

Electronic Grant Management System (eGMS)

Training Manual for Co-Applicants (CoAs)

Project Monitoring 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

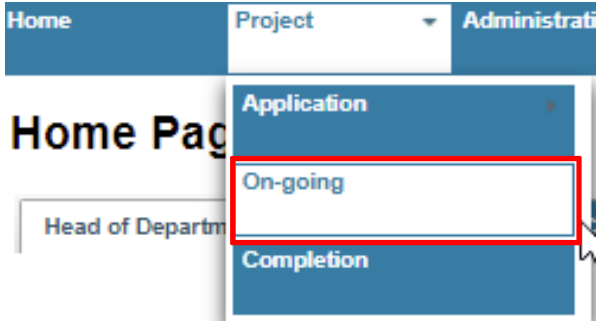
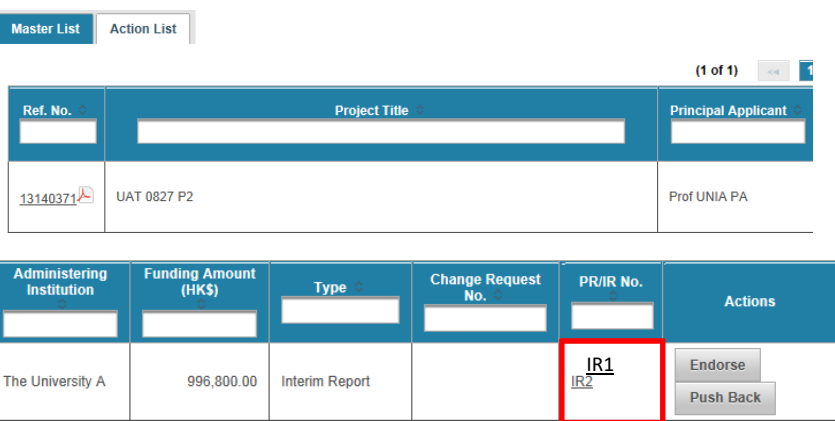
eGMS = Electronic Grant Management System

FR = Final Report

IR = Interim Report

PA = Principal Applicant

Endorsement of Interim Report (IR)

 <p>The screenshot shows a navigation menu with 'Home', 'Project', and 'Administrati'. A dropdown menu is open under 'Project', showing options: 'Application', 'On-going' (highlighted with a red box), and 'Completion'. The background shows 'Home Page' and 'Head of Departm'.</p>	<p>Step 1:</p> <p>Go to Project > On-going</p>						
 <p>The screenshot shows a table with two tabs: 'Master List' and 'Action List'. Below the tabs is a search bar with 'Ref. No.', 'Project Title', and 'Principal Applicant' fields. A table below contains one row of data:</p> <table border="1"> <thead> <tr> <th>Ref. No.</th> <th>Project Title</th> <th>Principal Applicant</th> </tr> </thead> <tbody> <tr> <td>13140371</td> <td>UAT 0827 P2</td> <td>Prof UNIA PA</td> </tr> </tbody> </table> <p>Below this is another table with columns: 'Administering Institution', 'Funding Amount (HK\$)', 'Type', 'Change Request No.', 'PR/IR No.', and 'Actions'. The 'PR/IR No.' column contains 'IR1' (highlighted with a red box) and 'IR2'. The 'Actions' column contains 'Endorse' and 'Push Back' buttons.</p>	Ref. No.	Project Title	Principal Applicant	13140371	UAT 0827 P2	Prof UNIA PA	<p>Step 2:</p> <ul style="list-style-type: none"> - Select “Action List”. - Click “IR” to view the Interim Report.
Ref. No.	Project Title	Principal Applicant					
13140371	UAT 0827 P2	Prof UNIA PA					

Interim Report

Report Ref. No.: IR2

Report Due Date: 1 Dec 2016

Report Status: Pending Signature

1. Project No.: 13140371

2. Grant Period: Commencement Date: 1 Sep 2015 End Date: 31 Aug 2017

3. Title of Project:

UAT 0827 P2

4. Applicant (s):	5. Administering Institution
Prof UNIA PA	The University A
Dr UNIA CoA	The University A

6. Aims/Objectives of the Research:

List the main objectives as stated in the approved proposal. Approval must be sought for any changes on the study objectives.

