IGMS
Financial Tracking

for HI HR

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Definitions, Acronyms and Abbreviations

Sl. No	Abbreviation / Acronyms	Definitions
1	PI	Principal Investigator
2	PM	Programme manager
3	AF	Agency Finance
4	HI	Host Institution
5	HI Finance	Host Institution Finance
6	HI HR	Host Institution Human Resources
7	RGO	Research Grant Office
8	EOM	Expenditure of Manpower (Vote or Budget Category)
9	OOE	Other Operating Expenditures (Vote or Budget Category)
10	EQP	Equipment (Vote or Budget Category)
11	RS	Research Scholarship (Vote or Budget Category)
12	OT	Overseas Travel (Vote or Budget Category)
13	SHC	Supplemental Human Capital (Vote or Budget Category)

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Definitions, Acronyms and Abbreviations

| Sl. No	Abbreviation / Acronyms	Definitions
14	EI	Exceptional Items (Vote or Budget Category)
15	IDC	Indirect Costs
16	IP Comm	IP and Commercialization

Learning Objectives

In this session, you will learn :

- **Overview and Navigation of IGMS**

In this module you will learn how navigate IGMS as a HI HR.

- **Fund Requisition (Project Claim)**

In this module you will learn about the fund requisition process, fund requisition pages, and how to complete the fund requisition.
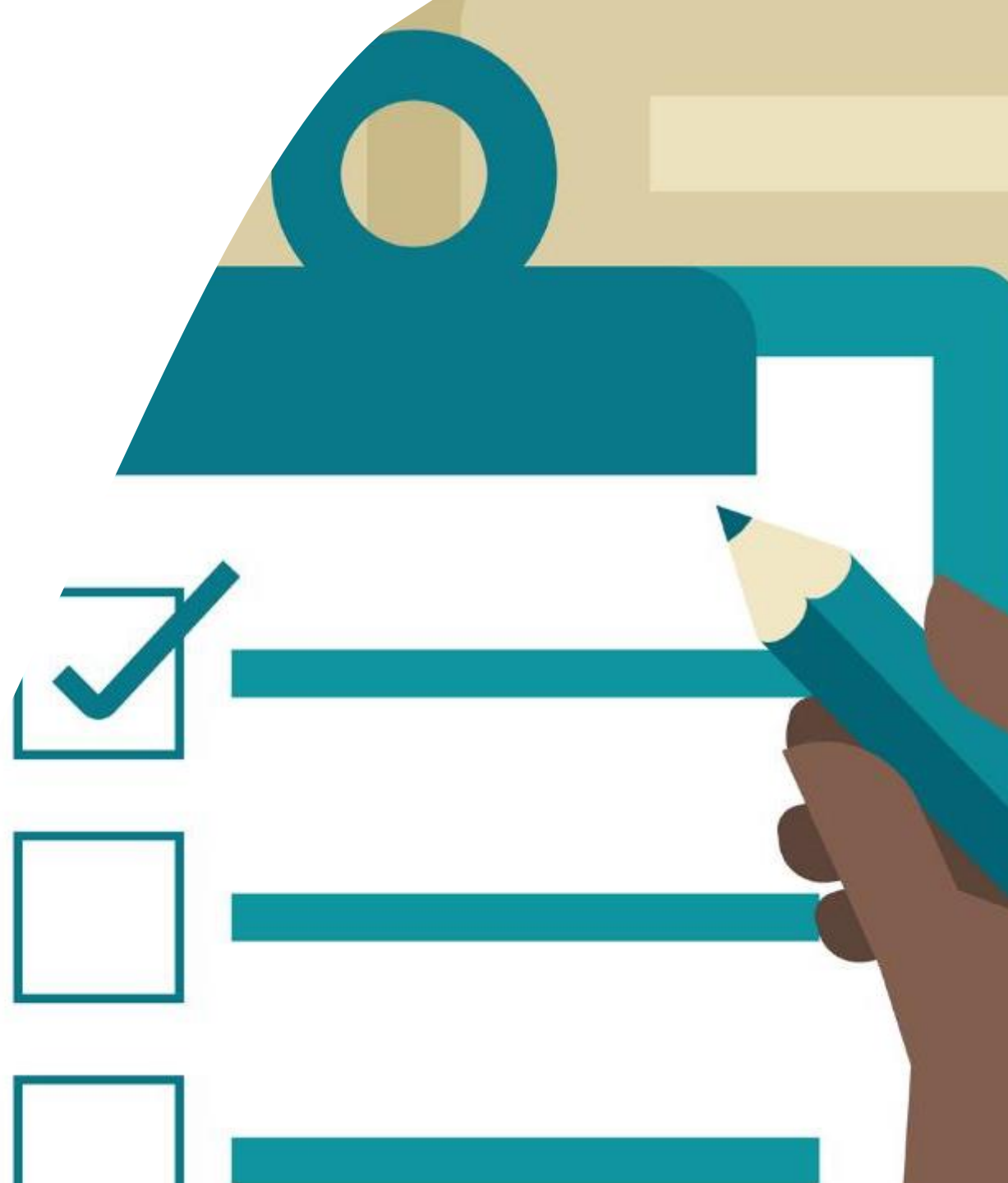
ncs
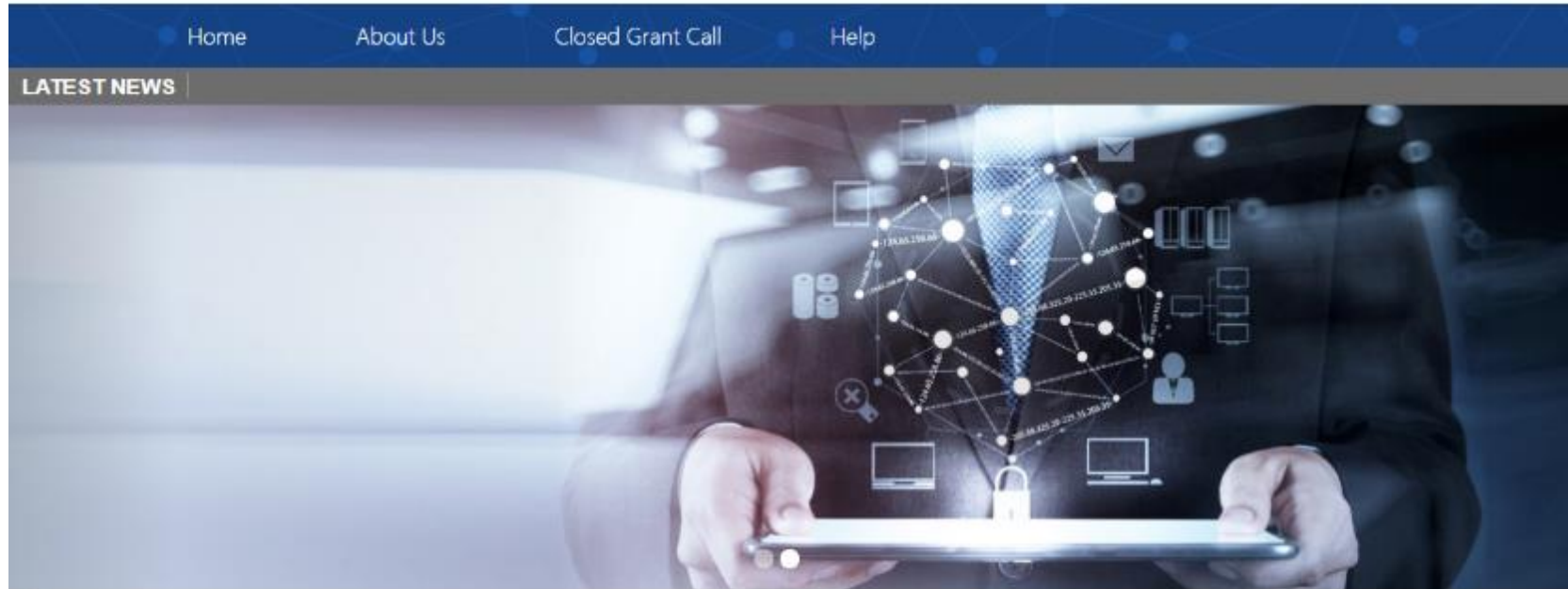making IT happen

