Getting started with the CFI Awards Management System

An overview document for institutional administrators

March 2026

INNOVATION

Canada Foundation
for Innovation

Fondation canadienne
pour l'innovation

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About the Canada Foundation for Innovation

With a bold, future-looking mandate, the CFI equips researchers to be global leaders in their fields and to respond to emerging challenges. Our investments in state-of-the-art tools, instruments and facilities at universities, colleges, research hospitals and non-profit research institutions underpin both curiosity- and mission-driven research that cuts across disciplines and bridges all sectors. The research infrastructure we fund mobilizes knowledge, spurs innovation and commercialization, and empowers the talented minds of a new generation.

The Canada Foundation for Innovation respectfully acknowledges that its head office is located on the traditional, unceded territory of the Anishinaabe Algonquin People.

1 Definitions

institution: CFI-eligible institution or an authorized representative acting on behalf of the institution.

institutional administrators: 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: 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: Encompasses all activities related to managing 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 leader: Individuals mandated by the institution to lead CFI-funded projects.

reviewer: 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.

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

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

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

The CFI liaison and account administrator are responsible for setting access privileges for all institutional administrators. Please contact them to obtain a CAMS account. If you are the CFI liaison or the account administrator for your institution, refer to section 15, "Managing institutional agreements and access privileges."

If you are an individual with an institutional agreement role (i.e., president, authorized signatory, liaison or account administrator), the CFI will create or update your account in CAMS. This will be done by the CFI following the receipt of a signed institutional agreement from your institution.

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

4.1   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 the "CAMS" icon in the menu bar at the top right
- The CAMS sign-in page will appear.
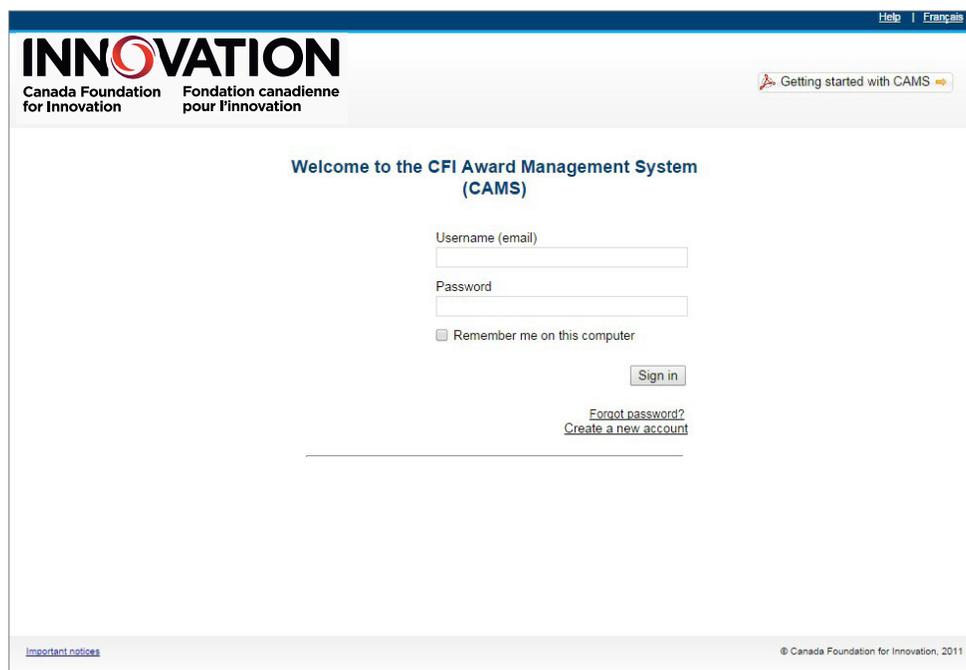
On this page:

- Registered users can sign in
- Registered users who have forgotten their password can reset their password
- Researchers and institutional administrators can create a CAMS account.

4.2　Two-step authentication

To enhance CAMS security, in addition to signing in using a username and password, you will be required to enter a security code to complete the authentication process.

You have the option of receiving the security code by email to your username, to an alternative email, to your mobile device number or to an authenticator app.

When entering the security code, if you specify that your computer or device is trusted, you will not have to enter a security code again when using that device and browser. However, if you change devices or browsers, or clear your browser cache, you will be required to use two-step verification when you sign in.

If you already have a CAMS account or are a new user, you will see the screen below when logging in. This screen guides you through enabling multi-factor authentication (MFA) with an authenticator app. To begin, simply click "Setup" to start the process for two-step authentication.

To use the "authenticator" option first download and install an authenticator app. Next, scan the QR code or manually enter the security key into the app, and then click "Setup." CAMS has been tested with Microsoft and Google authenticators, which are both compatible options.
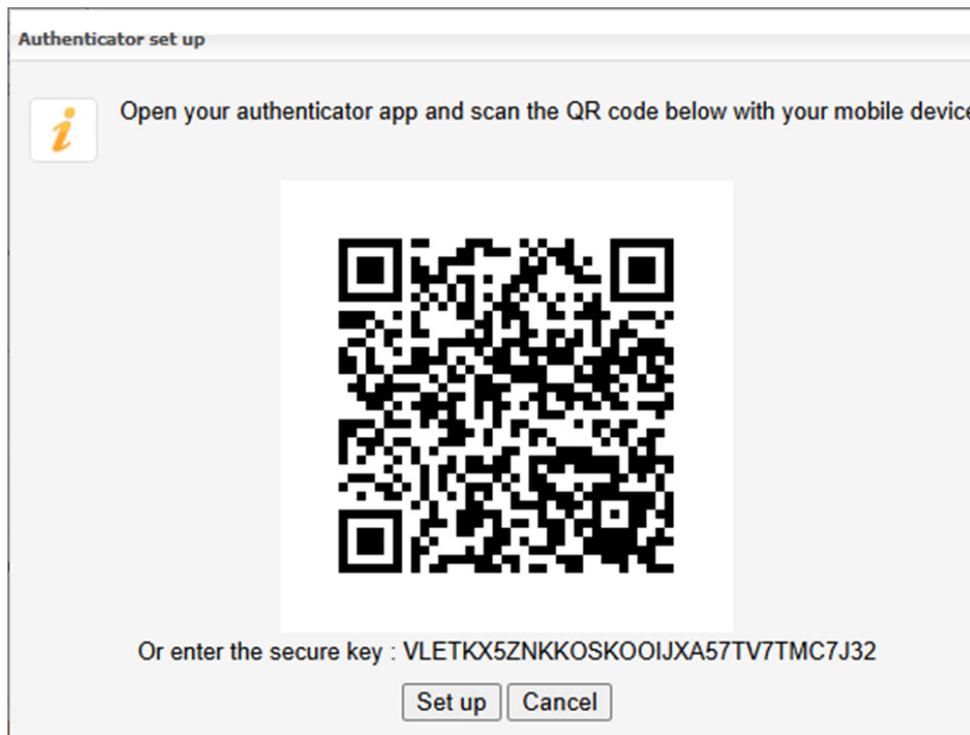
After clicking "Setup," enter the code generated by your authenticator app and save your changes.
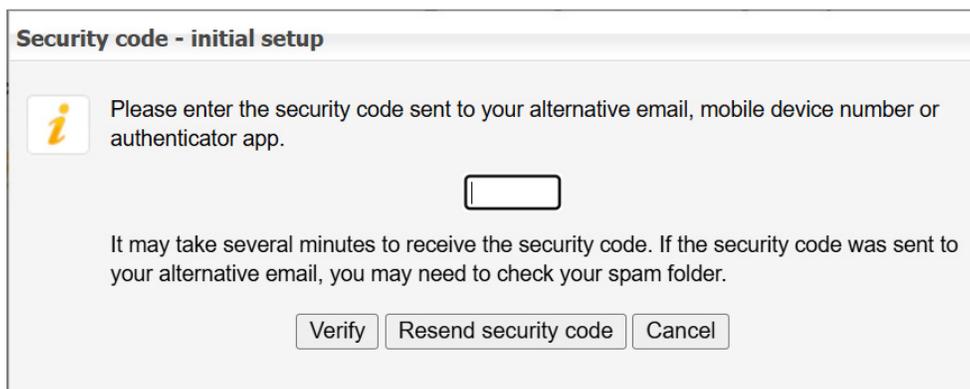
New users or users with a newly assigned institutional role will be prompted to set up a method of receiving security codes, either when creating a user account or when first logging into CAMS. You can modify the method of receiving security codes by navigating to the "My profile and preferences" screen.

4.3   Resetting your password

Reset your 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 address). You will receive an email with a unique password reset link. Once you click on the link, you will be required to create a new password. If you require assistance, please contact the CFI help desk at help@innovation.ca.

4.4   Accessing user profile and preferences

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

Home	Demo Account (kg15@innovation.ca)	My profile and preferences	Help	Français	Sign out

▶ Home >My profile and preferences

My profile and preferences

Update contact information	Security settings	View privacy notices

Click here to access your profile and preferences.

