Electronic Grant Management System (eGMS)

Training Manual for Administering Institution (AI) Users

Application Module

If you have any queries or encounter difficulties relating to eGMS, please send email to <u>egmsenquiry@healthbureau.gov.hk</u>

TM(App)_ AI (Updated: Mar 2025) Version 7

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Abbreviations

AI = Administering Institution
eGMS = Electronic Grant Management System
EO = Executive Officer
DH = Department Head*
FA = Fellowship Applicant
FO = Finance Officer*
PA = Principal Applicant
RFS = Research Fund Secretariat
RO = Research Officer*

*AI user

1. Endorsement of Application

Preview and Checking :	Step 4
Push Back:	Step 6
Endorsement:	Step 7

 \ast EO(DH), EO(FO) and EO(RO) are not able to endorse the application.

Subject: eGMS : Submission of Gran for Investigator-initiated Projects Dear (Title) (Last Name) (The contact person of This email is sent to inform you that grant app Applicant(s)/Fellowship Applicant(s) of your A Management System (eGMS) of the Research Please login to the eGMS (eGMS URL) to accomplete	<i>Step 1:</i> Click on the eGMS URL to login to the eGMS and review the application.	
Thank you.		
Login to eGMS Email: Your login email is your email address. Password: Cogin Ecropt your password? Forgot your login? Cogin with IAM Smart More Info 2 Erequently Asked Questions	Account Registration <i>(FOR <u>APPLICANTS</u> ONLY!)</i> Register for Principal Applicant Account Register for Co-Applicant Account Notes to Grant Review Board (GRB) Members/ xternal Reviewers GMS account has already been registered for GRB Members desternal Reviewers. Please contact the Research Fund ecretarial (Email: <u>semenoirf@beatbursu.govbk</u> if you have any uestions.	 Step 2: Enter login email. Enter password and click 'Login'.
Home Project Home Page To Do List Home Call Year Scheme Please Select Search (1 of 2) Ref. No. Broker Title =	Meeting Administration Administration	Method A Step 3: Go to Home Page > To Do List - Click the 'Case
TMP	Application Case Number / Subject Case Number / Subject Description tion ement	Number / Subject' of the project under type: 'Application Endorsement' <u>Go to Step 4</u>

Home	Project	Administration	 System Help 		Or Method B
	Application	View	Application		Step 3:
Home Pag		View	Application		Go to Project >
	On-going	Fund	ing Decision		Application >
Call Year	Completion	Repo	ort for Open Call		View Application
					<u>Go to Step 4</u>
Application Action List	st .				Step 4a:
Master List Action List Outstandin Scheme Please Select *	g Signature List Pushed Back List Search (1 of 1) << 1	Application Call			To review the Application Form, select 'Action List'.
Project Year Type	Project Title O Principal Applicant	Department Funding Amount (HK\$) Check in-orde List	Checked Actions (t	ubmission Time by PA to Al) ≎	Step 4a: via internet
(4a)			N Endorse Push Back		- Click on the 'Ref. no.' to check the web-base application form.
Application					OR
Master List Action List Outstanding Scheme Please Select	Signature List Pushed Back List	Application Call	_		Step 4b: (via pdf)
Project Year Ref. No. Type	Password Password Password	password (6 characters) for downloaded PD	20 ~ Department Funding Check. Clinorder Amount (HKS) List	ˈhecked ⇔	(i) Click on the 'PDF icon'.
(4b-i)	Download C	ancel (1 of 1) 1	20 ~	N	(ii) Set a 6-character
Note: Versitech (VXF) e-Form is no longer supp	orted, you can view the application(s) throug	h PDF version next to the Ref. No.			downloaded
Master List Action List	Dutstanding Signature List	shed Back List Application Ca			Application form.
Scheme Please Select	▼ Search				(iii) Open the downloaded
Project		(1 of 1) 🤜 1	> 20 •		Application form.
Year Ref. No. © Typ	e o Projec	t Title ○ Print App!	cant Department Funding C Amount (HK\$)	Check- n-order List	
	(4b iii)				
Application	(40-ш)				Stop 5.
Master List Action List Outstanding Scheme Please Select	Signature List Pushed Back List App Search	Nication Call	Check. in-order List		<i>To confirm Application form checked. (Optional)</i>
Project Year Ref. No. Type	Project Title Print	(1 of 1) ve 1 ve 2 ipal Department Amount (HKS)	Image: Checked order Actions St Image: Checked order Actions St Image: Checked order Image: Checked order St	ubmission Time (by PA to AI) ⊖	5.1Click the box under 'Check-in-order List'.
Check-in-ord	er List				5.2 Click the checkbox of the 'Checked Date'.
Project Title Principal Applicant Department User Name					5.3 Fill in the details in 'Remarks' (if any).
Checked Date Remarks (5.4) Confirm Checked	Ø (5.2	() Pusi	≥ (5.3) 1 Back		5.4 Click 'Confirm Checked' to save the checked entry.
					-