General Overview

1. **Overview and Navigation of IGMS**
2. Fund Requisition (Project Claim)
   - Understanding Fund Requisition
   - Understanding Fund Requisition Approval
   - Completing Projection Expenses (Advancement)
   - Completing Manpower list & review Fund Requisition
3. Download Fund Requisition

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Integrated Grant Management System (IGMS)

https://researchgrant.gov.sg/

Login in IGMS

Logging in IGMS

Logging in IGMS

Host Institution Users

- Principal Investigator
- HI Administrator
- Office of Research/ Director of Research
- HI Finance/ HI Human Resource
- Data Administrator/ HI Audit

2

2 Users performing transactions on behalf of their company should login using the "Host Institution Users" option.

Links and Menus in IGMS

Links and Menus in IGMS

1	**Dashboard:** Displays the items pending user's actions
2	**Projects:** Displays the awarded projects and fund requisitions under the user's institution
3	**Deviations:** Displays all submitted deviation requests
4	**Advance Search:** Displays the search for Grant Calls, and Awarded Projects
5	**User Profile:** Displays the user profile like name, id number, nationality, email address, etc.

Links and Menus in IGMS

**1** Dashboard | Projects ▾ | Deviations ▾ | Advanced Search ▾   👤 NRF PST HI HR 1 (HI HR) ▾

1 **Projects**

1 - 10 of 23 matching results found |◄ ◄ **1** 2 3 ► ►|

Date ▲	Subject	Reference ID ⇕	Read ⇕
04-Mar-2019	Fund requisition is pending for your input. To view details, click on reference ID	NRF-000173	Yes
15-Apr-2019	Fund requisition is pending for your input. To view details, click on reference ID	NRF-000698	Yes
04-Jun-2019	Fund requisition is pending for your input. To view details, click on reference ID	NRF-000721	No
16-Jul-2019	Fund requisition is pending for your input. To view details, click on reference ID	NRF-001307	No
14-Aug-2019	Fund requisition is pending for your input. To view details, click on reference ID	NRF-001352	Yes
05-Sep-2019	Fund requisition is pending for your input. To view details, click on reference ID	NRF-001380	Yes

