MEMO

From: Guy Levesque, Vice-President, Programs and Performance

Date: April 20, 2016

Re: Upcoming deployment of new functionalities in CAMS

Enhancements to institutional user access in CAMS

In an effort to increase efficiency, the Canada Foundation for Innovation (CFI) has streamlined and simplified its processes concerning the creation of the CFI Awards Management System (CAMS) institutional access privileges and has updated its institutional agreement (IA) form accordingly. While the CFI will continue to set privileges following the receipt of new or revised agreements for individuals who have an IA role, the institution will now be able to create accounts and assign access privileges to other institutional administrators through CAMS. Institutions will now have full autonomy in managing the accounts and accesses of these individuals.

A new module in CAMS entitled "institutional agreement and accesses" has been created on the institutional portal and will be available starting May 2, 2016. This will allow the account administrator and liaison to manage access privileges for other institutional administrators. In addition, the institution will be able to view future IAs submitted to the CFI by your institution as well as the list of individuals who have designated IA roles. The onus will be on the institutions to manage access privileges for their institutional administrators and ensure that they are appropriate. You will also find under this new tab, the functionality related to post-award, group-level privileges associated to project leaders.

As a result of the above changes, please note that the institutional user access form (IUAF) as well as the CFI account management email **(accountmanagement@innovation.ca)** will be discontinued. More information on the above new functionalities and processes will be included in *Getting started with the CFI Awards Management System: An overview document for institutional administrators* that will be available on Innovation.ca on May 2, 2016. An instructional video will also be available to assist account administrators and liaisons.

To simplify the process for IA signatories, the IA form has been slightly revised to include the CAMS privileges associated to each IA signatory. The main content of the IA form is very similar to the 2012 form. The concept of useful life of infrastructure has been moved from article 7 to 3 and the article has been slightly revised to reflect past changes to the *Policy and program guide*. Presidents will now automatically be given the highest access privileges in CAMS. A new appendix A has been created in which the President of the institution designates, as in the

past, one or two authorized signatories, an account administrator and a liaison for the institution. The IA roles have been updated to better align with current CFI and institutional practices. CAMS privileges will be set by the CFI according to the responsibilities and privileges indicated in the IA. The updated IA form will be available on Innovation.ca on May 2, 2016. Following that date, we ask institutions to use the new form when informing the CFI of changes or updates to their authorized signatories, account administrator, CFI liaison or President.

CFI award finalization form and its submission process

The CFI has updated the award finalization form (AFF) to reflect the new fiscal year periods. The AFF can now be submitted directly via CAMS. No other changes have been made to the form. As of May 2, 2016, the signatories of the institutional agreement will be able to submit the AFF for a project directly through their institutional portal in CAMS (using the submit button under the award finalization tab).

Report repository

This new feature will provide institutions access to frequently requested reports that will be made available in response to common information needs at recipient institutions. The report repository will be integrated into the overview information section of CAMS, and will be viewable by institutional users who are granted access to the institutional overview. The repository will provide 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.

Note that, although the repository itself will become available on May 2, it may take up to a week for all initial reports to become available to institutions. We will periodically add or modify reports, based on feedback we receive from institutions.

CV update

During the recent pan-Canadian consultation, several stakeholders asked CFI to examine ways to simplify the CV process. More specifically, the CFI was asked to reconsider requirements for supplementary information in addition to the common CV information imported to the CFI CV module in CAMS. The CFI was also encouraged to maintain a CFI CV option, particularly for non-Canadian principal users named on proposals who should not be required to create a common CV profile. Over the last two months, we have examined our options for streamlining the CV requirements and will be in a position to implement the best available option in time for both the 2017 Innovation Fund competition and the June 2016 round of the John R. Evans Leaders Fund. Changes will be made to the CFI CV on May 2.

Some highlights of the CV improvements include:

- The section "research/technology development contribution in the last five years" has been removed from the CV since it can be addressed in the body of the proposal. It should be noted that if a researcher wishes to retrieve information currently contained in this section, s/he can do so until May 2. Following that date, the information will no longer be retrievable.

- The section "list of published contributions" will no longer limit researchers to listing publications from the last five years, but will instead allow them to include publications that are most relevant to the proposal at hand.

- In two sections, the number of entries allowed was also reduced: under "work experience" only 15 entries will be permitted instead of the 35 previously allowed; under research or technology development funding" only 10 entries will be allowed instead of 18.

- The layout of the PDF, as it appears in the proposal, has also been streamlined and some information that was not central to the assessment process does not appear on the PDF (e.g. contact information, area of expertise).

- We have increased the amount of information that will be transferred from the common CV. When importing from the common CV, everything except the list of published contributions will be transferred to allow for more complete information transfer. Researchers will have to directly access the CFI CV in CAMS to fill in the list of published contributions section. Also note that the problem of having some sections of the CFI CV deleted when importing from the common CV has been resolved. Previously, sections that were not imported from the common CV (such as research/technology development contribution in the last five years) were rendered blank following the upload, potentially leading to loss of data from the CFI CV. This issue has been resolved and the list of published contributions section will not be rendered blank when importing from the common CV.

Any proposal submitted following May 2 will be using the revised CV format. Consequently, if you have started to fill in a CV for a targeted submission in May or later, you might need to adjust the information you have entered in the CV to fit the new requirements.

John R. Evans Leaders Fund (JELF)

When submitting a Canada Research Chair (CRC) proposal under the JELF – Partnership stream, you will now be required to provide the corresponding CRC project number to facilitate communication between the two organizations.