The Cancer Institute NSW Grants Management System Innovations in Cancer Control Grants

Grant Applicant User Guide

Version 2.0 | 21 December 2018

NSW GOVERNMENT

Cancer Institute NSW

Contents

1. Introduction

The Grants Management System (GMS) is the online portal that the Cancer Institute NSW (CINSW) uses for grant applications. The GMS allows the grant applicant to edit and submit their application before the closure date. The user may also have additional access to comment or share the application and projects with other users of GMS.

The recommended browser to use is Google Chrome (version 64 and higher).

1.1 Target Audience

The information in this user manual is aimed at users who have access to the GMS and would like to apply for open CINSW grants.
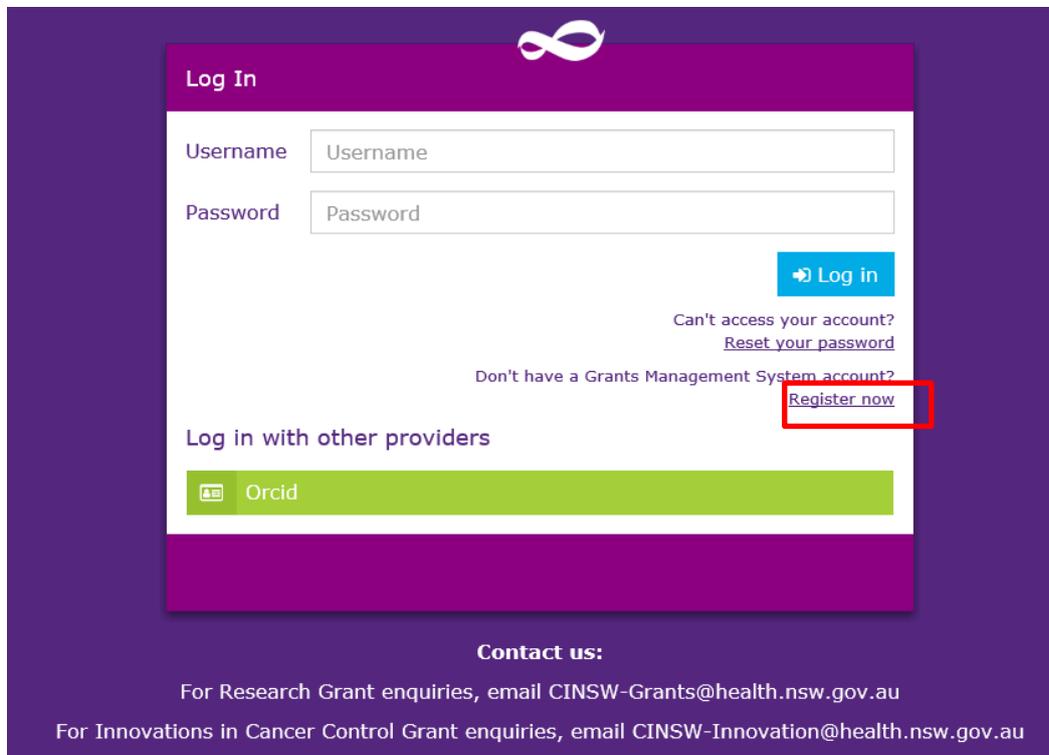
1.2 Guidelines

It is important that you refer to the applicable grant round guidelines in conjunction with using this manual to understand how each function relates to the CINSW grants lifecycle.

2. Registration

To apply for a grant application you will first need to register to the Cancer Institute NSW's Grants Management System (GMS). To access the GMS go to https://grants.cancerinstitute.org.au.

1. Click on "Register now" if you have not already registered.

2. The **Register form** will be displayed.
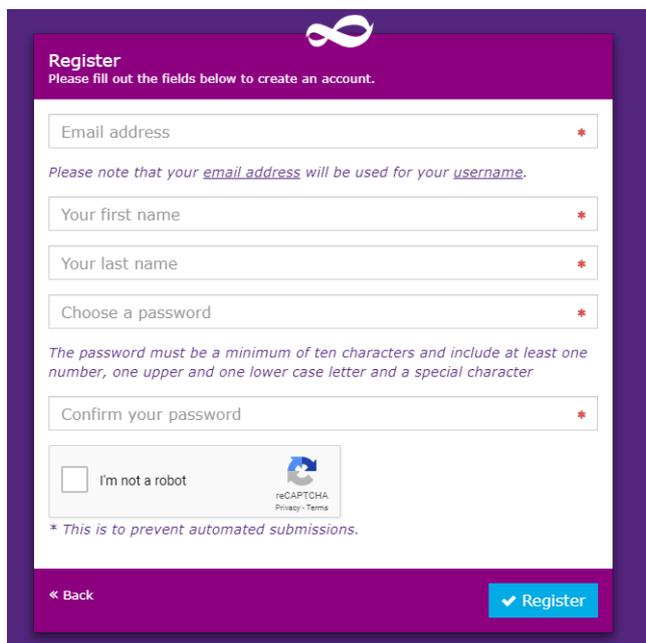
3. Complete the form. Please note that the password must be 10 characters and include at least one number, one upper/lower case letter and a special character.

