



Getting Started with the CFI Awards Management System

An overview document for
researchers

February 2013

Table of Contents

1	What is CAMS?	2
	1.1 Who should use CAMS?	2
	1.2 What can you do in CAMS?	3
2	Getting Started	4
	2.1 Access	4
	2.1.1 Sign-in page	4
	2.2 Overview	5
	2.3 Creating a new account	5
	2.4 Users with an existing CFI PIN	5
	2.5 Resetting your CAMS password	6
3	The Researcher Dashboard	7
	3.1 Overview	7
	3.2 Navigation	7
	3.3 My profile and preferences	8
4	Proposal Sharing	9
	4.1 Why would you want to share a proposal?	9
	4.2 Overview of proposal sharing	9
	4.3 How to share your proposal	10
	4.4 Updating or removing proposal sharing	11
5	CV Sharing.....	11
	5.1 How to share your CV.....	11

1 WHAT IS CAMS?

The CFI Awards Management System (CAMS) is the secure Web portal that allows universities, colleges, research hospitals and non-profit research institutions to apply for Canada Foundation for Innovation (CFI) funding, upload supporting documents, collaborate with other researchers to submit proposals, and to view the progress of and decisions on their proposals.

CAMS includes a number of features to enhance its usability and functionality, including:

- automatic password reset
- ability to share a proposal/CV with others by giving read and update access
- ability for key participants to accept an invitation to participate in a proposal
- ability to merge a submitted proposal into a single PDF

1.1 Who should use CAMS?

CAMS will be used by researchers and institutional research services personnel responsible for preparing, verifying and submitting CFI proposals, project progress reports, and institutional reports. Financial services personnel and other institutional administrators should continue to use the existing website and login to access financial reports, award finalization forms, and amendment request forms.

Researchers

All researchers will now be using the CAMS interface to sign in, access existing projects, access their CV, and create new proposals.

Institutional research services personnel

All institutional research services personnel will now be using the CAMS interface to sign in, access and manage existing projects.

Reviewers

CAMS also gives reviewers access, in a single location, to the information and documentation necessary to assess the proposals assigned to them.



Note: Additional help guides are available for institutional research services personnel and for reviewers:

[Getting started with CAMS: An overview document for institutional research services personnel](#)

[Getting started with CAMS: An overview document for reviewers](#)

1.2 What can you do in CAMS?

Using CAMS, you can create and submit proposals for research infrastructure funding from the CFI and manage the full life cycle of your proposal. In addition, you can:

- collaborate with colleagues throughout the application process
- view funding decisions made by the CFI
- finalize awards
- complete project progress reports

2 GETTING STARTED

If you already have a CFI PIN, you will need to update your account to use CAMS — a simple process outlined in [section 2.4](#). If you do not have a CFI PIN, you will need to create a CFI account by registering — outlined in [section 2.3](#). Users should have only one CAMS account.

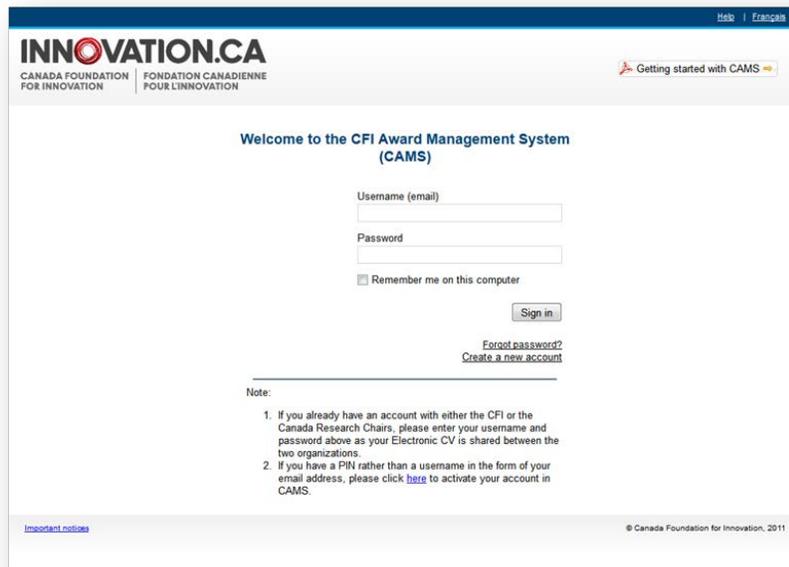
2.1 Access

You can access CAMS in the same way you have always accessed the CFI's online forms:

1. Navigate to <http://www.innovation.ca/en>
2. Click 'CFI online'
3. Choose 'Researchers'
4. A new window will launch and the CAMS sign-in page will appear.

