Training for Institutional Administrators

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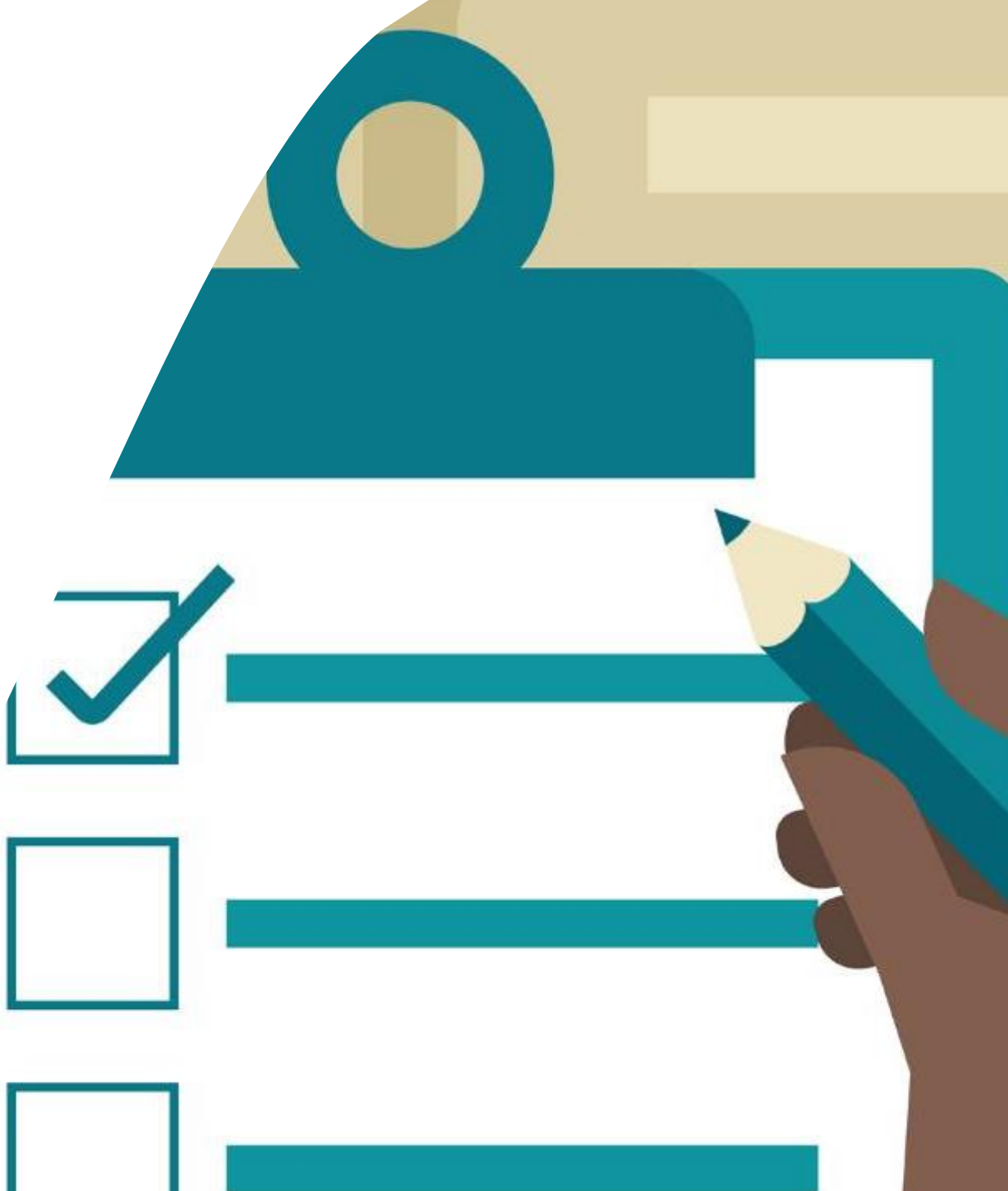
Learning Objectives

In this session, you will learn:

- Module -1: Understand IGMS
- Access IGMS
- Module -2: Landing page portal
- Module -3: Understand E-Service Portal
- Module -4: How to use IGMS system (administration module)
- Module – 5: How to use IGMS system (Proposal Submission)
- Module – 6: How to use IGMS system (Respond to nomination invitation)



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Module -1: Understand IGMS

- Overview of IGMS System
- Role of IGMS for Institutional administrators (Pre Award)
- Role of IGMS for Institutional administrators (Post Award)