4. For security purposes, click **I'm not a robot** - reCAPTCHA may require you to perform an additional task by selecting tiles of various objects.

5. Select **Register**.

6. A registration email will be sent to the email address you entered in the form.

7. If you do not receive the email within a few minutes, check your junk email folder. For any further support, check with your organisation's IT support or contact the Innovations in Cancer Control Grant Team on CINSW-Innovation@health.nsw.gov.au.

8. Click the link in the confirmation email to activate your account.

3. Login to the GMS

Once you have registered and your account is activated, you can login to the GMS.
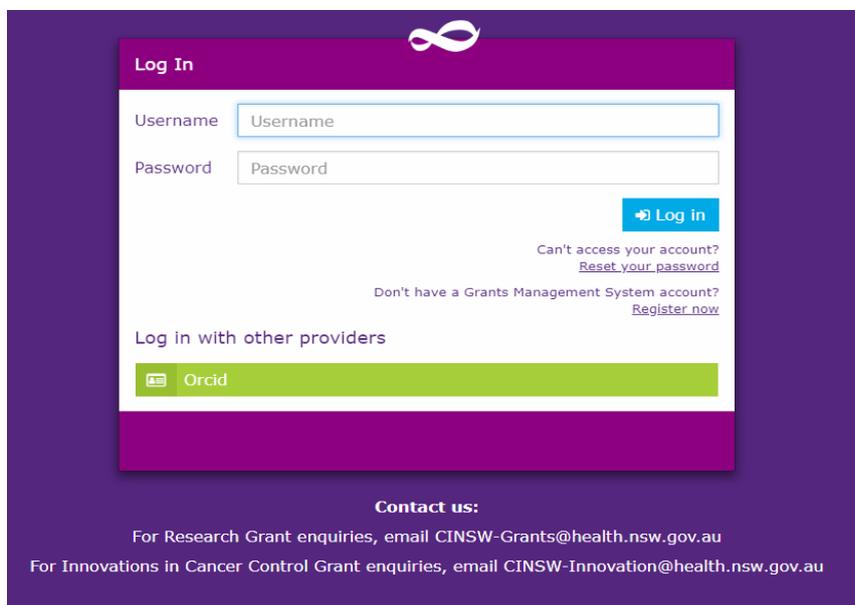
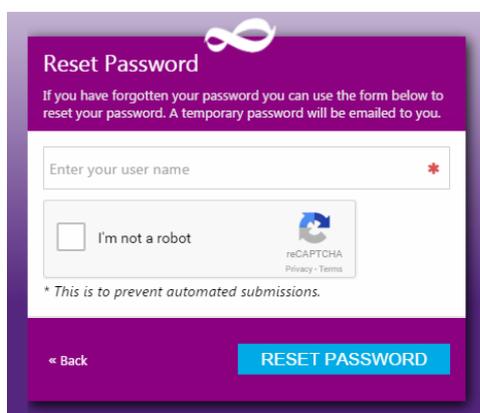1. Enter your **username** and **password.**

   Note: Your username is your email address that you have registered for your account.

2. Select **Sign In.**

3. Select **Agree** to accept the License Agreement.

4. The GMS home page will be displayed.

4. Forgotten password

If you have forgotten your password, follow the steps below to reset your password.

1. Click the **Reset Password** link.

2. Enter your email address in the text box.

3. Click **I'm not a robot** and complete the reCAPTCHA questions if required.

4. Select **Reset Password.**

5. Click **Finish.**

6. A password reset link will be emailed to the email address associated with your user account. Click on the link to finalise the password reset.