Application T, 1, Action List Asser List Control Oversamding Signature List Pushed Back List Application Call Scheme Please Solect Starch (1 of 1) 1 20 Endorse Project The Project Th	 Step 7. To Endorse application. 7.1 Select 'Action List'. 7.2 Click 'Endorse' for endorsement. 7.3 Click 'Yes' for confirmation.
Application I is endorsed successfully	An acknowledgment message for 'endorsed successfully' will be shown at the top. (Note: EO(DH), EO(FO) and EO(RO) cannot endorse the application.)
Sa (for DH/FO/RO) Application (8a) Interface (N/A/Y/N) Sole (101) Implication Sole Sole (101) Implication Sole Sole Sole Sole Sole Sole Sole Sole Sole Sole Sole Sole Sole Sole Sole Sole Sole Sole Sole Sole Sole Sole Sole <t< td=""><td>Step 8.To view the signing status of CoA(s) and AI users.(Optional)<u>8a (for DH/ FO/ RO)</u> Click 'Master List' to view the signing status.<u>8b (for RO only)</u> Click 'Outstanding List' (for viewing of signing status, completing 'Check-in-order' List and 'Endorse'/'Push Back' the applications).</td></t<>	Step 8.To view the signing status of CoA(s) and AI users.(Optional) <u>8a (for DH/ FO/ RO)</u> Click 'Master List' to view the signing status. <u>8b (for RO only)</u> Click 'Outstanding List' (for viewing of signing status, completing 'Check-in-order' List and 'Endorse'/'Push Back' the applications).

Home Project Administration System Help	Step 1:
Home Page	Go to Home Page
(1 of 12) << 1 2 3 4 5 6 7 8 9 10 >> 20 >>	
Ref. No. · · · Project Title · · · Principal Applicant · · · · · · · · · · · · · · · · · · ·	Or
<complex-block></complex-block>	Go to Project> Application> View application -Select 'Master List' (Note: 'Message icon' will be available for the communication with RFS after the application has been submitted to Research Fund Secretariat.)
Fright Status Bother Sarch Test No. Calors Type Project Table Project Determine Control Sarch Control Sarch	 Step 2: (1) Click on the 'Message icon' to pop up 'Message summary'. (2) Click 'Create Message' to send message to BES or
Ref. No.	'Close' to close the
(1 of 1) << >> 20 ¥	pop-up browser.
Date of Creation Subject Type Subject Receiver CC Sender Read? Detail No record (2) (1 of 1) 20 × Create Message Close Create Message Close	

2. Communicate with RFS through message icon



(3) Please select type of message. (4) Fill-in the Subject and Message. (5) Click 'Attach' to upload attachment(s), if any. (Attachment should in PDF format only and all files together should not exceed 2MB.) To remove the uploaded file, click on the 'Trash' icon. (6) Click 'Preview' to preview message or 'Cancel' to close the browser without any action. (7) Click on 'Back' for further editing, 'Send' to send the message to RFS or 'Cancel' to close the browser without any action.

Message Summary Ref. No. (1 of 1) Date of Creation Subject Receiver CC Sender N View Detail Message Summary Ret. No.	The message will be recorded at message summary after sent to RFS.
(1 of 1) 20 Creation Subject Receiver CC Sender Read? Detail Detail of Message Type: HMRF- Subject: Message: (1 of 1) 20 Time 20 To record (1 of 1) 20 Time 20 Ti	 (8)Click on 'View Detail' to review the message sent. After receiver read the message 'Y' will be shown under 'Read?'.
Example email for informing new inbox message. Subject: eGMS – New inbox message Dear (The Name of user), This email is sent to inform you that there is a new message in your inbox. Please login to the eGMS (eGMS URL) for your necessary action(s). Thank you.	Email notification for informing new inbox message will be received if RFS sent you a message through message icon. Please click on the eGMS URL to go to the eGMS login page for necessary action(s).
Image: Scheme Material Statement Statement <th>To review the unread message, click on the 'Message icon' at 'Home Page'. Click 'View Details' to</th>	To review the unread message, click on the 'Message icon' at 'Home Page'. Click 'View Details' to
Period From To Ref. No. Subject Type Please Select Read Subject Subject	review 'Detail of Message'. Note:
Ref. No. Date of Creation Subject Type Subject Receiver CC Sender Read? Detail Image: Subject Type Subject Type Subject Type Image: Subject Ty	(Remark: Entry of the viewed message will be removed from 'Inbox' automatically after closed the 'Detail of Message'.)