Approved Aims/Objectives	Estimated completion of aim/objective (%)
XX	XX

7. Timetable of Work:

Document the study progress according to the proposed timetable.

XXX

Date	Event/Progress Description
XX	XX

8. Achievements/Major Findings of the Project so far:

XXX

9. Budget & Expenditure (attach a certified Financial Statement):

10. Applicants' Comments:

Describe the potential of further investigations or exploitation of results. May include reflection/feedback of investigators and/or any difficulties encountered during the course of project. Comment of the potential for/current dissemination of research findings.

XXX

Attachment (if any):

Close

Step 3:

Click “Close” after viewing the Interim Report.

Administering Institution	Funding Amount (HK\$)	Type	Change Request No.	PR/IR No.	Actions
The University A	996,800.00	Interim Report		<u>IR1</u>	<input type="button" value="Endorse"/> <input type="button" value="Push Back"/>

Confirm

⚠ Are you sure to endorse this report?

Confirmation

⚠ Are you sure to Push Back IR2 of the project [13140371]?

Reason(s):

Step 4a:

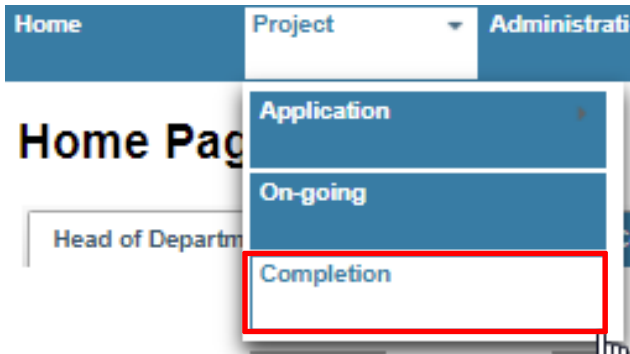
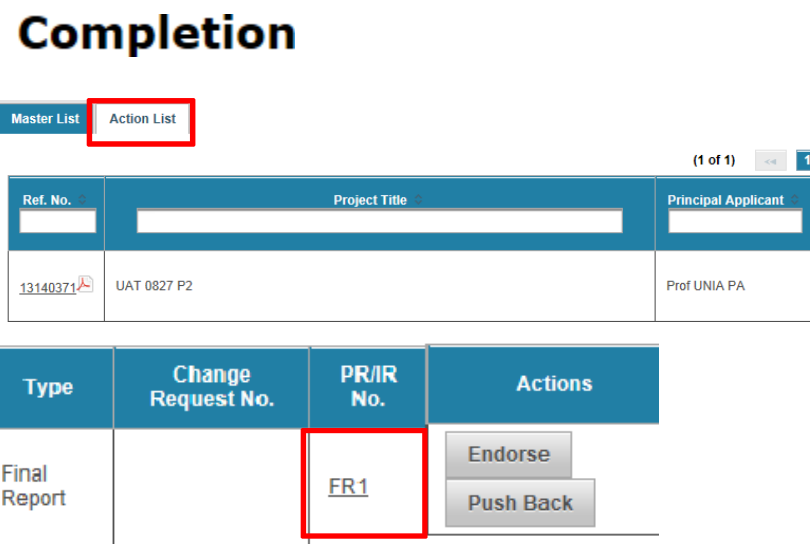
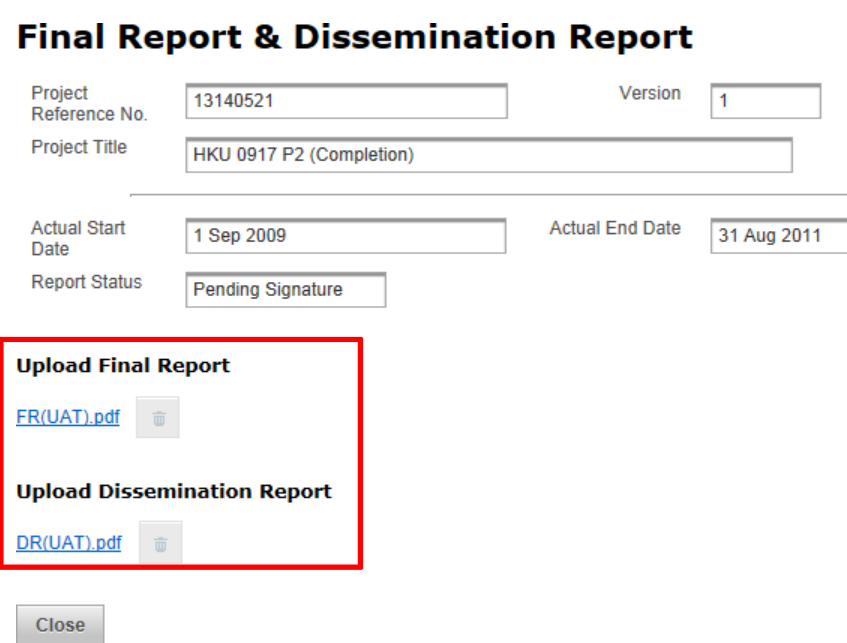
Click “**Endorse**” to endorse the Interim Report.