1 **Projects**: Displays the awarded projects (post-award) action items.
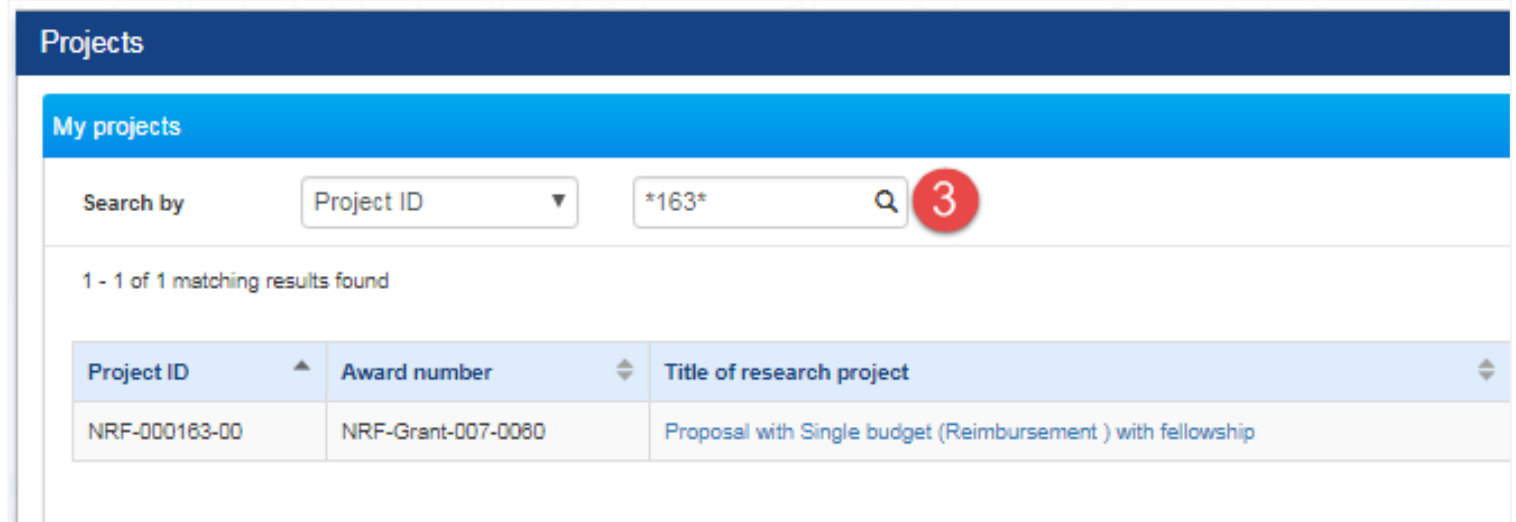
Overview and Navigation of IGMS
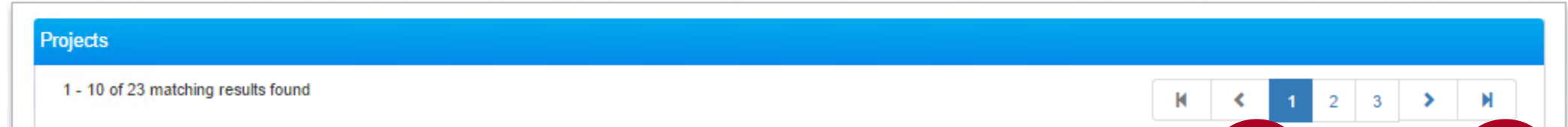
1. Use the ▸ arrow button to view the next page for multiple pages view. And ◂ arrow button to view previous page.

2. Use ⇥ arrow button to switch to the last page. And ⇤ arrow button to view the first page.

3. Use the search box to search a record. A syntax ** (star) can be use to search record like / similar (not exact match)

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Understanding Fund Requisition Types

Fund Requisition – Fund Requisition Type

There are 2 types of claim method in IGMS :

✓ Advancement

✓ Reimbursement

Each claim method will be submitted using these form types :

1. **Advancement :**

- Regular claims will use the Fund Requisition Advancement format

- For the last claim, use the Fund Requisition Statement of Account format

- HI Finance submits the fund requisition in the beginning of each period. Periods available for the project are : Quarterly, Yearly, or Half yearly

- HI finance reports the expenditure incurred in the previous quarter/Year/Half yearly using the funds received and the funds required in the current quarter/Year/Half yearly. The system will then compute the net amount required.

- Within each period, only 1 fund requisition is allowed for submission.

- If there is no FR submitted by the end of the quarter, a zero amount FR will be automatically generated. There will only be one FR outstanding at any point of time for each project.

Fund Requisition – Fund Requisition Type

There are 2 types of claim method in IGMS :
- ✓ Advancement
- ✓ Reimbursement

Each claim method will be submitted using these form types :

2. **Reimbursement :**
- In reimbursement mode, HI Finance submits the fund requisition after the HI has incurred the expenses.
- HI Finance submits the fund requisition at the beginning of each quarter for the expenses incurred in the previous quarter.
- Within one period (quarterly), only 1 fund requisition is allowed for submission.
- For both regular claims and last claim use the same form template. For the last claim, system will indicate a flag in the form as 'Final Claim'.

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Understanding Definition of Last Claim

Review Fund Requisition – Definition of Last Claim

1 Definition of <u>Last Claim</u> is the claim (or settlement) that can be submitted within 6 months after the project is ended. Depending on the project start and project end date, there will be different variations of qualifying dates for the last claim.