3. View Funding Decision

Home	Project 🗸 A	dministration 👻	System Help		Step 1:
	Application	N I I I			Go to Project >
Home Pag	Application	View A	pplication		Application >
	On-going	Fundir	ng Decision	·	Funding Decision
Research Office	Completion				
	Completion	Report	t for Open Call		
Home Project - Administra	stion System Help		🖂 User ID: -	Logout	Step 2:
Funding Decision					In the Funding Decision
Master List Fundable Application					page, click 'Master
Ref. No. 🔾	(1 of 6) and 1 2 3	4 5 6 → 20 ✓ Principal Applicant 0	Department Funding Amount (HK\$)	Status	List' to view all
	¢		Not recor sup	mmended for ort	applications.
			for su	upport ommended upport	
					Funding decision is
					shown under the
					'Status'.
Funding Decision					Step 3:
Mactor List Eurolable Application					In the Funding Decision
Ref. No. O Project Title O Pri	Department Funding Amount	Revised Et Status Applcation Due	hics Approval Due Status for		page, click 'Fundable
Z@	(HKS)	Recommended or support	te(Submission Agreement Date)		Application' to view
		Recommended Recommended			fundable applications.
Funding Decision		or support			
Master List Fundable Applie	cation				3.1 (Optional)
Ref. No. 🔅 Project Title 🜣	Principal Applicant	Funding Ap Amount Status Dat	Revised Ethics Approval plotation Due Due of Submission Date(Submission	Status for	Click on the
A		(HKS) Recommended for support	Date) Date)	Agreement	"Report icon" to view
		Recommended for support			the GRB/AP/RFAP
		for support			Report.
(3.1)			(3.2)		3.2 (Optional)
					Check the columns of
					Funding Amount and
					due dates.

(The following functions are granted to **<u>RO</u>** only)

Project Meeting Administration Home Method A Step 1: Go to Home Page > To Do List Home To Do List Scheme Please Select Call Year Search (1 of 1) 🖂 🚺 🍌 🛛 20 🗸 Click the 'Case Due Date Number / Subject' of the project under type: Outstanding Agreement 'Outstanding Agreement' Application Master List Action List Outstanding Signature List Outstanding Agreement List Pushed Back List Application Call The selected project will Note: Only the selected project is shown for your action be shown for your action. me Please Select 🔹 Search (1 of 1) 🖂 🚺 🗉 20 🗸 Click 'Update Project Period'. . Go to *Step 3* Home Project Administration System Help Method B *Step 1:* Application ۲ View Application Home Pac Go to Project > On-going Funding Decision Application > View Application Completion Call Year Report for Open Call Step 2: Application Go to Outstanding Master List Action List Outstanding Signature List Outstanding Agreement List Pushed Back List Application Call Agreement List to view Please Select Search all applications which are pending your action. Status for Agreement Action . Pending Signature 08 Jan 2025 Update Project Period Click 'Update Project Update Project Period Pending Signature 08 Jan 2025 Period'. Update Project Pending Signature 08 Jan 2025 <u>بر</u> (1 of 1) 🖂 1 🕟 20 🗸 Go to *Step 3*

4. Entering Project Commencement Date and End Date of Funded Projects

(The following functions are granted to **<u>RO</u>** only)

(Example for Funded Investigator-initiated Projects)	Step 3: (For Funded Investigator-initiated Projects) Enter the Project Start Date (= Commencement Date in the signed agreement) and Project End Date.
(Example for Research Fellowship Awards) Vodele Project Dates Approved Project Dates Project Dates Project Start Date OP Approved Felowship Fend Date OP Approved Training Start Date OP Approved Training Start Date OP Approved Training End Date OP Approved Training	(For Research Fellowship Awards) Enter the Project Start Date (= Commencement Date in the signed agreement), Project End Date, Fellowship Start Date, Fellowship End Date, Training Start Date and Training End Date.

5. Administrative Function – Create Account(s)

Home Project	✓ Administration	em Help	Step 1:
	Administration of User	Create User	Go to Administration >
Home Page	Account	•	Administration of
	Setung	Maintain User Account	User Account >
Call Year	Scheme Search Application	View Administering	Create Licer
		Insulution	Create User
2a: (RO only)			Step 2a: (RO only)
Create User Account			(i) Select 'Authorised
Authorised Role(s)	Please Select		Role(s)'.
Email	Please Select Executive Officer (Research Office)	Check email availability	(ii) Fill in all compulsory
Title	Head of Department		User's details.
Last Name			(iii) Click 'Save' to create
First Name			user
Location of Administering Institution Current Post	Please enter the English name before the English translation China - Hong Kong	of your Chinese name (e.g. David Tai-man).	(iv) Click 'Yes' for
Unit / Department		(2a-ii)	confirmation.
Al Room / Elear			
Building			
Street			
	Please enter number and name of street.		
City / Area			
Country / Region Contact No.	China - Hong Kong		
Fax			
Gender*	○ Male ○ Female		Or
(Save) (2a-iii)	Information collected will be used for statistical purposes only.		Step 2b: (DH/FO)
<u>2b: (DH/FO)</u>			(i) Fill in all compulsory User's details
Create Executive Officer A	ccount		(ii) Click 'Save' to create
Email		Check email availability	(II) CIICK Save to create
Title	Please provide institutional email account		user.
Last Name	Please Select 💌	(2b-i)	(111) Click 'Yes' for
First Name			confirmation.
	Please enter the English name before the English translation	of your Chinese name (e.g. David Tai-man).	
Location of Administering Institution Current Post	China - Hong Kong		(Remark:
Unit / Department			Email notification with login
AI			amail and password will be
Room / Floor			eman and password win be
Street			sent to the $EO(DH)/EO(FO)$.
*	Please enter number and name of street.		
City / Area			Each AI could create more
Country / Region Contact No.	China - Hong Kong		than one EO account.)
Fax			
Gender*	O Male O Female	1	
(2b-ii)	Information collected will be used for statistical purposes only	Ķ.	
Confirm			
Are you sure to create this us	ser?		
(2a-iv)/(2b-iii)			
Yes No			An acknowledgment message for the creation of
User with ema	ail [] is created		user's account will be shown at the top.

