



Getting Started with the CFI Awards Management System

An overview document for
institutional research services
personnel

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1 OVERVIEW OF CAMS

1.1 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 CFI funding, upload supporting documents, collaborate with researchers to submit proposals, and to view the progress of decisions on their proposals.

1.2 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.



Note: Throughout this document we use the following terms:

Research services personnel refer to individuals responsible for preparing, verifying and submitting CFI proposals, project progress reports, and institutional reports on behalf of the institution.

Financial services personnel refer to individuals responsible for completing financial reports for CFI projects on behalf of the institution.

Institutional administrators encompass both groups identified above.

The **institution** refers to the CFI-eligible institution or an authorized representative acting on behalf of the institution.

Researchers

All researchers will now be using the CAMS interface to sign in, access existing projects, access their CV, and create new proposals. If you are a researcher, please refer to the document [Getting started with CAMS: An overview document for researchers.](#)

Reviewers

CAMS also gives reviewers access, in a single location, to the information and documentation necessary to assess the proposals assigned to them. If you are a reviewer, please refer to the document [Getting started with CAMS: An overview document for reviewers.](#)

1.3 What can you do in CAMS?

With CAMS, you can create and submit proposals for research infrastructure funding from the CFI and manage progress and institutional reporting.

1.4 What you cannot do in CAMS (yet)

Future CAMS functionality includes the following:

- Submit award finalization documents
- Manage amendment requests
- Manage institutional accounts

2 GETTING STARTED

If you already have a CFI PIN, you will need to update your account to use CAMS. For more information, refer to the document [Getting started with CAMS: An overview document for researchers.](#)



Note: Users should have only one CAMS account. If you are both a researcher and an institutional administrator, you can have access to both the *Researcher's dashboard* and the *Institutional dashboard* with a single CAMS account.

2.1 Default institutional accounts

By default, anyone who creates a new account in CAMS or migrates a CFI PIN account to CAMS will only have access to the *Researcher's dashboard*. Institutional administrators require special access to view the *Institutional dashboard* to review and submit applications on behalf of the institution. The CFI has created or modified the CAMS accounts for all research services personnel identified in the *Institutional agreement* (e.g. CFI liaison) to assign the appropriate level of access to the *Institutional dashboard*.

2.1.1 Creating additional institutional accounts

In addition to the users identified in the *Institutional agreement*, the institution may wish to grant access to the *Institutional dashboard* to additional users. In order for the CFI to create accounts for each user requiring access to the *Institutional dashboard*, we ask that the CFI liaison at the institution send the name, email address and permission level of each additional user (as indicated below) by email to help.aide@innovation.ca.

Users can be assigned accounts with either read-only or data entry permissions:

- Read-only account holders have full access to view the Institutional dashboard but cannot modify any forms (proposals, reports, etc.)
- Data entry account holders can enter or modify data into online forms, but cannot submit proposals. Only authorized users as per the Institutional agreement can submit proposals to the CFI.

Once the CFI receives this information, an automated email notification (from notification@cfi-fci.ca) will be sent to each user to activate their account. These accounts must be activated within 30 days of receipt, so please consult with your institution's IT department to ensure that the CFI's automated activation messages are not blocked by your firewall. If you require assistance, please contact help.aide@innovation.ca.

2.1.2 Removing access to the Institutional dashboard

If a user no longer requires access to the *Institutional dashboard*, the CFI liaison should send an email to notify the CFI, including the user's name and email address to help.aide@innovation.ca. The CFI will then remove access to the *Institutional dashboard* for this account.