General information

Salutation	Please select... ▼	
* Family name	Account	50 characters
* First name	Demo	50 characters

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.
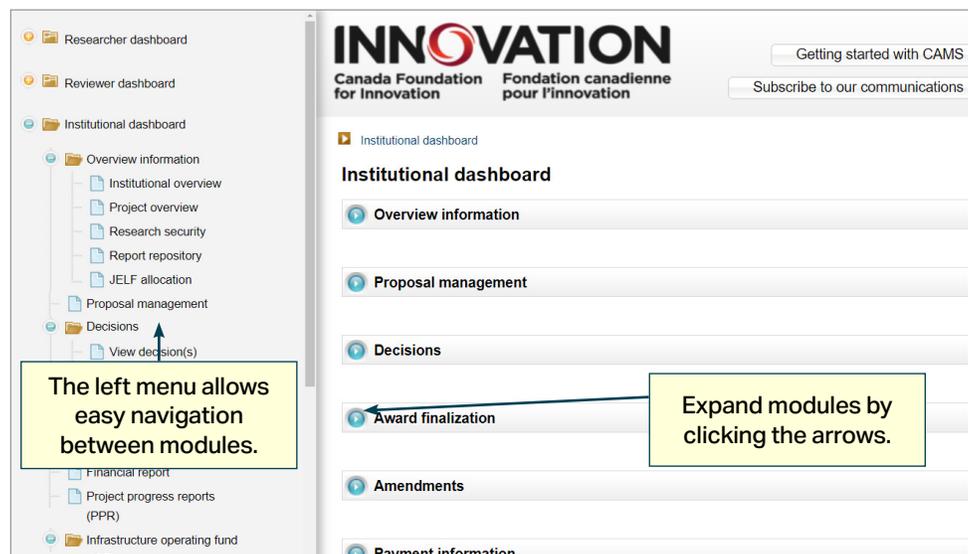
Note: You may not see all the sections displayed above. The sections displayed on your institutional dashboard will depend on the access privileges associated to your account.

A number of features are available in most CAMS modules that can help you navigate between screens or provide contextual information for certain fields.

Toggle page display for tables and search results.

Click column header to sort table. Click again to reverse sort order.

Access additional information by hovering on "i" icons.

For award finalizations prior to May 2014, the date displayed corresponds to the date the Itemized list & summary of secured contributions was submitted to the CFI.

Click on the breadcrumbs to navigate and return to modules.

Click on error link in a validation window to navigate to the relevant section.

6   The application process

The process to submit a notice of intent or proposal to the CFI typically involves three steps:

1. The project leader creates a new notice of intent or proposal and completes the forms online. Once the project leader has marked the form as complete, they 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 return it to the project leader for revision. When the notice of intent or proposal is deemed final, the institution indicates that the form has been verified. The system will then generate the final PDF version of the notice of intent or the proposal.
3. An institutional administrator with submission privileges then submits the notice of intent or proposal to the CFI.
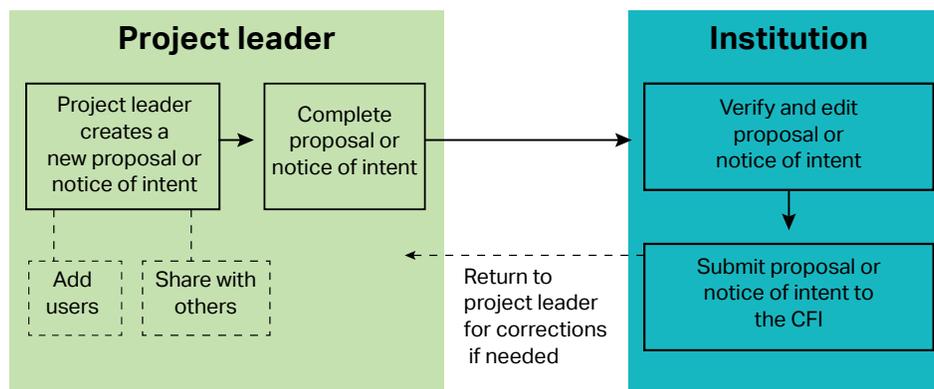
Application process

Note: For more information on the application process, refer to the specific instructions for each fund available through the "Funding opportunities" page of the CFI website.

6.1 Managing proposals

As an institutional administrator involved in pre-award activities, you may have access to the CAMS proposal management section through your institution. The proposal management section allows you to view the status of your institution's notices of intent and proposals.

> **Note:** Archived projects are not listed or counted in this form.

6.1.1 Searching

CAMS provides a search functionality to help institutional administrators locate specific notices of intent or proposals. You can use this search functionality by providing a project number or other search criteria.

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 notices of intent or proposals listed. Some basic features are available on each table, including the ability to sort by column and return to the search page.

Click here to return to the search page or status list.

Click "Display/print" to view the notice of intent or proposal.

6.1.3 Completing and validating forms

The status of all newly created forms 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

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 notice of intent 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 funding program, additional validation rules might apply at this stage. Run the validation to check if all required data has been entered in the form.

For notices of intent and proposals that include several modules or CVs, the system will generate a complete PDF of the form by merging all components into a single file. The merged PDF will be available within two hours and will appear 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

Verified notices of intent and proposals can be submitted in bulk by institutional administrators with submission privileges. If the institution needs to modify a form, it must be reopened for editing.

In some cases, the CFI may return a notice of intent or proposal to your institution so that corrections can be made. These can be found in the status list (see section 6.1).

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 the proposal for it has never been submitted.

Archived projects can be accessed in read-only mode from the "Project archiving" tab. Researchers may also access archived project forms from the researcher dashboard.

Note: Once a competition is closed by the CFI, all notices of intent and proposals that were never submitted will be automatically and permanently archived.

6.1.8 Collaborating requests

If an institution has either accepted to collaborate, or is being requested to collaborating this tab will be displayed. The table will list all projects including those that have been archived or withdrawn.

6.2 Guidelines for attachments

6.2.1 Pagination

CAMS will automatically paginate notices of intent and proposals when they are submitted. Documents **should not** be individually paginated prior to being uploaded to the electronic system.

6.2.2 Page formatting

Since reviewers will assess proposals electronically, the applicant should only use a standard, single column on an 8.5" x 11" page layout for documents. Avoid using a two-column or landscape format since it may reduce legibility.

The notice of intent and proposal must be clear and easily readable. Legibility is of paramount importance and should take precedence in the selection of an appropriate font for use in the notice of intent and proposal. The applicant is strongly encouraged to use a 12-point, black font and use single line spacing (six lines per 2.5 cm (1 inch)) with no condensed type or spacing.

Additionally, the CFI expects documents to conform to the following guidelines:

- **Header:** Indicate the administrative institution on the top left, the title of the section in the middle and the project number on the top right of each page.
- **Footer:** Do not include any information in the footer as this area will be used for automatic page numbering.
- **Page margin:** Insert a margin of no less than 2.5 cm (1 inch) around the page. The header may be within the margin.
- **File format and size:** Only PDF files may be uploaded. Documents in other formats should be converted to PDF prior to being uploaded and should not be encrypted or password protected. The file size must not exceed 20 megabytes.

Adherence to the page formatting guidelines noted above is necessary to ensure that the reviewers receive legible proposals and that no applicant will have an unfair advantage by using smaller type, line spacing or margins to provide more text in the notice of intent or in the proposal. Failure to adhere to these guidelines may result in the CFI returning a proposal for revision.

6.3 Notice of intent structure

Notices of intent will be used to assist the CFI in planning the review process, identifying the requisite expertise for the assessment of each proposal, recruiting committee members, and detecting potential eligibility issues with the infrastructure items requested. Therefore, notices of intent should contain accurate information about the infrastructure and its users, the proposed research or technology development and the expected outcomes.

Applicants will not be able to change the name of the project leader or administrative institution once a notice of intent is completed. That is because the CFI uses notices of intent to assemble review committees and changes to the project leader or administrative institution may result in a conflict of interest for a review committee member. **If such a change is deemed necessary, contact your Senior Programs Officer as soon as possible. The CFI will oversee the change to be made in CAMS.**

6.3.1 Project information

This section captures basic information about the project such as the title, administrative institution, keywords and research security information.

You may need to submit other documents as well, depending on the answer given to the research security questions (see sections 6.3.3 and 6.3.4).

6.3.2 Collaborating institutions

Identify the institutions eligible for CFI funding collaborating in this project. Enter the amount to be provided from each collaborating institution's envelope for this competition. Do not include in this list the administrative institution identified in the Project information section.

6.3.3 Principal users/team members

List the principal users of the infrastructure requested, including the project leader. Principal users must have a CAMS account and sign in to accept to participate in the project before a notice of intent can be submitted to the CFI. Researchers listed as principal users automatically gain read access to the notice of intent and proposal.

If the project aims to advance a sensitive technology research area (according to the answer given in the project information section), all team members must complete a CFI attestation form for Sensitive Technology Research and Affiliations of Concern (STRAC) in CAMS before they can accept to participate in the project (see section 6.3.4).