2 Example for Quarterly Claim Period and The Last Claim Date of Submission.

2 15-Dec-2017 – 14-Dec-2018

1st Claim : Oct - Dec 2017
2nd Claim : Jan - Mar 2018
3rd Claim : Mar - Jun 2018
4th Claim : Jul - Sep 2018

15-Dec-2018 – 14-Dec-2019

1st Claim : Oct - Dec 2018
2nd Claim : Jan - Mar 2019
3rd Claim : Mar - Jun 2019
4th Claim : Jul - Sep 2019

15-Dec-2019 – 14-Dec-2020

1st Claim : Oct - Dec 2019
2nd Claim : Jan - Mar 2020
3rd Claim : Mar - Jun 2020
4th Claim : Jul - Sep 2020

15-Dec-2020 – 14-Dec-2021

1st Claim : Oct - Dec 2020
2nd Claim : Jan - Mar 2021
3rd Claim : Mar - Jun 2021
4th Claim : Jul - Sep 2021

15-Dec-2021 – 14-Dec-2022

1st Claim : Oct - Dec 2021
2nd Claim : Jan - Mar 2022
3rd Claim : Mar - Jun 2022
4th Claim : Jul - Sep 2022

15-Dec-2017 – 14-Dec-2022 **2**

1st Claim :
Oct - 14 Dec 2022
Final Claim :
15 Dec - Jun 2023 **1**

Understanding Fund Requisition Status

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Fund Requisition – Understanding Fund Requisition Status

No	Status Name	Description
1	Draft	Initial status when HI Finance creates a Fund Requisition.
2	Pending Workflow Submission	Fund Requisition submitted to system, and waiting for workflow approval.
3	Pending HI HR Input	Pending HI HR to input manpower listing for the project.
4	Pending PI Input	This status is only applicable for ASTAR, where the PI needs to verify the claim and input projected expenses to calculate the required amount for advancement claims.
5	Pending Agency Finance Review	This status is when Agency Finance reviews the claim. Agency finance is only able to amend the fundable amount at this status.
6	Pending PM Review	This status is when the FR is pending PM's review and approval. PM is only able to amend fundable amount at this status.
7	Supported	This status is for multilevel projects when the FR is pending multilevel PM approval.
8	Approved Pending Payment	This is the last status in Fund Request. Only fund request with this status can be posted as an expense. This status appears after PM has approved, if the Fund Request is not multi level approval, or after the last multilevel PM approves the Fund Request.

Fund Requisition – Understanding Fund Requisition Status

No	Status Name	Description
9	Pending HI Finance Resubmission	This status is when Agency Finance rejects the claim to the HI Finance. The Fund Request will be returned to the HI Finance for amendment. After amendment, Fund Request will route to HI HR and PI (For ASTAR only) before it is submitted back to Agency Finance.
10	Pending HI HR Resubmission	This status is when Agency Finance rejects the claim to HI HR. The Fund Request will be returned to HI HR for amendment. After amendment, upon resubmission Fund Request will route to: • Agency Finance (for NRF,MOE,MOH) or • PI (For ASTAR only) then to the Agency Finance
11	Pending HI Finance Clarification	This status is when Agency Finance returns the Fund Request directly to HI Finance for clarifications. HI Finance would be able to submit the clarifications directly to Agency Finance for review.
12	Pending HI HR Clarification	This status is when Agency Finance returns the Fund Request to HI HR. HI HR would be able to submit the clarifications directly to Agency Finance for review.
13	Pending PI Clarification	This status when PM return Fund Request to PI. PI would be able to submit the clarifications directly to PM for review. PI is unable to make amendment to the Fund Request with this status.

Fund Requisition – Understanding Fund Requisition Status

No	Status Name	Description
14	Clarification Received-Pending Agency Finance Review	This status is when HI Finance or HI HR submits clarification to the Agency Finance.

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Fund Requisition Workflow Approval
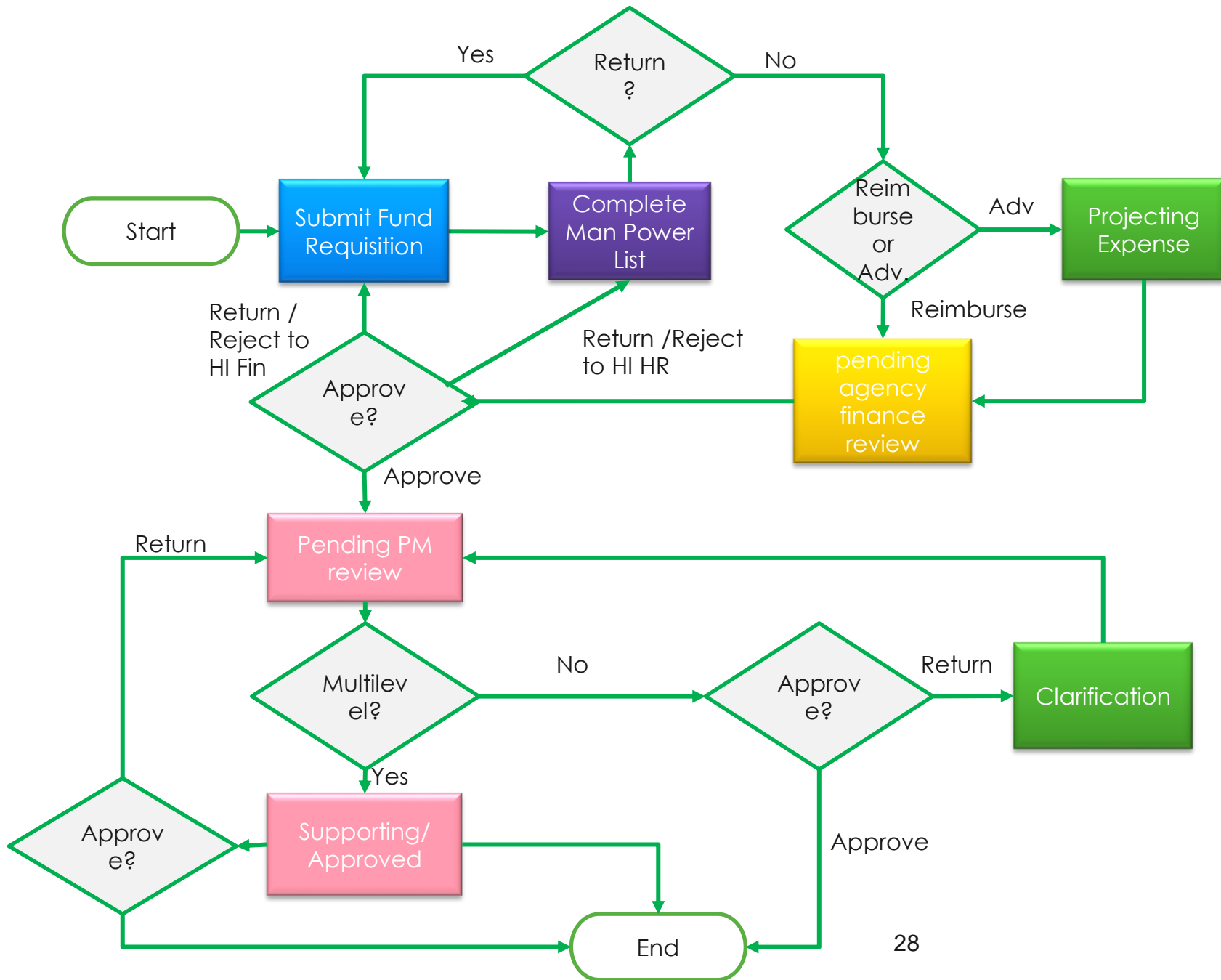
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Completing Projection Expense (Advancement)