OR

Step 4b:

Click “**Push back**” to request PA to revise the IR.

Endorsement of Final Report (FR)

	<p>Step 1:</p> <p>Go to Project > Completion</p>
	<p>Step 2:</p> <ul style="list-style-type: none"> - Select “Action List”. - Click “FR” to view the Final Report.
	<p>Step 3:</p> <p>Click and preview the FR / DR.</p>

Type	Change Request No.	PR/IR No.	Actions
Final Report		FR1	<div style="border: 2px solid red; padding: 2px;"> Endorse Push Back </div>

Confirm

Are you sure to endorse this report?

Confirmation

Are you sure to Push Back IR2 of the project [13140371]?

Reason(s):

Step 4a:

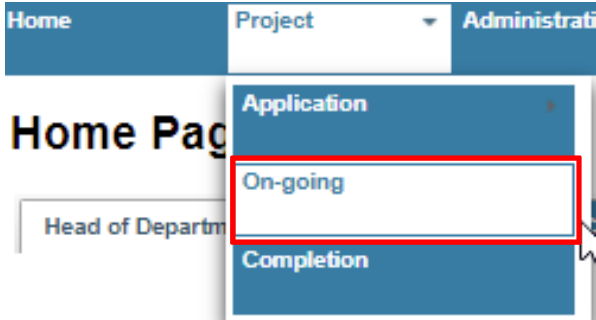
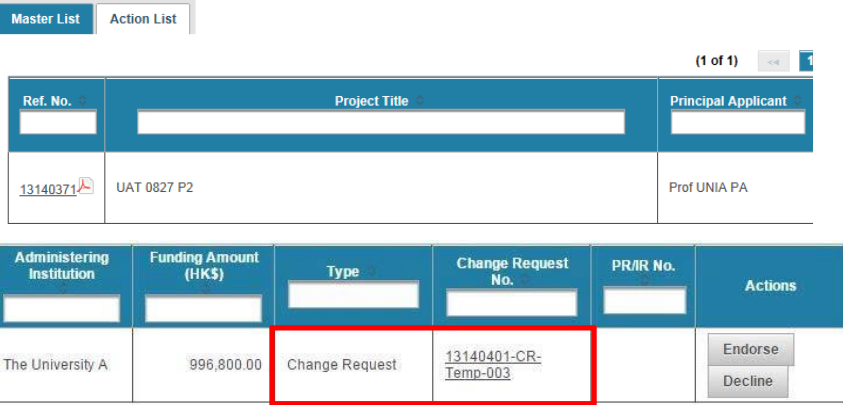
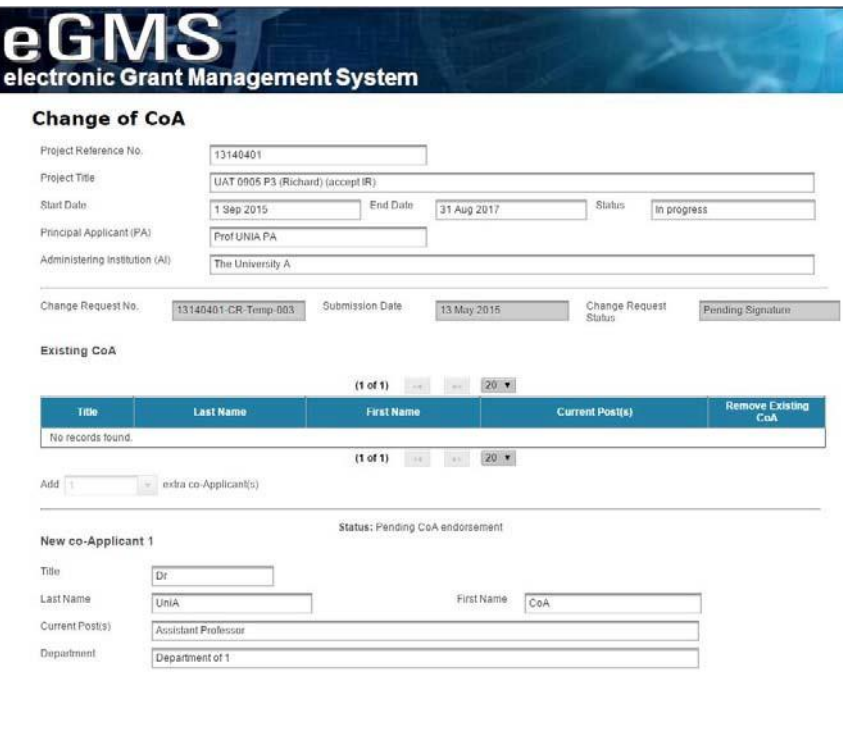
Click “Endorse” to endorse the Final Report.


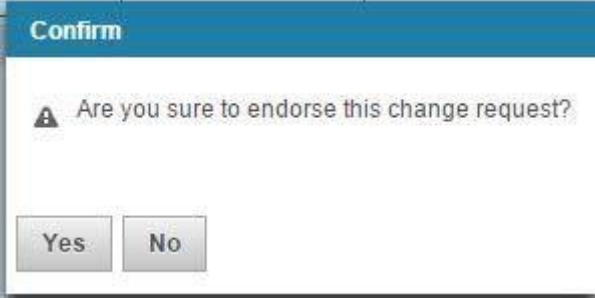
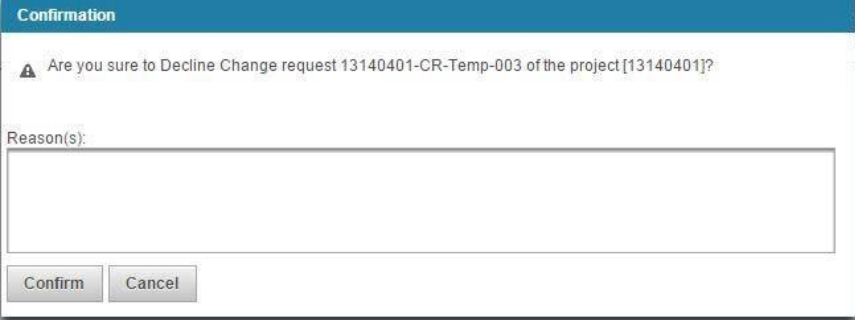
OR

Step 4b:

Click “Push back” to request PA to revise the FR.