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6.3.4   Research security

Institutional administrators can access the research security module through the menu on the left.
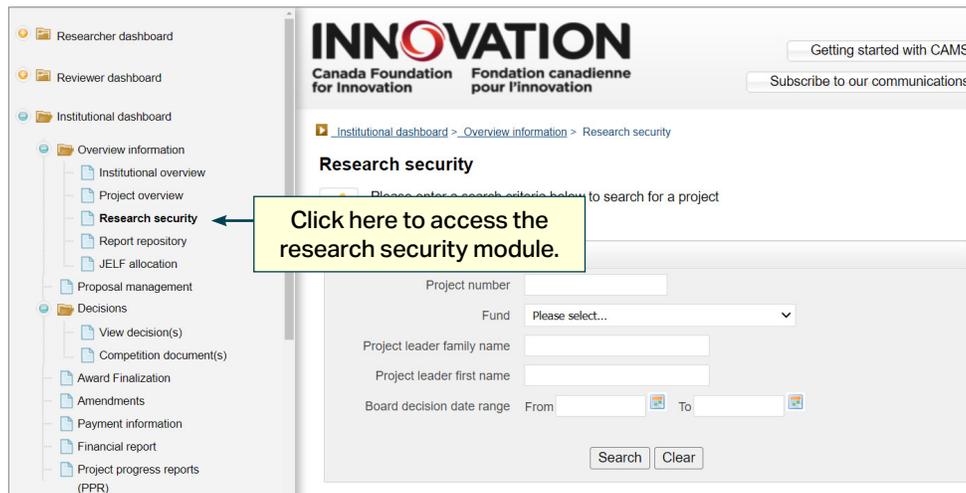
The top portion of the research security module displays, in read-only mode, the answers to the two research security questions as entered by the project leader in the project information section of the notice of intent.
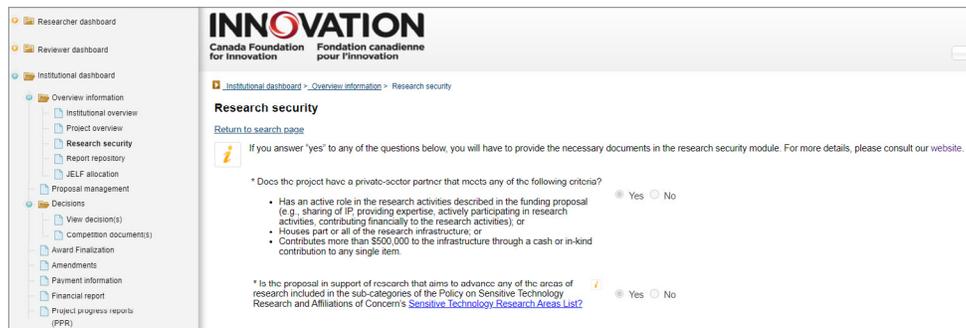
If the answer to the first research security question is "yes," institutional users must upload a Risk Assessment Form (RAF) and one or more private-sector partner identification forms using the middle portion of the research security module. You can complete these forms at any time, but you don't have to submit them until the proposal stage.
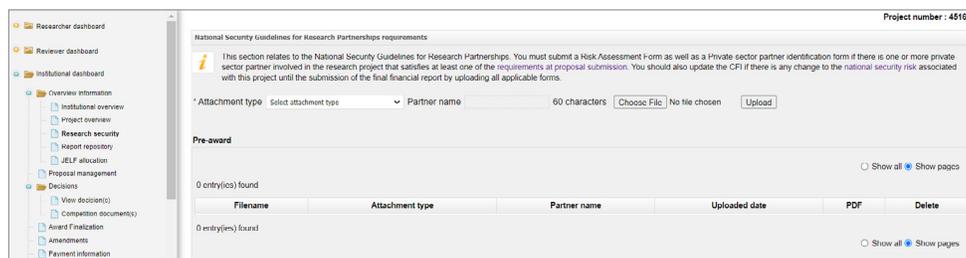
If the answer to the second research security question is "yes," the bottom portion of the research security module allows institutional users to monitor whether all team members have completed the attestation forms.

The attestation status column helps you follow the completion of all team members.

Resetting attestation will remove the user's attestation and allow the user to complete the attestation again.

Project leaders can access the research security module through the researcher's dashboard during the application phase. After the application is submitted, access to the research security is no longer available. To allow project leaders access to the research security module throughout all phases of the project, institutional administrators must enable this privilege under the "Institutional agreement and privileges" tab.

Then navigate to the tab " Project leader access"

First click on "Institutional Agreement and access privileges"

Select "Yes" to enable all project leaders access the research security module at all stages of the project

6.3.5   Project description (page limit varies by competition)

Provide a description of the major pieces of infrastructure requested, a short overview of the research or technology development activities to be enabled by the infrastructure, and the anticipated outcomes from these activities, including expected application(s).

Also use this section to clearly indicate if the proposal will include advanced research computing infrastructure. Similarly, specify if the proposed location of the infrastructure project would be either a national or international research facility. In both such cases, the institution must consult with the host facility, comply with the facility's established planning and project approval processes, and obtain the approval of the host facility.

6.3.6   Suggested reviewers

Identify a minimum of six reviewers who are well-qualified to review the proposal and who are not in a position of conflict of interest. A conflict of interest may be deemed to exist or perceived as such when reviewers:

- Are a relative or close friend, or have a personal relationship with the project leader or one of the principal users
- Are in a position to gain or lose financially/materially from the funding of the proposal
- Have had long-standing scientific or personal differences with the project leader or one of the principal users
- Are currently affiliated with the project leaders' or the principal users' institutions, organizations or companies — including research hospitals and research institutes

- Are closely professionally affiliated with the project leader or one of the principal users, as a result of having in the last six years:
  - Frequent and regular interactions with the project leader or one of the principal users in the course of their duties at their department, institution, organization or company
  - Been a supervisor or a trainee of the project leader or one of the principal users
  - Collaborated, published or shared funding with the project leader or one of the principal users, or have plans to do so in the immediate future
  - Been employed by the administrative institution
- Feel for any reason unable to provide an impartial review of the proposal. Note: The decision whether to contact the suggested reviewers remains with the CFI.

6.4   Proposal structure

The proposal should clearly present the merits and excellence of the proposed project. Sufficient information should be provided to enable reviewers to evaluate the proposal in accordance with the assessment criteria established by the CFI (please refer to the Assessment criteria section for the competition).

If the submission of a notice of intent was required, CAMS automatically populates the proposal with information provided in the notice of intent including the following: project information, collaborating institutions, principal users and suggested reviewers. Applicants will not be able to change the name of the project leader or administrative institution once the notice of intent is completed. This is because the CFI uses the notices of intent to assemble review committees and a change to the project leader or administrative institution may result in a conflict of interest for a review committee member. **If such a change is deemed necessary, contact your Senior Programs Officer as soon as possible. The CFI will oversee the change to be made in CAMS.**

Applicants are able to revise the details of the collaborating institutions, principal users, research security questions and suggested reviewers to reflect changes from the time of the notice of intent submission. However, we ask that you inform your Senior Programs Officer as soon as possible if any changes are made to the aforementioned lists.

The proposal consists of four separate CAMS modules:

- **Project module:** Information about the proposed project, how it meets the objectives and criteria of the competition
- **Finance module:** Information about the budgetary details of the proposal
- **Suggested reviewers module:** List of potential reviewers of the proposal
- **Research security module:** Information about research security requirements

The forms in CAMS will dictate the maximum number of characters that can be included in each section and/or the page limits for uploaded documents.

6.5   Project module

6.5.1   Project information

This section captures basic information about the project such as the title, administrative institution, keywords and research security information. The information in this section is automatically populated with information if it was provided in a notice of intent.

You might need to submit other documents as well, depending on the answers to the research security questions (see sections 6.5.4 and 6.8).

6.5.2 Plain language summary

Provide a short summary in plain language of the proposed project: what is being researched, how it is being done and why it is important. Focus on the expected impacts and benefits to Canada, beyond academic accomplishments. This summary will not be used in the review process. Should the project be funded, it may be used in the CFI's communications products and website.

6.5.3 Project summary

In language appropriate for a Multidisciplinary Assessment Committee (MAC), provide a general description of the research or technology development activities to be undertaken and a general overview of the infrastructure being requested. This summary must concisely address the extent to which the proposal meets the competition objectives.

6.5.4 Principal and other users/team members

The list of principal users/team members is prepopulated if a notice of intent was required. Newly added principal users must have a CAMS account and accept to participate in this project before a proposal can be submitted to the CFI. The CVs of the principal users will be appended to the proposal. Researchers listed as principal users automatically gain read access to the proposal.

If the project aims to advance a sensitive technology research area (according to the answer given in the project information section), all team members must complete a CFI STRAC attestation form in CAMS before they can accept to participate in the project.

6.5.5 Collaborating institutions

Identify the institutions eligible for CFI funding collaborating in this project. The list of collaborating institutions should be filled out prior to completing the Finance module. The choice of infrastructure location in the Cost of individual items section of the Finance module will be populated based on this list. Do not include in this list the administrative institution identified in the Project information section.

6.5.6 Financial resources for operation and maintenance

This section of the Project module captures the annual costs and sources of committed support to ensure the effective operation and maintenance of the infrastructure for the first five years after implementation.

In cases where the useful life[1] of some of the infrastructure items requested are longer or shorter than five years, the Assessment criteria section of the proposal should provide complementary information regarding the operating and maintenance needs for these items over their useful life.

Do not include costs related to research and/or technology development. If funding sources include the CFI Infrastructure Operating Fund (IOF), list these in the "institutional contribution" category.

6.5.7 Assessment criteria

Upload a PDF document that contains key information on how the proposal meets the objectives and assessment criteria for the competition. Ensure that the document follows the guidelines for attachments (Section 6.2).

Each assessment criterion will be evaluated against a standard. Each criterion includes aspects that must be addressed in the proposal. Failure to do so will weaken the proposal.

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1   The useful life of the research infrastructure is considered to be the period of time over which the infrastructure is expected to provide benefits and be usable for its intended purpose as per the proposal, factoring in normal repairs and maintenance.

The document allows the applicant maximum flexibility to address each criterion, including the use of figures or diagrams, where appropriate. The distribution of pages among criteria is at the applicant's discretion, up to the total page limits.