Home Page	Administration of User Create User	Go to Administration >
Call Year Scheme	Setting Maintain User Account Search Application View Administering Institution	Administration of User Account> Maintain User Account
Maintain User Account	(t ef 3) Authorised Role(s) Room / Floor Builing Street	RO can preview a summary of accounts of his/her AI. - Click 'Last name' to view / edit account details for a particular account.
Change User Details User Details User Details Delegation of PA Delegation of DH Email Image: Colspan="2">Image: Colspan="2" Colspan="2">Image: Colspan="2" Colspan="2">Image: Colspan="2" Col	Room / Floor Building Street City / Area Country / Region China - Hong Kong Contact No. Fax Authorised Role(s) Co-Applicant, Head of Department, Principal Account Status Account Status Answer	Step 3: Note: The update of 'Authorised Role(s)' or 'Account Status' of a user must be completed by RFS. Please e-mail to: egmsenquiry@healthburea u.gov.hk.
Justification (3.1) Save Cancel Reset Password Confirm A Are you sure to update the user profile? (3.2) Yes No	Account linked Linked Date	 3.1 Click 'Save' to update user details. 3.2 Click 'Yes' for confirmation. An acknowledgment message for 'User Profile

6. Administrative Function – Maintain User's Profile

Change User Details	Step 4:
(4.1)	10 view/update the
	(For users authorised with
Assign Delegate	PA Role only)
Email	4.1 Select 'Delegation of
Start Date (4.2)	PA'.
End Date	4.2 Fill in Assigned user's
Assign Delegate (4.3)	email and delegate period.
If your delegate is not an existing user in eGMS, please create an user.	4.3 Click 'Assign Delegate'.
	4.4 New record will show at
Delegation List (4.4)	'Delegation List'.
Delegate Name \diamond Email \diamond Assigned Time Delegate Period Actions	4.5Click 'Save' to save the
Edit 👜	'Delegation List'.
If your delegate is not an existing user in eGMS, pleas	4.6 Click ' <mark>Yes</mark> ' for
Create Delegate A Are you sure to update delegation list?	confirmation.
(4.0)	4./ The update is recorded
Delegation List	at Delegation History.
Delegate Name 🌣 Email 🔅 Assigned Time	An acknowledgment
(4.5)	message for 'Delegation list
(4.5) Export to CSV	has been updated
Delegation History	successfully' will be shown
(1 of 3) < 1 2 3 ⇒ 20 ∨ Action Time Action Performed Delegate Name Email > Delegate Period	at the top.
	L
(4.7)	(Remark: If the delegate
Delegation list has been updated successfully.	does not exist in eGMS,
	please go to Step 7 to create
	delegate (PA).)
Delegation List Delegate Name Email Assigned Time Delegate Period Actions	Step 5:
(5.4) Edit a	To edit delegate of
(Save) Export to CSV (5.1)	PA/DH.
(5.5) Stat Date COD NO COD NO COD	5.1 Click Edit at
End Date (DD MM YYYY) (5.2)	Delegation List'.
	5.2 Select the Start Date
(5 3) Su Mo Tu We Th Fr Sa	5.2 Click 'Sava'
	5.5 Click Save.
11 12 13 14 15 16 17 18 19 20 21 22 23 24	undated
25 26 27 28	5 5 Click 'Save'
	ene chun <mark>bure</mark> i
Confirm	5.6 Click ' <mark>Yes</mark> ' for
A Are you sure to update delegation list?	conformation.
Yes No (5.6)	
	An acknowledgment
	message for the update will
Delegation list has been updated successfully.	be shown at the top.