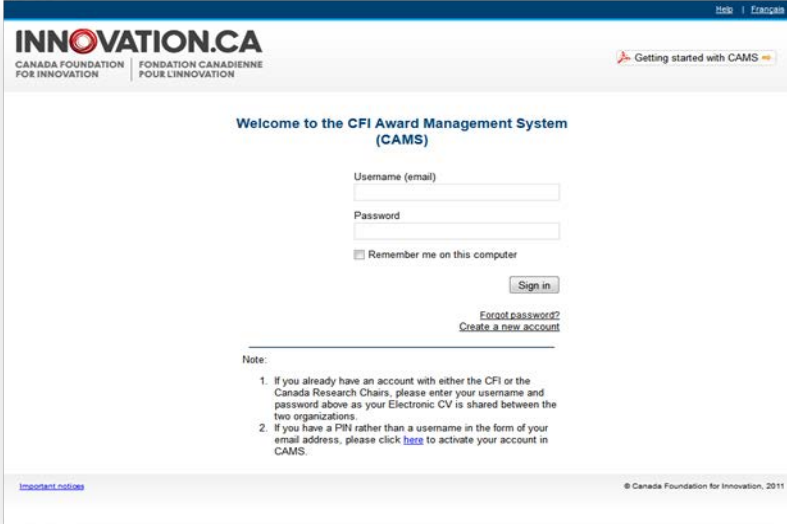
2.2 Access

Once your CAMS account is created and the appropriate roles assigned, you can access CAMS in the same way you have always accessed the CFI's online forms:

- Navigate to www.innovation.ca
- Click 'CFI online'
- Choose 'Institutions: Liaison Access'
- 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>

2.2.1 Sign-in page



The screenshot shows the CAMS sign-in page. At the top, there is a blue header with the 'INNOVATION.CA' logo and the text 'CANADA FOUNDATION FOR INNOVATION' and 'FONDATION CANADIENNE POUR L'INNOVATION'. A 'Help | Français' link is in the top right. Below the header, there is a 'Getting started with CAMS' link. The main heading is 'Welcome to the CFI Award Management System (CAMS)'. The sign-in form includes fields for 'Username (email)' and 'Password', a 'Remember me on this computer' checkbox, and a 'Sign in' button. Below the form are 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. At the bottom, there is a link for 'Important notices' and a 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

2.3 Accessing user profile and preferences

These pages allow you to manage your contact information and password and view privacy notices from the CFI. Note: Institutional administrators will not be able to change their institution from within their profile and preferences. If you have changed institutions, please contact the CFI.

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

* Province

* Type

* Institution name

2.4 Resetting your CFI password

Help | Français

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

Getting started with CAMS

Reset your CFI password

Username (email)

Submit Cancel

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.

3 THE INSTITUTIONAL 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 the project.

The information you can access in CAMS is dependent on your role(s). If you are an institutional administrator, for example, you are automatically directed to your *Institutional dashboard*, where you can perform tasks related to your role.

3.2 Navigation

The *Institutional dashboard* contains a number of sections. The following images describe these sections and illustrate their functionalities.

The image shows a screenshot of the 'INNOVATION.CA' Institutional dashboard. The top navigation bar includes the user's name 'Jan Smith (do2@innovation.ca)', links for 'My profile and preferences', 'Help', 'Français', and 'Sign out'. The main content area is titled 'Institutional dashboard' and features a left-hand navigation menu with options: 'Infrastructure projects', 'Proposal management', and 'Project progress reports'. A callout box points to this menu, stating: 'Left-hand navigation gives you easy access to relevant sections.' The main content area contains a section for 'Infrastructure projects' with an information icon and a link to 'Application management'. A callout box points to this link, stating: 'Click here to access proposal forms.' Below this is a 'Decisions' section with an information icon and a link to 'Competition documents and programs updates'. A callout box points to this link, stating: 'Click here to view competition documents and program updates.'


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

Click here to access proposal forms.

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

Click here to view competition documents and program updates.


Project and institution reports

 The link below provides access to project progress reports and the institution reports.

[Project and institution reports](#)

Click here to access Project and institution reports.

Strategic research plan summary

 Click on the link below to download your institution's *Strategic research plan summary*. If this summary needs to be updated, please download the form available [here](#) and mail the updated summary to the CFI.

[Strategic research plan summary](#)


Click here to access the institution's Strategic research plan summary.

Within a web proposal form

Home | John Smith (do2@ev...vaton.ca) | My profile and preferences | Help | Français | Sign out

LEF 2012 #29671 | Researcher dashboard > Application > LEF 2012 #29671 > Notice of intent > Project information

Project information

 Prior to submitting the notice of intent, please ensure that you complete all sections and fields.

Display/Print Save

Project information

Type of project: 2012 Leading Edge Fund

* Project title: Dec 12 R4 testing 2.0 (120 characters)

* Language of proposal: English

Applicant institution

* Country of institution: Canada

* Province: Ontario

* Type: University

* Institution: University of Toronto

Click to return to your dashboard.

