Getting started with the CFI Awards Management System

An overview document for researchers

May 2016

INNOVATION.CA

CANADA FOUNDATION FOR INNOVATION | FONDATION CANADIENNE POUR L'INNOVATION

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1 DEFINITIONS

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

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

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

Post-award activities encompass all activities related to managing 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 refers to individuals mandated by the institution to lead CFI-funded projects.

Reviewer refers to individuals who participate in the review process of proposals submitted to the CFI.

2 REFERENCE MATERIAL

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

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

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

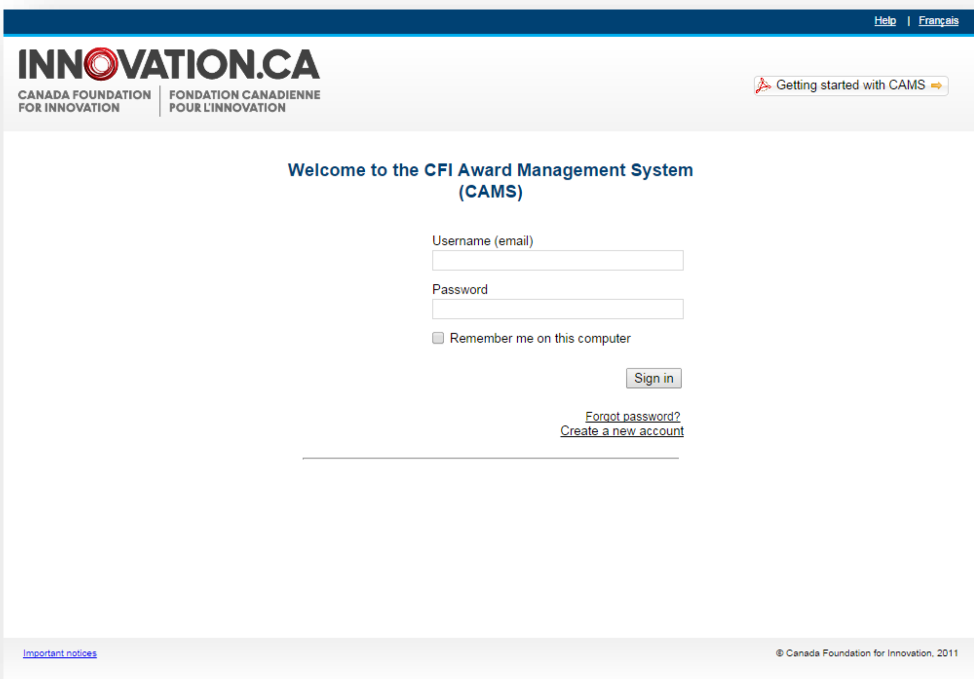
4.1 Accounts and access privileges

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

4.2 CAMS sign-in page

You can access CAMS as follows:

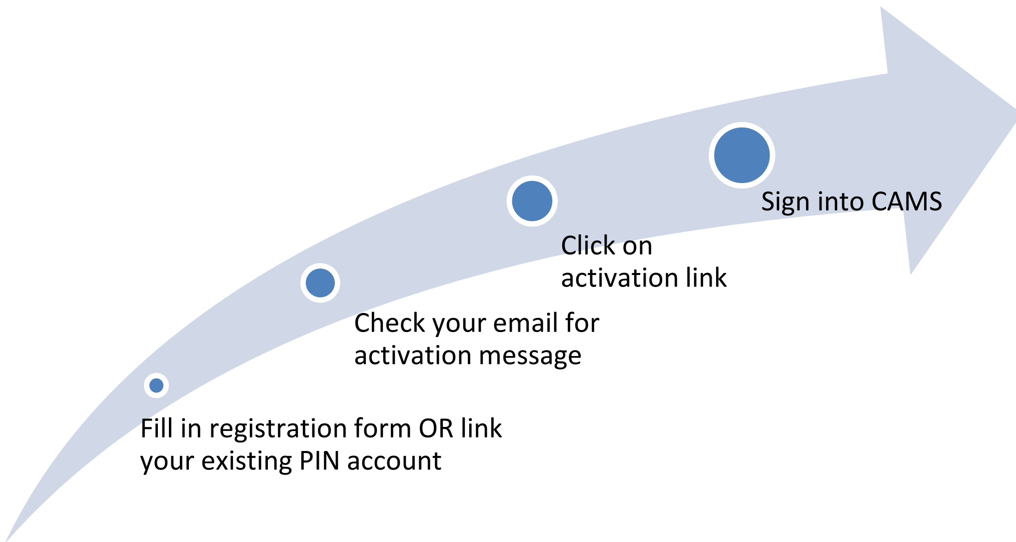
- Navigate to Innovation.ca;
- Click “CFI online” from top of screen;
- Click “Sign in” in right-hand menu; and,
- The CAMS sign-in page will appear.



On this page:

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

4.3 Account creation process



4.3.1 Creating a new account

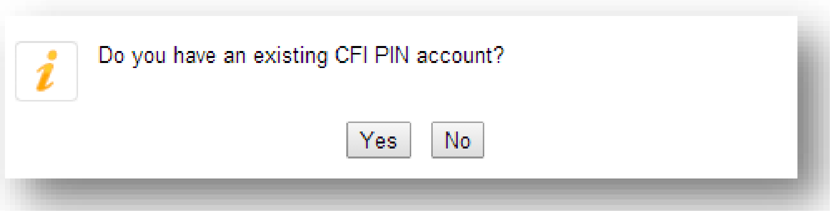
From the sign in page, click “Create a new account” and follow the instructions.

4.3.2 Researchers with an existing PIN

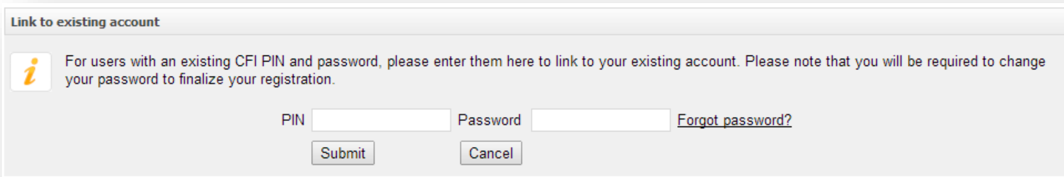
CAMS uses your email address as your username. If you have an existing PIN from our legacy system, you can link it to your CAMS username in order to use CAMS (see below for instructions). You will be given a **one-time opportunity** to link your existing PIN to your new username in CAMS, which will ensure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

Instructions:

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

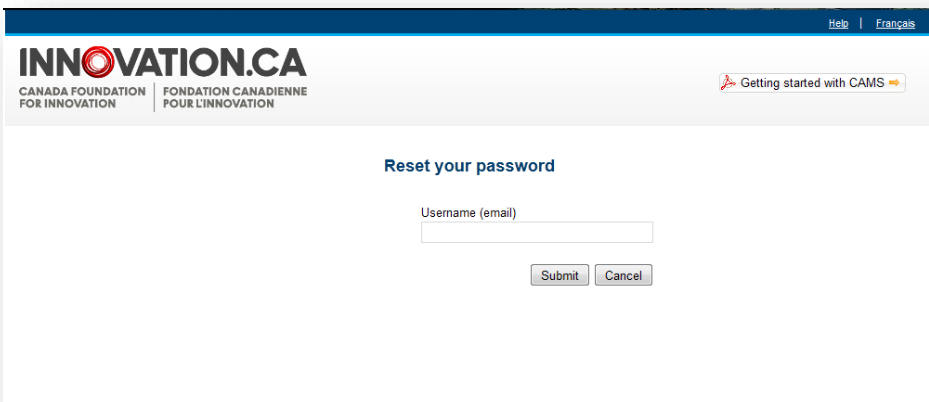


- Complete the information requested in the “Link to existing account” section.