Delegation List Delegate Name © Save Export to CSV (6 Confirm A Are you sure to update Yes No (6	Email © Assigned Time Delegate P .2) .2) ate delegation list? 3)	Period Actions Edit (5) (6.1)	Step 6: To delete delegate of PA/DH. 6.1 Click the 'Trash' icon. (*Record will be removed immediately on the screen after clicking 'Trash' icon.) 6.2 Click 'Save'. 6.3 Click 'Yes' for conformation.
Delegation list f	as been updated successfully.		message for the update will be shown at the top.
Change User De (7.1) User Details Delegation of Assign Delegate	TPA Delegation of DH		Step 7: To create delegate (PA). 7.1 Select 'Delegation of PA'.
Start Date			7.2Click <mark>'Create Delegate'</mark> .
If your delegate is not an existing Create Delegate (7.2) Create Delegate	user in eGMS, please create an user.		7.3 Complete & save delegate's contact information:
Authorised Role(s) Email Title Last Name First Name Location of Administering Institution Current Post	Please Select Please provide institutional email account Please Select Please Select Please select Please enter the English name before the English translation Please enter the English name before the English translation	k email availability r Chinese name (e.g. David Tai-man).	 (i) Fill in all compulsory User's details. (ii) Click 'Save' to create user. (iii) Click 'Yes' for confirmation.
Unit / Department Al Room / Floor Building Street City / Area Country / Region Contact No. Fax Gender* Save Back (7.3-ii)	China - Hong Kong China - Hong Kong China - Hong Kong Information collected will be used for statistical purposes only.	3-i)	(Remark: Email notification with login email and password will be sent to the delegate.)
Confirm Are you sure to create this user? Yes No (7.3-iii) User with email	is created		An acknowledgment message for 'User is created' will be shown at the top.

	Step 8:
Change User Details (8.1)	To view/update the
User Details Delegation of PA Delegation of DH	delegation of DH of a user.
Assign Delegate	(For users authorised with
Email	DH Role only)
Start Date (8.2)	
	8.1 Select 'Delegation of
End Date	DH'.
Assign Delegate (8.3)	8.2 Fill in Assigned user's
If your delegate is not an existing user in eGMS, please create an user	email and delegate
Create Delegate	period.
Delogation List (8.4)	8.3 Click 'Assign Delegate'.
Delegation List (0.4)	8.4 The delegation details
	will be shown at
	'Delegation List'
	8 5 Click 'Save' to save the
Create Delegate Confirm	'Delegation List'
A Are you sure to update delegation list?	8 6 Click ' <mark>Yes</mark> ' for
Delegation List	confirmation
Delegate Name 🔅 Email 🛇 Yes No	8 7 The undate is recorded
(8.5)	at 'Delegation History'
Sup Expect to CSV	at Delegation mistory .
save Export to CSV	
Delegation History	
Action Time Action Performed Delegate Name C Fmail C Delegate Period	An acknowledgment
	message for 'Delegation list
(8.7)	has been updated
	successfully' will be shown
Delegation list has been updated successfully.	at the top.
	I I I I I I I I I I I I I I I I I I I
	(Remark: If the delegate
	does not exist in eGMS,
	please refer to Step 9 to
	create delegate (DH).)

Change User	Details (9.1)	Step 9:
User Details Delegation	n of PA Delegation of DH	To create delegate (DH).
Assign Delegate		9.1 Select 'Delegation of
Start Date		DH .
End Date		
Assign Delegate		9.2Click 'Create Delegate'.
If your delegate is not an exist Create Delegate (9.2	ng user in eGMS, please create an user. 2)	
Create Delegate		
Authorised Role(s)	Please Select	
Email	Check email availability	9.3 Complete & save
Title	Please provide institutional email account	delegate's contact
Last Name	Fiedse Select	information:
First Name		
	Please enter the English name before the English translation of your Chinese name (e.g. Day	(i) Fill in all compulsory
Location of Administering Institution Current Post	China - Hong Kong	User's details.
Unit / Department	(9.3-i)	
Al Been / Elect	The University A	(ii) Click ' <mark>Save</mark> ' to create
Building		user.
Street		
	Please enter number and name of street.	(iii) Click ' <mark>Yes</mark> ' for
City / Area		confirmation.
Country / Region Contact No.	China - Hong Kong	
Fax		
Gender*	O Male O Female	
Save Back (9.3-ii)	Information collected will be used for statistical purposes only.	
Confirm		(Remark: Email
Are you sure to create	this user?	email and password will
		be sent to the delegate.)
Yes No (9.3-j	ii)	
		An asknowladsmant
A Hoor with any	il f	All acknowledgment
U User with ema		created' will be shown at
		the top
		the top.

