

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 egmsenquiry@healthbureau.gov.hk

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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*

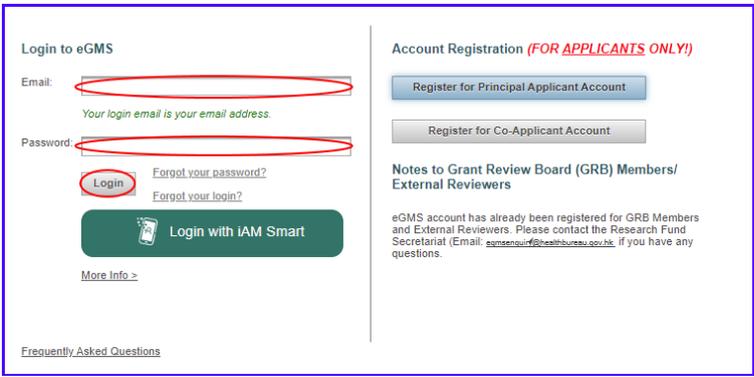
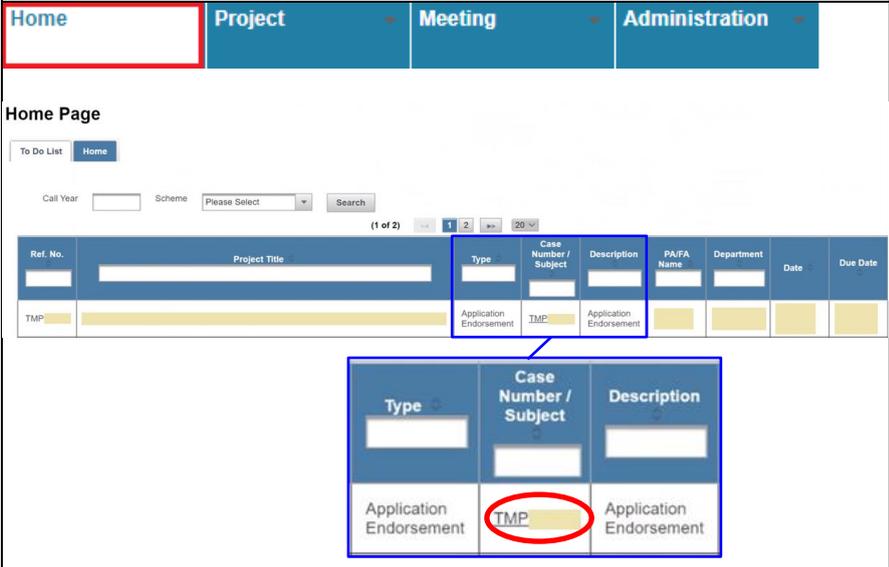
1. Endorsement of Application

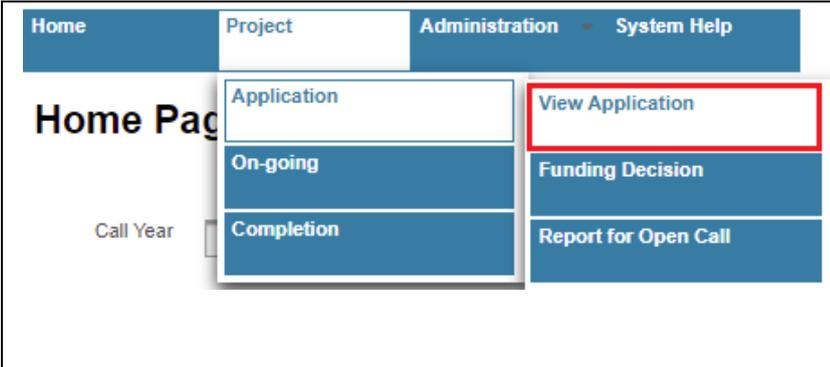
Preview and Checking : Step 4

Push Back: Step 6

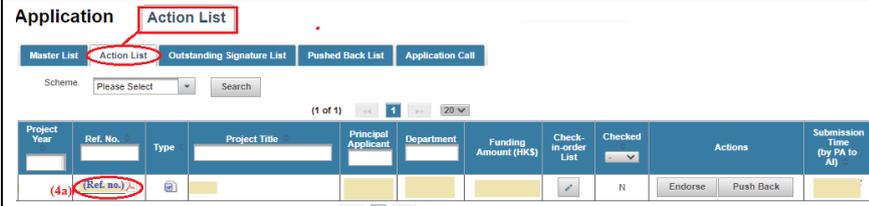
Endorsement: Step 7

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

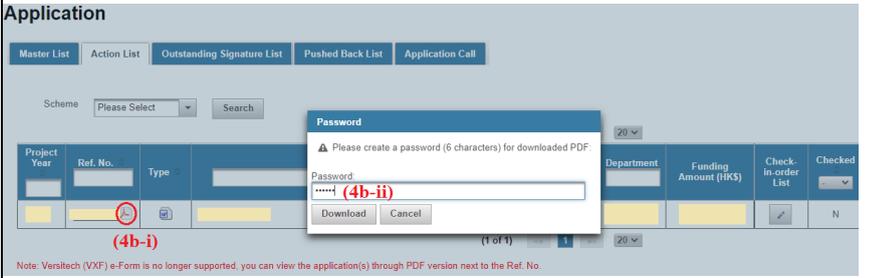
<p>Subject: eGMS : Submission of Grant Application(s) for the 20XX Open Call for Investigator-initiated Projects</p> <p>Dear (Title) (Last Name) (The contact person of RO/ FO/ DH as recorded in eGMS),</p> <p>This email is sent to inform you that grant application(s) has been submitted by Principal Applicant(s)/Fellowship Applicant(s) of your Administering Institution in the electronic Grant Management System (eGMS) of the Research Fund Secretariat, Health Bureau, HKSAR.</p> <p>Please login to the eGMS (eGMS URL) to access the application(s) for necessary action(s).</p> <p>Thank you.</p>	<p>Step 1:</p> <p>Click on the eGMS URL to login to the eGMS and review the application.</p>
	<p>Step 2:</p> <ul style="list-style-type: none"> - Enter login email. - Enter password and click 'Login'.
	<p>Method A</p> <p>Step 3:</p> <p>Go to Home Page > To Do List</p> <ul style="list-style-type: none"> - Click the 'Case Number / Subject' of the project under type: 'Application Endorsement' <p><u>Go to Step 4</u></p>



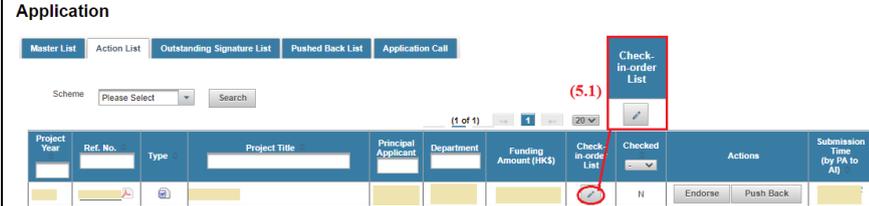
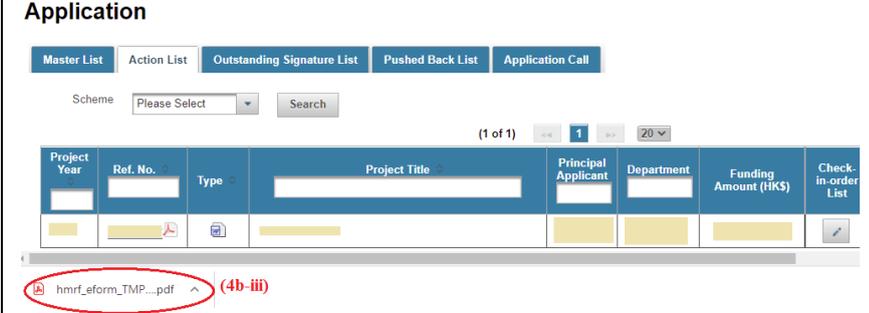
Or Method B
Step 3:
 Go to Project >
 Application >
 View Application
[Go to Step 4](#)



Step 4a:
 To review the Application Form, select 'Action List'.
Step 4a: via internet
 - Click on the 'Ref. no.' to check the web-base application form.



OR
Step 4b: (via pdf)
 (i) Click on the 'PDF icon'.
 (ii) Set a 6-character password to protect the downloaded Application form.
 (iii) Open the downloaded Application form.



Step 5:
 To confirm Application form checked. (Optional)



5.1 Click the box under 'Check-in-order List'.
 5.2 Click the checkbox of the 'Checked Date'.
 5.3 Fill in the details in 'Remarks' (if any).
 5.4 Click 'Confirm Checked' to save the checked entry.

Check-in-order List

Saved Successfully.

