

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

*Scotia Scholars (Master's and Doctorate Awards)*

## *Using This Guide*

The information presented in this GMS User Guide is intended to assist users from a high-level technical perspective.

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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. On the left is a navigation menu under 'Applicant' with 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'. On the right is a large green button labeled 'Apply for Grant or Award'. Below this is a 'Grant Application Status' table with columns: ID, Program, Deadline, Status, Last Update, PDF, and Review. The table is currently empty, showing 'No Grant Applications' and '0 - 0 of 0 records'. A callout box points to the table with the text: '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.

- Award Type (Master's or Doctorate)
  - you will be prompted to upload your CV /Resume in this section
- Title of Proposal
- Six keywords that describe your project
- Provincial health research priority most applicable to your project
- How you heard about this funding opportunity
- Institution that will administer fund
- Click 'Save & Next Page' to view the rest of the application pages/section

## 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 apply to Additional Student Awards 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"/>	 958	Scotia Scholars Award (Master's and Doctoral)	Mar 8, 2017 1:14PM	In Draft – Not Submitted	Feb 10, 2017 11:05AM		

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

### Supervisor(s)

*At least one Supervisor must be added to your application, but you may add up to two.*

**Supervisor(s) must have a GMS user account to add them to your application.** Supervisor(s) are **NOT** notified electronically that they have been added to your application.

- Click (*add Supervisor*) and add their email address (the email the Supervisor used to register to GMS with)
- Click (*add Supervisor*) to add an additional supervisor (if applicable)
- 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
- Click '**Save & Next Page**' to continue

### Research Expertise & Potential

- Upload your Research Expertise & Potential section
- Click '**Save & Next Page**' to continue

### Transcripts

- Upload your Transcripts
- Click '**Save & Next Page**' to continue

## References

- Upload your Reference section
- Click **'Save & Next Page'** to continue

## 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 of 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* on the Portfolio page under the Grant Application Status (PDF icon)

## 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 -	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 and review.
- ***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.