Delegation List Delegate Name Email Assigned Time Delegate Period Actions		Step 10:
(10.4) Edit :		To edit delegate of DH.
Save Export to CSV Edit (10.1)		10.1 Click <mark>'Edit'</mark> .
(10.5) Start Date (DD MM YYYY)		10.2 Select the 'start date'
End Date (DD MM YYYY) (10.2)		and 'end date'.
		10.3 Click <mark>'Save'</mark> .
(10.3) Su Mo Tu We Th Fr Sa 1 2 3		10.4 The 'Delegate Period'
4 5 6 7 8 <mark>9</mark> 10 11 12 13 14 15 16 17		1s updated.
18 19 20 21 22 23 24 25 26 27 28		10.5 Click 'Save'.
Confirm		10.6 Click ' <mark>Yes</mark> ' for
Are you sure to update delegation list?		conformation.
		An acknowledgment
(10.0)		message for 'Delegation list
		has been updated
Delegation list has been updated successfully.		successfully' will be shown
		at the top.
Delegation List		Step 11:
Delegate Name Email Assigned Time Delegate Period	Actions	l'o delete delegate.
Same Expect to CSV (11.2)	(11.1)	11.1 Click the 'Trash' icon
	(11.1)	(*Record will be removed
Confirm		immediately on the screen
A Are you sure to update delegation list?		after clicking 'Trash' icon.)
		11.2 Click ' <mark>Save</mark> '.
(Yes) No (11.3)		11.3 Click ' <mark>Yes</mark> ' for
		conformation.
Delegation list has been updated successfully.		An acknowledgment
		message for 'Delegation
		list has been updated
		successfully' will be
		shown at the top.

7. Administrative Function – Reset Password

Home Pro	ject 👻	Administration -	System Help		S	tep 1:
Home Page	Scheme	Administration of Account Setting Search Application	User C M n Vi In	reate User aintain User Account iew Administering stitution		Go to Administration > Administration of User Account > Maintain User Account
Maintain User Acco	Name Unit / Departr	(1 of 3)	1 2 3 → 20 × Authorised Role(s)	Email Account Status Solec V	Create Date	<i>tep 2:</i> Click ' <mark>Last name'</mark> to view/ edit account details.
Change User Deta Email Title Last Name	ils	F	Room / Floor Building Street			<i>tep 3:</i> Click 'Reset Password' for the user.
First Name Location of Administering Institution Current Post Unit / Department Al Affiliation Gender* Security Question	O Male O Female		City / Area Country / Region Contact No. Fax Authorised Role(s) Account Status Create Date Answer	China - Hong Kong China - Hong Kong Executive Officer (Head of De Active	partment)	
PA in Cc List of CoA Email ORCID ID Justification	Reset Pas	sword	- f	No		
Save Cancel Reset	of User		is reset		1	An acknowledgment nessage for 'Password of User is reset' will be shown at the top.
Sample email for pa Subject: eGMS - Pa Please find the temporary Password: (Insert tempor Login page: (eGMS URI	ssword reset ssword Rese y password for a rary password)	:: t: (User's Nan accessing the elect	ne) ronic Grant Ma	nagement System (e	GMS): SMS): ne se	<i>tep 4:</i> mail notification for the ew login password will be ent to user.
Please be reminded to se Thank you.	 t up a new passv	word after logging	in to the eGMS	S (eGMS URL).	P] U lo	lease click on the eGMS RL to go to the eGMS ogin page.

(The following functions are granted to **RO** only)

Home Project Administration System Help Home Page Administration of User Create User Gall Year Scheme Search Application View Administration Ref. No. Project Project Administration of User	Step 1: Go to Administration > Administration of User Account > ing al Applicant
View Administering Institution Type Address Room / Floor Code Building Name Street Department / Office City / Area Officer-in-charge ([Title][First Name][Last Name]) Country / Region Email Business Registration Certificate Contact No. Status Fax Status Email Domain list: Add Domain Enter New Domain : Add Domain	CHINA - HONG KONG .edf ACtive Step 3: (Optional)
Email Domain list: Inter New Domain: Domain Domain Delete Call Domain Delete Call Domain Delete Call Domain Domain Domain Confirm A re you sure to update domain list of this Administering institution? Call Domain Confirm A re you sure to update domain list of this Administering institution? Call Domain Call Domain Confirm Conf	 To Add email domains. 3.1 Enter the new domain. 3.2 Click 'Add Domain'. 3.3 Click 'Save'. 3.4 The new domain is shown at the 'Email Domain list'. 3.5 Click 'Save'. 3.6 Click 'Yes' for confirmation. An acknowledgment message for 'Domain List is updated' will be shown at the top.

8. Administrative Function – Maintain AI Profile - (email domains) (The following functions are granted to <u>RO</u> only)

Email Domain list:	Step 4:
Enter New Domain : Add Dom	ain To delete email domain.
Domain Delete (4.2) Save Export to CSV (4.1)	4.1 Click the 'Trash' icon. (*Record will be removed immediately on the screen after clicking 'Trash' icon.)
Confirm	4.2 Click 'Save'.
Are you sure to update domain list of this Administering	nstitution? 4.3 Click 'Yes' for confirmation.
Yes No (4.3)	
	An acknowledgment message for 'Domain List
Domain List is updated	is updated' will be shown at the top
	at the top.