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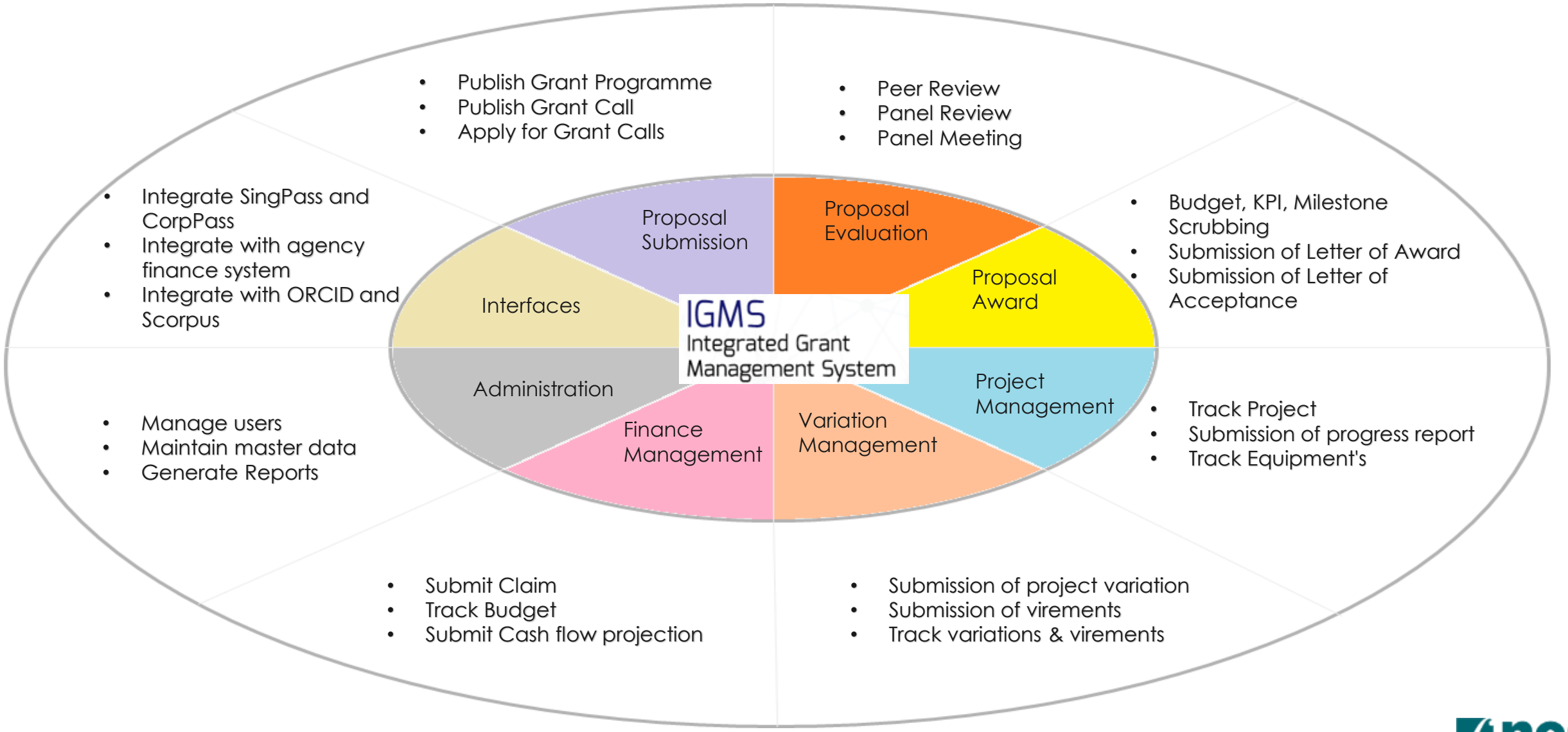
Overview of IGMS System



Definitions, Acronyms and Abbreviations

Sl. No	Abbreviation / Acronyms	Definitions
1	PI	Principal Investigator
2	PM	Programme manager
3	HI	Host Institution
4	HI ORE	Host Institution Office of Research
5	DOR	Director of Research
6	AI ORE	Academic Institution Office of Research
7	AI Dean	Academic Institution Dean
8	HI Finance	Host Institution Finance
9	HI HR	Host Institution Human Resources

Role of IGMS for Institutional administrators (Pre Award) – 1

	Liaison for CorpPass account to login IGMS	Administration	Grant Calls
HI ORE	• Point of contact for PIs to enquire for a CorpPass user account	• Management of institution profile • Management of user accounts	• Nomination of PIs for restricted grant calls
HI DOR			• Endorsement of PIs for restricted grant calls
AI ORE	• Management of Corppass	• Management of institution profile • Management of user accounts	

Note: *Applications to some of the MOH/NMRC funding programmes require both the HI and AI endorsement.*