Ref. No. []
 Project Title []
 Principal Applicant []
 Department []
 User Name []
 Checked Date []
 Remarks []

Confirm Checked Back Push Back

(1 of 1) 1 20

Ref. No.	Project Title	Principal Applicant	Department	Funding Amount (HK\$)	User Name	Authorised Role(s)	Checked Date	Remarks
[]	[]	[]	[]	[]	[]	[]	[]	[]

Application

Master List Action List Outstanding Signature List Pushed Back List Application Call

Scheme Please Select Search

(1 of 1) 1 20

Project Year	Ref. No.	Type	Project Title	Principal Applicant	Department	Funding Amount (HK\$)	Check-in-order List	Checked	Actions	Submission Time (by PA to AI)
[]	[]	[]	[]	[]	[]	[]	[]	Y	Endorse Push Back	[]

Application (6.1) Action List

Master List Action List Outstanding Signature List Pushed Back List Application Call

Scheme Please Select Search

(1 of 1) 1 20

Project Year	Ref. No.	Type	Project Title	Principal Applicant	Department	Funding Amount (HK\$)	Check-in-order List	Checked	Actions	Submission Time (by PA to AI)
[]	[]	[]	[]	[]	[]	[]	[]	Y	Endorse Push Back	[]

Confirmation

Are you sure to Push Back the application with Ref. No. []?

Reason(s): []

Confirm Cancel

Application [] is pushed back successfully

Scheme Please Select Search

(1 of 1) 1 20

Project Year	Ref. No.	Type	Project Title	Principal Applicant	Department	Funding Amount (HK\$)	Check-in-order List	Checked	Actions	Submission Time (by PA to AI)
[]	[]	[]	[]	[]	[]	[]	[]	[]	Endorse Push Back	[]

No records found.

Application (6.4) Pushed Back List

Master List Action List Outstanding Signature List Pushed Back List Application Call

Scheme Please Select Search

(1 of 1) 1 20

Project Year	Ref. No.	Type	Project Title	Principal Applicant	Department	Funding Amount (HK\$)	Check-in-order List	Checked	Actions	Submission Time (by PA to AI)
[]	[]	[]	[]	[]	[]	[]	[]	[]	(Date) Details	[]

Details

Pushed back by []

Reason(s): []

Close

An acknowledgment message for 'Saved Successfully' will be shown at the top.

Go to the 'Action List', 'Y' will be shown under 'Checked'.

Step 6.
To Push back application. (On a need basis)

6.1 Select 'Action List'.

6.2 Click 'Push back'.

6.3 Fill in the 'Reason(s)' and click 'Confirm'.

An acknowledgment message for 'pushed back successfully' will be shown at the top.

(Remark: Email notification will be sent to PA after his/her application has been pushed back by AI user(s).)

6.4 Pushed back applications will appear on the 'Pushed Back List'.

6.5 Click on 'Details' to view the reason(s) of push back.

Application (7.1) **Action List**

Master List **Action List** Outstanding Signature List Pushed Back List Application Call

Scheme Please Select Search (1 of 1) 1 20

Project Year	Ref. No.	Type	Project Title	Principal Applicant	Department	Funding Amount (HK\$)	Check in-order List	Checked	Actions	Submission Time (by PA to AI)
								Y	Endorse Push Back	
								N	Endorse Push Back	

Confirm

⚠ Are you sure to endorse the application with Ref. No. (Ref. no.) ?

(7.3) **Yes** No

Application [] is endorsed successfully

Step 7.
To Endorse application.

7.1 Select 'Action List'.

7.2 Click 'Endorse' for endorsement.

7.3 Click 'Yes' for confirmation.

An acknowledgment message for 'endorsed successfully' will be shown at the top.

(Note: EO(DH), EO(FO) and EO(RO) cannot endorse the application.)

8a (for DH/ FO/ RO)

Application Master List (8a)

Master List **Action List** Outstanding Signature List Pushed Back List Application Call

Scheme Please Select Search (1 of 1) 1 20

Project Year	Ref. No.	Type	Project Title	Principal Applicant	Department	Funding Amount (HK\$)	Status	Co-Applicant(s) Signed	Head of Department Signed	Finance Officer Signed	Research Officer Signed	Submission Time (by PA to AI)

(N/A / Y / N)

8b (for RO only)

Application (8b) Outstanding Signature List

Master List Action List **Outstanding Signature List** Pushed Back List Application Call

Scheme Please Select Search (1 of 1) 1 20

Project Year	Ref. No.	Type	Project Title	Principal Applicant	Department	Funding Amount (HK\$)	CO-Applicant(s) Signed	Head of Department Signed	Finance Officer Signed	Check-in-order List	Actions	Submission Time (by PA to AI)
							N/A	Y	N		Endorse Push Back	

(Signing status) (Check-in-order) (Endorse/Push Back)

Step 8.
To view the signing status of CoA(s) and AI users.(Optional)

8a (for DH/ FO/ RO)
Click 'Master List' to view the signing status.

8b (for RO only)
Click 'Outstanding List' (for viewing of signing status, completing 'Check-in-order' List and 'Endorse'/'Push Back' the applications).

2. Communicate with RFS through message icon

Home Project Administration System Help

Home Page

Call Year Scheme HMRP Search

(1 of 12) 1 2 3 4 5 6 7 8 9 10 20

Ref. No.	Project Title	Principal Applicant	Department	Funding Amount (HK\$)	Status
					Closed
					In progress

Home Project Administration System Help

Application View Application

Application Master List

Master List Action List Outstanding Signature List Pushed Back List Application Call

Scheme Please Select Search

(1 of 2) 1 2 20

Project Year	Ref. No.	Type	Project Title	Principal Applicant	Department	Funding Amount (HK\$)	Status	Co-Applicant(s) Signed	Head of Department Signed	Finance Officer Signed	Research Officer Signed	Submission Time (By PA to AI)
							Submitted to Research Fund Secretariat	Y	Y	Y	Y	

Step 1:
Go to Home Page

Or

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.)

Application

Master List Application Call

Scheme HMRP (Fellowship) Search

(1 of 1) 1 20

Project Year	Ref. No.	Actions	Type	Project Title	Department	Funding Amount (HK\$)	Status	Co-Applicant(s) Signed	Head of Department Signed	Finance Officer Signed	Research Officer Signed	Last Edited By	Submission Time (By PA to AI)
							Submitted to Research Fund Secretariat						

Message Summary

Ref. No.

(1 of 1) 1 20

Date of Creation	Subject Type	Subject	Receiver	CC	Sender	Read?	Detail
No record							

(2) (1 of 1) 1 20

Create Message Close Create Message Close

Step 2:

(1) Click on the 'Message icon' to pop up 'Message summary'.

(2) Click 'Create Message' to send message to RFS or 'Close' to close the pop-up browser.

Message

To: Assigned Secretariat Executive's email
CC: Assigned Scientific Reviewer's email (3)
Type: HMRF
Subject:
Message:
(4)

Please Select
Please Select
Progress Report
Interim Report
Final Report
Financial Statement
Audited Accounts
Request for change of principal applicant
Request for change of co-applicant
Request for change of administering institution

Attachment (if any, in PDF format only and all files together should not exceed 2MB):

(1 of 1) << >> 20

Filename	Remove
No record	

(1 of 1) << >> 20

(5) Attach

Attachment

Please attach the supporting documents

Browse
Browse
Browse
Browse
Attach

Filename	Remove
...pdf	

Preview Cancel (6)

Preview Message

To: Assigned SE's email
CC: Assigned SR's email
Type: HMRF
Subject:
Message:
...

Attachment (if any, in PDF format only and all files together should not exceed 2MB):

(1 of 1) << 1 >> 20

Filename	Remove
...pdf	

(1 of 1) << 1 >> 20

Attach

(7) Back Send Cancel

Back Send Cancel

- (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) << 1 >> 20

Date of Creation	Subject Type	Subject	Receiver	CC	Sender	Read?	Detail
						N	View Detail

Message Summary

Ref. No.

(1 of 1) << 1 >> 20

Date of Creation	Subject Type	Subject	Receiver	CC	Sender	Read?	Detail
						Y	View Detail

Detail of Message

Type: HMRF-

Subject:

Message:

(1 of 1) << 1 >> 20

Filename

No record

(1 of 1) << 1 >> 20

[Close](#)

(8)

The message will be recorded at message summary after sent to RFS.

(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).

eGMS
electronic Grant Management System

Home Project Administration System Help

Home Page

Call Year Scheme HMRF Search

83 (3) User ID: Logout

To review the unread message, click on the **‘Message icon’** at ‘Home Page’.

Inbox

Period From To Ref. No.

Subject Type Please Select Subject

Read N

[Submit](#)

(1 of 1) << 1 >> 20

Ref. No.	Date of Creation	Subject Type	Subject	Receiver	CC	Sender	Read?	Detail
							N	View Detail
							N	View Detail
							N	View Detail

Detail of Message

Type:

Subject:

Message:

(1 of 1) << 1 >> 20

Filename

No record

(1 of 1) << 1 >> 20

[Close](#)

[Export to CSV](#)

Click **‘View Details’** to review ‘Detail of Message’.

Note:

(Remark: Entry of the viewed message will be removed from ‘Inbox’ automatically after closed the ‘Detail of Message’.)