Fund Requisition – Completing Projection Expenses (Adv)

1

When a FR is assigned to you, you will receive an email notification. You will be able to view all the actionable FRs on the dashboard . Click on **reference ID** to open Fund Request that needs to be completed.

> ➢ Click on reference ID to take action on the FR.

Fund Requisition – Completing Projection Expenses (Adv)

1 To complete projection expenses, open the Expenditure section in the Summary page

2 Key in the projected expenses for each vote / budget category.

3 After keying in the projected amount, click Save as Draft to re-calculate the Summary amounts.

Summary ⌄

Expenditure **1** ⌃

VOTE	Fund balance as at 30-Jun-2019(I=E-H)	Commitments (supported by POs) (J)	Projected exp. for current quarter (K)	Amount required for current quarter (L=J+K-I)	Budget balances (M=D-E-L)	Budget utilisation N= ((E+L)/C)100
Expenditure on Manpower (EOM)	-10,000.00	0.00	30000.00 **2**	40,000.00	160,000.00	20.00%
Other Operating Expenditure (OOE)	-20,000.00	0.00	0.00	20,000.00	180,000.00	10.00%
Equipment (EQP)	0.00	0.00	0.00	0.00	200,000.00	0.00%
Overseas Travel (OT)	0.00	0.00	0.00	0.00	0.00	0.00%
Research Scholarship (RS)	0.00	0.00	0.00	0.00	0.00	0.00%
Indirect Cost (IDC)	-6,000.00	0.00	6000.00	12,000.00	108,000.00	10.00%
Total	-36,000.00	0.00	36,000.00	72,000.00	648,000.00	10.00%

Attachments ⌄

Action Trail ⌄

3

< Back   Save as Draft ⊟   Next ✔

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Completing Fund Request - Manpower

Fund Requisition – Completing Manpower Listing

1 After Finance submitted the Fund Request, HI HR need to complete the fund request by completing manpower listing. Click on the reference ID to open Fund Request that needs to be completed.

> ➤ Date, is the date when the task was assigned to the user.
> ➤ Subject, is the action item.
> ➤ Reference ID, is the document ID. Click this to navigate to the document source.
> ➤ Read, is to indicate if the dashboard message has been read by the user.