7. If you have entered your password incorrectly more than 3 times, the account will be locked. The following message may appear.
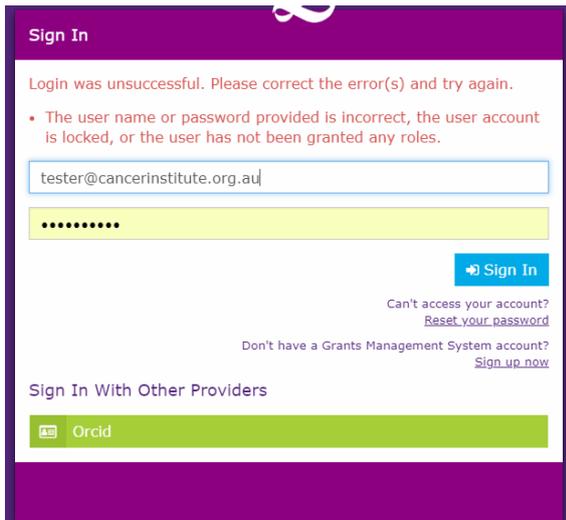
Before contacting CINSW, you should try to reset your password first using the instructions above. If you cannot log into your account after resetting the password, email CINSW-grants@health.nsw.gov.au to have your account unlocked.

5. GMS homepage

1. After you login you will be presented with the GMS homepage, which is the dashboard of the system.
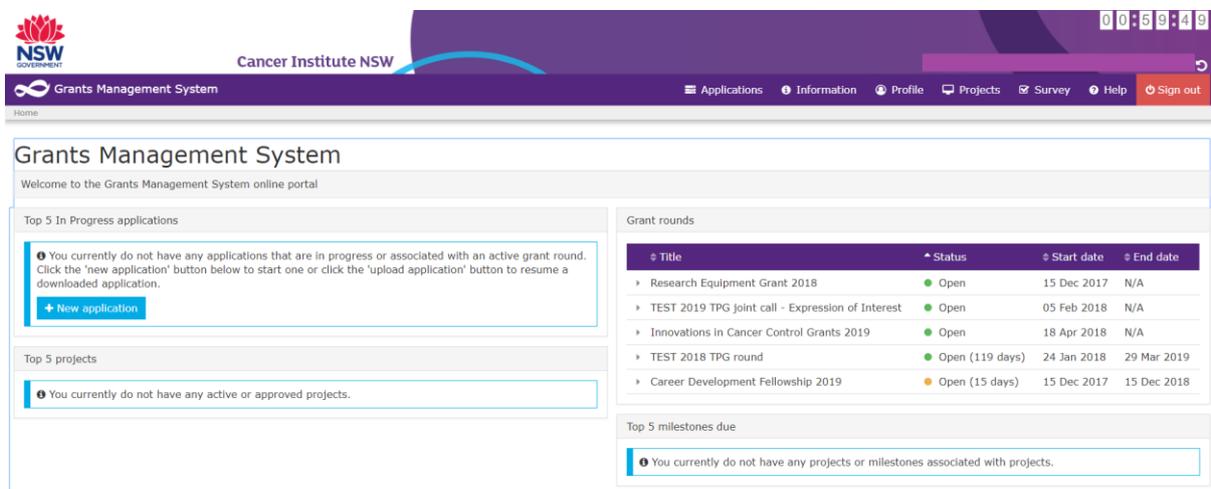
2. The menu bar provides access to any existing applications, projects and your user profile.