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

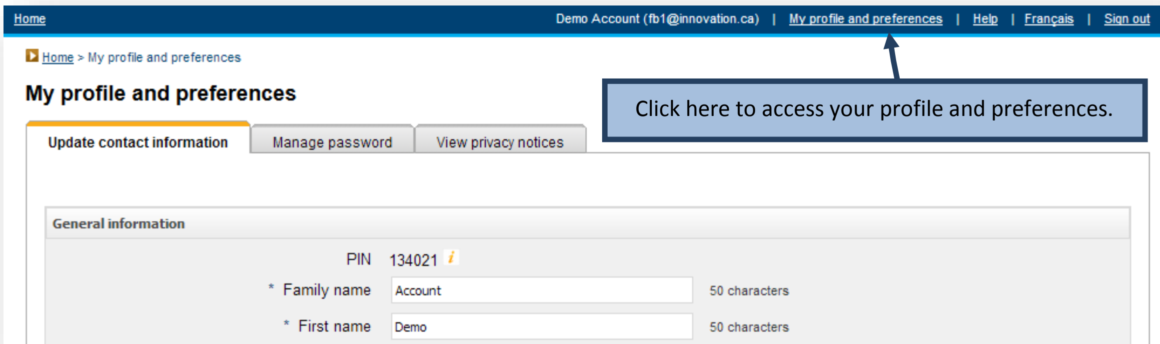
4.4 Resetting your password



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

4.5 Accessing user profile and preferences

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



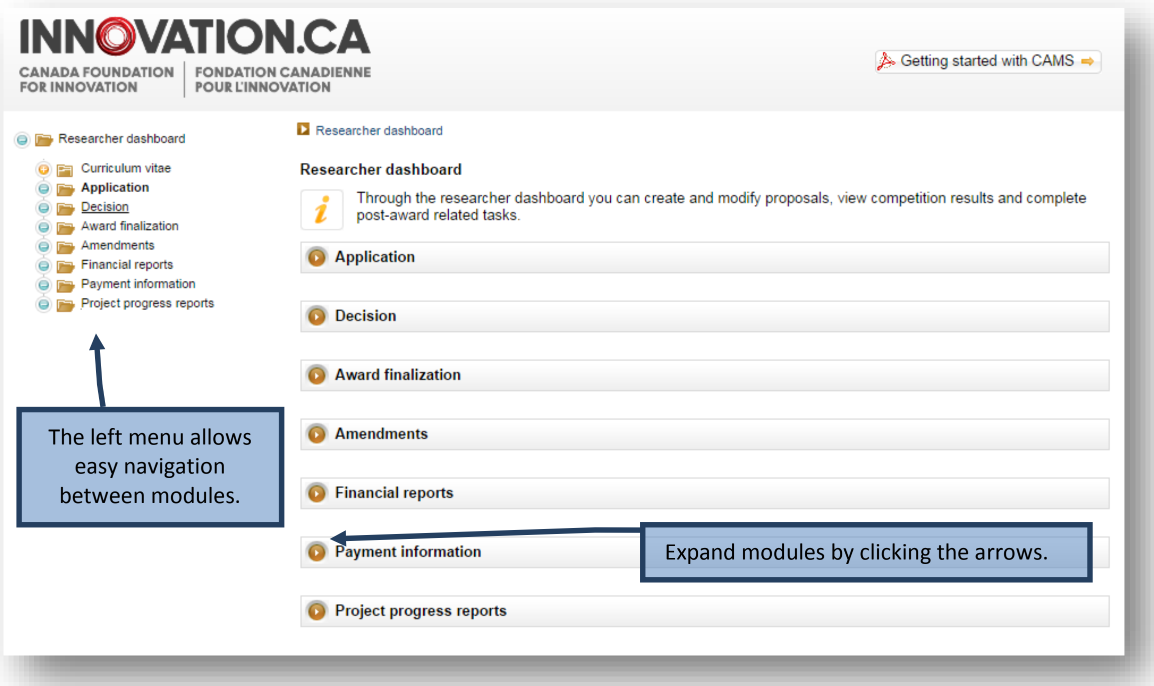
5 THE RESEARCHER DASHBOARD

5.1 Overview

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

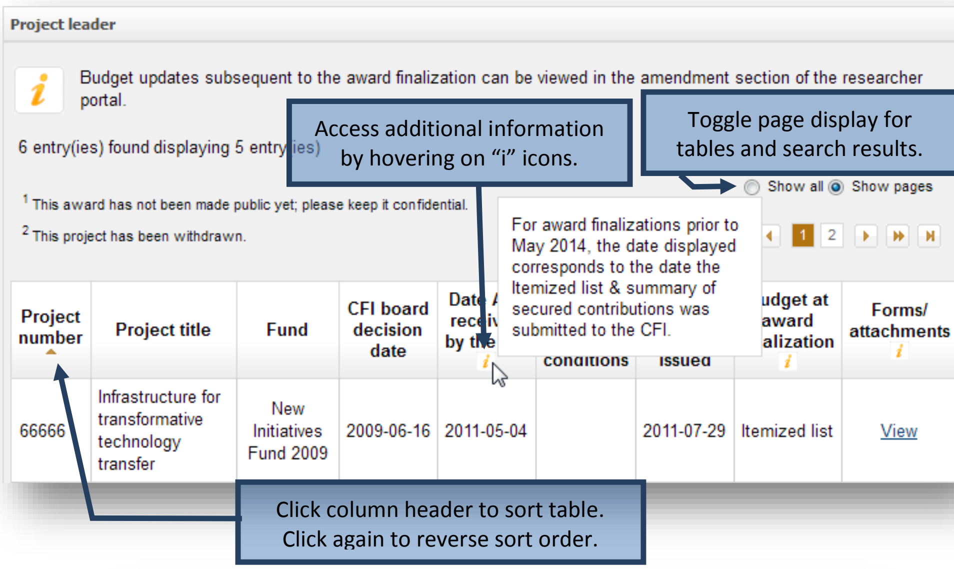
5.2 Navigation

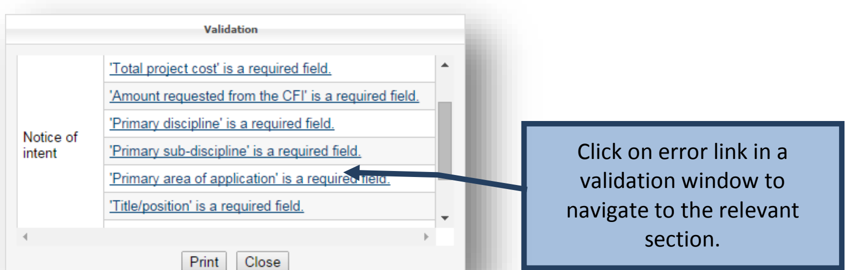
The researcher dashboard contains a number of sections. The following image describes these sections and illustrates their functionalities.



Note: You may not see all the sections displayed above. The sections displayed on your researcher dashboard will depend on the access privileges granted to you by your institution.

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

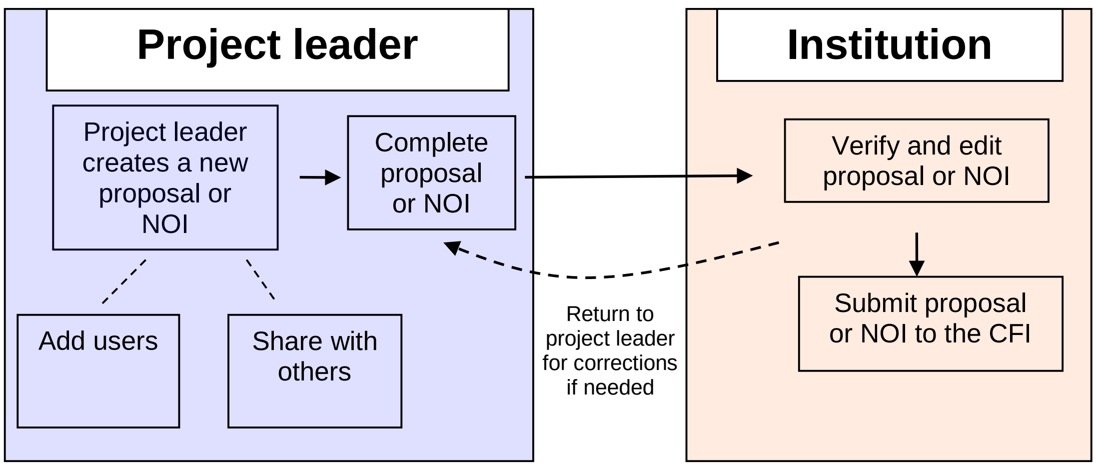




6 THE APPLICATION PROCESS

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

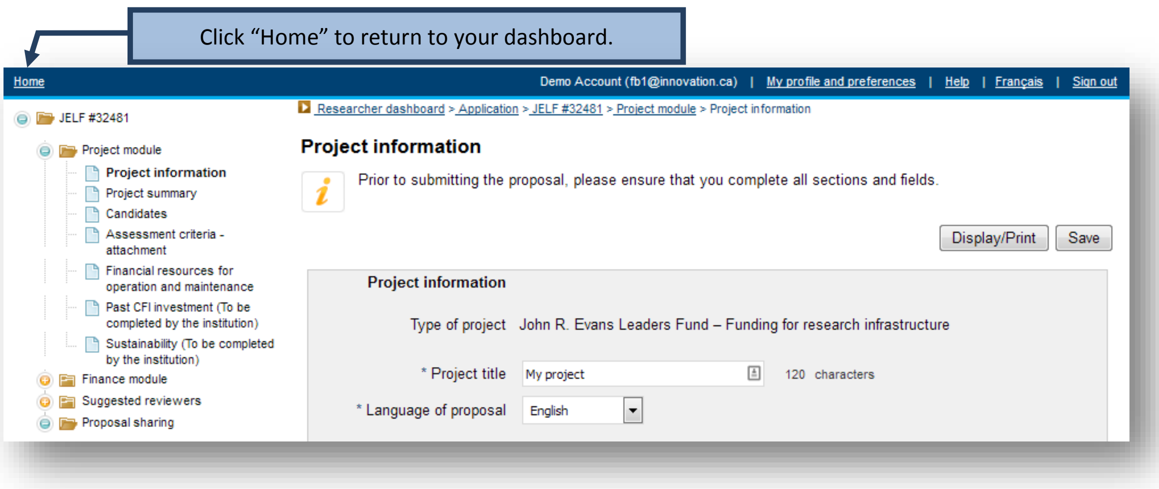
1. The project leader creates a new NOI or proposal and completes the forms online. Once the project leader has marked the form as complete he or she will no longer have access to modify it. Institutional administrators with appropriate access can also complete the forms online on behalf of the project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