6.6 Finance module

The Finance module consists of the following sections:

- Cost of individual items
- Construction or renovation plans (if applicable)
- Contributions from eligible partners
- Infrastructure utilization
- Overview of infrastructure project funding (generated automatically)

The tables in the Overview of infrastructure project funding section in CAMS will be automatically populated with information taken from the other sections of the Finance module. Note that the amount requested from the CFI is calculated based on the difference between the total contributions from eligible partners and the total eligible costs.

6.6.1 Cost of individual items

When completing the Cost of individual items section, the CFI recommends that the applicant bundle items into functional groupings. However, details and justification for each item within a group should be provided in addressing the infrastructure criterion in the Assessment criteria document. The CFI's *Policy and program guide* outlines the eligible costs for infrastructure projects.

List only the eligible infrastructure acquisition and development costs. List the full cost of each item. Retain documentation (price lists, quotes, etc.) so that you can provide it to the CFI upon request.

Please note:

- If the infrastructure will be used for purposes other than research or technology development, list only pro-rated research or technology development costs.
- The total eligible costs must include taxes (net of credits received), shipping and installation. However, taxes must not be calculated on the in-kind portion.
- When preparing budget estimates, the applicant must follow their existing institutional policies and procedures. Costs included in this budget must be close estimates of fair market value. Refer to the Policy and program guide for information on how in-kind contributions must be assessed.

6.6.2 Construction or renovation plans

All proposals that include construction or renovation must provide the following information:

- A detailed breakdown of the overall cost of the construction or renovation project, categorized by cost component (i.e. direct, soft and contingency costs);
- A timeline identifying key dates for the various stages of the proposed construction or renovation;
- Floor plans of the proposed area(s), showing the location of the infrastructure and the scale of the plans for projects involving multiple rooms. The floor plans must be legible when printed in black and white on standard letter size paper (8.5" x 11").

Note: The cost breakdown, timeline and floor plans should be uploaded as a separate PDF document. These pages do not count towards the page limit for the Assessment criteria section of the proposal.

6.6.3   Contributions from eligible partners

List all contributions from eligible partners. Do not include the amount requested from the CFI. Provide the partner name and type, as well as a breakdown of contributions (cash and in-kind) for each eligible partner. The applicant is encouraged to bundle all expected in-kind contributions from vendors into a single line. If partner contributions are expected but have not yet been confirmed, outline the plans for securing these funds.

6.6.4   Infrastructure utilization

This section of the Finance module captures the use of the requested infrastructure for CFI-eligible and non-eligible purposes and any applicable pro-rating of costs.

6.7   Suggested reviewers module

The list of suggested reviewers is prepopulated using the list if one was provided in a notice of intent. You may identify additional reviewers who are well-qualified to review the proposal. Refer to Section 6.3.5 of this document for conflict of interest guidelines. The decision whether or not to contact the suggested reviewers remains with the CFI.

6.8   Research security module

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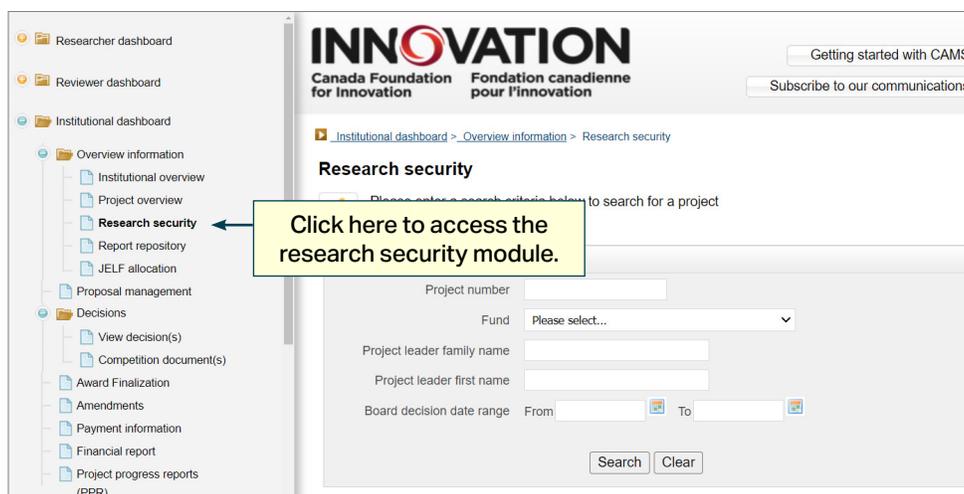
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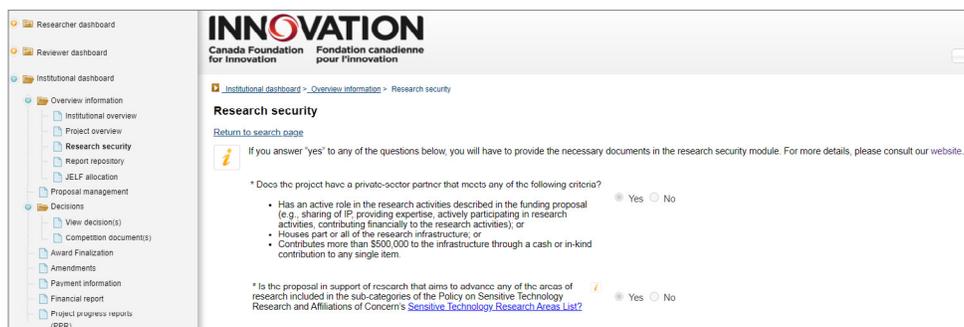
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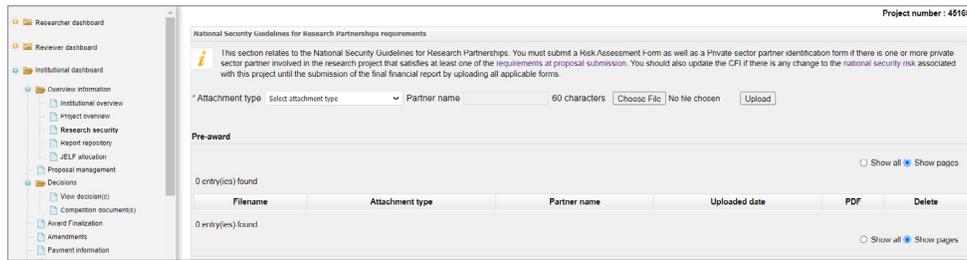
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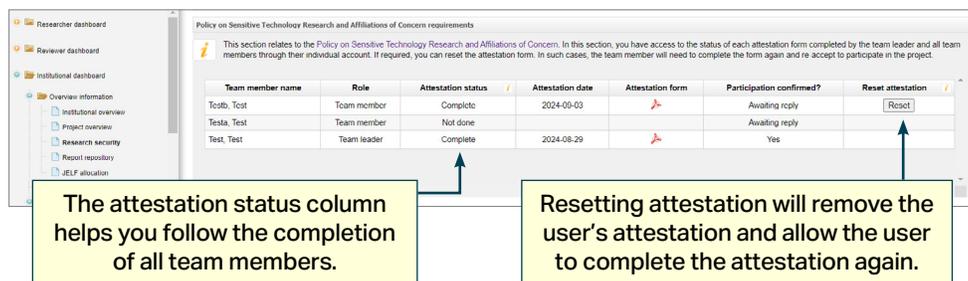
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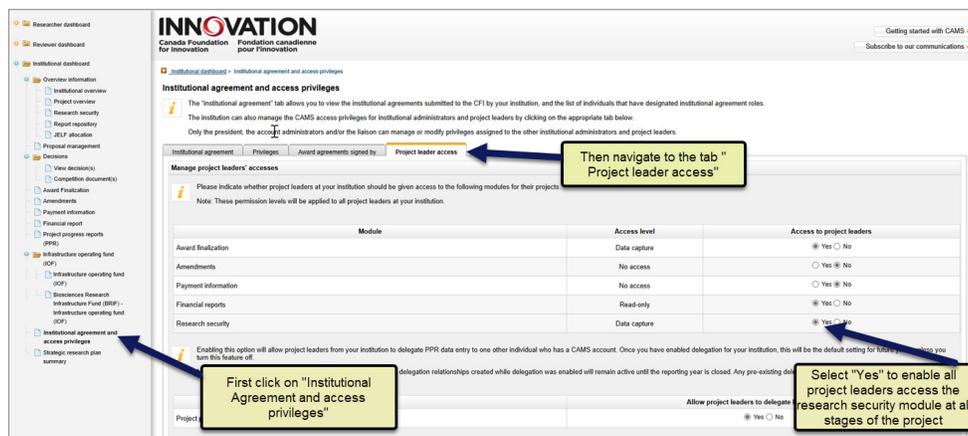
Then navigate to the tab "Project leader access"

First click on "Institutional Agreement and access privileges"

Select "Yes" to enable all project leaders access the research security module at all stages of the project

7 Decisions

As an institutional administrator involved in managing CFI-funded projects, your institution may have given you access to the project overview, which allows you to view decisions related to proposals submitted to the CFI by your institution and gives you access to review materials uploaded by the CFI.

The review materials are not uploaded to CAMS for projects evaluated by the province of Quebec or our funding partners for the JELF partnership streams. You must contact the appropriate funding partner to obtain these materials.

7.1　View decisions

The project overview page allows you to search for a specific project (using the project number or project leader name) or for projects based on the fund name, funding decision or board decision date range.

7.2 Search results

When you search using family name, first name, fund, funding decision or board decision date range, you will be presented with a table listing the projects that match your search criteria. The list is sorted by project number in ascending order by default, but you can sort the information by clicking on most of the column headers in the table.

Click a project number to access project level information for that project.

