to *innovation.ca*;
- Click “CFI online” from top of screen;
- Click “Sign in” in right-hand menu; and
- The CAMS sign in page will appear.

On this page:

- Registered users can sign in;
- Registered users who have forgotten their password can reset their password; and
- Researchers can create a CAMS account.
4.3 Resetting your CFI password

If you have forgotten your password, you can request to have the password automatically reset by clicking “Forgot password?” on the sign in page. You will be required to provide your username (email) and the answer to the security question in your profile. If you do not remember the answer to this question, please contact the CFI help desk at help.aide@innovation.ca. Your temporary password will be emailed to you. Use this password to sign in to CAMS. Please note that the temporary password will expire after 30 days.

4.4 Accessing user profile and preferences

These pages allow you to manage your contact information and password, as well as view privacy notices from the CFI.
5 THE INSTITUTIONAL DASHBOARD

5.1 Overview
Once signed in as an institutional administrator in CAMS, you are automatically directed to your institutional dashboard. The information you can access is dependent on the access privileges granted to you by your institution for every module.

5.2 Navigation
The institutional dashboard contains a number of sections. The following image describes these sections and illustrates their functionalities.

Note: You may not see all the sections displayed above. The sections displayed on your institutional dashboard will depend on the access privileges granted to you by your institution.
A number of features are available in most CAMS modules that can help you navigate between screens or provide contextual information for certain fields.
5.3 Setting project leaders’ access to post-award modules

An institution can grant project leaders access to perform any or all of the following actions in relation to the project(s) for which they are the designated project leader:

- view award finalization information (e.g. status, *Award agreement*, budget at award finalization, CFI conditions),
- view amendment information (e.g. status, amendment in progress or submitted, CFI comments) and complete amendment requests for internal submission to the institution,
- view financial report information (e.g. status, financial reports in progress or submitted, CFI comments),
- view payment information and associated CFI comments.

Note that the access option (“Yes” or “No”) selected for each of the modules will apply to all project leaders at the institution, as this cannot be customized at the individual project leader level.

![Set project leaders access to the amendment module](image)

**Note:** Only the CFI account administrator and CFI liaison can modify this selection on behalf of the institution.
6 THE APPLICATION PROCESS

The process to submit a Notice of Intent (NOI) or proposal to the CFI typically involves three steps:

1. The project leader creates a new proposal and completes the forms online. Once the project leader has marked the form as complete he or she will no longer have access to modify it. Institutional administrators with appropriate access can also complete the forms online on behalf of the project leader.
2. The institution may edit the form and/or release it back to the project leader for revision. When the NOI or proposal is deemed final, the institution indicates that the form has been verified. If applicable, the system will generate the final PDF version of the complete proposal at this point.
3. An authorized institutional administrator then submits the NOI or proposal to the CFI.

Note: For more information on the application process, refer to the specific instructions for each fund available through the “Our funds” page of the CFI website.
6.1 Managing proposals

As an institutional administrator involved in pre-award activities, your institution may have given you access to the CAMS proposal management section. The proposal management section allows you to view the status of your institution’s NOIs and proposals.
6.1.1 Searching

CAMS provides a search functionality to help institutional administrators locate specific NOIs or proposals. You can use this search functionality by providing a project number, or other search criteria (see figure below.)

Click to perform your search based on all selected criteria and display the results.

Click to display a list of all of your institution’s projects.
6.1.2 Listing and sorting

Whether you list items by status, or search for specific projects, you will be presented with a table of results. The available actions will depend on the status of the NOI(s) or proposal(s) listed. Some basic features are available on each table, including the ability to sort by column and return to the search page (see figure below).
6.1.3 Completing and validating forms

The status of all newly created projects in CAMS is “in progress”. Project leaders have full access to the forms to enter data. If the institution wishes to mark the form as complete on behalf of the project leader, it will be able to do so from this table. Once the form is marked as complete the project leader will no longer be able to modify it.

6.1.4 Navigating within the form

Click “Home” to return to your dashboard.

Use the left-hand menu to navigate across proposal sections.
6.1.5 Verifying or returning to the project leader for corrections

Once the form has been marked as complete, the institution retains access to edit the forms and can return them to the project leader for corrections. Once the institution is satisfied that the NOI or proposal is final and ready for submission to the CFI, it must indicate this by clicking on the button in the “Verified?” column. Note: Depending on the fund, additional validation rules might apply at this stage. Run the validation to check if all required data has been entered in the form.