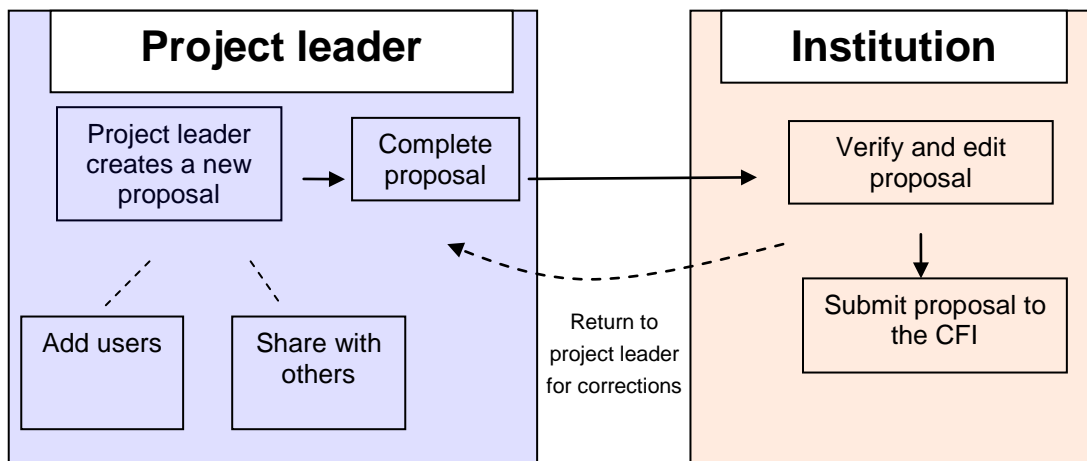
The 'breadcrumbs' are a navigation aid that allow you to keep track of your location within the system.

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

4 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.
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.



Application process



Note: For more information on the application process, refer to the specific instructions for each fund available through the [Our funds](#) page.

4.1 Managing proposals

The Proposal management section allows you to view the status of your institution's NOIs and proposals.

The screenshot shows the 'Proposal management' section of an institutional dashboard. At the top, a breadcrumb trail reads 'Institutional dashboard > Infrastructure projects > Proposal management'. Below this, the 'Proposal management' title is followed by a navigation bar with 'Status list', 'Search', and 'Project archiving' tabs. The main content is divided into two sections: 'Notice of intent' and 'Proposal'. Each section lists various statuses with corresponding counts in parentheses. Callout boxes with arrows point to specific links and the navigation bar.

Proposal management

Status list Search Project archiving

Notice of intent

- [In progress](#) (200)
- [Completed by researcher](#) (10)
- [Verified by institution](#) (1)
- [Submitted to the CFI](#) (33)
- [Previously submitted - available to institution for corrections](#) (4)
- [Previously submitted - available to researcher for corrections](#) (0)
- [Previously submitted - completed by researcher after corrections](#) (0)
- [Previously submitted - verified by institution after corrections](#) (0)
- [Withdrawn](#) (0)

Proposal

- [In progress](#) (262)
- [Completed by researcher](#) (6)
- [Verified by institution](#) (4)
- [Submitted to the CFI](#) (45)
- [Previously submitted - available to institution for corrections](#) (2)
- [Previously submitted - available to researcher for corrections](#) (1)
- [Previously submitted - completed by researcher after corrections](#) (0)
- [Previously submitted - verified by institution after corrections](#) (0)
- [Withdrawn](#) (3)

Use the navigation bar to quickly jump to various sections.

Click on links to see the NOIs in each status.

Click on links to see the proposals in each status.

The numbers in parentheses indicate the number of NOIs or proposals in that status.


4.1.1 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.)

[Institutional dashboard](#) > [Infrastructure projects](#) > [Proposal management](#)

Proposal management

Status list **Search** Project archiving

 Use the search tool below to find notices of intent or proposals in which Test inst is the applicant institution.

You can search:

- by project number; or,
- by any combination of the search criteria indicated. Results will be projects matching all criteria.

Note: Keyword searches are enabled in the project title and project leader name search fields (e.g. a search for "smith" will match "Smith", "Naismith", "Smithers", etc.).