6.1 Navigating within the proposal form



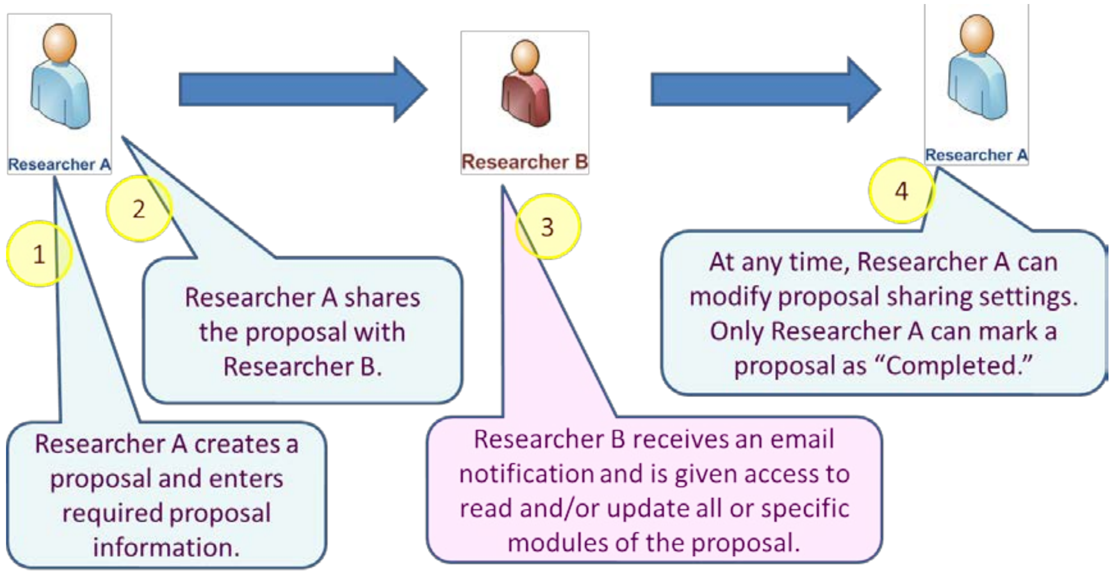
6.2 Proposal sharing

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

You may wish to share a proposal in order to:

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

6.2.1 Overview of proposal sharing



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

6.2.2 How to share your proposal

Step 1: Create a proposal

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

Step 2: Enter the required proposal information

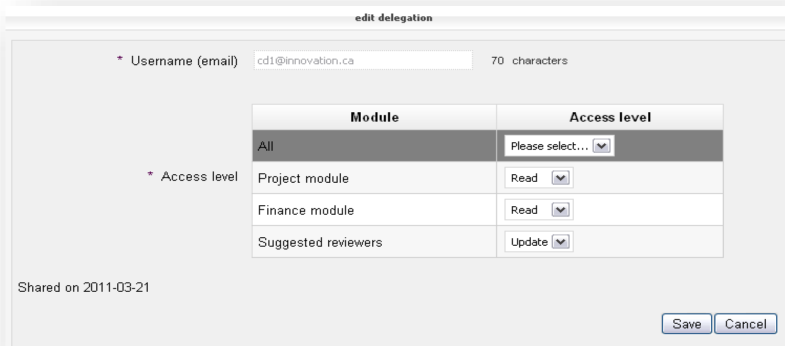
Enter the required proposal information and other related information. You can complete the entire proposal yourself, or collaborate with one or more colleagues to complete it.

Step 3: Go to the proposal sharing screen

Click "Proposal sharing" on the left-hand navigation bar and on the proposal sharing screen, click "Share this proposal with another person." Note that the proposal sharing screen is only accessible from within an application form. To reach the proposal sharing screen from your researcher dashboard, click on any module of the proposal you wish to share.

Step 4: Invite a colleague to read or update your proposal

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



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

6.2.3 Updating or removing proposal sharing

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

6.3 CV sharing

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

Step 1: Open your CV

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

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

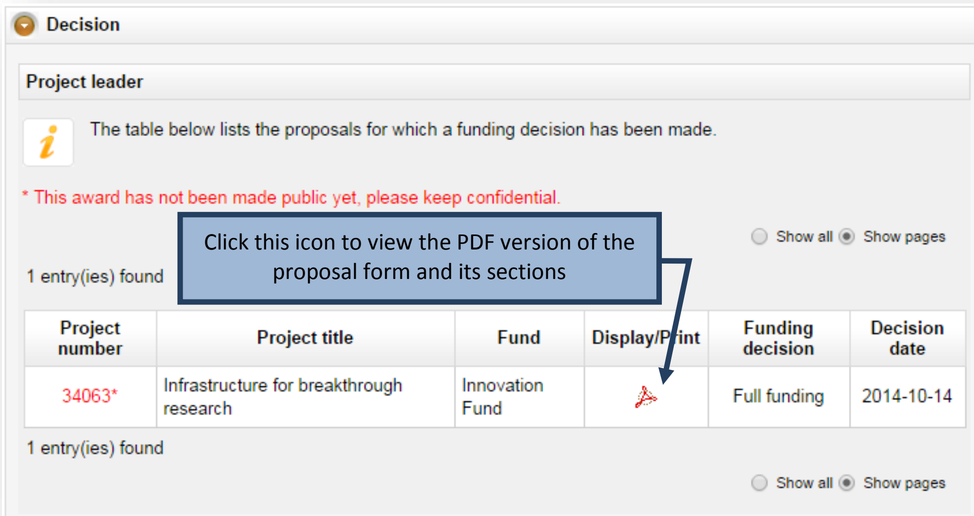
On the left-hand navigation bar, click "CV sharing" to access the CV sharing screen. Enter your colleague's username (email address) and click "Validate username."

Step 3: Send sharing invitation

Before you send the invitation to share your CV, specify the type of access — read or update — you wish your colleague to receive. You can also add comments that will be sent to your colleague. When you have completed this section, click "Save."

7 DECISIONS

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

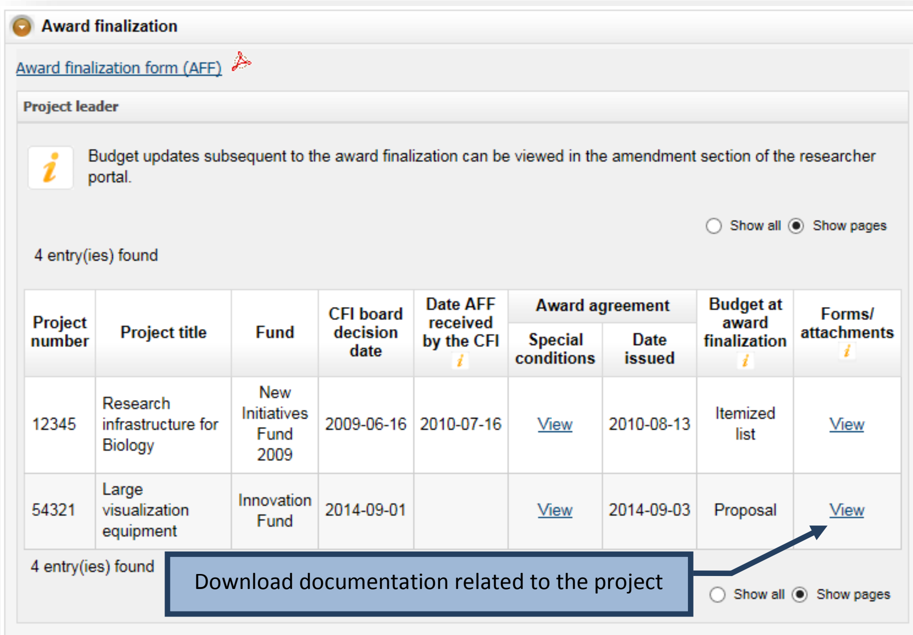


8 AWARD FINALIZATION

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

The award finalization section allows you to view award finalization status information related to the project(s), such as the date the award finalization form was received by the CFI, the date the award agreement was issued by the CFI (if applicable) and which budget was used at award finalization (itemized list[1], amendment or proposal). You will also be able to view special conditions included in the award agreement and whether these have been met or not.

