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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.

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.

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.

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

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

2 REFERENCE MATERIAL

This guide is intended for researchers. Other guides are available, depending on your role and the type of activity you perform in CAMS.

Institutional administrator: If you are an institutional administrator, please refer to the document Getting started with CAMS: An overview document for institutional administrators.

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 life cycle 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

If you already have a CFI PIN, you will need to update your account to use CAMS via a simple process outlined in section 4.3.2 of this document. If you do not have a CFI PIN, you will need to create a CFI account by registering via a process outlined in section 4.3.1 of this document. Users should have only one CAMS account.

4.2 CAMS sign in page

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 Account creation process

4.3.1 Creating a new account

From the sign in page, click “Create a new account” and follow the instructions.

4.3.2 Researchers with an existing PIN

CAMS uses your email address as your username. If you have an existing PIN from our legacy system, you can link it to your CAMS username in order to use CAMS (see below for instructions). You will be given a one-time opportunity to link your existing PIN to your new username in CAMS, which will ensure that the information you have stored in the legacy system, such as your contact information, CV and previous proposals, are automatically carried over to CAMS.

Instructions:

- Click “Create a new account” from the CAMS sign in page;
- Accept terms of use;
- Select “Yes” if you have an existing CFI PIN account; and

![Image of a pop-up asking if you have an existing CFI PIN account with options Yes and No]
• Complete the information requested in the “Link to existing account” section.

If you have forgotten the password associated with your PIN, you may also retrieve it on this page. If you have forgotten your PIN, please contact the CFI at help.aide@innovation.ca for assistance.

4.4 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 address) 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. Use this password to sign in to CAMS. Please note that the temporary password will expire after 30 days.
4.5 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 RESEARCHER DASHBOARD

5.1 Overview

Once signed in as a researcher in CAMS, you are automatically directed to your researcher dashboard. The dashboard contains easy access to information related to your role(s) in a project (e.g. key participant, collaborator, project leader, etc.).

5.2 Navigation

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

![Researcher Dashboard Image]

The left menu allows easy navigation between modules. Expand modules by clicking the arrows.

Note: You may not see all the sections displayed above. The sections displayed on your researcher 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.
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 NOI or 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 innovation.ca.
6.1 Navigating within the Proposal form

Click “Home” to return to your dashboard.

6.2 Proposal sharing

Proposal sharing is a feature which allows two or more users to contribute to a proposal. A proposal can be shared with anyone who has a CAMS account.

You may wish to share a proposal in order to:

- Allow one or more colleagues to contribute to the writing and preparation of a proposal or to specific modules of a proposal; or
- Allow one or more colleagues to view a proposal or specific modules of a proposal.
6.2.1 Overview of proposal sharing

Researchers listed as principal users or candidates automatically gain read access to the entire proposal. However, if you would like one or more of the principal users identified on a proposal to complete or edit any part of your proposal, you must share the proposal with them to allow them to access and update it.

6.2.2 How to share your proposal

Step 1: Create a proposal

In the researcher dashboard click “Create a new proposal” and follow the steps.

Step 2: Enter the required proposal information

Enter the required proposal information and other related information. You can complete the entire proposal yourself, or collaborate with one or more colleagues to complete it.

Step 3: Go to the proposal sharing screen

Click “Proposal sharing” on the left-hand navigation bar and on the proposal sharing screen, click “Share this proposal with another person.” Note that the proposal sharing screen is only accessible from within an application form. To reach the proposal sharing screen from your researcher dashboard, click on any module of the proposal you wish to share.
Step 4: Invite a colleague to read or update your proposal

Enter your colleague’s username (email address) and select the level of access (read, update or none) you would like him or her to have for various proposal modules. In the example below, the project leader has given read access to the project and finance modules, and update access to the suggested reviewers section. You can also add comments that will be sent to your colleague. When you have completed this section, click “Save.”

Your colleague will receive an email notification that he or she has been invited to view (read) or edit (update) your proposal.

6.2.3 Updating or removing proposal sharing

At any time, you can update or remove proposal sharing by selecting “Modify access level” on the proposal sharing page.

6.3 CV sharing

CV sharing is a feature of CAMS similar to proposal sharing. It allows you to give a colleague read or update access to your CV.

6.3.1 How to share your CV

Step 1: Open your CV

On your researcher dashboard, click “Curriculum vitae” (left-hand navigation bar) and open your CV from within the “My CV” table.

Step 2: Invite your colleague to view or update your CV

On the left-hand navigation bar, click “CV sharing” to access the CV sharing screen. Enter your colleague’s username (email address) and click “Validate username.”
Step 3: Send sharing invitation

Before you send the invitation to share your CV, specify the type of access — read or update — you wish your colleague to receive. You can also add comments that will be sent to your colleague.

When you have completed this section, click “Save.”
7 DECISIONS

CAMS allows you to view the funding decision related to the projects you lead. This section will only appear in your dashboard if you have proposals for which a funding decision has been made.

Click this icon to view the PDF version of the proposal form and its sections.
8 AWARD FINALIZATION MODULE

As a project leader, your institution may have given you access to the award finalization module. This module will only appear in your dashboard if you lead projects that have been funded by the CFI.

The award finalization section allows you to view award finalization status information related to the project(s), such as the date the Award finalization form was received by the CFI, the date the Award agreement was issued by the CFI (if applicable) and which budget was used at award finalization (itemized list\(^1\), 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 the 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.

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

As a project leader, your institution may have given you access to the amendment module. This module will only appear in your dashboard if you lead projects for which an amendment request has been created.

The amendment module allows you to view amendment status information related to the project(s), such as the number of amendment requests created and the status of the latest amendment requests created. It also allows you to input data in the Amendment form.

Click a project number to access this project’s main amendment page.
9.1 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 the project (if any), and input data in amendment requests created by your institution.

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.

Once you have marked an amendment request as completed, your institution will verify it and submit it to the CFI, if no changes are required. If changes are required, your institution may make corrections itself, but can also return the amendment request to you in order to allow you to make the appropriate corrections.
9.2 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.

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

Save changes before navigating to other sections (tabs).
10 PAYMENT MODULE

As a project leader, your institution may have given you access to the payment module. This module will only appear in your dashboard if you lead projects that have been funded by the CFI and for which an award agreement has been issued.

The payment module allows you to view payment information related to the project(s), such as amounts paid to date and remaining balance to be paid by the CFI.
11 FINANCIAL REPORT MODULE

As a project leader, your institution may have given you access to the financial report module. This module will only appear in your dashboard if you lead projects for which a financial report has been created.

The financial report module allows you to view financial report status information related to the project(s).
11.1 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). You can also view CFI comments related to the financial report for a specific reporting year (if any) and have access to the PDF version of all the financial reports.
For any questions about CAMS, feel free to contact us at:

help.aide@innovation.ca

We will be happy to answer you promptly.