7.3 Project overview page

Each project has a project overview page where you can view important summary information related to one project on one screen, including the CFI funding decision and the review materials.

8   Award finalization

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 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. You can also 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). Additionally, the award finalization module allows you to fill in award finalization forms.

This section provides additional information on the award finalization module within CAMS. You should consult the 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   Access

By default, all individuals identified in the institutional agreement can enter data in the award finalization form (i.e., president, director general, authorized signatories, liaison and account administrator).

The liaison and account administrator are responsible for setting appropriate access privileges to the award finalization forms. They can:

- Provide institutional administrators who have no institutional agreement role with data capture privileges in accordance with their institutional control framework and practices. They can do this using the "Privileges" tab of the "Institutional agreement and access privileges" section (see section 15.2)
- Grant project leaders access to the award finalization module through the "Project leader access" tab of the "Institutional agreement and access privileges" section (see section 15.4).

Only individuals identified in the institutional agreement can submit an award finalization form in CAMS (i.e., president, director general, authorized signatories, liaison and account administrator).

8.2 Searching

You will have access to the award finalization form as soon as a positive funding decision is communicated to your institution. If the recipient institution is different from the applicant institution, the award finalization form will be available in the recipient institution's dashboard. 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.

8.3 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 projects 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 status of the award finalization form, the date the award finalization form was submitted to the CFI, the date the award agreement was issued by the CFI and which budget was used at award finalization (itemized list[2], 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.

You can complete and modify unsubmitted award finalization forms by clicking on the project number. In addition, if you are identified in the institutional agreement (i.e., president, director general, authorized signatories, liaison and account administrator), clicking the project number will also provide you with the option of submitting the award finalization form.

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 "View." If applicable, you will also be able to view all revised award agreements issued for the project.

8.4 Project's main award finalization page

Each project has a main award finalization page where you can view the status of the award finalization form, access it for modification or submit it to the CFI.

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2   The use of the itemized list form has been discontinued by the CFI in December 2014.

8.5   Award finalization form

The award finalization form consists of four tabs. When an award finalization form is first opened, the "Overview" tab is selected by default. You will always have access to the "Certification" and "Research security" tabs, but the eligible costs tab will only be available for projects requesting more than $1 million from the CFI.

You can use the "Research security" tab to inform the CFI of any changes to the project related to the research security requirements that pertain to the Government of Canada's National Security Guidelines for Research Partnerships. Answering "yes" to the question will give you access to the research security module. For this reason, you should upload relevant documents (updated Risk Assessment Form and private-sector partner identification form(s)) to the system.

If the project was not aiming to advance a sensitive technology research area when you submitted the proposal, remain aware of any change in the nature of the project that would mean it now does. In such an instance, each project/team leader and team member is required to immediately submit an attestation form. Contact your Senior Programs Officer for detailed instructions on how to submit those forms. (In this instance, you cannot submit the attestation forms in CAMS.)

8.6   Submit the award finalization form

Only individuals identified in the institutional agreement can submit an award finalization form in CAMS (i.e., president, director general, authorized signatories, liaison and account administrator). This is done by clicking the "submit" button in the main award finalization page.

▶ Institutional dashboard > Award finalization > Project # 40400

Return to search page

i   The submission of the award finalization form is required before an award agreement can be issued. Only users that have roles designated in the institutional agreement can submit the award finalization form.

If a budget update is required before award finalization, please submit the amendment request in CAMS before submitting the award finalization form.

Award finalization form

Project number	40400		Total eligible costs	$5,000,000
Project/Team leader(s)	Leblanc, Alex		Maximum CFI contribution	$2,000,000
Fund	TEST Release 14 AFF			
Project title	Water chemistry			

Click 'Submit' to submit the award finalization form to the CFI.

Award finalization form

Webform		Status *i*	Submit to the CFI	Submission date	CFI comments	Display/Print
Display	Validate					
View/edit	Run	In progress	Submit			🅰

9   Amendments

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 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 "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.

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

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.

Note that only amendment requests that relate to changes to the infrastructure will include an Excel version in addition to the PDF version. If the amendment request pertains 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.

9.4 Amendment requests: statuses and actions

Create amendment request
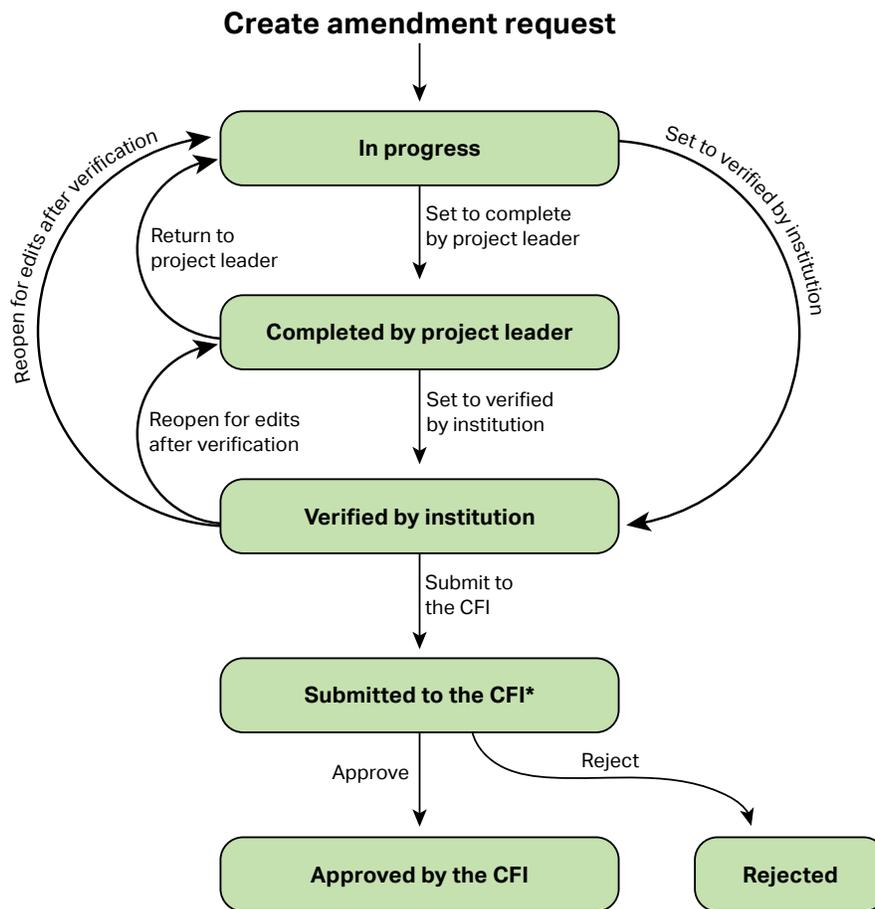
* In some cases, the CFI may return an amendment request to your institution so that corrections can be made.

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 confirm that the form is complete. Once this is done, 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 its status as verified, even if project leaders have been granted access to the amendment module.

You will then verify the amendment request and set the status as verified. If changes are required, you 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 no further changes are required, the amendment request can be submitted to the CFI. No further changes are possible at this point, and the status of the amendment request changes to "submitted to the CFI."

The CFI will approve, reject or return the amendment request to your institution for corrections. 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.

9.5   Amendment request form

The amendment request form has seven 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 "Attachments" tab allows you to attach up to three documents (PDF format) to further explain changes made to the project.

You can use the "Research security" tab to inform the CFI of any changes to the project related to the research security requirements that pertain to the Government of Canada's National Security Guidelines for Research Partnerships. Answering "yes" to the question will give you access to the research security module. For this reason, you should upload relevant documents (updated Risk Assessment Form and private-sector partner identification form(s)) to the system.

If the project was not aiming to advance a sensitive technology research area when you submitted the proposal, remain aware of any change in the nature of the project that would mean it now does. In such an instance, each project/team leader and team member is required to immediately submit an attestation form. Contact your Senior Programs Officer for detailed instructions on how to submit those forms. (In this instance, you cannot submit the attestation forms in CAMS.)

10 Payment

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.

Search results

i Transaction level details can be viewed by clicking on the related project number link within the search results table.

Please note that the final granted amount and any remaining balance to be paid are fully dependent on the actual **eligible** costs incurred by the institution and the institution's compliance with CFI policies and the award conditions.

📊 Export results to Excel ← **Click to generate an Excel file from search results.**

1 entry(ies) found   ○ Show all ● Show pages

Project number ▲	Project leader	Fund	Granted amount *i*	Amount paid to date *i*	Remaining balance				Approved project end date
					Scheduled payments (net)	Held payments (net) *i*	Holdback	Payments not yet scheduled (gross) *i*	
12345	Account, Demo	FL 1 M$-2 M$	800 000	623 443	96 556	0	80 001	0	2016-12-31

1 entry(ies) found   ○ Show all ● Show pages

Click a project number to access transaction level information for that project.

11 Financial reports

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 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").

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 projects 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 ongoing 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.

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 six 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.

You can use the "Research security" tab to inform the CFI of any changes to the project related to the research security requirements that pertain to the Government of Canada's National Security Guidelines for Research Partnerships. Answering "yes" to the question will give you access to the research security module. For this reason, you should upload relevant documents (updated Risk Assessment Form and private-sector partner identification form(s)) to the system.

If the project was not aiming to advance a sensitive technology research area when you submitted the proposal, remain aware of any change in the nature of the project that would mean it now does. In such an instance, each project/team leader and team member is required to immediately submit an attestation form. Contact your Senior Programs Officer for detailed instructions on how to submit those forms. (In this instance, you cannot submit the attestation forms in CAMS.)