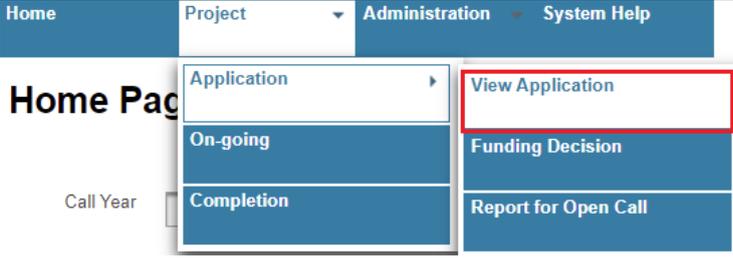
3. View Funding Decision

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

	<p>Step 1: Go to Project > Application > Funding Decision</p>																																																																								
	<p>Step 2: In the Funding Decision page, click 'Master List' to view all applications. Funding decision is shown under the 'Status'.</p>																																																																								
<p>Funding Decision</p> <p>Master List Fundable Application</p> <table border="1"> <thead> <tr> <th>Ref. No.</th> <th>Project Title</th> <th>Principal Applicant</th> <th>Department</th> <th>Funding Amount (HK\$)</th> <th>Status</th> <th>Revised Application Due Date (Submission Date)</th> <th>Ethics Approval Due Date (Submission Date)</th> <th>Status for Agreement</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td>Recommended for support</td> <td></td> <td></td> <td></td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td>Recommended for support</td> <td></td> <td></td> <td></td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td>Recommended for support</td> <td></td> <td></td> <td></td> </tr> </tbody> </table> <p>Funding Decision</p> <p>Master List Fundable Application</p> <table border="1"> <thead> <tr> <th>Ref. No.</th> <th>Project Title</th> <th>Principal Applicant</th> <th>Department</th> <th>Funding Amount (HK\$)</th> <th>Status</th> <th>Revised Application Due Date (Submission Date)</th> <th>Ethics Approval Due Date (Submission Date)</th> <th>Status for Agreement</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td>Recommended for support</td> <td></td> <td></td> <td></td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td>Recommended for support</td> <td></td> <td></td> <td></td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td>Recommended for support</td> <td></td> <td></td> <td></td> </tr> </tbody> </table> <p>(3.1) (3.2)</p>	Ref. No.	Project Title	Principal Applicant	Department	Funding Amount (HK\$)	Status	Revised Application Due Date (Submission Date)	Ethics Approval Due Date (Submission Date)	Status for Agreement						Recommended for support									Recommended for support									Recommended for support				Ref. No.	Project Title	Principal Applicant	Department	Funding Amount (HK\$)	Status	Revised Application Due Date (Submission Date)	Ethics Approval Due Date (Submission Date)	Status for Agreement						Recommended for support									Recommended for support									Recommended for support				<p>Step 3: In the Funding Decision page, click 'Fundable Application' to view fundable applications.</p> <p><i>3.1 (Optional)</i> Click on the 'Report icon' to view the GRB/AP/RFAP Report.</p> <p><i>3.2 (Optional)</i> Check the columns of Funding Amount, and due dates.</p>
Ref. No.	Project Title	Principal Applicant	Department	Funding Amount (HK\$)	Status	Revised Application Due Date (Submission Date)	Ethics Approval Due Date (Submission Date)	Status for Agreement																																																																	
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4. Entering Project Commencement Date and End Date of Funded Projects

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

 <p>Home Project Meeting Administration</p> <p>To Do List Home</p> <p>Call Year [] Scheme [Please Select] Search</p> <p>(1 of 1) 1 20</p> <table border="1"> <thead> <tr> <th>Ref. No.</th> <th>Project Title</th> <th>Type</th> <th>Case Number / Subject</th> <th>Description</th> <th>PA/FA Name</th> <th>Department</th> <th>Date</th> <th>Due Date</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td>Outstanding Agreement</td> <td>(Case Number)</td> <td>Update Project Period</td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table> <p>Application</p> <p>Master List Action List Outstanding Signature List Outstanding Agreement List Pushed Back List Application Call</p> <p>Note: Only the selected project is shown for your action.</p> <p>Scheme [Please Select] Search</p> <p>(1 of 1) 1 20</p> <table border="1"> <thead> <tr> <th>Project Year</th> <th>Ref. No.</th> <th>Type</th> <th>Project Title</th> <th>Principal Applicant</th> <th>Department</th> <th>Funding Amount (HK\$)</th> <th>Status for Agreement</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>Pending Signature 08 Jan 2025</td> <td>Update Project Period</td> </tr> </tbody> </table>	Ref. No.	Project Title	Type	Case Number / Subject	Description	PA/FA Name	Department	Date	Due Date			Outstanding Agreement	(Case Number)	Update Project Period					Project Year	Ref. No.	Type	Project Title	Principal Applicant	Department	Funding Amount (HK\$)	Status for Agreement	Action								Pending Signature 08 Jan 2025	Update Project Period	<p><u>Method A</u></p> <p>Step 1: Go to Home Page > To Do List</p> <ul style="list-style-type: none"> Click the 'Case Number / Subject' of the project under type: 'Outstanding Agreement' <p>The selected project will be shown for your action.</p> <p>Click 'Update Project Period'.</p> <p>Go to Step 3</p>
Ref. No.	Project Title	Type	Case Number / Subject	Description	PA/FA Name	Department	Date	Due Date																													
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 <p>Home Project Administration System Help</p> <p>Home Page</p> <ul style="list-style-type: none"> Application <ul style="list-style-type: none"> View Application Funding Decision Report for Open Call On-going Completion <p>Call Year []</p>	<p><u>Method B</u></p> <p>Step 1: Go to Project > Application > View Application</p>																																				
<p>Application</p> <p>Master List Action List Outstanding Signature List Outstanding Agreement List Pushed Back List Application Call</p> <p>Scheme [Please Select] Search</p> <p>(1 of 1) 1 20</p> <table border="1"> <thead> <tr> <th>Project Year</th> <th>Ref. No.</th> <th>Type</th> <th>Project Title</th> <th>Principal Applicant</th> <th>Department</th> <th>Funding Amount (HK\$)</th> <th>Status for Agreement</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>Pending Signature 08 Jan 2025</td> <td>Update Project Period</td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>Pending Signature 08 Jan 2025</td> <td>Update Project Period</td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>Pending Signature 08 Jan 2025</td> <td>Update Project Period</td> </tr> </tbody> </table> <p>(1 of 1) 1 20</p>	Project Year	Ref. No.	Type	Project Title	Principal Applicant	Department	Funding Amount (HK\$)	Status for Agreement	Action								Pending Signature 08 Jan 2025	Update Project Period								Pending Signature 08 Jan 2025	Update Project Period								Pending Signature 08 Jan 2025	Update Project Period	<p>Step 2: Go to Outstanding Agreement List to view all applications which are pending your action.</p> <p>Click 'Update Project Period'.</p> <p>Go to Step 3</p>
Project Year	Ref. No.	Type	Project Title	Principal Applicant	Department	Funding Amount (HK\$)	Status for Agreement	Action																													
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(Example for Funded Investigator-initiated Projects)

Note 1: The Project Start Date should be within 6 months from the Date of Approval Letter.

Note 2: Make sure the Calculated Project Duration is the same as that approved in the Application.

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)

Note 1: The Project Start Date should be within 6 months from the Date of Approval Letter.

Note 2: Make sure the Calculated Project Duration/ Fellowship Period/ Training Period is the same as that approved in the Application.

(For Research Fellowship Awards)