Dashboard	Projects ⏷	Deviations ⏷	Advanced Search ⏷		👤 NCS PST HI HR's 1 (HI HR) ⏷
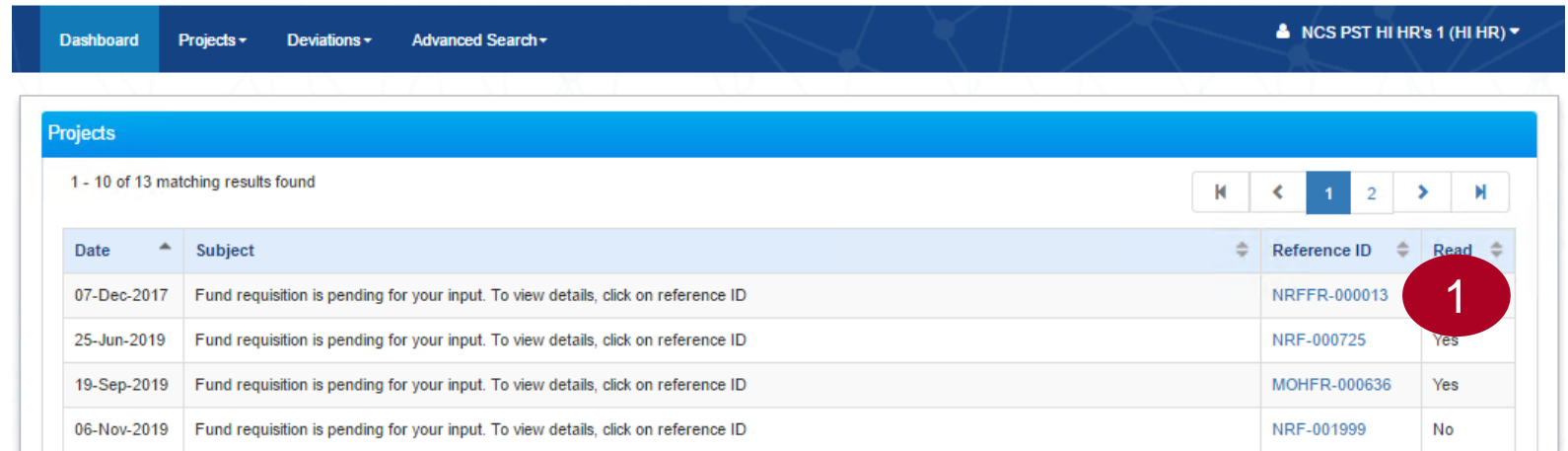
Projects

1 - 10 of 13 matching results found

|⏮|◀|**1**|2|▶|⏭|

Date ▲	Subject	Reference ID ⇕	Read ⇕
07-Dec-2017	Fund requisition is pending for your input. To view details, click on reference ID	NRFFR-000013	**1**
25-Jun-2019	Fund requisition is pending for your input. To view details, click on reference ID	NRF-000725	Yes
19-Sep-2019	Fund requisition is pending for your input. To view details, click on reference ID	MOHFR-000636	Yes
06-Nov-2019	Fund requisition is pending for your input. To view details, click on reference ID	NRF-001999	No

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Fund Requisition – Completing Manpower Listing

- ➢ Once read & action has been taken, the dashboard item will be removed from the dashboard.
- ➢ The Dashboard item is sorted by ascending date, which means the oldest action will come first.

Notes:

In the case of A*STAR for advancement mode, the PI can return the claim to the HI HR for additional amendments or input.

Fund Requisition – Completing Manpower Listing

1 After clicking the reference ID on the Dashboard, system will redirect the HI HR to the Fund Requisition form, Summary page. Go to the Action trail at the Summary page to check If HI Finance or PI has any specific comments.

Fund Requisition – Completing Manpower Listing

1 Use the navigation bar on the header to switch to the manpower page.
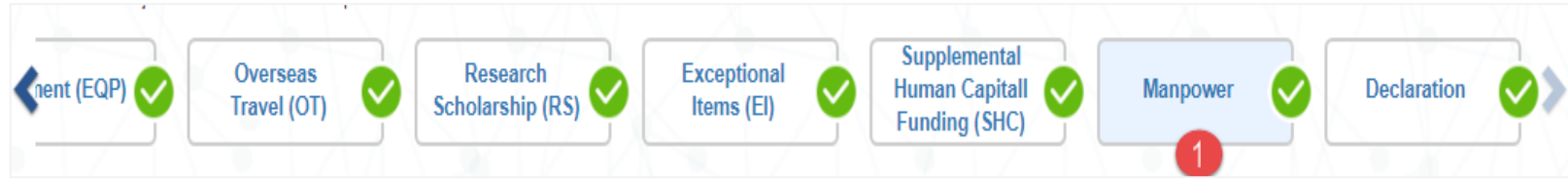
2 To add manpower list, click the Add button on the HI claim line details.

HI claim line details

This is the **FULL** Manpower Listing for **ALL** staff (employed using the awarded grant only) working under the project. Please note that this 'Manpower Listing' is a "growing list". Thus, no names should be removed from the list as the project progresses, even though the staff is no longer working under the project. For staff that has left the project mid-way, the "End Date" of the staff should be indicated. For Final Claims, the "End Date" for all staff working under the project **MUST** be indicated, in order to close-off the project completely. For example, the "Project End Date" should be indicated for a staff who is working until the last day of the project.

To add a new manpower, click on the add button. To retrive previously added manpower, open from the existing research staff list. Please note that existing research staff list also includes all research staff that had been approved for "Nationality Waiver" deviation requests previously.

To add an item, click on the add button. To edit the line item, click on the hyperlink under the S/N column. To delete multiple lines, click select all and remove.

0 - 0 of 0 matching results found

S/N	Name	Job Type	Start date	End date	Citizenship	Nationality	% effort with job scope	

Remove ⊖   Add ⊕

Fund Requisition – Completing Manpower Listing

1 Add new manpower name on a project :
Key in manpower name

2 Select job type

3 Select nationality

4 Select citizenship, options are :
  ➢ Singapore Citizen
  ➢ Singapore PR
  ➢ Foreigner

5 Key in employment start date

6 Key in employment end date. This field is only mandatory for the last claim or the last fund requisition.

Add/Change in Manpower

✦ Name	John Doe **1**
Research staff list	Select
✦ Job type	Others – Do not require PhD Qualifica **2**
✦ Nationality	Singapore **3**
✦ Citizenship	Singapore Citizen **4**
✦ Job type description	input job type description here

✦ Start date 01/11/2019 **5**
End date 31/10/2020 **6**
✦ % Involved 100 **7**

8

Cancel ✖   Save 🖫 **9**

Notes :

HR can update the 'employment end date' earlier if the staff is no longer working under this current project, has resigned or have been transferred out to another project.

