



# **Grants Management System (GMS) User Guide**

*GANS Research Grant*

## Using This Guide

The information presented in this GMS User Guide is intended to assist users from a high level technical perspective. **It is the responsibility of the applicants to refer to the specific grant/award requirements.** If you have any questions regarding application requirements, please contact the program manager listed in the requirements.

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## Creating Your Application

- Once logged in to the GMS, you will arrive at the **'Portfolio'** page.
- On the portfolio page, click on the large green button **'Apply for Grant or Award'**.

The screenshot shows the 'Applicant Portfolio' page for the year 2017. On the left, a sidebar contains links for 'Portfolio', 'Apply for Grant or Award', 'Account Settings', and 'Contact Us'. A callout box points to 'Contact Us' with the text: 'Links to update your account settings or password, also click 'Contact Us' to send our GMS helpdesk a question'. The main content area has a heading 'Applicant Portfolio' and a dropdown menu set to '2017'. Below this, there are instructions: 'Open the Common CV site in a new window' and 'Your CV is not yet attached (Not required for REDI/Knowledge Sharing Awards)'. A red note states: 'If you previously validated your NSHRF PIN for a prior CCV submission, please DELETE THE OLD VALIDATION AND REVALIDATE to successfully submit your CV.'. A large green button 'Apply for Grant or Award' is visible. Below the instructions is a 'Grant Application Status' table with columns: ID, Program, Deadline, Status, Last Update, PDF, and Review. The table currently shows 'No Grant Applications' and '0 - 0 of 0 records'. Two callout boxes point to the table: one says 'A validated and submitted Canadian Common CV (CCV) attachment would appear here' and the other says 'Any in-draft or submitted applications will appear in this table'.


- A page with available grant applications will be displayed. Select the appropriate **grant/award type** to begin your application
- The first page of the application (**Project Details**) will be displayed

## Project Details Section

Complete the **Project Details** page by entering/selecting the following information. The **Project Details** page must be complete to view the rest of the application sections.

- Title of Proposal
- Six keywords that describe your project
- How you heard about this funding opportunity
- Institution that will administer funds
- Click **'Save & Next Page'** to view the rest of the application pages/sections



## Editing Your Application

- REQUIRED\* fields are marked with an asterisk and you will be required to complete them before you can move forward to another page within the application.
- Remember to click **'Save'** or **'Save & Next Page'** after you make any changes.
- If you have saved a page, a green check mark  will appear next to that page in the menu.  
**NOTE:** Each section within the GMS application must have a green checkmark in order to submit, even if the section is not required by the grant/award requirements. (For example, if you do not choose to have Team Members in your application, simply **'Save'** the empty page to generate a green checkmark for that section).
- Any uploads in GMS must be in PDF format only. Some office suites such as Microsoft Office have the ability built in to save documents as PDF. Ensure uploaded documents are not locked or password protected as the system will not be able to open them.

## Returning to Your In-Draft Application

Once an application has been started, the application will appear in your portfolio page. Click the **'edit pencil'** (shown below) to return and edit that application:

### Grant Application Status

<input type="checkbox"/>	ID	Program	Deadline	Status	Last Update	PDF	Review
<input type="checkbox"/>	 969	NSHRF Catalyst Award	May 4, 2017 10:46AM	In Draft - Not Submitted	Feb 16, 2017 11:50AM		

Click the *pencil* to return to your in-draft application

Click the *PDF* icon to download your full application

## Application Sections- Step by Step

### Principal Investigator

- In this section, please review your account information and update if necessary
- Click **'Save & Next Page'** to continue
- **NOTE:** While not required to complete this page, **the Principal Investigator must validate and attach a Common CV to their GMS account before application submission.**

### Co-PI & Team Members

Review this section if you are adding a Co-PI and/or Team Member(s) to your application. If you are **not** adding team member(s), click **'Save & Next Page'** to continue to the next section.

#### Team Members must have a GMS user account to add them to your application

Team members are **NOT** notified electronically that they have been added to your application

Email	Role	Has Academic Appointment	Resume
<input type="text"/>	<ul style="list-style-type: none"><li>Co-Principal Investigator</li><li>Co-Investigator</li><li>Associate</li><li>Partner</li><li>Mentor</li></ul>	<input type="checkbox"/>	(select file) <span style="float: right;">(delete)</span>

Add their email address (the email address the team member used to register with GMS)

Role (select their role type)

Check box if team member has an academic appointment\*

Upload the team member's resume if they do not have an academic appointment

- Click **'(add team member)'** to add additional, or click **'(delete)'** to remove a member
- Click **'Save & Next Page'** to continue

\*If the team member has an academic appointment, they must [validate a Common CV](#) to their GMS account.

## Plain Language Summary

- Enter your Plain Language Summary (maximum of 500 words)
- Click **'Save & Next Page'** to continue

## Objectives

- Enter your main project objectives - only one objective per text box
- Click **'(add objective)'** to enter additional objectives, up to a maximum of ten (10)
- Click **'Save & Next Page'** to continue

## Project Description

- Upload your Project Description section
- Upload your Work Plan in a PDF file format
- Click **'Save & Next Page'** to continue

## Budget

- Enter your budget information in the table provided (maximum of \$50,000)
- Upload a Budget Justification section below the budget table
- Click **'Save & Next Page'** to continue

## Additional Attachments

- Upload any additional attachments in this section (if applicable)
- Click **'Save & Next Page'** to continue
- (This section is optional, if you are not uploading any documentation, just 'Save' the empty page for validation)

## Signature/Submission

- If you agree with the Signature and Submission text, click **'I accept'** and then click **'Save & Submit Application'**
- If you try to submit your application before all the required information is completed, you will receive messages in **red text** at the top of the page indicating what is still required

- When the application is complete and submitted, a confirmation popup will display saying *“Your application was successfully submitted”*
- You can [view/download your full application \(including CCVs\)](#) on the Portfolio page under the Grant Application Status (PDF icon)

## Institutional Approval

Once your application has been successfully submitted, your application is sent for approval to the GMS account of the Institution Administering Funds you selected on the Project Details page.

**Institutions are not notified electronically that applications have been submitted for approval. It is the responsibility of the applicant to ensure that the institution is aware of the application and completes the approval prior to the application deadline.** If the Institution approves your application, your application status will change to **‘Submitted-RNS’** on the Portfolio page. Please review [Application Status Definitions](#) for details about each status.

## Application Status Definitions

Below are a list of definitions of Application Status, found on the Portfolio page of GMS (example below):

<input type="checkbox"/>	904 2016 Knowledge Sharing Support Award	Nov 4, 2016 1:24PM	Submitted - NSHRF	Oct 26, 2016 1:09PM	
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### Pre-Submission

- **In Draft - Not Submitted:** The user has started the process, but has not completed all the required information.
- **In Draft- Missed Deadline:** The user has not submitted their application before the deadline.
- **Withdrawn:** The user has chosen to withdraw their application from the competition.

### Post-Submission

- **Submitted – ‘Institution’:** The application has been sent to the Institution Administering Funds for approval.
- **Submitted – RNS:** The institution has approved the application and it has been submitted to RNS. This does not mean the submission is eligible.
- **Eligible:** The application has been reviewed and deemed eligible.
- **Not Eligible:** The application has been reviewed and deemed not eligible.
- **Withdrawn:** The user has chosen to withdraw their application from the competition.
- **Funded:** The application has a funding offer.
- **Not Funded:** The application has not been funded.
- **Accepted:** The applicant has accepted the funding offer in GMS.