Alternately, you can link directly to the CAMS sign-in page at: <https://www2.innovation.ca/sso/signIn.iface>

2.1.1 Sign-in page

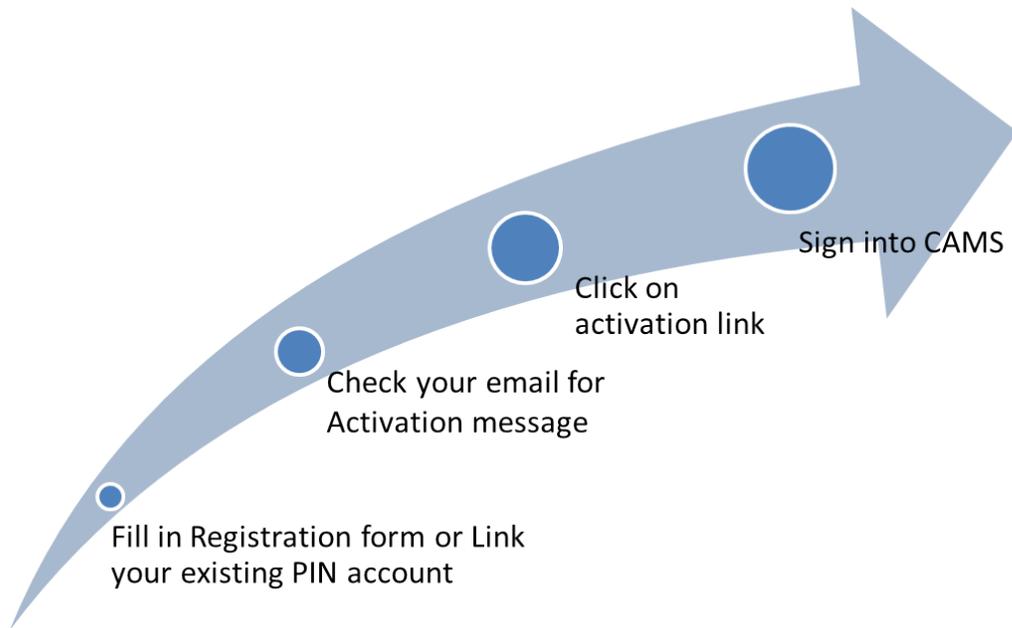


The screenshot shows the sign-in page for the CFI Award Management System (CAMS). The page header includes the INNOVATION.CA logo and the text 'CANADA FOUNDATION FOR INNOVATION' and 'FONDATION CANADIENNE POUR L'INNOVATION'. There is a 'Help | Français' link in the top right corner and a 'Getting started with CAMS' button. The main heading is 'Welcome to the CFI Award Management System (CAMS)'. Below this, there are input fields for 'Username (email)' and 'Password', a 'Remember me on this computer' checkbox, and a 'Sign in' button. There are also links for 'Forgot password?' and 'Create a new account'. A 'Note' section contains two instructions: 1. If you already have an account with either the CFI or the Canada Research Chairs, please enter your username and password above as your Electronic CV is shared between the two organizations. 2. If you have a PIN rather than a username in the form of your email address, please click [here](#) to activate your account in CAMS. The footer includes a link for 'Important notices' and the copyright notice '© Canada Foundation for Innovation, 2011'.

On this page:

- Registered users can sign in
- Registered users who have forgotten their password can reset their password
- New users can create an account

2.2 Overview



2.3 Creating a new account

From the sign-in page, click 'Create a new account' and follow the instructions.

2.4 Users with an existing CFI PIN

CAMS uses your email as your *username*. If you have an existing PIN, you can link it to your new username (email) 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 current online CFI system, such as your contact information, CV and previous proposals, are automatically carried over to CAMS.

Instructions:

- click 'Create new account'
- accept terms of use
- select 'Yes' you have an existing CFI or CRC PIN account



 Do you have an existing CFI or Canada Research Chairs (CRC) PIN account?

- complete the information requested in the 'Link to existing account' section



Link to existing account

 For users with an existing CFI or Canada Research Chairs PIN and password, please enter them here to link to your existing account. Please note that you will be required to change your password to finalize your registration.