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Fund Requisition – Completing Manpower Listing

7 Key in percentage of involvement

8 For some job types (e.g."Others – Do not require PhD Qualification" or "Others – Require PhD Qualification") the Job type description field is mandatory.
For job types where this field is not applicable, this field will not appear.

9 Click Save to continue.

Add/Change in Manpower

+ Name	John Doe	**1**
Research staff list	Select	
+ Job type	Others – Do not require PhD Qualifica	**2**
+ Nationality	Singapore	**3**
+ Citizenship	Singapore Citizen	**4**
+ Job type description	input job type description here	

+ Start date 01/11/2019 **5**
End date 31/10/2020 **6**
+ % Involved 100 **7**

8

Cancel ✖   Save 💾 **9**

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Fund Requisition – Completing Manpower Listing

1 If the system displays this error message, it means the job type selected requires a nationality waiver for foreigner manpower. Please contact the PI to raise a deviation request to hire a foreign talent for the selected job type.

1

Error

No nationality waiver had been obtained to employ the non-Singapore Citizen/Permanent Resident (non-SC/PR) staff. Please obtain an approval from Grantor.

OK

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Fund Requisition – Completing Manpower Listing

1 To add existing manpower on the current Fund Request submission, or, to add approved manpower from deviation request, click add button on manpower page.

2 Select the name from existing research staff list. This list included previously submitter manpower, and also approved manpower from deviation request.

To add a new manpower, click on the add button. To retrive previously added manpower, open from the existing research staff list. Please note that existing research staff list also includes all research staff that had been approved for "Nationality Waiver" deviation requests previously.

To add an item, click on the add button. To edit the line item, click on the hyperlink under the S/N column. To delete multiple lines, click select all and remove.

0 - 0 of 0 matching results found

|K | < | 1 | > | >|

S/N	Name	Job Type	Start date	End date	Citizenship	Nationality	% effort with job scope

Remove ⊖   Add ⊕ **1**

‹ Back   Next ›

Add/Change in Manpower

* Name

2 Research staff list

Select
Ma. Fernandez Quantorino
Swami Vivekananda
Troy Andrea Quantorino
Loo Tong Yang - Roderick
Dr. Jurgen Ruhle
Siti Maimunah Bte. Anwar

* Job type

End date

* Nationality

* Start date

* Citizenship   Singapore Citizen

* % Involved

Cancel ✖   Save 🖫

42

Fund Requisition – Completing Manpower Listing

1 After completed manpower list, click next to switch to undertaking page.

Fund Requisition – Completing Manpower Listing

1 After completing the manpower list, click Next to switch to the Undertaking page. In this page, HI HR need to declare the consent before submitting the completed Fund Request to IGMS. The HI HR also need to acknowledge the consent. The name of the current user login name, will be shown in the form.

2 Tick "Yes" under Acknowledgement to enable the Submit button.

Fund Requisition – Completing Manpower Listing

3 Key in comments if necessary. In case of return, you need to specify a reason why the Fund Request needs amendment.

4 The Date of acknowledgement will show the current system date by default and is non-editable.

Undertaking By HI Finance

Undertaking By HI HR

I hereby certify that: The details provided above are true and correct, and verified against the original source of documents. This request has been made in accordance with the Grantor's Guidelines, the Terms and Conditions and the Letter(s) of Award.

Name of HI HR: NCS PST HI HR's 1
Date of acknowledgement: 01/04/2020

Acknowledgement: ● Yes ○ No

Comments: input comment here...

Action Trail

< Back
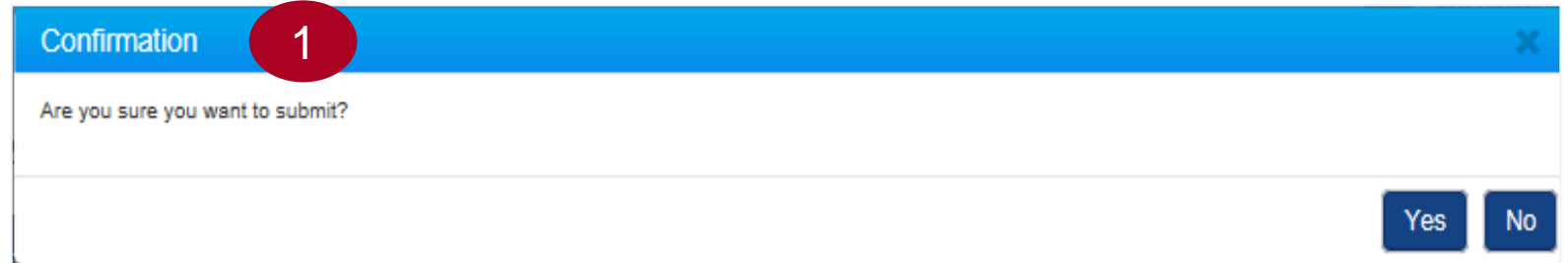
Actions
Submit
Return to HI Finance

NATIONAL RESEARCH FOUNDATION

Fund Requisition – Completing Manpower Listing

5 Click the Actions button. There are 2 actions that the HI HR can perform :

➤ Submit, for reimbursement method, this will submit the Fund Request to the Agency Finance. For advancement method, this will submit to PI.