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



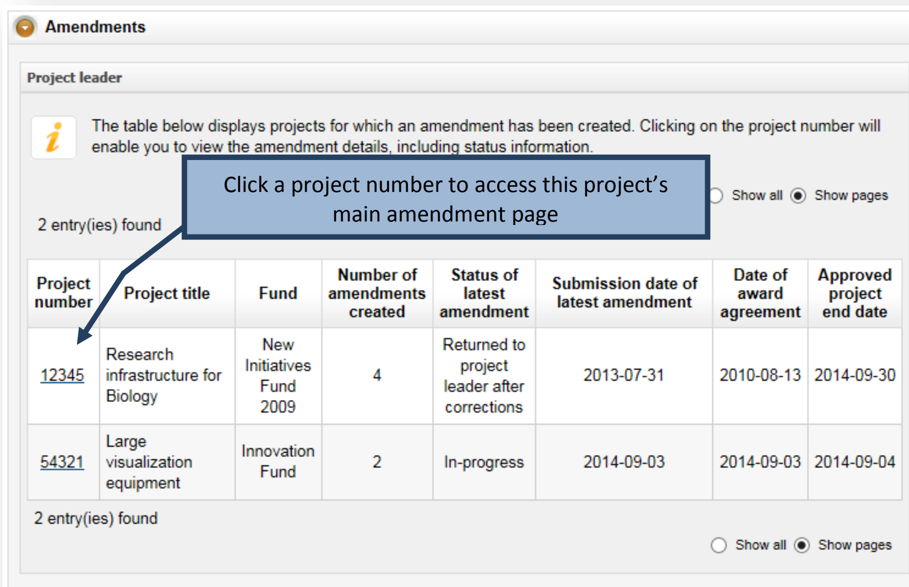
Project number	Project title	Fund	CFI board decision date	Date AFF received by the CFI	Award agreement		Budget at award finalization	Forms/ attachments
					Special conditions	Date issued		
12345	Research infrastructure for Biology	New Initiatives Fund 2009	2009-06-16	2010-07-16	View	2010-08-13	Itemized list	View
54321	Large visualization equipment	Innovation Fund	2014-09-01		View	2014-09-03	Proposal	View

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

9 AMENDMENTS

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

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



Amendments

Project leader

The table below displays projects for which an amendment has been created. Clicking on the project number will enable you to view the amendment details, including status information.

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

Show all Show pages

2 entry(ies) found

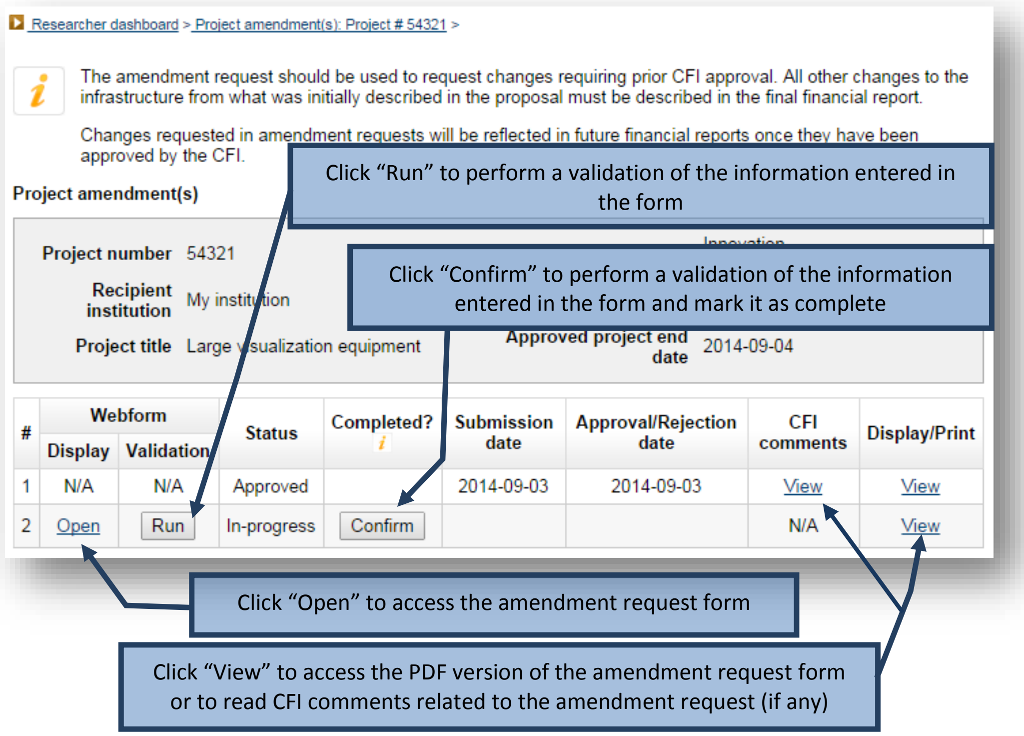
Project number	Project title	Fund	Number of amendments created	Status of latest amendment	Submission date of latest amendment	Date of award agreement	Approved project end date
12345	Research infrastructure for Biology	New Initiatives Fund 2009	4	Returned to project leader after corrections	2013-07-31	2010-08-13	2014-09-30
54321	Large visualization equipment	Innovation Fund	2	In-progress	2014-09-03	2014-09-03	2014-09-04

2 entry(ies) found

Show all Show pages

9.1 Project's main amendment page

Each project has a main amendment page where you can view the status of previous amendment requests submitted to the CFI for the project (if any), and input data in amendment requests created by your institution.

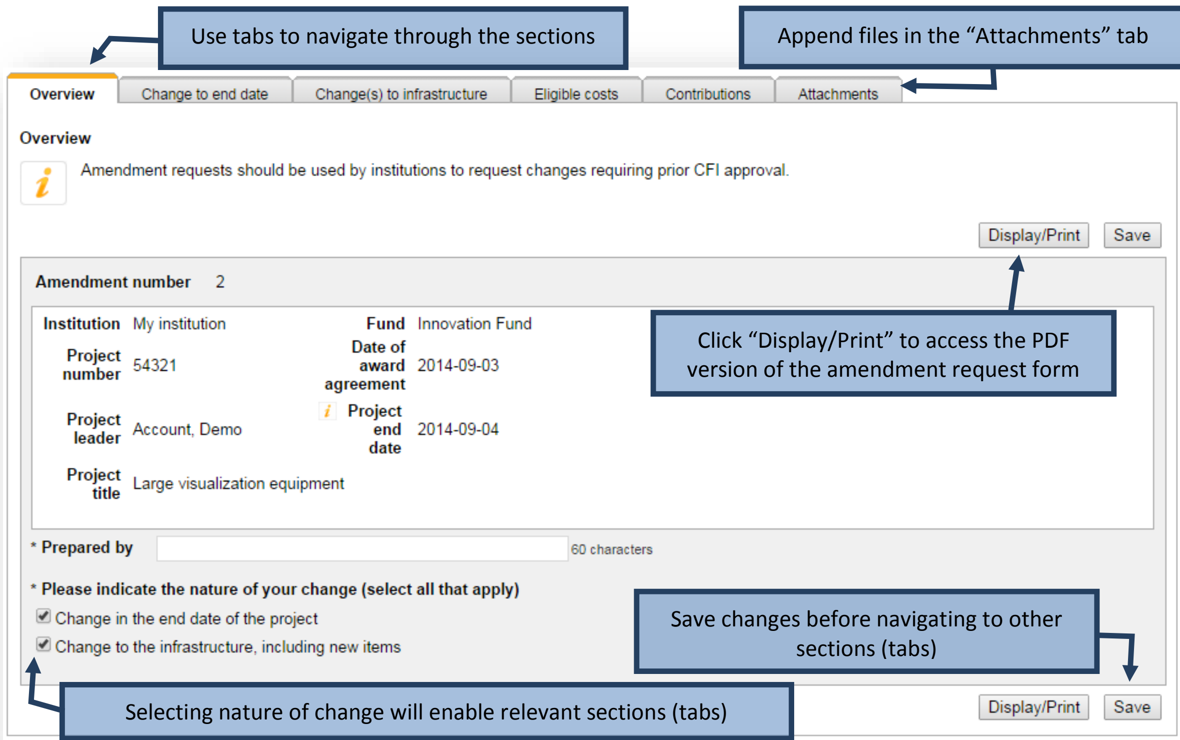


Note that only amendment requests relating to changes to the infrastructure will include an Excel version of the amendment request, in addition to the PDF version. If the amendment request pertained only to a change in the project end date, only the PDF version of the amendment request will be available.