The final financial report form consists of five tabs. When a final financial report is first opened, the default tab is the "Overview." You will need to indicate whether 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 Project progress report

As an institutional administrator involved in post-award activities, your institution may have given you access to the *Project progress report* (PPR) module. The PPR module allows you to view the infrastructure operational statuses and PPR submission statuses related to the projects at your institution, thereby helping you manage the PPR reporting process at your institution.

This section provides additional information on the PPR module within CAMS. You should consult the Policy and program guide for information on requirements and guidelines related to completing the PPR.

The process to submit a PPR to the CFI typically involves three steps:

1. The project leader indicates infrastructure operational status online (if applicable). Institutional administrators with appropriate access can also indicate operational status online on behalf of the project leader.
2. The project leader fills out, validates, and completes the PPR.
3. The institution may edit the PPR and/or return it to the project leader for revision. An authorized institutional administrator submits the PPR to the CFI.

Although completion of the PPR is under the responsibility of the project leader, a delegation tool allows her/him to share access to the online form with another individual with a CAMS account to support data entry.

The graphic below depicts the overview of CAMS PPR modules and associated tasks for institutions.

Institutional dashboard

Project progress reports: reporting deadlines

- View the historical and current submission status of infrastructure operational statuses and PPRs
- Change institutional deadline of operational statuses and PPRs
- Select project numbers to drill down details list for operational statuses and PPRs

Institutional agreement and access

- Enable project leaders to delegate PPR entry to another individual

Project progress report form

- Go to each section of PPR to fill out form and validate content of *Project progress report* *
- Give access to another individual to enter PPR data (only when institution activates this function) *

Operational status: selected year

- Search and select projects to view their infrastructure operational statuses
- Export the search results to Excel file
- Change the infrastructure operational status *

Project progress reports: selected year

- Search and select project to view the status of PPR reporting
- Export the search results to Excel file
- Select project to go to PPR form
- Display or print out PPR content
- Validate PPR content *
- Confirm PPR is completed *
- Return PPR to researcher
- Submit PPR to CFI

* Indicates tasks for which the project leader has primary responsibility. Institutional administrators with appropriate access can also complete these tasks on behalf of project leaders.

12.1 Operational statuses and PPR submissions: reporting deadlines

The summary table indicates annual requirements and the latest submissions for infrastructure operational statuses and the PPRs. From this list, you will be able to drill down to the page in the selected year to manage operational statuses and the PPRs. You will be able to set the institutional deadlines if applicable.

12.2 Managing required operational statuses

The detailed listing of operational statuses for the current year allows institutional administrators with appropriate access to view, set or change the operational statuses of projects on behalf of the project leaders. Four different statuses can be displayed under the "Infrastructure operational" column:

- **Status not submitted yet:** Infrastructure operational status needs to be reported.
- **Operational (FFR submitted):** PPR will be required in the next reporting period following final financial report (FFR) being submitted.
- **Operational:** PPR is due in the current reporting period.
- **Not yet operational:** PPR is not required this year unless the status is changed to operational. The status can be changed to operational any time before the institutional deadline indicated.

12.3 Filling out, validating and completing project progress reports

The statuses of all newly created PPRs in CAMS are shown as "in progress." Project leaders have full access to the PPR form to enter, validate data and complete the PPR. Institutional administrators with appropriate access can also enter, validate and complete the forms on behalf of the project leader.

12.4 Navigating within the project progress report form

To navigate between Project progress report sections, use the left-hand side menu. For additional reference, you can find a page-by-page view of each screen of the PPR in the PPR template document.

12.5 Returning project progress reports to project leaders or submitting them to the CFI

Once the form has been marked as "complete," the project leader will no longer be able to modify the PPR. The institution retains access to edit the forms and can return them to the project leader for corrections as needed. Once the institution ensures that the PPR is completed and ready for submission, an authorized institutional administrator may submit one or more PPRs to the CFI.

Once the PPR has been submitted to the CFI, the institution will no longer be able to edit the forms.

12.6 Enabling project leaders to delegate project progress report data entry

An institution can grant project leaders to delegate PPR entry to another individual who has a CAMS account. Data entry privileges of the designated individual are limited to PPR forms only and must be re-created every year.

To manage access levels for project leaders, refer to section 15.4.

12.7 Delegating completion of the project progress reports

Project leaders can give access to someone with a CAMS account to enter data in their project progress report. Institutional administrators with appropriate access can also delegate entry on behalf of the project leader.

Click to enter the username (email) of delegate.

Enter the CAMS username (email) of delegate, and validate.

The message entered here will be included in the email sent to the delegate.

By clicking "Save," an email notification will be automatically sent to the delegate.

In order to deactivate delegate function, click "Remove access."

Click to disable delegation for this PPR.

Note: The project leader and institution will still be responsible for the PPR "complete" and "submit" functions through their CAMS dashboards, and for ensuring the completeness and accuracy of the data entered in their PPRs. The delegate will NOT have the ability to set the PPR as "complete."

13 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 Policy and program guide for complete information on requirements and guidelines related to the IOF.

Institutional dashboard > IOF module

Infrastructure operating fund

IOF allocation summary

Overall allocation	$13,764,871
Available allocation	$12,551,782
Less CFI payments *i*	($7,273,434)
Unused available allocation	$5,278,348

View
View

Obtain description of allocation
View IOF adjustment details
View IOF award agreement

IOF annual report(s)

Click to change the reporting date.

An IOF annual report is in progress therefore you cannot create another report at this time.

Reporting period end date	Webform Display	Webform Validation	Status	Submit to the CFI	Submission date	CFI approval date	CFI comments	Display/print	Delete
2015-03-31	View	Run	In progress	Submit				View	✕
2013-03-31	N/A	N/A	Approved	N/A	2013-06-20	2013-09-23		View	
2012-03-31	N/A	N/A	Approved	N/A	2012-06-29	2012-07-09		View	
2011-03-31	N/A	N/A	Approved	N/A	2011-06-30	2011-07-26	View	View	
2010-03-31				N/A	2010-0				
2009-03-31				N/A	2009-06-18	2009-07-08		View	
2008-03-31				N/A	2008-06-16	2008-07-11		View	
2007-03-31	N/A	N/A	Approved	N/A	2007-06-15	2007-07-30		View	
2006-03-31	N/A	N/A	Approved	N/A	2007-06-11	2006-10-05		View	
2005-03-31	N/A	N/A	Approved	N/A	2005-03-31	2005-03-31	View	View	

Click to access the IOF annual report form.

Click to delete the IOF annual report.

13.1 Infrastructure Operating Fund annual report form

Return to IOF module

Infrastructure Operating Fund annual report

i   In the upper table, enter the actual expenditures incurred during the period [...] to incur in the period following the "period ending" of this report. IOF payments for the current year will be based on forecasted expenditures presented in this report and the cumulative CFI excess payment or shortfall. Please refer to the CFI Policy and program guide for more information on how the IOF payment schedule will be established. Please note that the institution should only report the operating and maintenance expenditures for which it is requesting funding from the CFI.

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

[Display/Print] [Save]

| IOF annual report | | | Period ending | 2015-03-31 |

Actual expenditures and CFI payments

Description	Cumulative as of March 31, 2014	Actual expenditures for the period April 1, 2014 to March 31, 2015	Cumulative as of March 31, 2015	% of total cumulative
Personnel, technical and other operational	5,161,293		5,161,293	83.92%
Supplies (maximum 10%)	401,655		401,655	6.53%
Maintenance and repairs	349,681		349,681	5.69%
Services	233,475		233,475	3.80%
Other (specify) [100 characters]	4,073		4,073	0.07%
Total	$6,150,177	$0	$6,150,177	100%
Less CFI payments to date	(7,273,434)	(0)	(7,273,434)	
Shortfall/(excess payment)	($1,123,257)	$0	($1,123,257)	

Forecasted expenditures

Description	Cumulative as of March 31, 2015	Forecasted expenditures for the period April 1, 2015 to March 31, 2016	Cumulative as of March 31, 2016	% of total cumulative
Personnel, technical and other operational	5,161,293		5,161,293	83.92%
Supplies (maximum 10%)	401,655		401,655	6.53%
Maintenance and repairs	349,681		349,681	5.69%
Services	233,475		233,475	3.80%
Other (specify) [100 characters]	4,073		4,073	0.07%
Total	$6,150,177	$0	$6,150,177	100%

Certification

We certify that:

- The information provided in the IOF annual report is accurate.
- Expenditures included have not been claimed for reimbursement from another source.
- Actual expenditures reported have all been incurred in the period April 1, 2014 to March 31, 2015. Outstanding commitments included in actual expenditures consists only of expenditures that were incurred in this period, but for which the invoice was paid subsequently.
- Actual and forecasted expenditures reported are eligible costs as per the CFI Policy and program guide.
- Actual and forecasted expenditures reported are related to infrastructure projects which are admissible under the IOF, as per the CFI Policy and program guide.
- Actual and forecast expenditures reported were and will be subject to the institution's usual tendering and purchasing policies and procedures.
- All confirmations have been obtained from project leaders to attest that the infrastructure for which IOF is being requested is still used for research purposes.
- The forecasts presented are realistic and take into consideration the most recent information at the time the IOF annual report was submitted.
- Infrastructure for which IOF is requested is expected to be used for research purposes in the upcoming year.
- The administration of the funding received/requested has/will be in accordance with the Institutional A[...] IOF award agreement regarding the use of Infrastructure Operating Funds.