3. The "New application" button allows you to start a new application.

4. The "Grant rounds" section displays the grant rounds that are currently open.

5. The timer at the top of the page shows the time left before your session will expire after inactivity.

6. To return to the home page, click on **Grants Management System** on the left hand side of the tool bar.

6. Creating a user profile

Once you have registered, a basic profile will be created in the GMS. In this profile you can update your details (i.e. address, email, appointments and qualifications). You can also update your password and username in your account settings. Information stored in your profile can be used to pre-populate the application form with information e.g. appointments, so you do not need to re-enter this information in the application form.
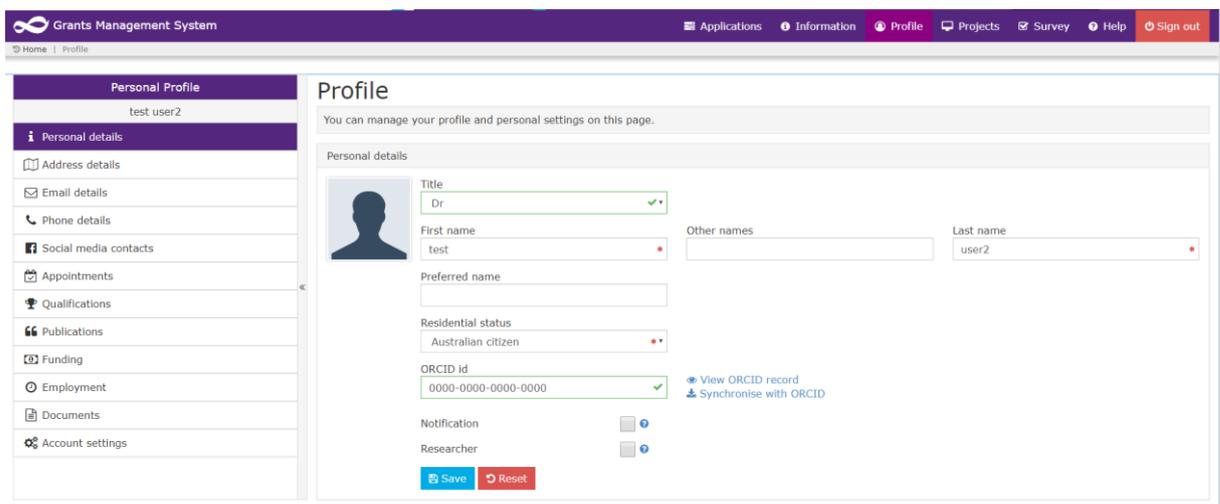
To update or view your profile:

1. Select **Profile** from the toolbar.

2. The **Profile** page will appear.

3. Enter your **Residential status**.

4. Enter your ORCID if you have one. If you have registered your ORCID previously, it should appear here.

   Details about ORCID can be found here: https://orcid.org/

5. Using the menu on the left hand side, you can navigate through the different options and update your details.

    The main sections that will require your input are listed under Personal Details below.

6.1 Personal Details

1. Select "Reset" to discard any additional changes you make.

2. Select "Notification" to receive email updates.

3. Select "Researcher" if relevant.

6.2 Email Details

Emails will be sent to your preferred email address (i.e. the email address you used to register). You can change your preferred email address by following the below steps:

1. Select "Add new email address".

2. Enter the email address.

3. Select the preferred checkbox (only one email address can be specified as preferred).

4. Select "Save".

5. You cannot delete the email address used to login to your account. To change your login email address select **Account Settings > Change username**.

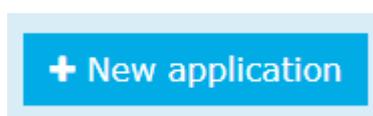6. The preferred status is displayed in the email list.

6.3 Account Settings

From here you can change your username or password.

Please note that the username must be a valid email address.

7. Creating an application

1. You can begin an application from the GMS home page by clicking on the **New application** button.

2. Alternatively, you can go to the application page by clicking on the **applications tab** on the toolbar.

3. Click **New application.**

4. From the drop down list select the grant program you are applying for.

5. Create a title for the application and add any comments or notes. The application title will appear on your dashboard for your own reference when the application is in progress. The final title of the application will be the one that is entered in the application form.

6. Use the left hand menu or forward and back arrows to navigate through the application form.

A green tick indicates that the page has passed the necessary validation. A cross next to the page means that it has not passed all the validation e.g. all mandatory fields have not been filled in.

7. Select **Save** to save your changes. You can save and continue as often as you like.

    Click on "Close" on the dialog box to continue.

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8. You can download a PDF copy of the application at any time using the **Preview** button. Please allow a few seconds for the system to generate the PDF preview copy to your browser.

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9. Once you have started an application it will be assigned a unique application identifier. Applications which are in progress will be listed on the GMS homepage and on the Applications page.

    Important Note: On the "Administrative Summary" page, if your organisation is not listed in the "Administering Organisation" drop down menu, you must email CINSW-Innovation@health.nsw.gov.au to arrange for it to be added. Please save your application first before contacting CINSW.

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    Once CINSW informs you that the organisation has been added, continue with the application by logging into GMS and then search for your "In Progress" application under the "Applications" menu item or from the dashboard.

Notes:

*   Help tips are provided throughout the form. Click on the question mark icon to display a description.

*   Mandatory fields are indicated with an *.

*   Incomplete sections of the application will appear with a cross symbol next to the section name.