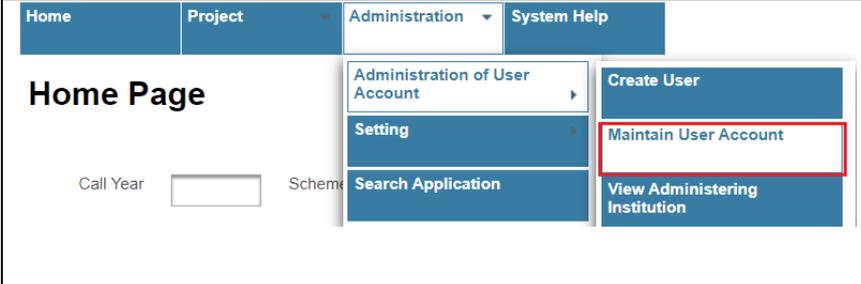
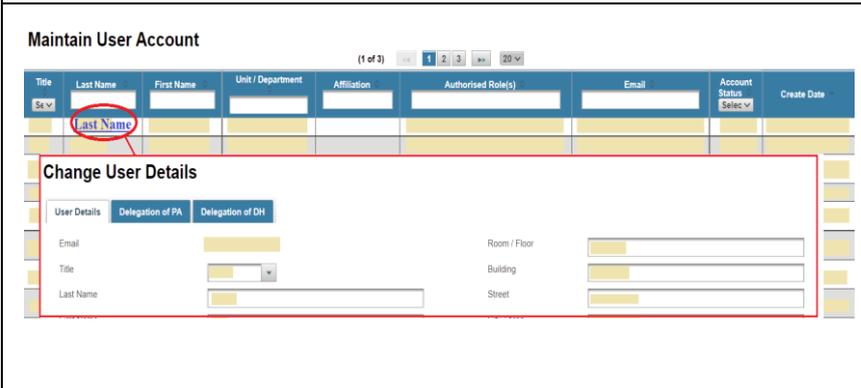
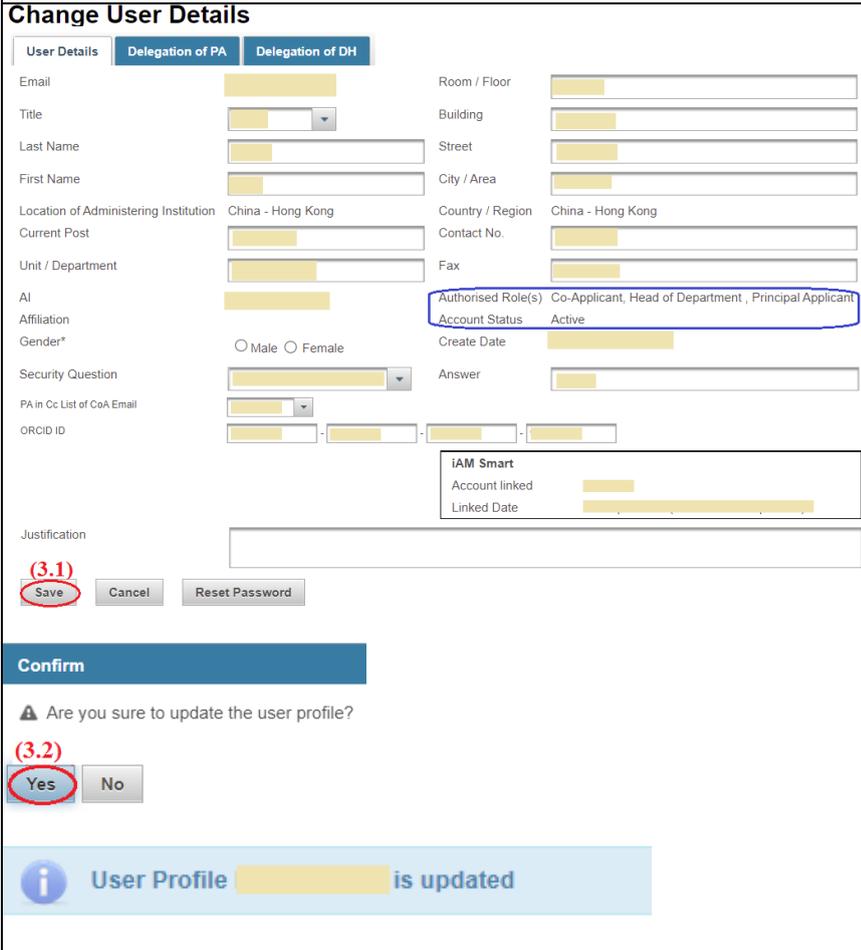
Enter the **Project Start Date** (= Commencement Date in the signed agreement), **Project End Date**, **Fellowship Start Date**, **Fellowship End Date**, **Training Start Date** and **Training End Date**.

5. Administrative Function – Create Account(s)

	<p>Step 1: Go to Administration > Administration of User Account > Create User</p>
<p>2a: (RO only) Create User Account</p>	<p>Step 2a: (RO only) (i) Select 'Authorised Role(s)'. (ii) Fill in all compulsory User's details. (iii) Click 'Save' to create user. (iv) Click 'Yes' for confirmation.</p> <p>Or Step 2b: (DH/FO) (i) Fill in all compulsory User's details. (ii) Click 'Save' to create user. (iii) Click 'Yes' for confirmation.</p>
<p>2b: (DH/FO) Create Executive Officer Account</p>	<p>(i) Fill in all compulsory User's details. (ii) Click 'Save' to create user. (iii) Click 'Yes' for confirmation.</p>
<p>Confirm</p>	<p>(Remark: Email notification with login email and password will be sent to the EO(DH)/EO(FO). Each AI could create more than one EO account.)</p> <p>An acknowledgment message for the creation of user's account will be shown at the top.</p>

6. Administrative Function – Maintain User’s Profile

(The following functions are granted to RO only)

	<p>Step 1:</p> <p>Go to Administration > Administration of User Account> Maintain User Account</p>
	<p>Step 2:</p> <p>RO can preview a summary of accounts of his/her AI.</p> <p>- Click ‘Last name’ to view / edit account details for a particular account.</p>
	<p>Step 3:</p> <p>Note: The update of ‘Authorised Role(s)’ or ‘Account Status’ of a user must be completed by RFS. Please e-mail to: egmsenquiry@healthbureau.gov.hk.</p> <p>3.1 Click ‘Save’ to update user details.</p> <p>3.2 Click ‘Yes’ for confirmation.</p> <p>An acknowledgment message for ‘User Profile is updated’ will be shown at the top.</p>

Change User Details

(4.1)

User Details **Delegation of PA** Delegation of DH

Assign Delegate

Email

Start Date

End Date

Assign Delegate (4.3)

If your delegate is not an existing user in eGMS, please create a user.

Create Delegate

Delegation List (4.4)

Delegate Name	Email	Assigned Time	Delegate Period	Actions
				Edit <input type="button" value="Edit"/> <input type="button" value="Delete"/>

If your delegate is not an existing user in eGMS, please create a user.

Create Delegate

Confirm

Are you sure to update delegation list?

Yes No (4.6)

Delegation List

Delegate Name	Email	Assigned Time

Save Export to CSV (4.5)

Delegation History (1 of 3)

Action Time	Action Performed	Delegate Name	Email	Delegate Period

(4.7)

Delegation list has been updated successfully.

Delegation List

Delegate Name	Email	Assigned Time	Delegate Period	Actions
			(5.4)	Edit <input type="button" value="Edit"/> <input type="button" value="Delete"/>

Save Export to CSV (5.5)

Edit (5.1)

Start Date

End Date

Save Clk

(5.3)

Su	Mo	Tu	We	Th	Fr	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28			

Confirm

Are you sure to update delegation list?

Yes No (5.6)

Delegation list has been updated successfully.

Step 4:

To view/update the Delegation of PA.

(For users authorised with PA Role only)

4.1 Select 'Delegation of PA'.

4.2 Fill in Assigned user's email and delegate period.

4.3 Click 'Assign Delegate'.

4.4 New record will show at 'Delegation List'.

4.5 Click 'Save' to save the 'Delegation List'.

4.6 Click 'Yes' for confirmation.

4.7 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 7 to create delegate (PA).)

Step 5:

To edit delegate of PA/DH.

5.1 Click 'Edit' at 'Delegation List'.

5.2 Select the 'Start Date' and 'End Date'.

5.3 Click 'Save'.

5.4 The 'Delegate Period' is updated.

5.5 Click 'Save'.

5.6 Click 'Yes' for confirmation.

An acknowledgment message for the update will be shown at the top.

Delegation List

Delegate Name	Email	Assigned Time	Delegate Period	Actions
				Edit 

(6.2) (6.1)

Confirm

⚠ Are you sure to update delegation list?

(6.3)

 Delegation list has been updated successfully.

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.

An acknowledgment message for the update will be shown at the top.

Change User Details (7.1)

Assign Delegate

Email

Start Date

End Date

If your delegate is not an existing user in eGMS, please create an user.

(7.2)

Create Delegate

Authorised Role(s)

Email

Please provide institutional email account

Title

Last Name

First Name

Please enter the English name before the English translation of your Chinese name (e.g. David Tai-man).

Location of Administering Institution

Current Post

Unit / Department

AI

Room / Floor

Building

Street

Please enter number and name of street.

City / Area

Country / Region

Contact No.

Fax

Gender* Male Female

Information collected will be used for statistical purposes only.

(7.3-ii)

Confirm

⚠ Are you sure to create this user?

(7.3-iii)

 User with email [] is created

Step 7:
To create delegate (PA).

7.1 Select 'Delegation of PA'.

7.2 Click 'Create Delegate'.

7.3 Complete & save delegate's contact information:

(i) Fill in all compulsory User's details.

(ii) Click 'Save' to create user.

(iii) Click 'Yes' for conformation.

(Remark: Email notification with login email and password will be sent to the delegate.)

An acknowledgment message for 'User is created' will be shown at the top.

Change User Details (8.1)

User Details Delegation of PA **Delegation of DH (8.1)**

Assign Delegate

Email (8.2)

Start Date

End Date

Assign Delegate (8.3)

If your delegate is not an existing user in eGMS, please create an user.

Delegation List (8.4)

Delegate Name	Email	Assigned Time	Delegate Period	Actions
				<input type="button" value="Edit"/> <input type="button" value="Delete"/>

Delegation List (8.5)

Delegate Name	Email	Assigned Time	Delegate Period	Actions

Confirm (8.6)

Are you sure to update delegation list?

Delegation History (8.7)

(1 of 1) << 1 >> 20

Action Time	Action Performed	Delegate Name	Email	Delegate Period

Delegation list has been updated successfully.

Step 8:

To view/update the delegation of DH of a user. (For users authorised with DH Role only)

- 8.1 Select 'Delegation of DH'.
- 8.2 Fill in Assigned user's email and delegate period.
- 8.3 Click 'Assign Delegate'.
- 8.4 The delegation details will be shown at 'Delegation List'.
- 8.5 Click 'Save' to save the 'Delegation List'.
- 8.6 Click 'Yes' for confirmation.
- 8.7 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 refer to Step 9 to create delegate (DH).)

Change User Details (9.1)

User Details | **Delegation of PA** | **Delegation of DH**

Assign Delegate

Email

Start Date

End Date

If your delegate is not an existing user in eGMS, please create a user.