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

9.2 Amendment request form

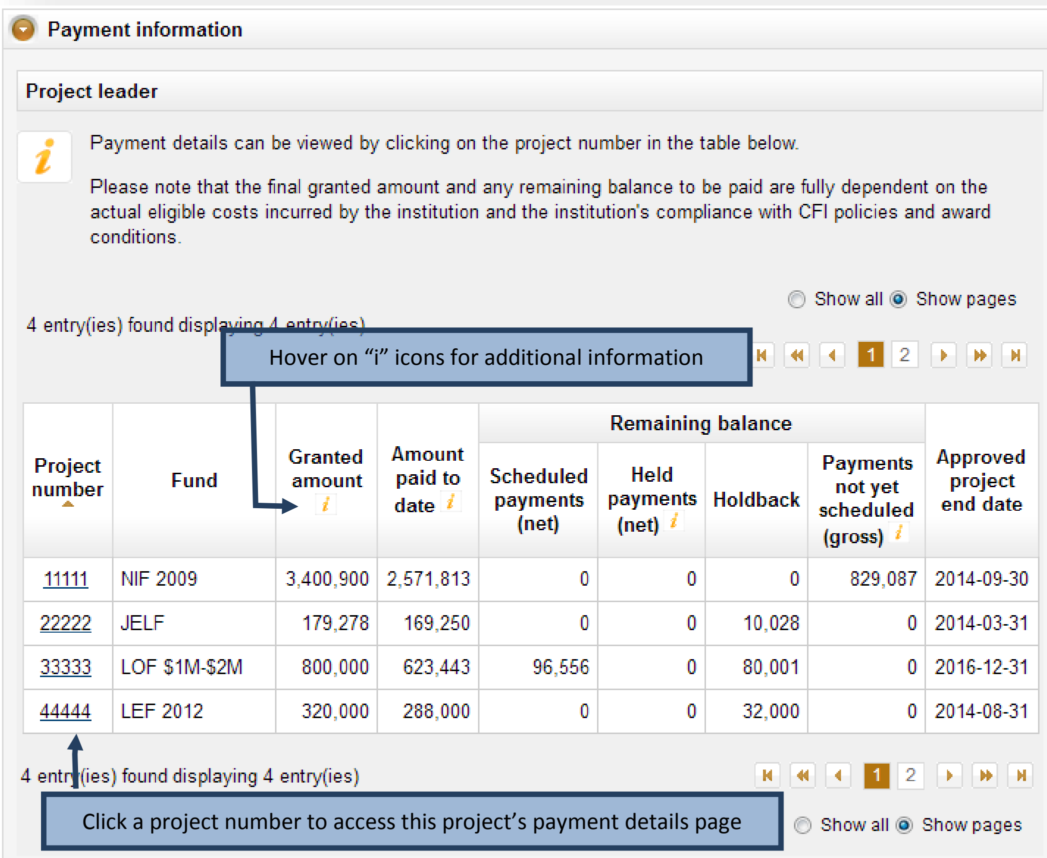
The amendment request form consists of six tabs. When an amendment request is first opened, the default tab is the "Overview" and the other tabs are not accessible. You will first need to indicate the nature of your change (i.e. change to the end date of the project or change to the infrastructure, including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



10 PAYMENT

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

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

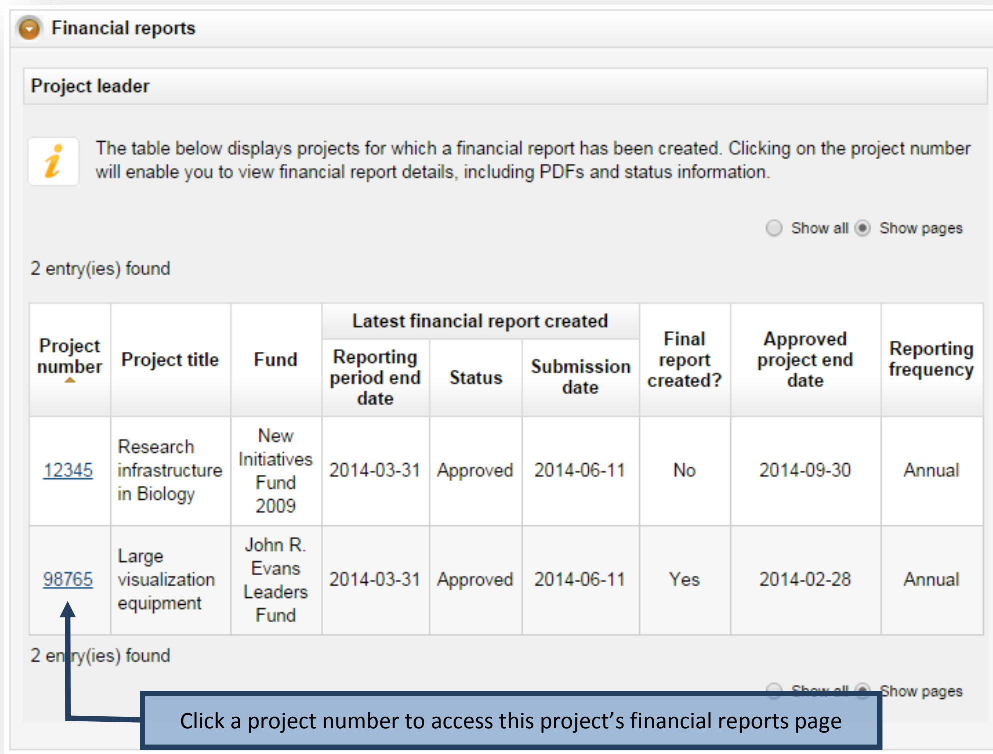


Project number	Fund	Granted amount	Amount paid to date	Remaining balance				Approved project end date
				Scheduled payments (net)	Held payments (net)	Holdback	Payments not yet scheduled (gross)	
11111	NIF 2009	3,400,900	2,571,813	0	0	0	829,087	2014-09-30
22222	JELF	179,278	169,250	0	0	10,028	0	2014-03-31
33333	LOF $1M-$2M	800,000	623,443	96,556	0	80,001	0	2016-12-31
44444	LEF 2012	320,000	288,000	0	0	32,000	0	2014-08-31

11 FINANCIAL REPORTS

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

The financial report module allows you to view financial report status information related to the project(s).



Financial reports

Project leader

The table below displays projects for which a financial report has been created. Clicking on the project number will enable you to view financial report details, including PDFs and status information.

Show all Show pages

2 entry(ies) found

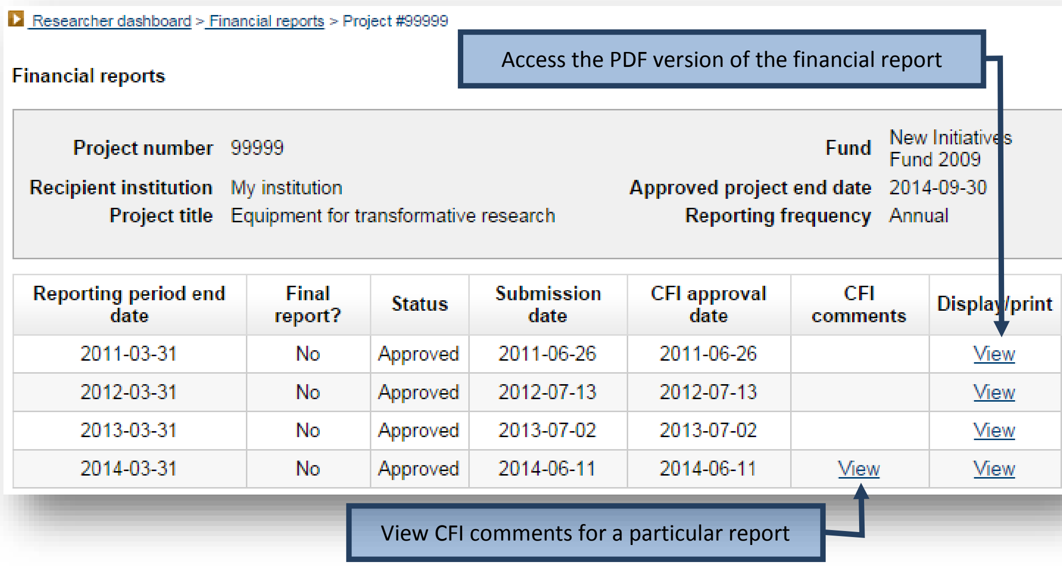
Project number	Project title	Fund	Latest financial report created			Final report created?	Approved project end date	Reporting frequency
			Reporting period end date	Status	Submission date			
12345	Research infrastructure in Biology	New Initiatives Fund 2009	2014-03-31	Approved	2014-06-11	No	2014-09-30	Annual
98765	Large visualization equipment	John R. Evans Leaders Fund	2014-03-31	Approved	2014-06-11	Yes	2014-02-28	Annual

2 entry(ies) found

Show all Show pages

11.1 Project's main financial report page

Each project has a main financial report page where you can view the status of previous financial reports submitted to the CFI for the project (if any). You can also view CFI comments related to the financial report for a specific reporting year (if any) and have access to the PDF version of all the financial reports.