For proposals that include several modules or CVs, the system will generate a complete PDF of the proposal by merging all components into a single file. The merged PDF will be available within 24 hours and will appear as an option in the “Display/Print” window. Proposals can be submitted to the CFI prior to having the merged PDF available.
6.1.6 Reopening or submitting to the CFI

Once the form has been marked as verified by the institution, an authorized institutional administrator may submit one or more NOIs or proposals to the CFI. If the institution needs to modify the forms it must reopen the forms for editing. If applicable, this will delete the merged PDF of the proposal.

Once a NOI or proposal has been submitted to the CFI, the institution will no longer be able to edit the forms. In some cases, the CFI may return a NOI or proposal to your institution so that corrections can be made. These can be found in the status list (see section 6.1, “Managing proposals”).
6.1.7 Project archiving

At any time, an institution may decide that it will not submit a particular project or group of projects. Institutions can archive these projects to remove them from the institutional and researcher dashboards. Note that you can only archive projects if their proposal has never been submitted.

Search for a project either by project number or other criteria.

Use these buttons to archive or un-archive the selected projects.

Select one or more projects from the search results.
7 DECISIONS

As an institutional administrator, your institution may have given you access to the CAMS decisions module. This module allows you to view decisions related to proposals submitted to the CFI by your institution and gives you access to competition documents uploaded by the CFI.

7.1 View decision(s)

This search engine enables you to search and display subsets of decisions made by the CFI Board. Alternatively, you may click on the link “View all decisions” to list all decisions for your institution.
7.2 Competition documents

This section allows you to view documents uploaded by the CFI in relation to competitions, such as review material.
8 AWARD FINALIZATION MODULE

As an institutional administrator involved in post-award activities, your institution may have given you access to the award finalization module. The award finalization module allows you to view award finalization status information related to the projects at your institution, thereby helping you manage your award finalization process. The search features allow you to obtain/view lists of projects for various award finalization statuses. In addition, you can view specific project-related information such as the Award agreement, the budget at award finalization, the Award finalization form, and Award agreement special conditions (if any).

This section provides additional information on the award finalization module within CAMS. You should consult the CFI Policy and program guide for complete information on requirements and guidelines related to finalizing CFI awards.

If an updated budget is required prior to finalizing the Award agreement, institutions must submit an amendment using the amendment module. Refer to the next section of this guide for further information regarding the amendment module.

8.1 Searching

The award finalization module allows you to search for a specific project, search by project leader, or search for projects based on their current award finalization status.
8.2 Search results

Whether you search for a specific project or by award finalization status, you will be presented with a table of results listing the project(s) that match your search criteria. The list is by default sorted by project number ascending, but you can sort the information by clicking on most of the column headers in the table. You also have the option of exporting your search results to Excel.

The search results will show you the date the Award finalization form was received by the CFI, the date the Award agreement was issued by the CFI and which budget was used at award finalization (itemized list, amendment or proposal). You will also be able to view special conditions included in the Award agreement and whether these have been met or not.

Finally, you will be able to view the forms and attachments related to a project such as the Award finalization form, the Award agreement and the budget at award finalization (in both PDF and Excel format) by clicking on the “View” link. If applicable, you will also be able to view all revised Award agreements issued for the project.

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1 The use of this form has been discontinued by the CFI in December 2014.
9 AMENDMENT MODULE

As an institutional administrator involved in post-award activities, your institution may have given you access to the amendment module. The amendment module allows you to view amendment status information related to your institution’s projects, thereby helping you manage the amendment request process at your institution. The search features allow you to obtain/view lists of projects based on the project or amendment status (e.g., in progress, approved, rejected). The amendment module allows you to create, update, delete and submit amendment requests, as well as view CFI comments (if any) related to a specific amendment.

This section provides additional information on the amendment module within CAMS. You should consult the CFI Policy and program guide for complete information on requirements and guidelines related to changes to infrastructure projects and instances where a change request must be submitted via the amendment module in CAMS.

If an updated budget is required prior to finalizing the Award agreement, institutions must submit an amendment using the amendment module. This same module must be used to submit an amendment request following the finalization of an Award agreement.

**Note:** Amendment requests can only be created if a final financial report has not yet been created for a project. Inversely, a final financial report cannot be created if an amendment request is in progress.

9.1 Searching

The amendment module allows you to search for a specific project, or to search for projects based on the project leader’s name, the fund, the status of the latest amendment request or the status of the project. You can also view all projects or only projects with an amendment request.

When you search for a specific project using the project number, you will be brought directly to the project’s main amendment page (see section 9.3, “Project’s main amendment page”).
9.2 Search results

When you search using family name, first name, statuses or by using the links available (view all projects or view all projects with amendment requests), you will be presented with a table of results listing the project(s) that match your search criteria. The list is by default sorted by project number ascending, but you can sort the information by clicking on any of the column headers in the table.