(9.2)

Create Delegate

Authorised Role(s)

Email

Please provide institutional email account

Title

Last Name

First Name

Location of Administering Institution

Current Post

Unit / Department

AI

Room / Floor

Building

Street

City / Area

Country / Region

Contact No.

Fax

Gender* Male Female

(9.3-ii)

Information collected will be used for statistical purposes only.

(9.3-i)

Confirm

⚠ Are you sure to create this user?

(9.3-iii)

i User with email [] is created

Step 9:

To create delegate (DH).

9.1 Select 'Delegation of DH'.

9.2 Click 'Create Delegate'.

9.3 Complete & save delegate's contact information:

- (i) Fill in all compulsory User's details.
- (ii) Click 'Save' to create user.
- (iii) Click 'Yes' for confirmation.

(Remark: Email notification with login email and password will be sent to the delegate.)

An acknowledgment message for 'User is created' will be shown at the top.

Delegation List

Delegate Name	Email	Assigned Time	Delegate Period	Actions
			(10.4)	<input type="button" value="Edit"/> <input type="button" value="Trash"/>

(10.5)

Edit

Start Date: (DD MM YYYY) (10.2)

End Date: (DD MM YYYY)

(10.3)

				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28			

Confirm

⚠ Are you sure to update delegation list?

(10.6)

i Delegation list has been updated successfully.

Step 10:

To edit delegate of DH.

- 10.1 Click 'Edit'.
- 10.2 Select the 'start date' and 'end date'.
- 10.3 Click 'Save'.
- 10.4 The 'Delegate Period' is updated.
- 10.5 Click 'Save'.
- 10.6 Click 'Yes' for conformation.

An acknowledgment message for 'Delegation list has been updated successfully' will be shown at the top.

Delegation List

Delegate Name	Email	Assigned Time	Delegate Period	Actions
				<input type="button" value="Edit"/> <input type="button" value="Trash"/>

(11.2)

Confirm

⚠ Are you sure to update delegation list?

(11.3)

i Delegation list has been updated successfully.

Step 11:

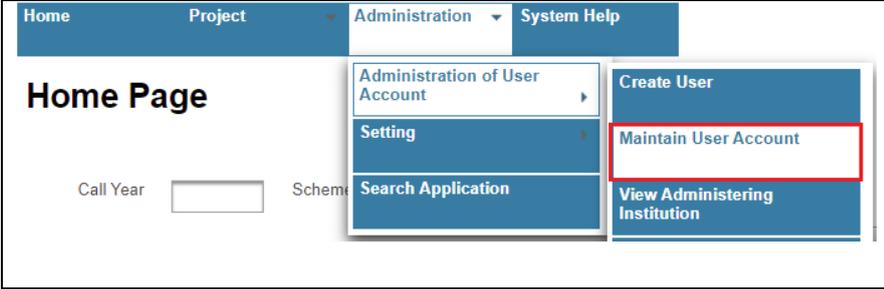
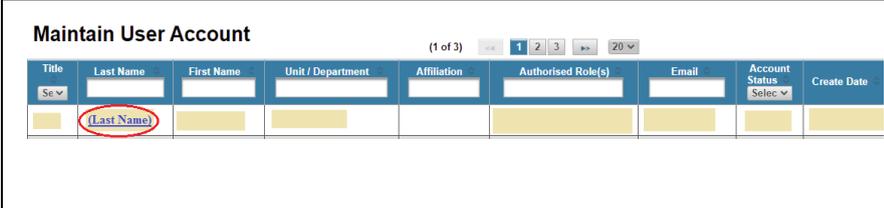
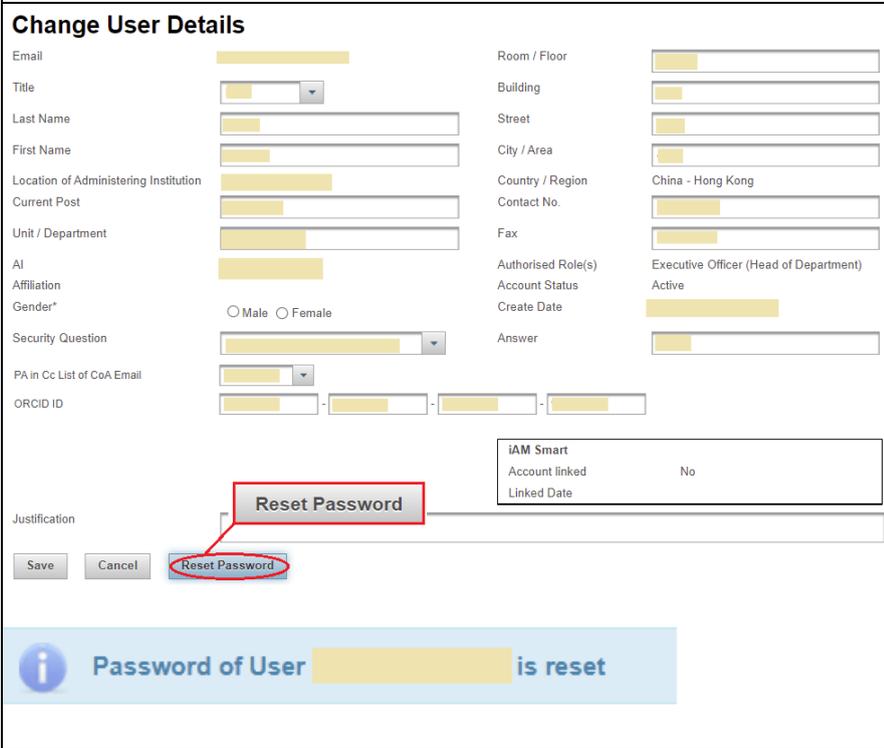
To delete delegate.

- 11.1 Click the 'Trash' icon. (*Record will be removed immediately on the screen after clicking 'Trash' icon.)
- 11.2 Click 'Save'.
- 11.3 Click 'Yes' for conformation.

An acknowledgment message for 'Delegation list has been updated successfully' will be shown at the top.

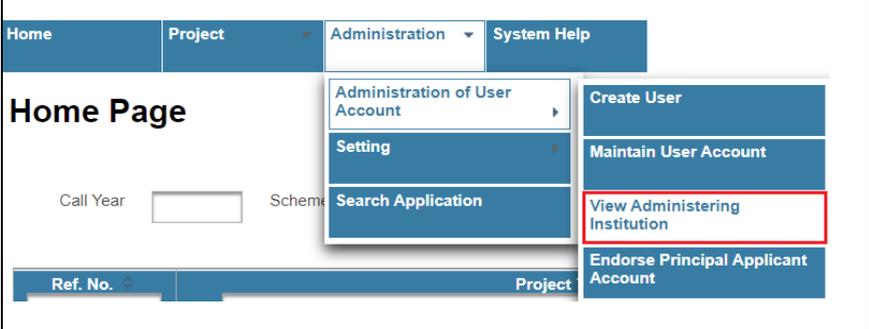
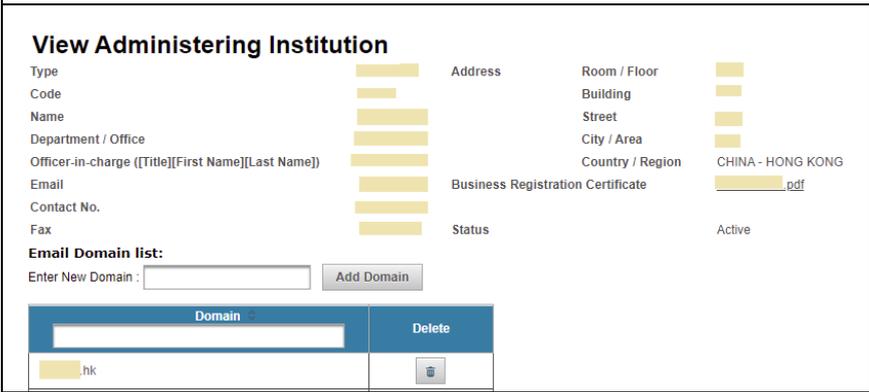
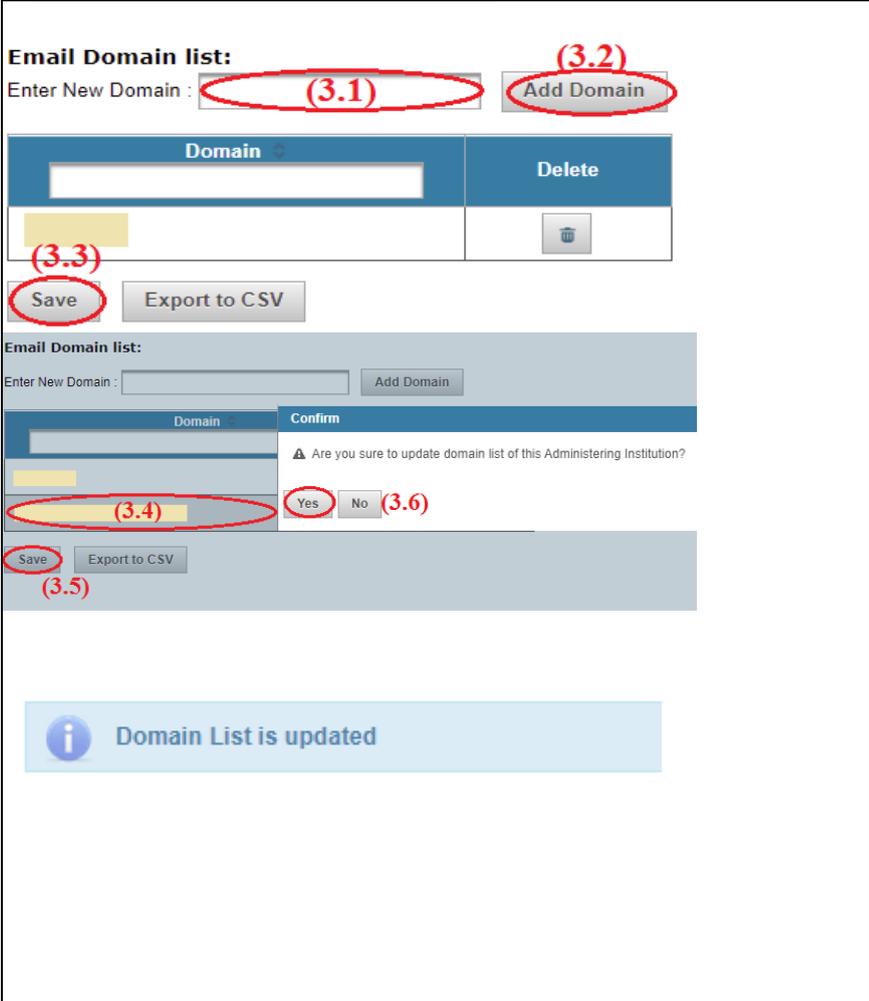
7. Administrative Function – Reset Password