PIN Password [Forgot password?](#)

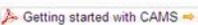
If you have forgotten the password associated with your PIN, you may also retrieve it on this page. If you have forgotten your PIN, please contact the CFI at pin.nip@innovation.ca for assistance.

2.5 Resetting your CAMS password



Help | Français

INNOVATION.CA
CANADA FOUNDATION FOR INNOVATION | FONDATION CANADIENNE POUR L'INNOVATION

 Getting started with CAMS

Reset your CFI password

Username (email)

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. Use this password to sign in to CAMS.

3 THE RESEARCHER DASHBOARD

3.1 Overview

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

The information you can see in CAMS is dependent on your role in the project. If you are a researcher, for example, you are automatically directed to your researcher dashboard, where you can create and modify proposals, view competition results and complete post-award related tasks.

3.2 Navigation

Navigation on the researcher dashboard

The screenshot shows the INNOVATION.CA researcher dashboard. The top navigation bar includes the user's name (John Smith), email (do2@innovation.ca), and links for 'My profile and preferences', 'Help', 'Français', and 'Sign out'. The left-hand navigation menu lists sections like 'Curriculum vitae', 'Application', 'Decision', 'Award finalization', 'Amendments', and 'Project progress reports'. The main content area features a 'Create a new proposal' button and a 'Project leader' section with a table of proposals.

Top navigation bar where you can access your profile and preferences, view help documents, switch languages, and sign out.

Click here to create a new proposal.

Proposals will appear here.

Left-hand navigation allows you easy access to relevant sections.

Fund	Project number	Project title	Module	Display/Print	Status	Validation	Completed?
			Notice of intent		In progress	<input type="button" value="Run"/>	<input type="button" value="Confirm"/>
	29671	Dec 12 testing 2.0	Project		In progress	<input type="button" value="Run"/>	<input type="button" value="Confirm"/>
			Finance		In progress	<input type="button" value="Run"/>	<input type="button" value="Confirm"/>
			Suggested reviewers		In progress	<input type="button" value="Run"/>	<input type="button" value="Confirm"/>
LEF 2012			Notice of intent		In progress	<input type="button" value="Run"/>	<input type="button" value="Confirm"/>

Within a proposal web form

Click to return to your researcher dashboard.

The 'breadcrumbs' are a navigation aid that allow you to keep track of your location within the system.

The left-hand menu gives you access to all of the modules and sections of the proposal.

The screenshot shows a web interface for a proposal. At the top, there is a user profile for John Smith (do2@innovation.ca) and navigation links for 'My profile and preferences', 'Help', 'Français', and 'Sign out'. Below this is a breadcrumb trail: 'Researcher dashboard > Application > LEF 2012 #29671 > Notice of intent > Project information'. A callout box points to the 'Researcher dashboard' link in the breadcrumb, stating it returns to the researcher dashboard. Another callout points to the breadcrumb trail, explaining it as a navigation aid. On the left, a vertical menu lists various sections like 'Project information', 'Collaborating institutions', and 'Past CFI awards'. A callout points to this menu, stating it provides access to all modules and sections. The main content area is titled 'Project information' and contains a form with fields for 'Type of project' (2012 Leading Edge Fund), 'Project title' (Dec 12 R4 testing 2.0), 'Language of proposal' (English), and 'Applicant institution' (Country: Canada, Province: Ontario, Type: University, Institution: University of Toronto). There are 'Display/Print' and 'Save' buttons at the top right of the form.

3.3 My profile and preferences

These pages allow you to manage your contact information and password, and view privacy notices from the CFI.

Home > My profile and preferences

My profile and preferences

Update contact information | Manage password | View privacy notices

General information

* Family name 50 characters

* First name 50 characters

Initials 5 characters

* Correspondence language

* Country of institution

The screenshot shows the 'My profile and preferences' page. At the top, there are three tabs: 'Update contact information' (selected), 'Manage password', and 'View privacy notices'. Below the tabs is a section titled 'General information' with several form fields: 'Family name' (50 characters), 'First name' (50 characters), 'Initials' (5 characters), 'Correspondence language' (dropdown menu), and 'Country of institution' (dropdown menu).