![Search results table]

9.3 Project’s main amendment page

Each project has a main amendment page where you can view the status of previous amendment requests submitted to the CFI for this project (if any), and create new amendment requests.

![Amendment request page]

Click a project number to access this project’s main amendment page.

Click this button to create an amendment request.

Click to view CFI comments on amendment request.

Click to view a PDF version of the amendment request.
Note that only amendment requests relating to changes to the infrastructure will include an Excel version of the Amendment request, in addition to the PDF version. If the amendment request pertained only to a change in the project end date, only the PDF version of the Amendment request will be available.

For amendments that are in progress, you will be able to run a validation (to check for errors in the amendment form) and perform various actions, depending on the status of the amendment. You can also delete an amendment request previously created but not yet submitted to the CFI.

Click “Open” to access the amendment request form.

Click “Run” to perform a validation of the information entered in the form.

Select a value to perform an action.

Click to delete the amendment request.
9.4 Amendment requests: statuses and actions

The status of all newly created amendment requests in CAMS is “in progress.” The amendment requests can be created only by institutional administrators with appropriate access. They can then be accessed by the project leader if institutional access has been granted.

If given access, and once a project leader has finished entering data in the amendment request, he/she will be required to set it as “complete.” Once the project leader marks the amendment request as completed, he/she will no longer have access to modify it.

Note that completion of the amendment request by a project leader is not a mandatory step. An institutional administrator with the appropriate privileges can fill in the form and set it as “verified,” even if project leaders have been granted access in the system.

The institutional administrator will then verify the amendment request and set the status as verified. If changes are required, the institutional administrator can also return the amendment request to the project leader so that he/she can make the appropriate changes.

Once an amendment request has been set as verified, it can be reopened to make additional changes, if required. If no further changes are required, the institutional administrator with appropriate access can submit the amendment.
request to the CFI. No further changes are possible at this point, and the status of the amendment changes to “submitted to the CFI.”

The CFI will approve the amendment request, reject it or return it to your institution for corrections. In the latter case, the process described above should be followed once again. Note that it is possible to delete an amendment request at any stage in the process, except after it has been submitted to the CFI, approved or rejected.
9.5 Amendment request form

The Amendment request form consists of six tabs. When an amendment request is first opened, the default tab is the "Overview" and the other tabs are not accessible. You will first need to indicate the nature of your change (i.e. change to the end date of the project or change to the infrastructure, including new items, or both). This will determine which tabs will become available and need to be filled out. The last tab allows you to attach up to three documents (PDF format) to further explain changes made to the project.

Use tabs to navigate through the sections.

Append files in the “Attachments” tab.

Click “Display/Print” to access the PDF version of the Amendment request form.

Save changes before navigating to other sections (tabs).

Selecting nature of change will enable relevant sections (tabs).
10 PAYMENT MODULE

As an institutional administrator involved in post-award activities, your institution may have given you access to the payment module. The payment module allows you to view payment information related to an infrastructure project or the IOF. You can also view payment information by transaction date or for a specific period for all projects. Finally, payment information can be viewed by type or status.

10.1 Searching

The Payment module allows you to search at either a detailed level or at a summary level.

Searching at a detailed level will allow you to view individual payment transactions. You can use various search criteria such as project number, transaction date, payment type, payment status or a combination of these. You also have the option of displaying only IOF payments.
Searching at a summary level will allow you to view summary payment information. You can search for a specific project or by status of project (all, on-going or completed).
10.2 Search results

The search results displayed for the “Details” tab will list all individual transactions that match the search criteria entered. The search results can be exported to Excel.

The search results displayed from the summary tab will list all projects that match the search criteria entered. From the search results displayed, you will be able to drill down to transaction level information by clicking on the project number link. The search results can be exported to Excel.
11 FINANCIAL REPORT MODULE

As an institutional administrator involved in post-award activities, your institution may have given you access to the financial report module. The financial report module allows you to view financial report status information related to a project, thereby helping you manage the financial reporting process at your institution. The search features allow you to obtain lists of projects by financial report status or type (e.g. in progress, submitted, approved, interim, final). The financial report module allows you to create, update, delete and submit financial reports, as well as view CFI comments (if any) related to a specific financial report.

This section provides additional information on the financial report module within CAMS. You should consult the CFI Policy and program guide for complete information on requirements and guidelines related to the financial reporting process.

11.1 Searching

The financial report module allows you to search for a specific project (using project number or project leader name), or to search for projects based on the status of the latest report created or the financial report type. You can also view the information for all projects or view a list that includes information of the next report due for each project.