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

	<p>Step 1: Go to Administration > Administration of User Account > Maintain User Account</p>
	<p>Step 2: Click 'Last name' to view/ edit account details.</p>
	<p>Step 3: Click 'Reset Password' for the user.</p> <p>An acknowledgment message for 'Password of User is reset' will be shown at the top.</p>
<p>Sample email for password reset: Subject: eGMS - Password Reset: (User's Name) Please find the temporary password for accessing the electronic Grant Management System (eGMS): Password: (Insert temporary password) Login page: (eGMS URL) Please be reminded to set up a new password after logging in to the eGMS (eGMS URL). Thank you.</p>	<p>Step 4: Email notification for the new login password will be sent to user. Please click on the eGMS URL to go to the eGMS login page.</p>

8. Administrative Function – Maintain AI Profile - (email domains)

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

	<p>Step 1: Go to Administration > Administration of User Account > View Administering Institution</p>
	<p>Step 2: RO can preview information of his/her own AI.</p>
	<p>Step 3: (Optional) To Add email domains.</p> <p>3.1 Enter the new domain.</p> <p>3.2 Click ‘Add Domain’.</p> <p>3.3 Click ‘Save’.</p> <p>3.4 The new domain is shown at the ‘Email Domain list’.</p> <p>3.5 Click ‘Save’.</p> <p>3.6 Click ‘Yes’ for confirmation.</p> <p>An acknowledgment message for ‘Domain List is updated’ will be shown at the top.</p>

Email Domain list:

Enter New Domain :

Domain	Delete
<input type="text"/>	

(4.2) **(4.1)**

Confirm

 Are you sure to update domain list of this Administering Institution?

(4.3)

 Domain List is updated

Step 4:
To delete email domain.

4.1 Click the 'Trash' icon. (*Record will be removed immediately on the screen after clicking 'Trash' icon.)

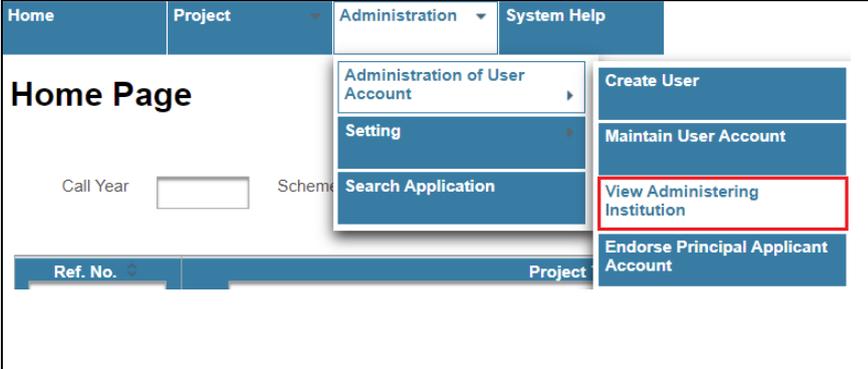
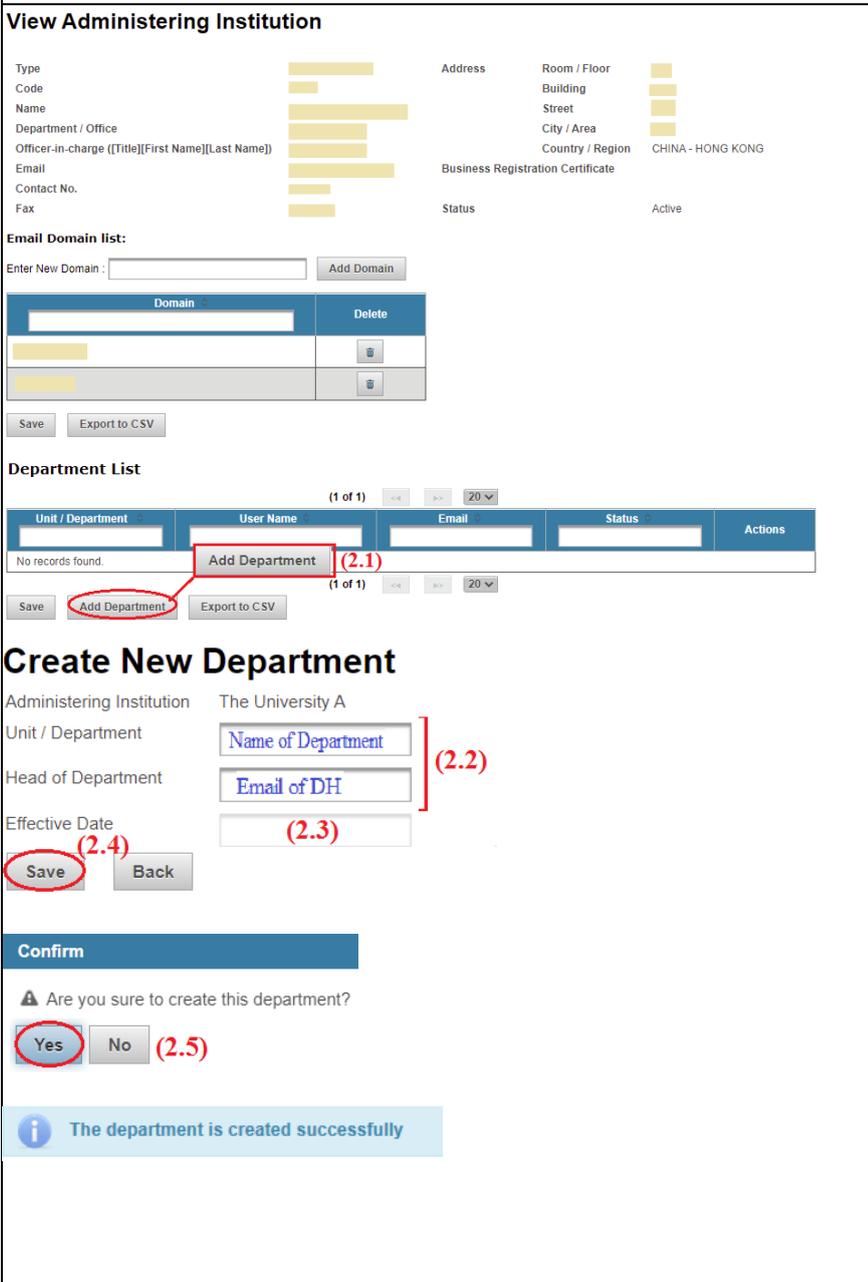
4.2 Click 'Save'.

4.3 Click 'Yes' for confirmation.

An acknowledgment message for 'Domain List is updated' will be shown at the top.

9. Administrative Function – Maintain AI Profile - (Department List)

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

	<p>Step 1: To maintain the list of departments and department heads. Go to Administration > Administration of User Account > View Administering Institution</p>
	<p>Step 2: To add department.</p> <p>2.1 Click 'Add Department' under 'Department List'.</p> <p>2.2 Fill in the name of department, email of DH, and effective date (if necessary).</p> <p>2.3 If 'Effective Date' is not entered, the role of 'Head of Department' will be assigned immediately.</p> <p>2.4 Click 'Save'.</p> <p>2.5 Click 'Yes' for confirmation.</p> <p>An acknowledgment message for 'The department is created successfully' will be shown at the top.</p>

Department List (1 of 1) << 1 >> 20

Unit / Department	User Name	Email	Status	Actions
				<input type="button" value="Edit"/> <input type="button" value="Trash"/>

(1 of 1) << 1 >> 20

Edit Department

Administering Institution

Unit / Department

Status

Head of Department

New Head of Department (3.2)

Email

Effective Date

Change current Head of Department immediately

(3.3)

Confirm

⚠ Are you sure to save this department?