*   Certain sections of the application form will require you to provide multiple entries (e.g. milestones, publications). Multiple entries will be required for the "Authorised Contacts" section.

*   Entries can be added, deleted or duplicated using add, delete or fill down buttons. To delete a row, you must select the check box next to the row first before you click on the ⊖ symbol.

8. Submitting an application

To submit the application:

Please be aware that once an application has been submitted it cannot be changed.

1. From the certification page, read and confirm that the required actions have been undertaken.

2. Click on **Submit.**

3. You will receive an email confirming that the application has been successfully submitted.

4. These options are available for "Submitted" applications before a decision has been made and can be accessed via the 3 dots next to the application's identifier:
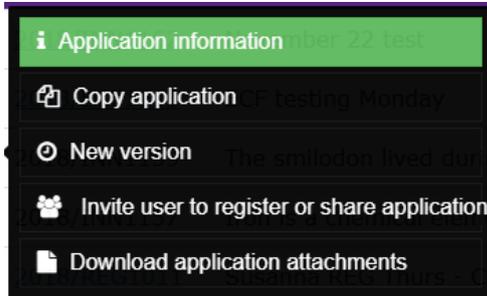
5. A PDF version of the submitted application and other documents can be accessed by clicking on the **Download application attachments** icon.

6. **Copy application** will create a new version of the application with a new identifier.

7. **Note:** it is possible to create a New Version of the application but this will move the application back to "In Progress". You must submit the application prior to the application closing date.

8.1 Menu options for applications

1. Clicking on the 3 dots next to an "In Progress" application (that has not yet been submitted) will reveal the following options:
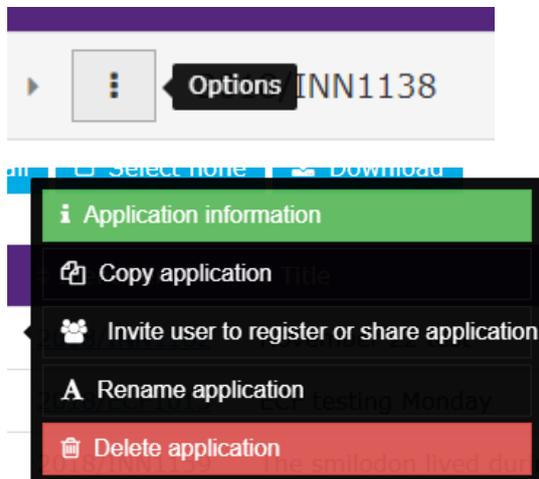
- **Application information** displays information regarding the application, including a log of the changes made to the application. Comments can be entered from this page.

- **Copy application** will create a new version of the application with a new unique identifier.

- **Invite user to register or share application** allows you to share the application with colleagues (see section 9 for more details).

- **Rename application** allows you to rename the application.

- **Delete application** will permanently delete the application. The action cannot be undone.

2. These options are available for "Submitted" applications that have been successful:
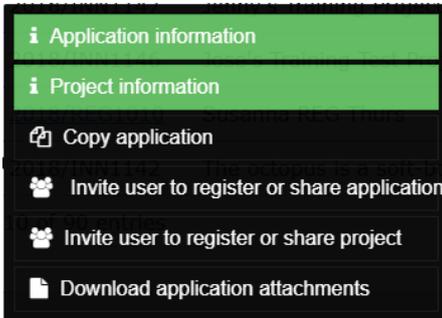

- **Application information**
- **Project information –** if the application has been successful, project information is available here as well as under the "Projects" tab.
- **Copy Application –** creates a new application that is not a resubmission of this current application.
- **Invite user to register or share application**
- **Invite user to register or share project**
- **Download application attachments**
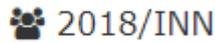
9. Sharing an application

An applicant can share their application with other registered GMS users, or invite other users to share the application. To access an application, the recipient must be registered on the GMS. To share an application:

1. Identify the application you wish to share, click on the 3 dots and click on **"Invite user to register or share application"**
2. Enter the recipient(s) GMS username (their email address). The system will look up the user list to check if the email address is already in the system.
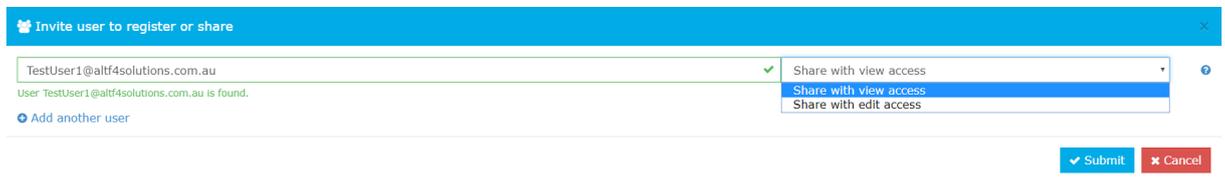
3. If the recipient is registered in the GMS, they will receive an email notifying them that you would like to share an application with them.
4. If they are not registered they will receive an email inviting them to register.
5. You may enter another user in step 2 if you would like multiple users to access the application.
6. The application can be accessed from the homepage by clicking on the **Identifier**.

7. When an application is shared, only one recipient can access the application at any one time.

8. You can also delete assigned users from this dialog box.

9. The following icon appears on applications that are shared:

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Note: Only the original owner of the application will have rights to share an application.

10. Sharing a Project

If your application is successful, you will have access to the "Project" record that is generated from your application. You are also able to share the Project record with others.

You can access your projects by clicking on the "Projects" icon on the top toolbar. You will then be presented with a list of your approved or active grants.

Clicking on the 3 dots next to the project record will reveal the following icon:

Similar to sharing the application, you are able to invite or share the project with others.


11. Submitting Milestone Reports

You may be requested to submit periodical progress reports and these can be completed using GMS.

1. If you have a report due, a reminder email will be sent to you. You can then search for the Project under the "Project" tab from the dashboard.

2. In the projects screen, look for your project that the email is referring to. Click on the project title and select "Milestones" under the project details menu.
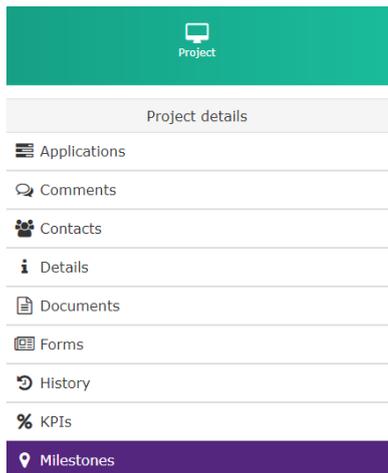
3. On the Milestone page, click on the report that is due. In the example below, a progress report is due.

4. After clicking on the pending report, click on the "Submit report" button.

5. If the report has been linked with an online form, you can enter the required information directly into the form on GMS.

6. If the pending report is not linked with an online form, you may be directed to submit the document using the "Documents" page. Only use this if directed.
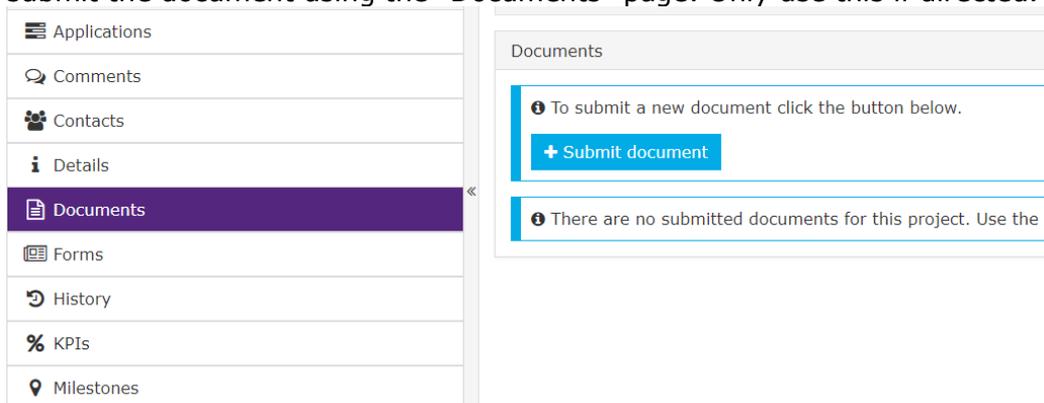
12. Help and information

To access help tips across the GMS, click on the help icon on the tool bar. If you do experience any problems or would like some further information, please contact the Innovations in Cancer Control Grants Team on CINSW-Innovation@health.nsw.gov.au.

You may also access the Innovations in Cancer Control Grants Expression of Interest (EOI) guidelines by clicking on the "**Information**" link from the top menu bar.