Researcher dashboard > Financial reports > Project #99999

Access the PDF version of the financial report

Financial reports

Project number	99999	Fund	New Initiatives Fund 2009
Recipient institution	My institution	Approved project end date	2014-09-30
Project title	Equipment for transformative research	Reporting frequency	Annual

Reporting period end date	Final report?	Status	Submission date	CFI approval date	CFI comments	Display/print
2011-03-31	No	Approved	2011-06-26	2011-06-26		View
2012-03-31	No	Approved	2012-07-13	2012-07-13		View
2013-03-31	No	Approved	2013-07-02	2013-07-02		View
2014-03-31	No	Approved	2014-06-11	2014-06-11	View	View

View CFI comments for a particular report

12 PROJECT PROGRESS REPORT

As a project leader, you have access to the *Project progress report* (PPR) module which allows you to view and manage the infrastructure operational status as well as fill out and complete the PPR form.

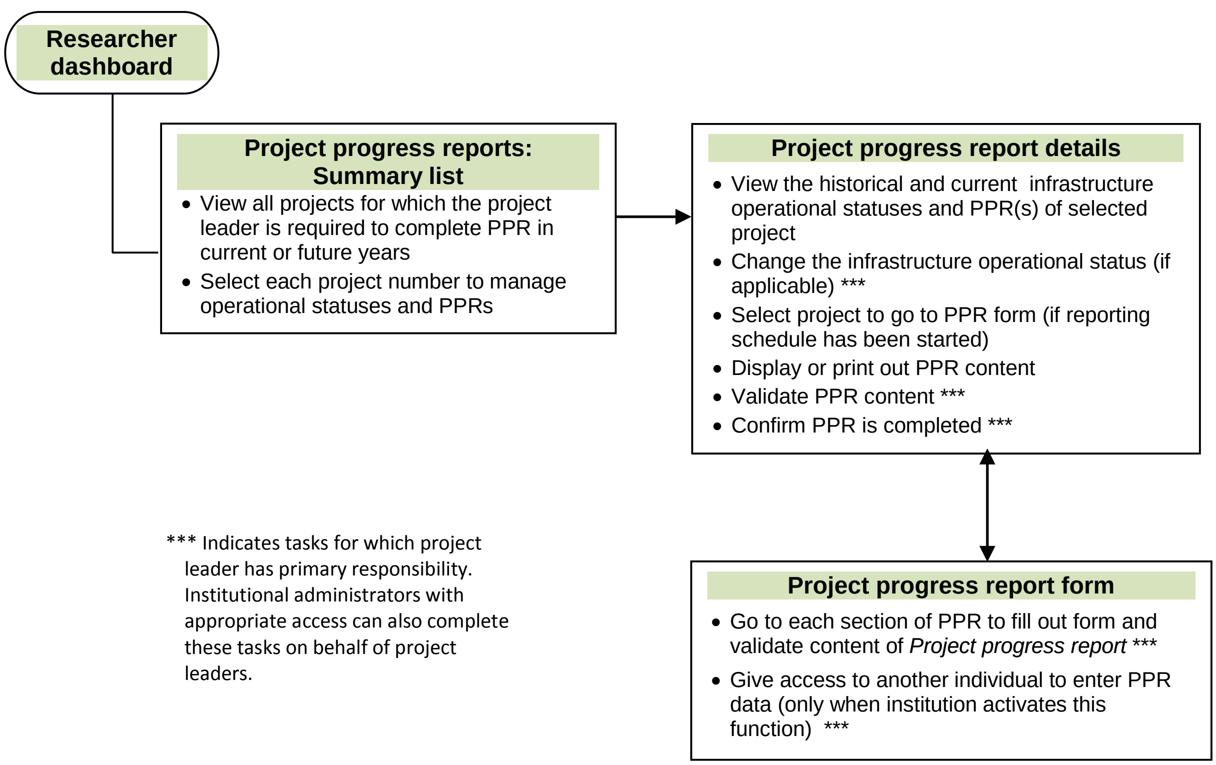
This section provides additional information on the PPR module within CAMS. You should consult the *Policy and program guide* for information on requirements and guidelines related to completing the PPR.

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

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

Although completion of the PPR is under your responsibility, a delegation tool allows you 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 you as a project leaders.

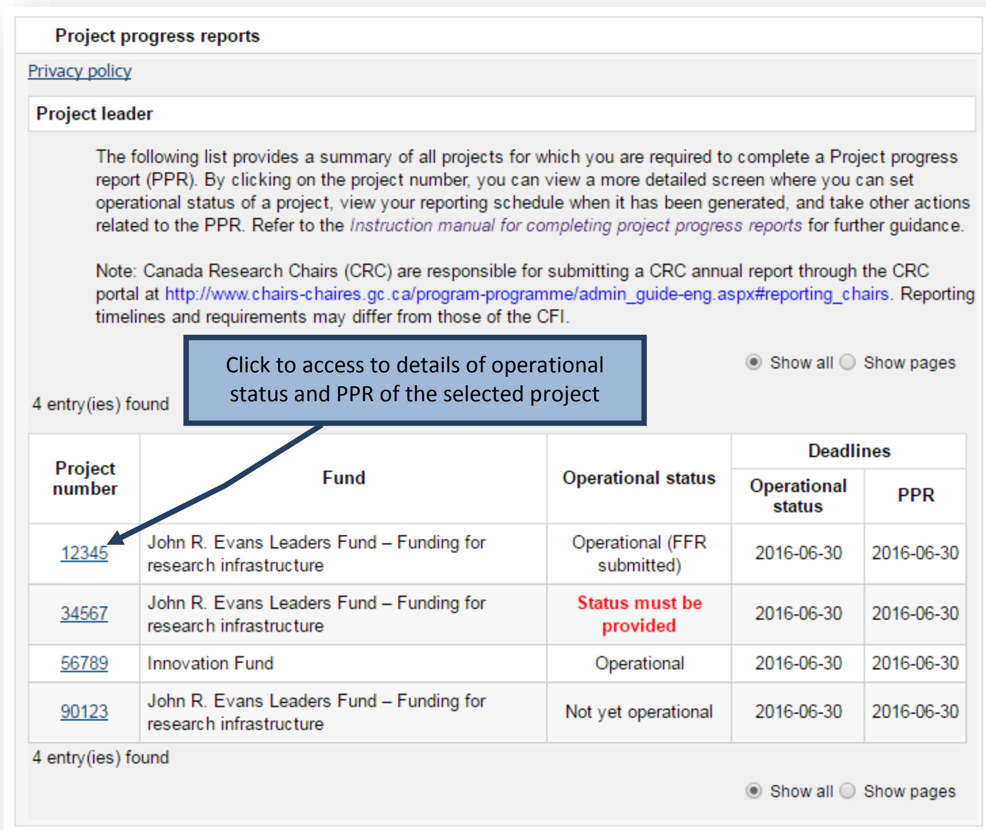


12.1 Summary of operational and PPR statuses

The summary table indicates all of the projects for which you are required to take actions related to infrastructure operational statuses and PPRs in current or upcoming years. From this list, you will be able to drill down to the page in the selected project to manage operational status and the PPR. Institutional administrators with appropriate access can also complete these actions on your behalf.

Four different statuses can be displayed under the “Infrastructure operational status” column:

- **Status must be provided**: 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. You may change the status to operational any time before the institutional deadline indicated.


Project progress reports

Privacy policy

Project leader

The following list provides a summary of all projects for which you are required to complete a Project progress report (PPR). By clicking on the project number, you can view a more detailed screen where you can set operational status of a project, view your reporting schedule when it has been generated, and take other actions related to the PPR. Refer to the *Instruction manual for completing project progress reports* for further guidance.