(3.4)

i The department is updated successfully

Step 3:
To edit Department List.

3.1 Click 'Edit'.

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'.

3.4 Click 'Yes' for confirmation.

An acknowledgment message for 'The department is updated successfully' will be shown at the top.

Department List (1 of 1) << 1 >> 20

Unit / Department	User Name	Email	Status	Actions
				<input type="button" value="Edit"/> <input type="button" value="Trash"/>

(4.2) (1 of 1) << 1 >> 20 (4.1)

Confirm

⚠ Are you sure to update department list?

(4.3)

i The department list is updated

Step 4:
To delete department.

4.1 Click the 'Trash' icon.
(*Record will be removed immediately on the screen after clicking 'Trash' icon.)

4.2 Click 'Save'.

4.3 Click 'Yes' for confirmation.

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 functions are granted to **RO** only)

Subject: eGMS - Account Endorsement for Principal Applicant

Dear (Title) (Last Name) (The contact person of RO as recorded in eGMS),

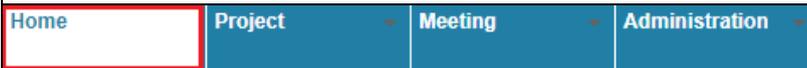
Principal Applicant (PA) of your Administering Institution has registered to open a PA account in the electronic Grant Management System (eGMS) of the Research Fund Secretariat, Health Bureau, HKSAR. Please login to the eGMS (eGMS URL) to endorse it.

Thank you.

Step 1:

Email notification will be sent to RO for endorsement of a PA account.

Please click on the eGMS URL to go to the eGMS login page.



Home Page

To Do List Home

Call Year Scheme Search

Ref. No.	Project Title	Type	Case Number / Subject	Description	PA/FA Name	Department	Date	Due Date
N/A	N/A	Endorse PA Account Application		Endorse PA Account Application				

Type	Case Number / Subject	Description
Endorse PA Account Application		Endorse PA Account Application

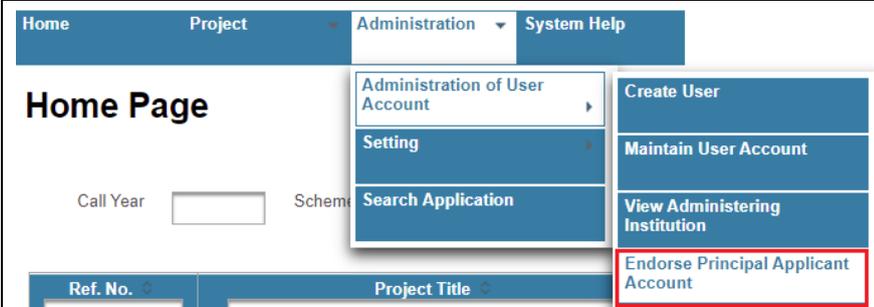
Method A

Step 2:

Go to Home Page > To Do List

- Click the 'Case Number / Subject' of the project under type: 'Application Endorsement'

[Go to Step 4](#)



Or Method B

Step 2:

Go to Administration > Administration of User Account >

Endorse Principal Applicant Account

Endorse Principal Applicant Account

(1 of 1)

Title	Last Name	First Name	Email	Unit / Department
Select	(Last Name)			

Last Name

(Last Name)

Step 3:

- Click 'Last name' to review PA's details.

[Go to Step 4](#)

Endorse Principal Applicant Account

Email

Title

Last Name

First Name

Current Post

Unit / Department

AI

Room / Floor

Building

Street

City / Area

Country / Region CHINA - HONG KONG

Contact No.

Fax

ORCID ID - - -

Gender* Male Female

(i) **(ii)**

Confirm

⚠ Endorse this user account ?

(i)

or

Confirm

⚠ Reject this user account ?

(ii)

Endorse Principal Applicant Account

i Endorsement is completed. Email notification will be sent to

or

Endorse Principal Applicant Account

i Registration for PA role was rejected. Email notification will be sent to

Step 4:

To endorse. (Optional)
(i) Click 'Endorse' and 'Yes' for confirmation.

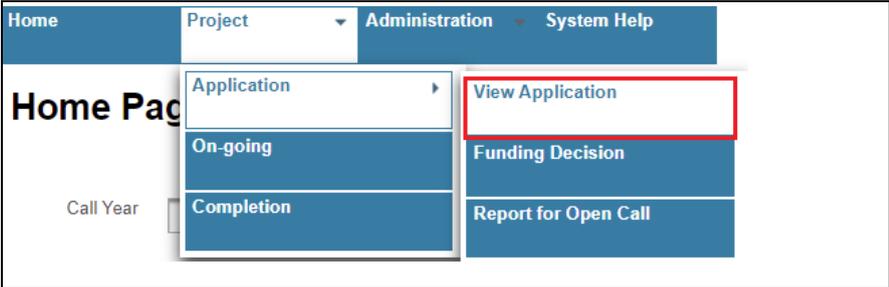
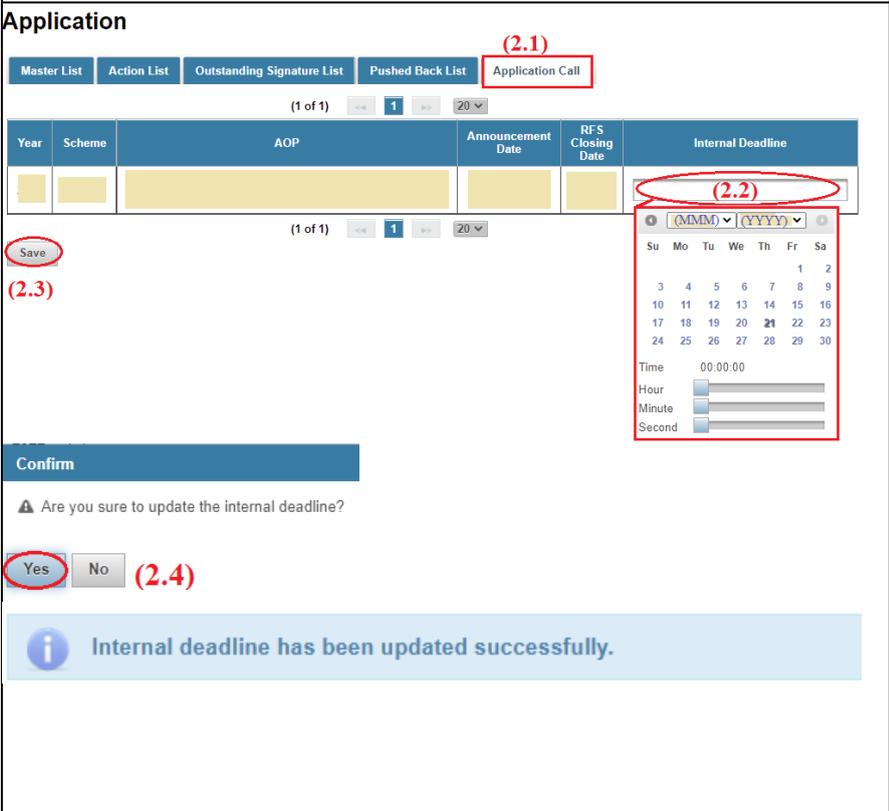
Or

To reject. (Optional)
(ii) Click 'Reject' and 'Yes' for confirmation.

An acknowledgment message for the endorsement/reject will be shown at the top.