Save changes before submitting the report.

☐ I have read, understood and agree with the above.

[Display/Print] [Save]

14 Overview information

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

14.1 Institutional overview

The institutional overview will allow you to view important institutional information on 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); and,
- Your institution's strategic research plan.

14.2 Report repository

The report repository provides access to information in Excel format that is specific to your institution and that can be used to facilitate data analysis, project monitoring and other institutional activities.

14.3 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 finalization form;
- Award agreement and special conditions (if any);
- Summary payment and expenditure information; and
- Summary reporting information (e.g., latest financial report, *Project progress reports*).

14.4 Research security

The research security module allows you to access a project's research security module using search options.

In this module, you can manage the requirements related to research security for each project. You can upload Risk Assessment Forms (RAFs) and private-sector partner identification forms and monitor whether all team members have completed attestation forms.
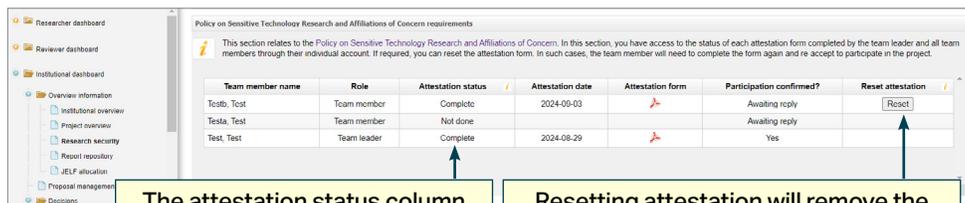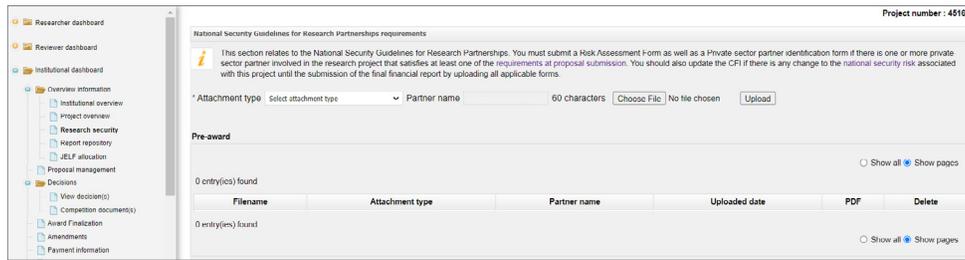
> The attestation status column helps you follow the completion of all team members.

> Resetting attestation will remove the user's attestation and allow the user to complete the attestation again.

If the risks related to national security change during the life of the project, institutional users can also use this functionality to complete RAFs and private-sector partner identification forms after funding is awarded.

If the answer pertaining to the National Security Guidelines for Research Partnerships was "No" when the proposal was submitted and you need to inform the CFI of any change. You can inform the CFI by clicking on the Update to post-award tab and it will enable the research security module of the project.
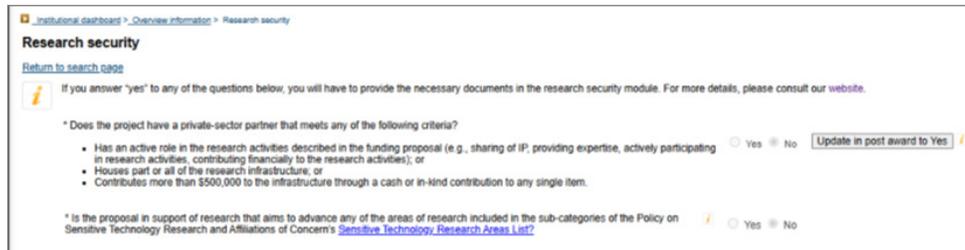
If the project was not aiming to advance a sensitive technology research area when you submitted the proposal, remain aware of any change in the nature of the project that would mean it now does. In such an instance, each project/team leader and team member is required to immediately submit an attestation form. Contact your Senior Programs Officer for detailed instructions on how to submit those forms. (In this instance, you cannot submit the attestation forms in CAMS.)

Please consult our website for more information on CFI's research security requirements.

15 Managing institutional agreements and access privileges

The institutional agreement and access privileges module is only accessible if you are the President, the liaison or the account administrator, as indicated in the institutional agreement submitted to the CFI by your institution. It allows you to view the institutional agreements submitted to the CFI by your institution, and the list of individuals that have designated institutional agreement roles. It also allows you to manage the CAMS access privileges for institutional administrators and project leaders.

A video highlighting the various functions available in this module is also available on the CFI website.

15.1 Institutional agreement

The "Institutional agreement" tab allows you to view the institutional agreements submitted to the CFI by your institution, and the list of individuals that have designated institutional agreement roles.

Upon receiving a signed institutional agreement from the institution, the CFI will update or create respective accounts in CAMS for the individuals who have designated institutional agreement roles (i.e., president, authorized signatory, liaison and account administrator). Privileges will be assigned according to the responsibilities and privileges indicated in the institutional agreement. Note that these individuals have minimum privileges that are automatically assigned to them in the institutional agreement and that cannot be revoked.

Appendix A – Minimum privileges describe the minimum privileges automatically assigned by the CFI and the ones that can be modified for each institutional agreement role. If needed, you can modify certain privileges for these individuals by clicking the "Manage" link.

> **Note:** The institution must inform the CFI as soon as possible of any changes to the President, designated authorized signatories, account administrator and/or liaison by submitting a revised institutional agreement to the CFI senior programs officer responsible for your institution.

15.2 Manage privileges

The "Privileges" tab allows you to assign and revoke access privileges for institutional administrators, whether they have an institutional agreement role or not. The liaison and account administrator are responsible for setting appropriate access privileges for institutional administrators with no institutional agreement role in accordance with institutional control framework and practices.

> **Note:** Some privileges can only be assigned to a limited number of individuals:
> - For amendments, data capture and submit can only be assigned to individuals with an institutional agreement role.
> - For proposals, data capture and submit can only be assigned to individuals with an institutional agreement role and ONE additional individual (if necessary).
>
> All other privileges can be assigned to an unlimited number of individuals.

From this screen you can create a new CAMS account for institutional administrators who do not yet have one.

As well, some privileges can only be assigned by either the liaison or the account administrator. These limitations are described in Appendix B – Privileges that can be assigned by each institutional agreement role.

Since the institution is responsible for privilege delegation and its impact on data access and integrity, CAMS accesses and privileges for all institutional administrators should be reviewed on a regular basis to ensure that they remain appropriate. You can obtain a list of all institutional administrators and their privileges in CAMS.

You can search for an individual by first name, family name or username (email). If no results are found, you will need to create a CAMS account for the individual.

Note that this module must not be used to create new accounts for project leaders. Project leaders can create new CAMS accounts online. Their access levels related to post-award modules can be set in CAMS by the CFI liaison or the CFI account administrator (refer to <ins>section 15.4</ins>).

15.2.1 Search results

You will be presented with a table of results listing the individuals that match your search criteria.

Click to add or remove privileges from this user.

Name▲	Username	Account status	Privileges	History
Davis, Tom	tom@myinstitution.ca	Active	Manage	View

Click to view a detailed history of privileges for this user.

15.2.2 Setting individual privileges and requesting deactivation

You can assign different access privileges for every CAMS module and will generally be able to choose from the following access privileges:

- Read only
- Data capture (no submission capabilities)*
- Data capture and submit *

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

Note: If an individual is no longer working at your institution, please do not forget to revoke his/her privileges in CAMS. If the responsibilities of an institutional administrator changes, you may need to modify his/her access privileges.