Note: Canada Research Chairs (CRC) are responsible for submitting a CRC annual report through the CRC portal at http://www.chairs-chaires.gc.ca/program-programme/admin_guide-eng.aspx#reporting_chairs. Reporting timelines and requirements may differ from those of the CFI.

Click to access to details of operational status and PPR of the selected project

Show all Show pages

4 entry(ies) found

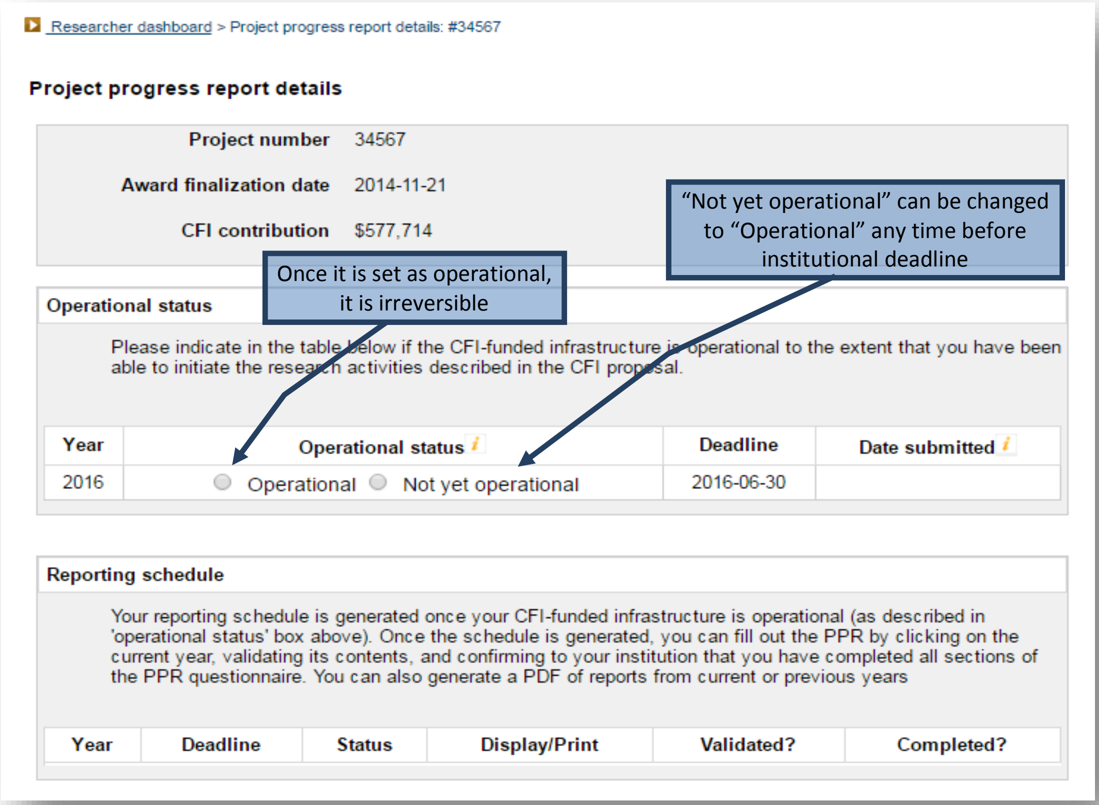
Project number	Fund	Operational status	Deadlines	
			Operational status	PPR
12345	John R. Evans Leaders Fund – Funding for research infrastructure	Operational (FFR submitted)	2016-06-30	2016-06-30
34567	John R. Evans Leaders Fund – Funding for research infrastructure	**Status must be provided**	2016-06-30	2016-06-30
56789	Innovation Fund	Operational	2016-06-30	2016-06-30
90123	John R. Evans Leaders Fund – Funding for research infrastructure	Not yet operational	2016-06-30	2016-06-30

4 entry(ies) found

Show all Show pages

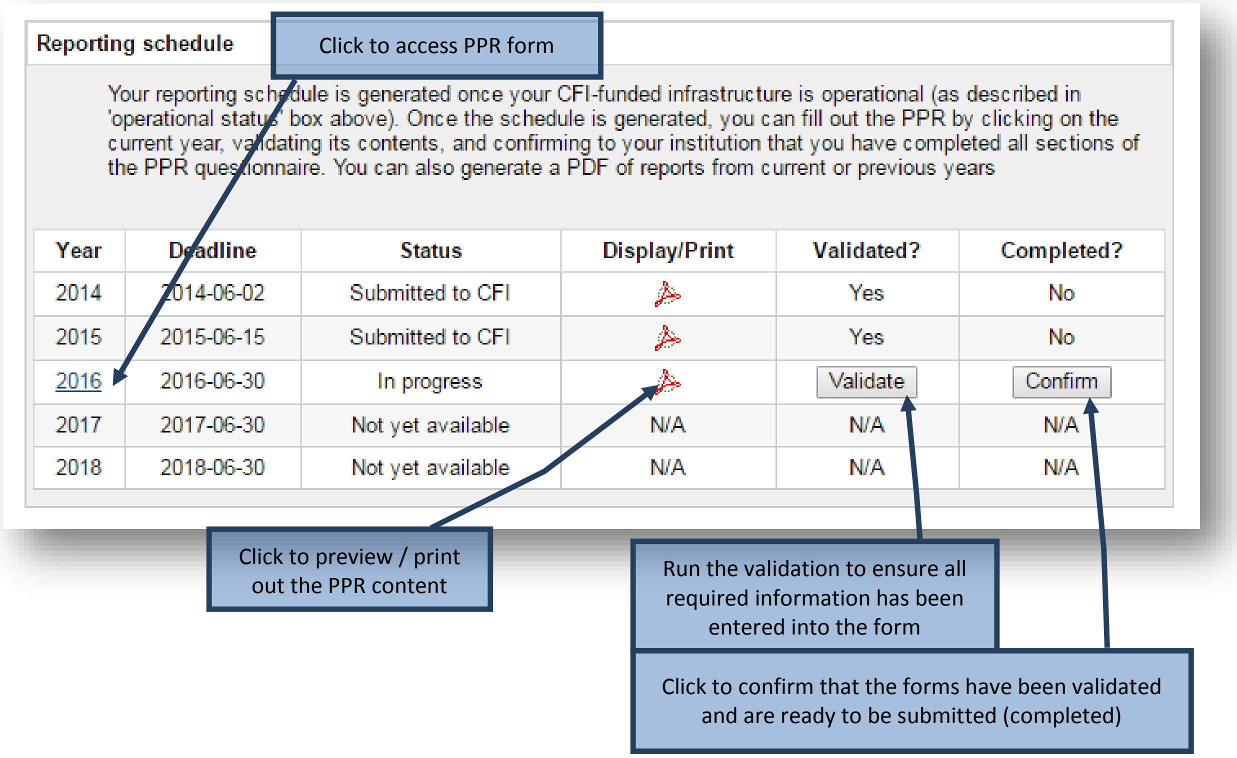
12.2 Managing required operational statuses

When the operational status column indicates “Status must be provided,” you will be required to select the latest infrastructure operational status. This will trigger the PPR reporting schedule as specified in section 12.1, “Summary of operational and PPR statuses”.