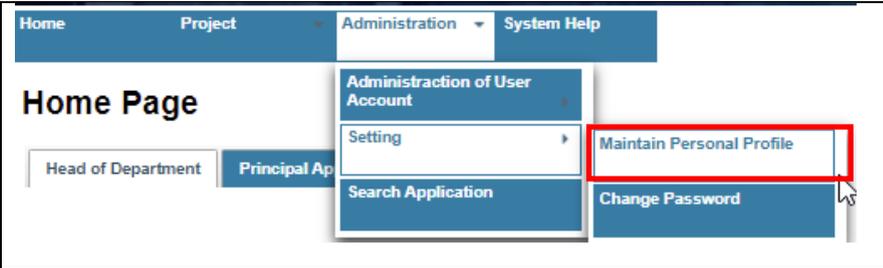
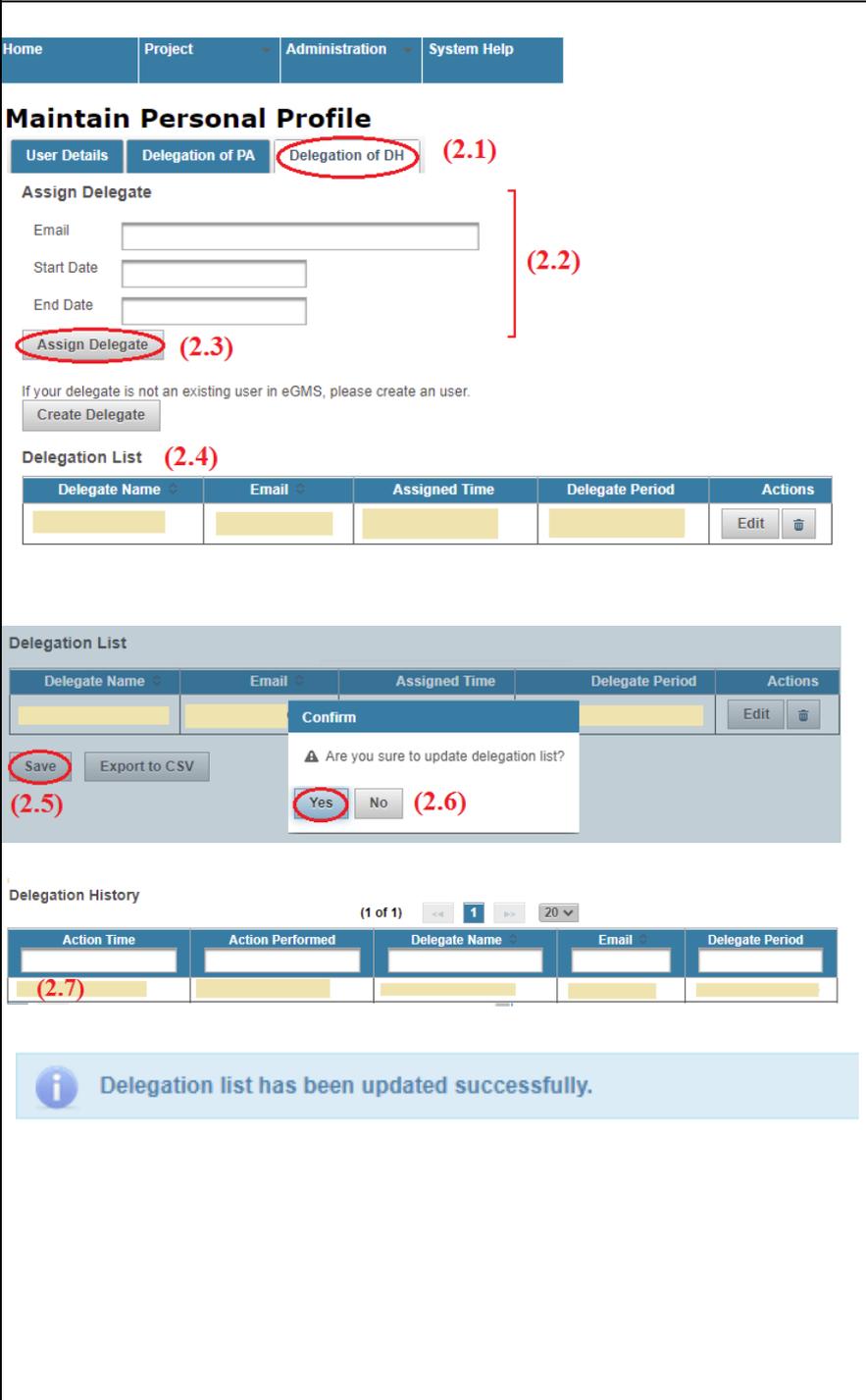
11. Administrative Function – Maintain Internal Deadline for Open Call

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

	<p>Step 1: Go to Project > Application > View Application</p>
	<p>Step 2: To update Internal Deadline.</p> <p>2.1 Click 'Application Call' to view current open call.</p> <p>2.2 Fill in the internal deadline.</p> <p>2.3 Click 'Save'.</p> <p>2.4 Click 'Yes' for confirmation.</p> <p>An acknowledgment message for 'Internal deadline has been updated successfully' will be shown at the top.</p>

12. Administrative Function – Delegation of DH

(The following function is granted to **DH** only)

 <p>Home Project Administration System Help</p> <p>Administration of User Account</p> <ul style="list-style-type: none"> Setting Maintain Personal Profile Search Application Change Password 	<p>Step 1: Go to Administration> Setting > Maintain Personal Profile</p>																														
 <p>Home Project Administration System Help</p> <h3>Maintain Personal Profile</h3> <p>User Details Delegation of PA Delegation of DH (2.1)</p> <p>Assign Delegate</p> <p>Email: <input type="text"/></p> <p>Start Date: <input type="text"/></p> <p>End Date: <input type="text"/></p> <p>Assign Delegate (2.3)</p> <p>If your delegate is not an existing user in eGMS, please create an user. Create Delegate</p> <p>Delegation List (2.4)</p> <table border="1"> <thead> <tr> <th>Delegate Name</th> <th>Email</th> <th>Assigned Time</th> <th>Delegate Period</th> <th>Actions</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td></td> <td></td> <td>Edit <input type="button" value="Edit"/> <input type="button" value="Delete"/></td> </tr> </tbody> </table> <p>Delegation List</p> <table border="1"> <thead> <tr> <th>Delegate Name</th> <th>Email</th> <th>Assigned Time</th> <th>Delegate Period</th> <th>Actions</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td></td> <td></td> <td>Edit <input type="button" value="Edit"/> <input type="button" value="Delete"/></td> </tr> </tbody> </table> <p>Save (2.5) Export to CSV</p> <p>Confirm: Are you sure to update delegation list? Yes (2.6) No</p> <p>Delegation History (1 of 1)</p> <table border="1"> <thead> <tr> <th>Action Time</th> <th>Action Performed</th> <th>Delegate Name</th> <th>Email</th> <th>Delegate Period</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table> <p>(2.7)</p> <p>Delegation list has been updated successfully.</p>	Delegate Name	Email	Assigned Time	Delegate Period	Actions					Edit <input type="button" value="Edit"/> <input type="button" value="Delete"/>	Delegate Name	Email	Assigned Time	Delegate Period	Actions					Edit <input type="button" value="Edit"/> <input type="button" value="Delete"/>	Action Time	Action Performed	Delegate Name	Email	Delegate Period						<p>Step 2: To view/update the delegation of DH of a user. (For users authorised with DH Role only)</p> <p>2.1 Click 'Delegation of DH'.</p> <p>2.2 Fill in Assigned user's email and delegate period.</p> <p>2.3 Click 'Assign Delegate'.</p> <p>2.4 The delegation details will be shown at 'Delegation List'. (DH can assign more than one delegate.)</p> <p>2.5 Click 'Save' to save the 'Delegation List'.</p> <p>2.6 Click 'Yes' for confirmation.</p> <p>2.7 The update is recorded at 'Delegation History'.</p> <p>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).)</p>
Delegate Name	Email	Assigned Time	Delegate Period	Actions																											
				Edit <input type="button" value="Edit"/> <input type="button" value="Delete"/>																											
Delegate Name	Email	Assigned Time	Delegate Period	Actions																											
				Edit <input type="button" value="Edit"/> <input type="button" value="Delete"/>																											
Action Time	Action Performed	Delegate Name	Email	Delegate Period																											

Delegation List

Delegate Name	Email	Assigned Time	Delegate Period	Actions
			(3.4)	<input type="button" value="Edit"/> 

Edit

Start Date: (DD MM YYYY) (3.2)

End Date: (DD MM YYYY) (3.2)

(3.3)

				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28			

(3.5)

Confirm

⚠ Are you sure to update delegation list?

(3.6)

 Delegation list has been updated successfully.

Step 3:
To edit delegate of DH.

3.1 Click 'Edit'.

3.2 Select the 'start date' and 'end date'.

3.3 Click 'Save'.

3.4 The 'Delegate Period' is updated.

3.5 Click 'Save'.

3.6 Click 'Yes' for conformation.

An acknowledgment message for 'Delegation list has been updated successfully' will be shown at the top.

Delegation List

Delegate Name	Email	Assigned Time	Delegate Period	Actions
				<input type="button" value="Edit"/> 

(4.2)

(4.1)

Confirm

⚠ Are you sure to update delegation list?

(4.3)

 Delegation list has been updated successfully.

Step 4:
To delete delegate.

4.1 Click the 'Trash' icon.
(*Record will be removed immediately on the screen after clicking 'Trash' icon.)

4.2 Click 'Save'.

4.3 Click 'Yes' for conformation.

An acknowledgment message for 'Delegation list has been updated successfully' will be shown at the top. will be shown at the top.

Maintain Personal Profile

User Details

Delegation of PA

Delegation of DH

Assign Delegate

(5.1)

Email

Start Date

End Date

Assign Delegate

If your delegate is not an existing user in eGMS, please create an user.

Create Delegate

(5.2)

Create Delegate

Authorised Role(s)

Email

Please provide institutional email account

Title

Last Name

First Name

Location of Administering Institution

Current Post

Unit / Department

AI

Room / Floor

Building

Street

Please enter the English name before the English translation of your Chinese name (e.g. David Tai-man).

City / Area

Please enter number and name of street.

Country / Region

Contact No.

Fax

Gender* Male Female

Information collected will be used for statistical purposes only.

(5.3-i)

Save

Back

(5.3-ii)

Confirm

⚠ Are you sure to create this user?

Yes

No

(5.3-iii)



User with email [] is created

Step 5:

To create delegate (DH).

5.1 Select 'Delegation of DH'.

5.2 Click 'Create Delegate'.

5.3 Complete & Save delegate's contact information:

(i) Fill in all compulsory User's details.

(ii) Click 'Save' to create user.

(iii) Click 'Yes' for confirmation.

(Remark: Email notification with login email and password will be sent to the delegate.)

An acknowledgment message for 'User is created' will be shown at the top.