As an institutional administrator, you can request a user to be deactivated. To deactivate a user navigate to the "Privileges" tab and search for the user to be deactivated.
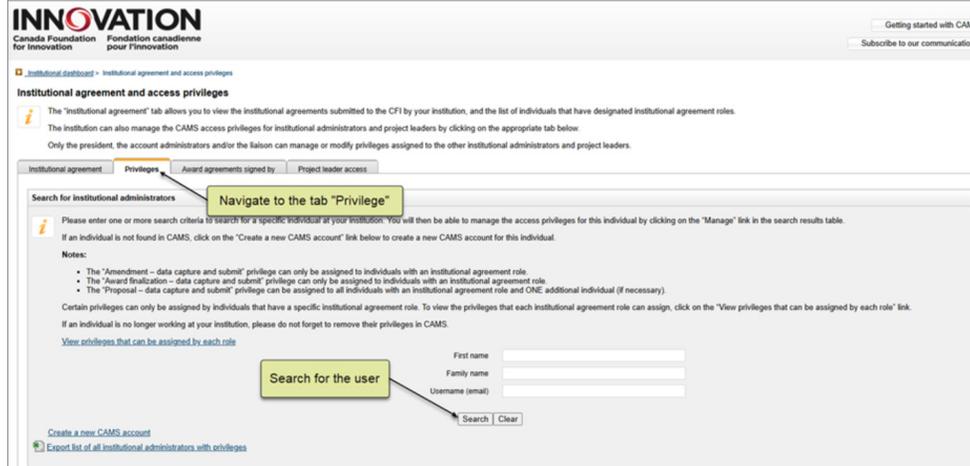
You can search for a user using any of the search criteria (First name, last name, email).
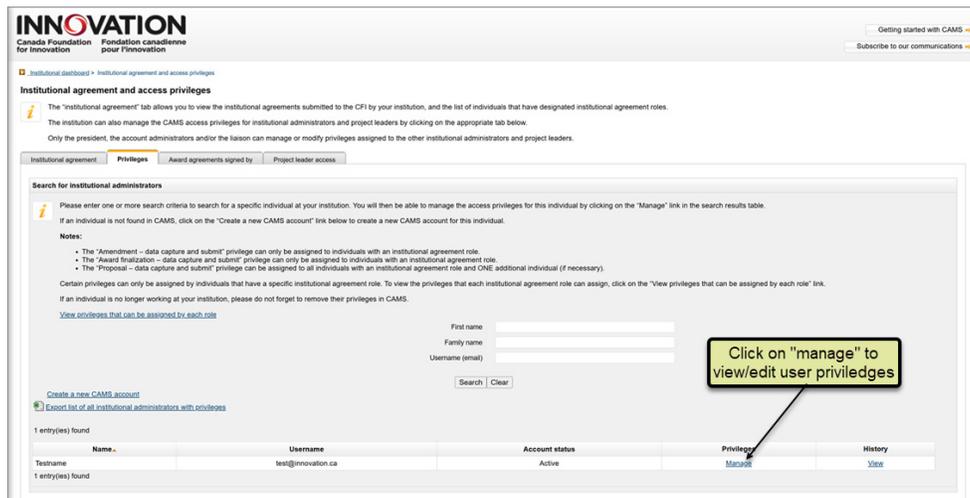
Next, click on "Request user account deactivation." Provide a reason for deactivating the user. Once submitted, the system will send a notification to the CFI administrator, who will process your deactivation request.
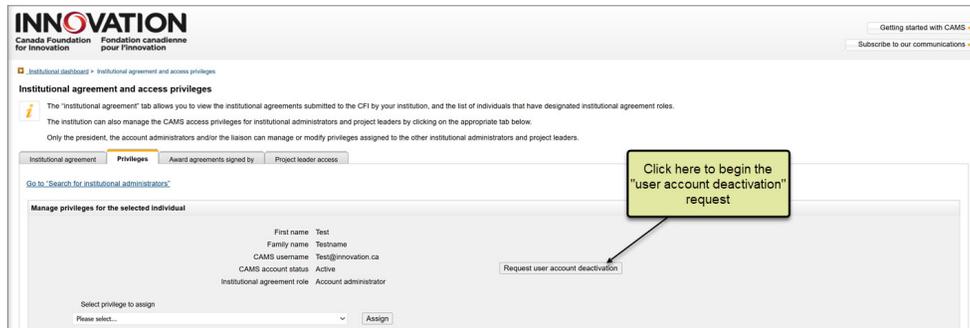
Once you have entered the reason for deactivation, click "Confirm" to submit your request.

15.2.3 History

You can view the history of the changes made to an individual's privileges (e.g., dates of changes and author of the change).

Privilege history

Below you will find a history of operations performed on the selected individual's privileges.

First name: Tom
Family name: Davis
CAMS username: tom@myinstitution.ca

Date	Author	Action	Privilege
2016-04-22 17:02	paul@myinstitution.ca	Revoke	Project progress report – Data capture and submit
2016-04-22 17:02	paul@myinstitution.ca	Revoke	Proposal – Data capture
2016-04-22 17:02	paul@myinstitution.ca	Revoke	Proposal – Data capture and submit
2016-04-22 16:59	paul@myinstitution.ca	Assign	Proposal – Data capture and submit
2016-04-22 16:57	paul@myinstitution.ca	Assign	Proposal – Data capture
2016-04-22 16:46	paul@myinstitution.ca	Assign	Project progress report – Data capture and submit
2016-04-22 16:32	CFI	Assign	Amendment – Read-only
2016-04-22 16:32	CFI	Assign	Institutional overview – Read-only
2016-04-22 16:32	CFI	Assign	Proposal – Read-only
2016-04-22 16:32	CFI	Assign	Award finalization – Submit

Close

15.3 Award agreements signed by

The individuals mentioned in this tab will receive award agreements electronically for signature. If more than one authorized signatory or account administrator have been identified in the institutional agreement, you need to identify the one to receive the award agreements for signature by clicking the edit link.

15.4 Access levels for project leaders

Project leaders must create their own CAMS accounts online. When creating an account, the project leader will automatically be given access to the Curriculum vitae, the application and the decision modules in CAMS.

The liaison and account administrator 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) and complete award finalization forms for internal submission to the institution;
- View amendment information (e.g., status, amendment in progress or submitted, CFI comments) and complete amendment requests for internal submission to the institution;
- Delegate data entry for the research security module;
- View financial report information (e.g., status, financial reports in progress or submitted, CFI comments);
- View payment information and associated CFI comments; and,
- Delegate PPR data entry to one other individual.

Note: The access level 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.

Module	Access level	Access to project leaders
Award finalization	Data capture	● Yes ○ No
Amendments	Data capture	● Yes ○ No
Payment information	No access	○ Yes ● No
Financial reports	Data capture	○ Yes ● No
Research security	No access	○ Yes ● No

Enabling this option will allow project leaders from your institution to delegate PPR data entry to one other individual who has a CAMS account. Once you have enabled delegation for your institution, this will be the default setting for future years unless you turn this feature off.

Note: If delegation is turned on and then subsequently disabled, any delegation relationships created while delegation was enabled will remain active until the reporting year is closed. Any pre-existing delegation will remain active even if you select "No".

Module	Allow project leaders to delegate PPR data entry
Project progress report delegation	○ Yes ● No

Appendix A – Minimum privileges

Institutional agreement role	Minimum access privileges (cannot be revoked)	Additional privileges that can be modified*
President	Amendment – Data capture and submit Award finalization – Data capture and submit Financial report – Data capture and submit Infrastructure Operating Fund – Data capture and submit Institutional overview – Read-only Institutional privilege management Payment – Read-only Project overview – Read-only Project progress report – Data capture and submit Proposal – Data capture and submit	Research security – Data capture
Authorized signatory	Amendment – Read-only Award finalization – Data capture and submit Financial report – Read-only Infrastructure Operating Fund – Read-only Institutional overview – Read-only Payment – Read-only Project overview – Read-only Project progress report – Data capture and submit Proposal – Data capture and submit	Amendment – Data capture Amendment – Data capture and submit Financial report – Data capture Financial report – Data capture and submit Infrastructure Operating Fund – Data capture Infrastructure Operating Fund – Data capture and submit Research security – Data capture
Liaison	Amendment – Data capture and submit Award finalization – Data capture and submit Financial report – Read-only Infrastructure Operating Fund – Read-only Institutional overview – Read-only Institutional privilege management Payment – Read-only Project overview – Read-only Project progress report – Data capture and submit Proposal – Data capture and submit Research security – Data capture	Financial report – Data capture Financial report – Data capture and submit Infrastructure Operating Fund – Data capture Infrastructure Operating Fund – Data capture and submit

Institutional agreement role	Minimum access privileges (cannot be revoked)	Additional privileges that can be modified*
Account administrator	Amendment – Read-only	Amendment – Data capture
	Award finalization – Data capture and submit	Amendment – Data capture and submit
	Financial report – Data capture and submit	Project progress report – Data capture
	Infrastructure Operating Fund – Data capture and submit	Project progress report – Data capture and submit
	Institutional overview – Read-only	Proposal – Data capture
	Institutional privilege management	Proposal – Data capture and submit
	Payment – Read-only	Research security – Data capture
	Project overview – Read-only	
	Project progress report – Read-only	
	Proposal – Read-only	

* Additional privileges can be selected by the institution in the institutional agreement, or they can be managed in CAMS as needed.

Appendix B – Privileges that can be assigned by each institutional agreement role

Institutional agreement role	Privileges that can be assigned to institutional administrators by the institutional agreement role	Privileges that cannot be assigned
President	The president can assign all privileges available to institutions in CAMS	N/A
Authorized signatory	The authorized signatory cannot assign any privilege	N/A
Liaison	Amendment – Data capture Amendment – Data capture and submit[3] Amendment – Read-only Award finalization – Read-only Financial report – Read-only Infrastructure Operating Fund – Read-only Institutional overview – Read-only Payment – Read-only Project overview – Read-only Project progress report – Data capture Project progress report – Data capture and submit Project progress report – Read-only Proposal – Data capture Proposal – Data capture and submit[4] Proposal – Read-only Research security – Data capture	Financial report – Data capture Financial report – Data capture and submit Infrastructure Operating Fund – Data capture Infrastructure Operating Fund – Data capture and submit

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3 The "Amendment – Data capture and submit" privilege can only be assigned to individuals with an institutional agreement role.

4 The "Proposal – Data capture and submit" privilege can only be assigned to individuals with an institutional agreement role and one additional individual (if necessary).

Institutional agreement role	Privileges that can be assigned to institutional administrators by the institutional agreement role	Privileges that cannot be assigned
Account administrator	Amendment – Read-only	Amendment – Data capture
	Award finalization – Read-only	Amendment – Data capture and submit
	Infrastructure Operating Fund – Data capture	Project progress report – Data capture
	Infrastructure Operating Fund – Data capture and submit	Project progress report – Data capture and submit
	Infrastructure Operating Fund – Read-only	Proposal – Data capture
	Institutional overview – Read-only	Proposal – Data capture and submit
	Financial report – Data capture	
	Financial report – Data capture and submit	
	Financial report – Read-only	
	Payment – Read-only	
	Project overview – Read-only	
	Project progress report – Read-only	
	Proposal – Read-only	
	Research security – Data capture	

For any questions about CAMS,
feel free to contact us at:
help@innovation.ca
We will be happy to answer you promptly.