9. Administrative Function – Maintain AI Profile - (Department List) (The following functions are granted to <u>RO</u> only)

Home Project Administration System Help	Step 1:
Home Page	te User To maintain the list of departments and department
Setting Main	tain User Account heads.
Call Year Scheme Search Application View	Administering ution Go to Administration >
Endo Ref. No. ≎ Project Acco	Administration of User Account >
	View Administering
	Institution
View Administering Institution	Step2:
Type Address Room / Floor Code Building	To add department.
Name Street Department / Office City / Area	2.1 Click 'Add Department'
Officer-in-charge ([Title][First Name][Last Name]) Country / Region Email Business Registration Certificate	cHINA-HONG KONG under 'Department List'.
Fax Status	Active
Email Domain list:	
Add Domain	2.2 Fill in the name of
Delete	department, email of DH,
U	and effective date (if
Save Export to CSV	necessary).
Department List	
(1 of 1) ≪ ⇒ 20 ▼ Unit / Department ≎ User Name ⇒ Email ≎ Status	
No records found. Add Department (2.1)	Actions 2.3 II Effective Date 18 flot
Save Add Department Export to CSV	of Department' will be
Create New Department	assigned immediately.
Unit / Department Name of Department	
Head of Department [2.2]	2.4 Click 'Save'.
Effective Date (2.3)	
Save Back	
Confirm	2.5 Click 'Ves' for
A Are you sure to create this department?	confirmation
Yes No (2.5)	commuton.
The department is created successfully	An acknowledgment message
	for 'The department is created
	successfully' will be shown at the top
	ine top.

	Ston 3.
Department List	To edit Department List
(1 of 1) << 1 >> 20 ×	To cuit Department List.
Unit / Department 🗘 User Name 🔅 Email 🌣 Status 🗘 Actions	3.1 Click ' <mark>Edit</mark> '.
(1 of 1) Save Add Department Export to CSV Fclit Department Administering Institution Unit / Department Status Active • Head of Department Email Effective Date Confirm A re you sure to save this department? Yes No (3.4)	 3.2 Update the Department details and enter email of new DH and effective date (if necessary). If 'Effective Date' is not entered, the role of 'Head of Department' will be assigned immediately. 3.3 Click 'Save'. 3.4Click 'Yes' for confirmation.
The department is updated successfully	An acknowledgment message for 'The department is updated successfully' will be shown at the top.
Department List (1 of 1) and 1 and 20 and	<i>Step 4:</i> To delete department.
Unit / Department User Name Email Status Actions (4.2) (1 of 1) (1 b) 20 v (4.1) Save Add Department Export to CSV (4.1)	4.1Click the 'Trash' icon. (*Record will be removed immediately on the screen after clicking 'Trash' icon.)
Confirm	4.2 Click ' <mark>Save</mark> '.
Are you sure to update department list?	4.3 Click ' <mark>Yes</mark> ' for confirmation.
The department list is updated	An acknowledgment message for 'The department list is updated' will be shown at the top.

10. Administrative Function - Endorsement of Principal Applicant (PA) Account

(The following	g functions are g	ranted to <u>RO</u> or	lly)	
Subject: eGMS -	Step 1:			
Dear (Title) (Last Name) (The contact person of RO as recorded in eGMS),				Email notification will
Principal Applicant (PA) of your Administering Institution has registered to open a PA account in the				be sent to RO for
electronic Grant Man HKSAR. Please login	agement System (eGMS to the eGMS (eGMS U) of the Research Fund RL) to endorse it.	Secretariat, Health Bureau,	account
The sub-second	× ×	,		
Thank you.				Please click on the
				eGMS URL to go to the
Homo	Droject	Monting	Administration	eGMS login page.
nome	Project	meening •	Auminisuauon	Method A
				Step 2:
Home Page				Go to Home Page >
TO DO LIST Home				10 Do List
Call Year Scheme	Please Select Scarch (1 of 2)	 1 20 ✓ 		Click the Case
Ref. No.	Project Title	Type Case Number / Subject	Description PA/FA Department Date Due Date	- Click the Case Number / Subject' of
N/A N/A		Endorse PA Account Application	Endorse PA Account Application	the project under type:
	'Application			
	Endorsement'			
	Endorse PA Account		Endorse PA Account	<u>Go to Step 4</u>
	Application		Application	
Homo F)roioot Admir	intration Sustam U		Or Mathad D
rionie r	Aunn		ειþ	Stan 2:
Home Page	Admi Acco	nistration of User unt	Create User	Co to Administration >
	Settin	ng 🔸	Maintain User Account	
Call Year	Scheme Searc	h Application		Administration of User
	Account >			
Ref No 🔅	Endorse Principal			
				Applicant Account
Endorse Principal Appli	cant Account			Step 3:
Title 0 Last Name 0 Select V	(1 of 1 First Name 0	e 1 so 20 v Email O	Unit / Department 😒	
(Last Name)	- Click 'Last name' to			
	Last Name 💠	review PA's details.		
(Lout Name)				Co to Stan A
Las				<u>00 10 Step 4</u>
1				