12.3 Filling out, validating and completing a PPR

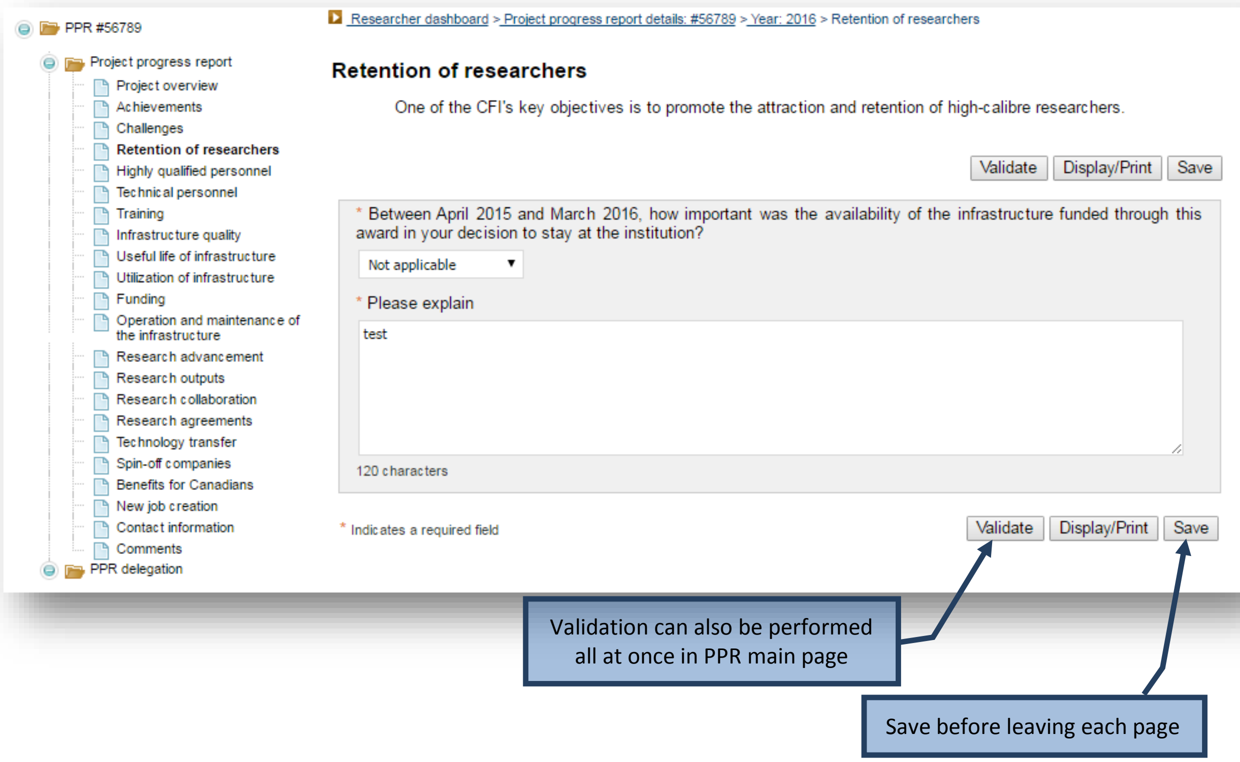
Once the PPR reporting schedule has been triggered, the statuses of all newly created PPRs in CAMS are shown as “in progress.” Clicking on the project number will take you to the PPR form. As a project leader, you have full access to the PPR form to enter, validate data and complete the PPR. Institutional administrators with appropriate access can also enter, validate and complete the forms on your behalf.



Once the form has been completed, you will no longer be able to modify the PPR. The institution retains access to edit the forms and can return the PPR to you for corrections as needed. Once the institution ensures that the PPR is completed and ready for submission, an authorized institutional administrator may submit the PPR to the CFI.
Once the PPR has been submitted to the CFI, the institution will no longer be able to edit the forms.

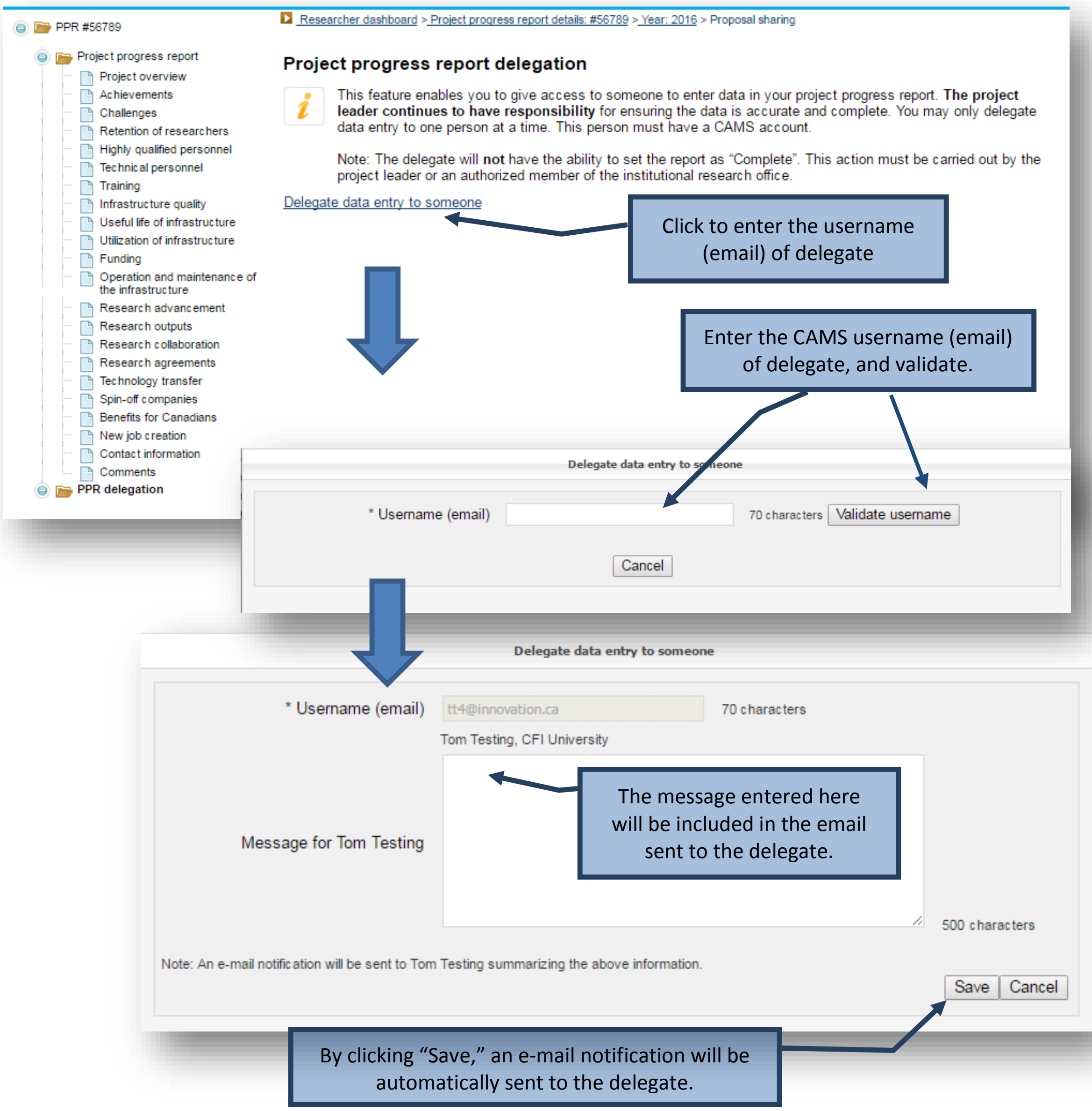
12.4 Navigating within the PPR form

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.



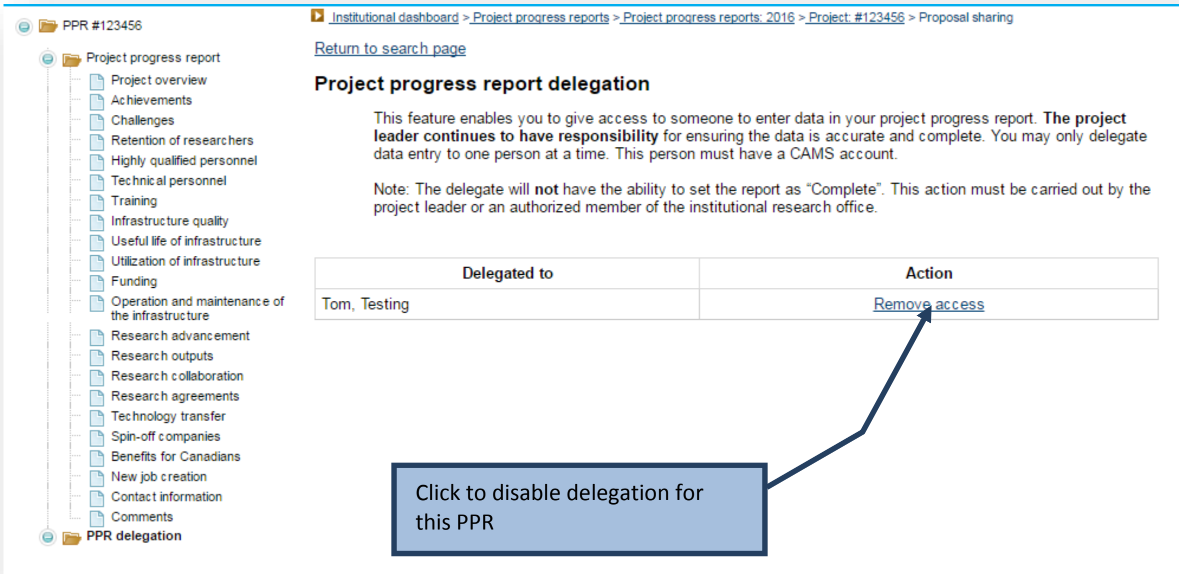
12.5 Delegate filling out the PPR to another individual

This feature enables you to give access to someone to enter data in your *Project progress report*. Institutional administrators with appropriate access can also delegate entry on your behalf.



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

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



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

help.aide@innovation.ca

We will be happy to answer you promptly.