When you search for a specific project using the project number, you will be brought directly to this project’s main financial report page (see section 11.3, “Project’s main financial report page”).

![Use these links to quickly retrieve relevant project lists.](image)
11.2 Search results

When you search using family name, first name, status of latest financial report created, financial report type or by using the “View all projects” link, you will be presented with a table of results listing the project(s) that match your search criteria. The list will indicate the status of the latest financial report created.

When you use the “View reports to be submitted” link, you will be presented with a table of results listing the next report due for the on-going project(s) at your institution.
11.3 Project’s main financial report page

Each project has a main financial report page where you can view the status of previous financial reports submitted to the CFI for the project (if any) and create a new financial report.

Click to create a financial report for this project.

Click to view comments from the CFI.

Click to view a PDF version of the financial report.
For financial reports that are in progress, you will be able to run a validation (to check for errors in the *Financial report form*) and submit the financial report to the CFI. You can also delete a financial report previously created but not yet submitted to the CFI.

### 11.4 Financial report statuses

Once a financial report is submitted to the CFI, the CFI will assign one of the following statuses to the report:

- **Approved**: the financial report has been reviewed by the CFI and approved. No further action is required from your institution.
- **Returned to institution for corrections**: the financial report has been reviewed by the CFI but corrections are required. You will need to view the CFI comments for this report, make the appropriate corrections, and re-submit the report to the CFI.
- **Issue pending**: the financial report has been reviewed by the CFI but there is an issue pending that requires follow-up by your institution. You will need to view the CFI comments for this report and address the issue described.
- **Submitted to the CFI — No CFI action required**: In some cases, your institution may choose to create a financial report even if one is not required by the CFI. In those cases, the CFI will not review the financial report and will indicate that no CFI action is required. Please note that this status only applies to interim financial reports.
11.5 Financial report form

When you create a financial report for a project, you will first need to indicate whether the report is an interim report or a final report for the project. Depending on your answer, the appropriate form (i.e. interim financial report or final financial report) will be created.

The interim Financial report form consists of five tabs. When an interim financial report is first opened, the default tab is the "Overview," which is a read-only section and is provided for your reference only. Each of the three tabs, "Eligible costs," "Contributions" and "Changes," needs to be filled out by your institution. The fifth tab, "Summary," is read-only and is updated every time information is entered in the "Eligible costs" or the "Contributions" tab.

Use tabs to navigate through the sections.

Click “Display/Print” to access the PDF version of the Financial report form.

Save changes before navigating to other sections (tabs).
The final Financial report form also consists of five tabs. When a final financial report is first opened, the default tab is the "Overview." You will need to indicate whether or not this project is a multi-institutional project. Each of the four tabs, "Eligible costs," "Contributions," "Changes" and "Certification," needs to be filled out by your institution. The "Changes" tab also contains a section where you can attach a document (PDF format) to further explain changes made to the project.
12 INFRASTRUCTURE OPERATING FUND MODULE

As an institutional administrator involved in post-award activities, your institution may have given you access to the Infrastructure Operating Fund module. The Infrastructure Operating Fund (IOF) module allows you to view the details of your institution’s IOF allocation and adjustments (if any), as well as IOF payment information. It also allows you to create, update, delete and submit IOF annual reports, as well as view the status and CFI comments (if any) related to an IOF annual report.

This section provides additional information on the IOF module within CAMS. You should consult the CFI Policy and program guide for complete information on requirements and guidelines related to the IOF.
Click to change the reporting date.
Click to access the IOF annual report form.
Click to delete the IOF annual report.
12.1 IOF annual report form

Click “Display/Print” to access the PDF version of the IOF annual report.

Save changes before submitting the report.
13 OVERVIEW INFORMATION

As an institutional administrator involved in managing CFI-funded projects, your institution may have given you access to the institutional overview and/or the project overview.

13.1 Institutional overview

The institutional overview will allow you to view important institutional information in one screen, such as:

- Summary information related to proposals and awards
- Summary information related to the IOF (IOF allocation, payments, Award agreement, annual report)
- Summary information related to financial reports, amendment requests and Project progress reports to help the institution identify action items (e.g. in progress, reports due, reports returned to the institution for corrections, payments on hold, projects past end dates)
- Your institution’s strategic research plan

13.2 Project overview

The project overview will allow you to view important summary information related to one project in one screen, such as:

- Approved budget and amendment requests
- Award agreement and special conditions (if any)
- Summary payment and expenditure information
- Summary reporting information (e.g. latest financial report, Project progress reports)
For any questions about CAMS, feel free to contact us at:

help.aide@innovation.ca

We will be happy to answer you promptly.