You will be able to see the current status of projects found and display or print them directly from the search results table below. To perform additional actions (e.g. submit a proposal to the CFI), click on the link to the notice of intent or proposal, as appropriate, within the Component column.

Search

Project number

----- or -----

Status

Fund

Notice of intent or proposal?

Project title

Project leader's first name

Project leader's family name

This button executes your search criteria and displays the results.

This button displays a page where all your projects are listed.

4.1.2 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).

The screenshot displays a web interface for "Proposal management" under the "Infrastructure projects" section. It shows a table of two project entries. Two callout boxes provide instructions: one points to the "Return to search page" link, and another points to the "Project number" column header.

Proposal management
[Return to search page](#)

Notice of intent - Submitted to the CFI

2 entry(ies) found Show all Show pages

Project number ▲	Project title	Project leader	Fund	Comments from the CFI	Display/print	Submission date
29307	m11 Test project - Kemptville	Lagacé, Mark1	CIIF - Stream 1	N/A		2011-07-22
29150	Test project ML2	Testor, ES	CIIF - Stream 1	N/A		2011-07-08

2 entry(ies) found Show all Show pages

4.1.3 NOIs and proposals in progress

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.

[Institutional dashboard](#) > [Infrastructure projects](#) > [Proposal management](#)

Proposal management

[Return to search page](#)

Notice of intent - In Progress

1 entry(ies) found Show all Show pages

Project number ▲	Project title	Project leader	Fund	Module	Display/print	Run	Completed?
29396	Testing complete	Lagacé, Mark1	CIIF - Stream 1	Notice of intent		<input type="button" value="Run"/>	<input type="button" value="Yes"/>

1 entry(ies) found Show all Show pages

Run the validation to make sure all required data has been entered into the form.

Indicate that the form is complete on behalf of the project leader.

4.1.4 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.

[Institutional dashboard](#) > [Infrastructure projects](#) > Proposal management

Proposal management

[Return to search page](#)

Notice of intent - Completed by researcher

1 entry(ies) found Show all Show pages

Project number	Project title	Project leader	Fund	Module	Display/print	Run	Return to researcher	Verified?
29184	sdfs	paradis, judith	CIIF - Stream 1	Notice of intent		<input type="button" value="Run"/>	<input type="button" value="Yes"/>	<input type="button" value="Yes"/>

1 entry(ies) found Show all Show pages

Return the NOI or proposal to the project leader. The project leader will regain access to edit the form.

Click here to access the forms for editing.

Click here to indicate that the forms have been verified and are ready to submit.

4.1.5 Status: Verified by institution

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 re-open the forms for editing. If applicable, this will delete the merged PDF of the proposal.

Once an NOI or proposal has been submitted to the CFI, the institution will no longer be able to edit the forms.

Proposal management

[Return to search page](#)

Notice of intent - Verified by institution

1 entry(ies) found

	Project number ▲	Project title	Project leader	Fund	Display/Print	Edits required? ⓘ
<input type="checkbox"/>	29439	NIF test project	Lagacé, Mark1	NIF2012		<input type="button" value="Yes"/>

1 entry(ies) found

Show all Show pages

Reopen the NOI or proposal. The institution will regain access to edit the form.

Show all Show pages

Click here to select the projects you wish to submit to the CFI.

4.1.6 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 institution and researcher dashboards. Note that you can only archive projects if their full proposal has never been submitted.

Proposal management

Status list Search **Project archiving**

i This form allows you to archive or un-archive projects from various lists displayed in your institution's dashboard and related researcher dashboards. Note that you can only archive projects if their full proposal has never been submitted.

Search

Project number

or

Fund Please select...

Project title

Project leader's first name

Project leader's last name

Archived Please select...

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

Use these buttons to archive or un-archive the selected project(s)

Select: [All](#) [None](#) Show all Show pages

1 entry(ies) found

	Project number	Project leader	Fund	Project status	Archived
<input type="checkbox"/>	29742	test, test	ClIF - Funding for research infrastructure	In progress	No

1 entry(ies) found

Select: [All](#) [None](#) Show all Show pages

Select one or more projects from the search results.



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

help.aide@innovation.ca

We will be happy to answer
you promptly.