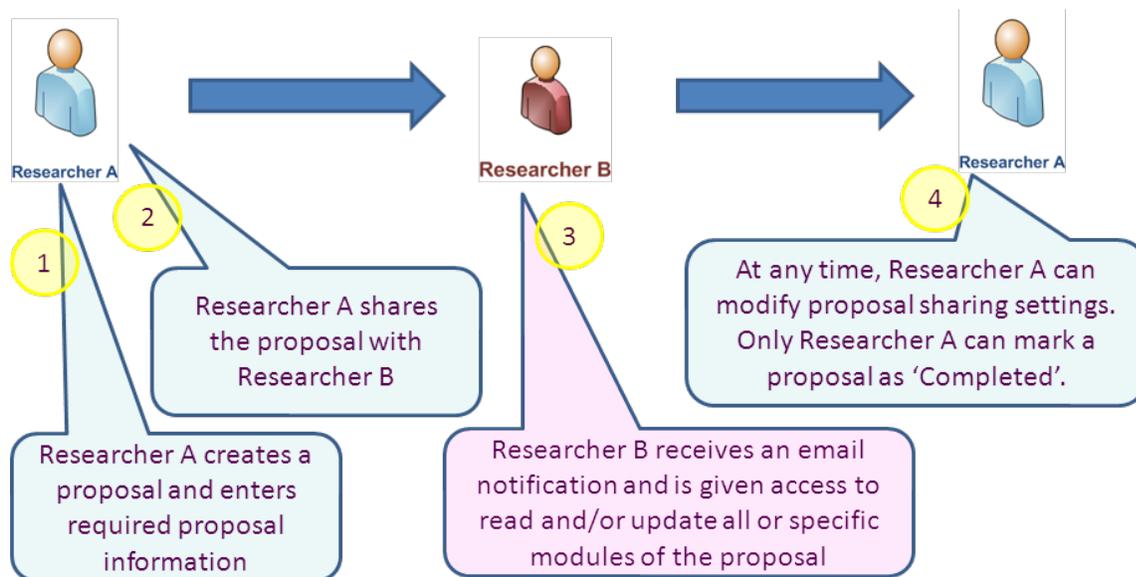
4 PROPOSAL SHARING

Proposal sharing is a new feature of the CFI Awards Management System (CAMS) which allows two or more users to contribute to a proposal. A proposal can be shared with anyone who has a CAMS account.

4.1 Why would you want to share a proposal?

- To allow one or more colleagues to contribute to the writing and preparation of a proposal or to specific modules of a proposal
- To allow one or more colleagues to view a proposal or specific modules of a proposal

4.2 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.

4.3 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

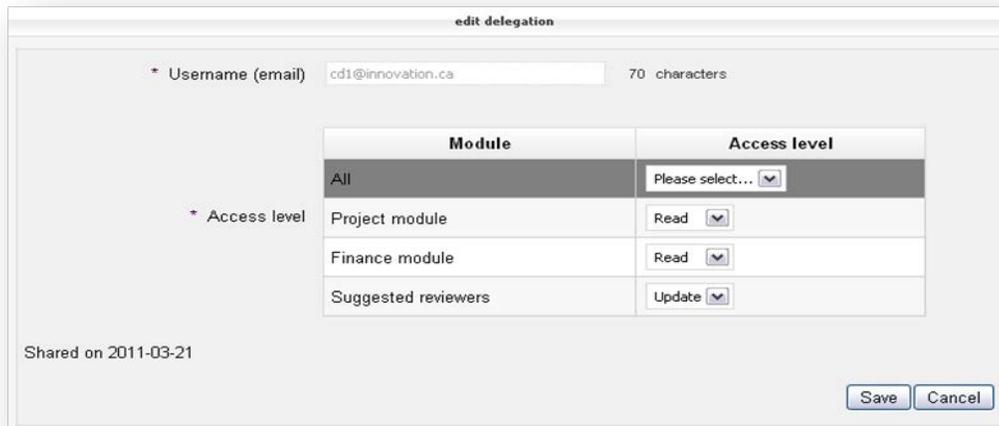
Enter the required proposal information and other related information. You can complete the entire proposal yourself, or collaborate with one or more colleagues to complete it.

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.'



The screenshot shows a web form titled "edit delegation". At the top, there is a text input field for "Username (email)" containing "cd1@innovation.ca" and a character count of "70 characters". Below this is a table with two columns: "Module" and "Access level". The table has four rows: "All", "Project module", "Finance module", and "Suggested reviewers". The "All" row has a dropdown menu with "Please select..." selected. The "Project module" row has a dropdown menu with "Read" selected. The "Finance module" row has a dropdown menu with "Read" selected. The "Suggested reviewers" row has a dropdown menu with "Update" selected. Below the table, there is a label "Shared on 2011-03-21". At the bottom right, there are two buttons: "Save" and "Cancel".