➤ Return to HI Finance, in case you need HI Finance to revise the EOM claim, you can click Actions and select return to HI Finance.

Undertaking By HI Finance

Undertaking By HI HR

I hereby certify that: The details provided above are true and correct, and verified against the original source of documents. This request has been made in accordance with the Grantor's Guidelines, the Terms and Conditions and the Letter(s) of Award.

| Name of HI HR | NCS PST HI HR's 1 | | Date of acknowledgement | 01/04/2020 | |

Acknowledgement ⦿ Yes ○ No

Comments input comment here...

Action Trail

< Back

5 Actions ▾

Submit
Return to HI Finance

NATIONAL RESEARCH FOUNDATION

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Fund Requisition – Completing Manpower Listing

1 Confirmation is the message to confirm on the action to be taken.

2 Information is the message after the action is successful.

To Note

For Fund Request type "Statement of Account" (SOA), you should submit the SOA to the Agency before the Submission Due Date is due. Else, the Lead PI will get debarred for new Proposal submission.
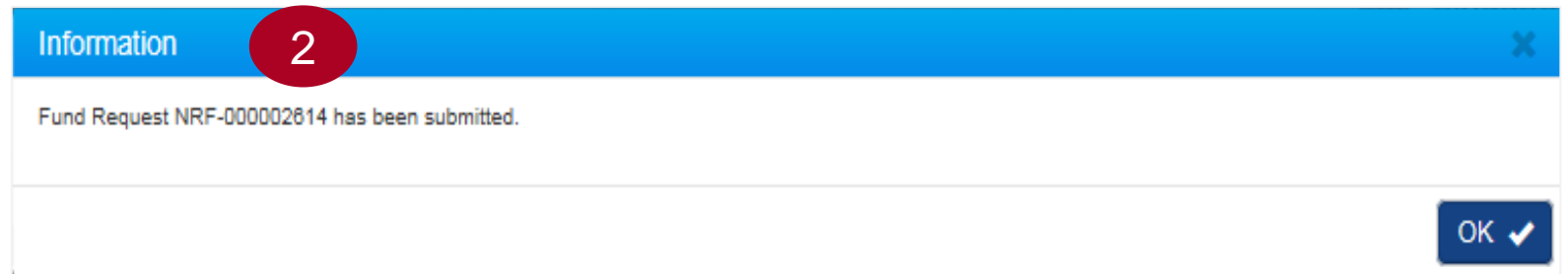
Confirmation **1**

Are you sure you want to submit?

Yes   No

Information **2**

Fund Request NRF-000002614 has been submitted.

OK ✔

Download Fund Requisition

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Download Fund Requisition

After a fund requisition is submitted, you may download the fund requisition package by initiating a download request. Follow the steps below to place the request. Note that a draft fund requisition cannot be downloaded.

1. To access the fund requisition, click **Projects** > **View Projects**, select the project ID and expand the *Fund Requisition section*. Select the Fund Requisition ID hyperlink

Download Fund Requisition

2 In *Summary* page, click on *Download Fund Request* button and system will display a notification that the package will be ready in ± 30 minutes

To Note

The package consists of below items in a ".zip" file:
a. Fund Request printout (in excel format)
b. Fund Request's attachment(s)
c. The package will contain the latest information as of the time of placing the download.

Home > Projects > S... > Summary

2

| Summary | Expenditure on Manpower (EOM) ✓ | Other Operating Expenditure (OOE) ✓ | Equipment (EQP) ✓ | Overseas Travel (OT) ✓ | Research Scholarship (RS) ✓ | Exception Items (E...) |

Summary
Expand All Sections

∧ Hide Fund Details

Fund requisition ID	NRF-001982	Project ID	NRF-000807-01
Financial quarter	FY 2019 Q3	Award number	NRF-t351-0001
Submission date and time	01-Oct-2019	Project start date	01-Sep-2019
Host instituition	NUS	Project end date	01-Aug-2021
HI claim no		Lead PI/Team PI	NCS PST PI 2
Status	Pending Review		

2

Download Fund Request

Summary ∨

Attachments ∨

Action Trail ∨

Download Fund Request ∨

Message **2** ✕

The package requested will be available for download in around 30 mins. Please access this project later to download the package.

OK ✓

Download Fund Requisition

3

After the package is ready, it will be displayed in the *Download Fund Request* section. Click on the hyperlink of the File name to download

Summary ✓	Expenditure on Manpower (EOM) ✓	Other Operating Expenditure (OOE) ✓	Equipment (EQP) ✓	Overseas Travel (OT) ✓	Research Scholarship (RS) ✓	Exception Items (E...

Summary

Expand All Sections

∧ Hide Fund Details

Fund requisition ID	NRF-001982	Project ID	NRF-000807-01
Financial quarter	FY 2019 Q3	Award number	NRF-t351-0001
Submission date and time	01-Oct-2019	Project start date	01-Sep-2019
Host instituition	NUS	Project end date	01-Aug-2021
HI claim no		Lead PI/Team PI	NC S PST PI 2
Status	Pending Review		

Download Fund Request

Summary	∨
Attachments	∨
Action Trail	∨
Download Fund Request	∨

3

Download Fund Request ∧

⊕ Download All

NOTE: The attached file(s) if any will be displayed after anti-virus scan is completed. Please wait and visit this page later.

3

	File name	Size/Status	Actions	☐ Check all
📄	NRF-000006315.zip 05-Feb-2020 05:49 PM	10.81 KB		