Endorse Change Request for CoA

 <p>Home Project Administration</p> <p>Home Page</p> <p>Application</p> <p>On-going</p> <p>Completion</p> <p>Head of Department</p>	<p>Step 1:</p> <p>Go to Project > On-going</p>																		
 <p>Master List Action List</p> <p>(1 of 1)</p> <table border="1"> <thead> <tr> <th>Ref. No.</th> <th>Project Title</th> <th>Principal Applicant</th> </tr> </thead> <tbody> <tr> <td>13140371</td> <td>UAT 0827 P2</td> <td>Prof UNIA PA</td> </tr> </tbody> </table> <table border="1"> <thead> <tr> <th>Administering Institution</th> <th>Funding Amount (HK\$)</th> <th>Type</th> <th>Change Request No.</th> <th>PR/IR No.</th> <th>Actions</th> </tr> </thead> <tbody> <tr> <td>The University A</td> <td>996,800.00</td> <td>Change Request</td> <td>13140401-CR-Temp-003</td> <td></td> <td>Endorse Decline</td> </tr> </tbody> </table>	Ref. No.	Project Title	Principal Applicant	13140371	UAT 0827 P2	Prof UNIA PA	Administering Institution	Funding Amount (HK\$)	Type	Change Request No.	PR/IR No.	Actions	The University A	996,800.00	Change Request	13140401-CR-Temp-003		Endorse Decline	<p>Step 2:</p> <ul style="list-style-type: none"> Select “Action List”. Click “Change Request No.” to view the Change Request.
Ref. No.	Project Title	Principal Applicant																	
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Administering Institution	Funding Amount (HK\$)	Type	Change Request No.	PR/IR No.	Actions														
The University A	996,800.00	Change Request	13140401-CR-Temp-003		Endorse Decline														
 <p>eGMS electronic Grant Management System</p> <p>Change of CoA</p> <p>Project Reference No. 13140401</p> <p>Project Title UAT 0905 P3 (Richard) (accept IR)</p> <p>Start Date 1 Sep 2015 End Date 31 Aug 2017 Status In progress</p> <p>Principal Applicant (PA) Prof UNIA PA</p> <p>Administering Institution (AI) The University A</p> <p>Change Request No. 13140401-CR-Temp-003 Submission Date 13 May 2015 Change Request Status Pending Signature</p> <p>Existing CoA</p> <p>(1 of 1)</p> <table border="1"> <thead> <tr> <th>Title</th> <th>Last Name</th> <th>First Name</th> <th>Current Post(s)</th> <th>Remove Existing CoA</th> </tr> </thead> <tbody> <tr> <td colspan="5">No records found.</td> </tr> </tbody> </table> <p>(1 of 1)</p> <p>Add 1 extra co-Applicant(s)</p> <p>Status: Pending CoA endorsement</p> <p>New co-Applicant 1</p> <p>Title Dr</p> <p>Last Name Unia First Name CoA</p> <p>Current Post(s) Assistant Professor</p> <p>Department Department of 1</p>	Title	Last Name	First Name	Current Post(s)	Remove Existing CoA	No records found.					<p>Step 3:</p> <p>Review the project details and personal contacts</p>								
Title	Last Name	First Name	Current Post(s)	Remove Existing CoA															
No records found.																			

 <p>Actions</p> <p>Endorse Decline</p>  <p>Confirm</p> <p>⚠ Are you sure to endorse this change request?</p> <p>Yes No</p>  <p>Confirmation</p> <p>⚠ Are you sure to Decline Change request 13140401-CR-Temp-003 of the project [13140401]?</p> <p>Reason(s):</p> <p>Confirm Cancel</p>	<p><i>Step 4a:</i> Click “Endorse” to agree to join the project team. Change Request will be submitted to RFS.</p> <p>OR</p> <p><i>Step 4b:</i> Click “Decline” and provide reason(s), if any, for not joining the project team.</p>
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