Module	Access level
All	Please select... ▼
Project module	Read ▼
Finance module	Read ▼
Suggested reviewers	Update ▼

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

4.4 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.

5 CV SHARING

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

5.1 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.

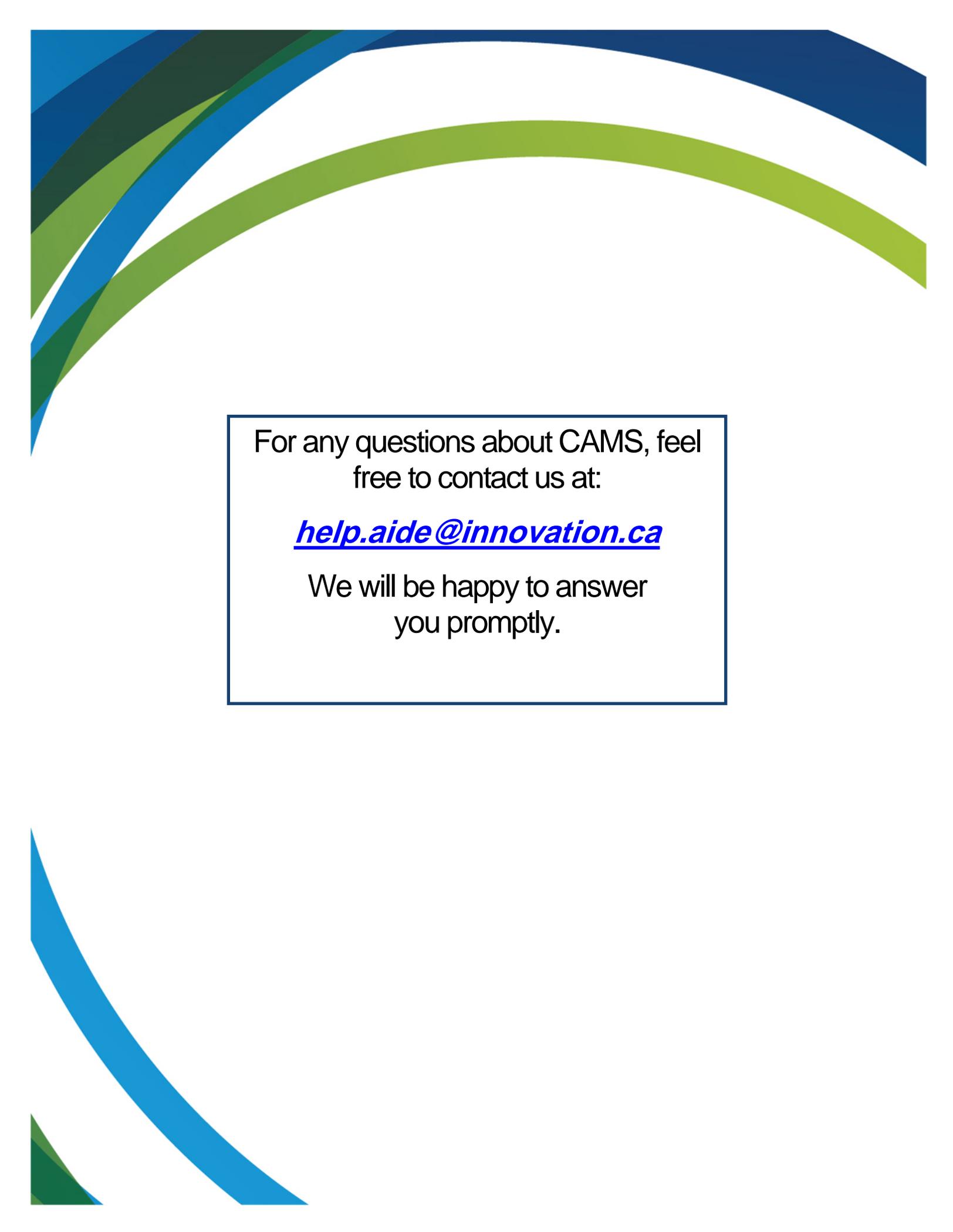
Step 2: Invite your colleague to view or update your CV

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.’



For any questions about CAMS, feel
free to contact us at:

help.aide@innovation.ca

We will be happy to answer
you promptly.