		8				
Home	Project 👻	Administra	tion 👻 System	Help		Step 1:
	A li ti	_				Go to Project >
Home Pac	Application	•	View Application	1		Application >
	On-going		Funding Decisio	n		View Application
			·			
Call Year	Completion		Report for Open	Call		
Application						Step 2:
		1	(2.1)			To update Internal
Master List Action List	Outstanding Signature List	Pushed Back Lis	Application Call			Deadline.
	(1 of 1)	≪ 1 >> 2	Announcement RFS	<u> </u>		
Year Scheme	AOP		Date Closing Date Date	Interna	al Deadline	2.1 Click 'Application Call'
				<u> (2</u>	2.2)	to view current open
Sava	(1 of 1)	≪ 1 ≫ 2	20 🗸	Su Mo Tu	v (YYYY) ✓ O We Th Fr Sa	call.
(2,3)				345	12 6789	
				10 11 12 17 18 19	13 14 15 16 20 21 22 23	2.2 Fill in the internal
				24 25 26	27 28 29 30	deadline.
				Hour	.00	
				Second		2.3 Click 'Save'.
Confirm						
Are you sure to upda	ate the internal deadline?					2.4 Click ' <mark>Yes</mark> ' for
						confirmation.
Yes No (2.4	•)					
						An acknowledgment
1 Internal	deadline has be	en updateo	successfully.			message for 'Internal
						deadline has been
						undated successfully' will
						he shows at the top
						be snown at the top.

11. Administrative Function – Maintain Internal Deadline for Open Call (The following functions are granted to **BO** only)

(The following function is granted to DH only)	
Home Project Administration System Help Home Page Administraction of User Head of Department Principal Ap Search Application Change Password	Step 1: Go to Administration> Setting > Maintain Personal Profile
Home Project Administration System Help Maintain Personal Profile (2.1) User Details Delegation of PA Delegation of DH (2.1) Assign Delegate (2.1) (2.2) Email (2.3) (2.2) If your delegate is not an existing user in eGMS, please create an user. Create Delegate Delegation List (2.4) Delegate Name Email Assigned Time Delegate Period Actions	 Step 2: To view/update the delegation of DH of a user. (For users authorised with DH Role only) 2.1 Click 'Delegation of DH'. 2.2 Fill in Assigned user's email and delegate period. 2.3 Click 'Assign Delegate'.
Delegation List Delegation List Delegate Name Email Assigned Time Delegate Period Actions Confirm Edit Image: Confirm Edit Image: Confirm Save Export to CSV Image: Confirm Edit Image: Confirm Save Export to CSV Image: Confirm Image: Confirm <th> 2.4 The delegation details will be shown at 'Delegation List'. (DH can assign more than one delegate.) 2.5 Click 'Save' to save the 'Delegation List'. 2.6 Click 'Yes' for confirmation. 2.7 The update is recorded at 'Delegation History'. An acknowledgment message for 'Delegation list has been updated successfully' will be </th>	 2.4 The delegation details will be shown at 'Delegation List'. (DH can assign more than one delegate.) 2.5 Click 'Save' to save the 'Delegation List'. 2.6 Click 'Yes' for confirmation. 2.7 The update is recorded at 'Delegation History'. An acknowledgment message for 'Delegation list has been updated successfully' will be
	shown at the top. (Remark: If the delegate does not exist in eGMS, please go to Step 5 to create delegate (DH).)

12. Administrative Function – Delegation of DH



Maintain Personal Profile			Step 5:
User Details Delegation of PA Delegation of DH			To create delegate (DH).
Assign Delegate	(5.1)		5.1 Select 'Delegation of
Start Date			ДΠ.
End Date			
If your delegate is not an existing user in eGMS, please create an user.			5.2Click 'Create Delegate'.
Create Delegate D (3.2)			2 000 8000 1
Create Delegate			
Authorised Role(s)	Please Select	_ [5.3 Complete & Save
Email		Check email availability	delegate's contact
Title	Please Select		information:
Last Name			
First Name			
Please enter the English name before the English translation of your Chinese name (e.g. David Tai-man).			
Current Post			(i) Fill in all compulsory
Unit / Department		(5.3-i)	User's details.
AI	The University A		
Room / Floor			
Street			
	Please enter number and name of street.		
City / Area			
Country / Region Contact No	China - Hong Kong	_	
Fax			
Gender*			
Save Back (5.3-ii)			(ii) Click 'Save' to create user.
Confirm			
A Are you sure to create this user?			(iii) Click 'Yes' for confirmation.
Yes No (5.3-iii)			(Remark: Email
			notification with login
			email and password will
			be sent to the delegate.)
User with email [I is created		An acknowledgment message for 'User is	
			created' will be shown at
			the top.
			-