Role of IGMS for Institutional administrators (Pre Award) – 2

	Proposal Submission	Proposal Scrubbing	Proposal Award
HI ORE	• Proposal Verification	• Verification of Budget, KPI and Milestone	• Verification of Letter of Award
HI DOR	• Proposal Endorsement • Proposal Rejection	• Endorsement of Budget, KPI and Milestone	• Endorsement of Letter of Award
AI ORE	• Proposal Verification	• Verification of Budget, KPI and Milestone	• Verification of Letter of Award
AI Dean	• Proposal Endorsement • Proposal Rejection	• Endorsement of Budget, KPI and Milestone	• Endorsement of Letter of Award

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Role of IGMS for Institutional administrators (Post Award)

- HI ORE
- HI DOR
- AI ORE
- AI Dean
- HI Finance
- HI HR

Progress Report	Variation Management	Finance Module
• Progress Report verification • Progress Report Endorsement • Etc..	• Verification of Variation request • Endorsement of Variation request • Etc...	• Submission of claims • Submission of projection • Etc...

More details will be provided during the training for Post Award modules

Module -2: Landing page portal

- Overview of Landing Page
- Viewing Open and Upcoming Grant Calls
- Applying for a Grant Call
- Searching on Landing Page

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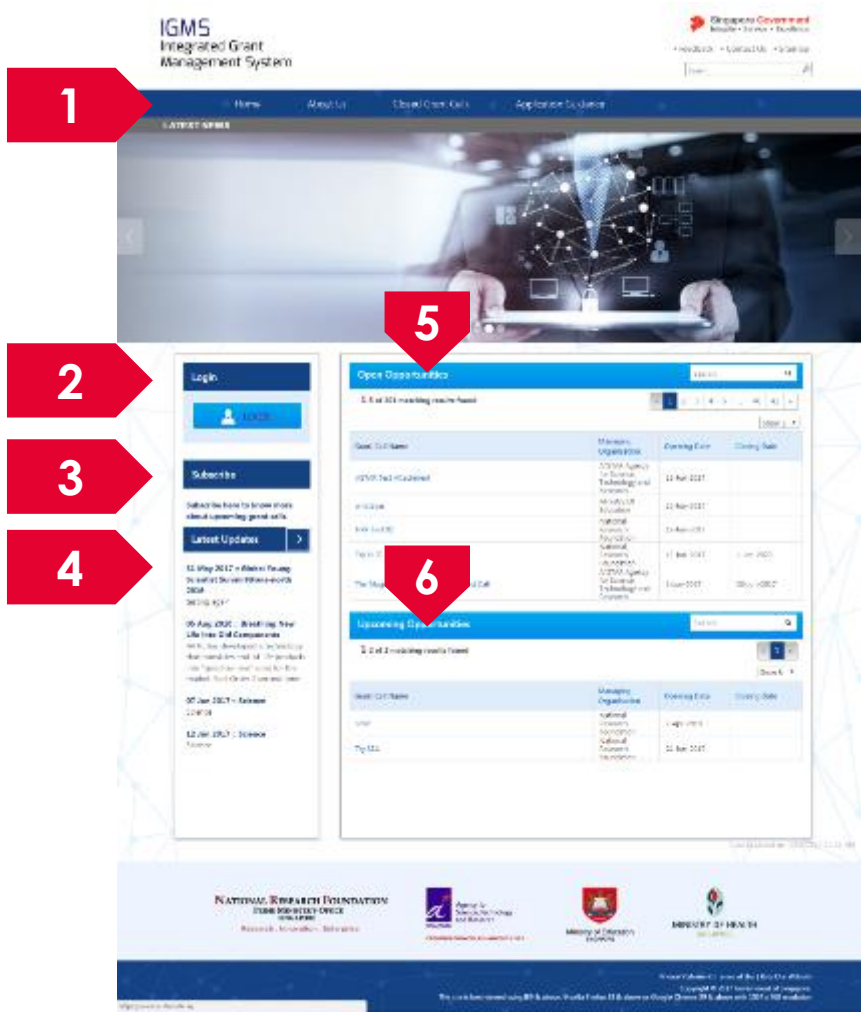
Overview of Landing Page



1. **Menu**: This is the top navigation which leads the user to the inner pages
2. **Login**: The login button is to login to the e-service portal
3. **Subscribe**: Subscribe is for users who want to receive emails when new grant calls are published
4. **Latest Updates**: This section provides the latest news and updates regarding grants and portal
5. **Open Opportunities**: This section lists out all the current open grant calls
6. **Upcoming Opportunities**: This section lists out all the upcoming grant calls

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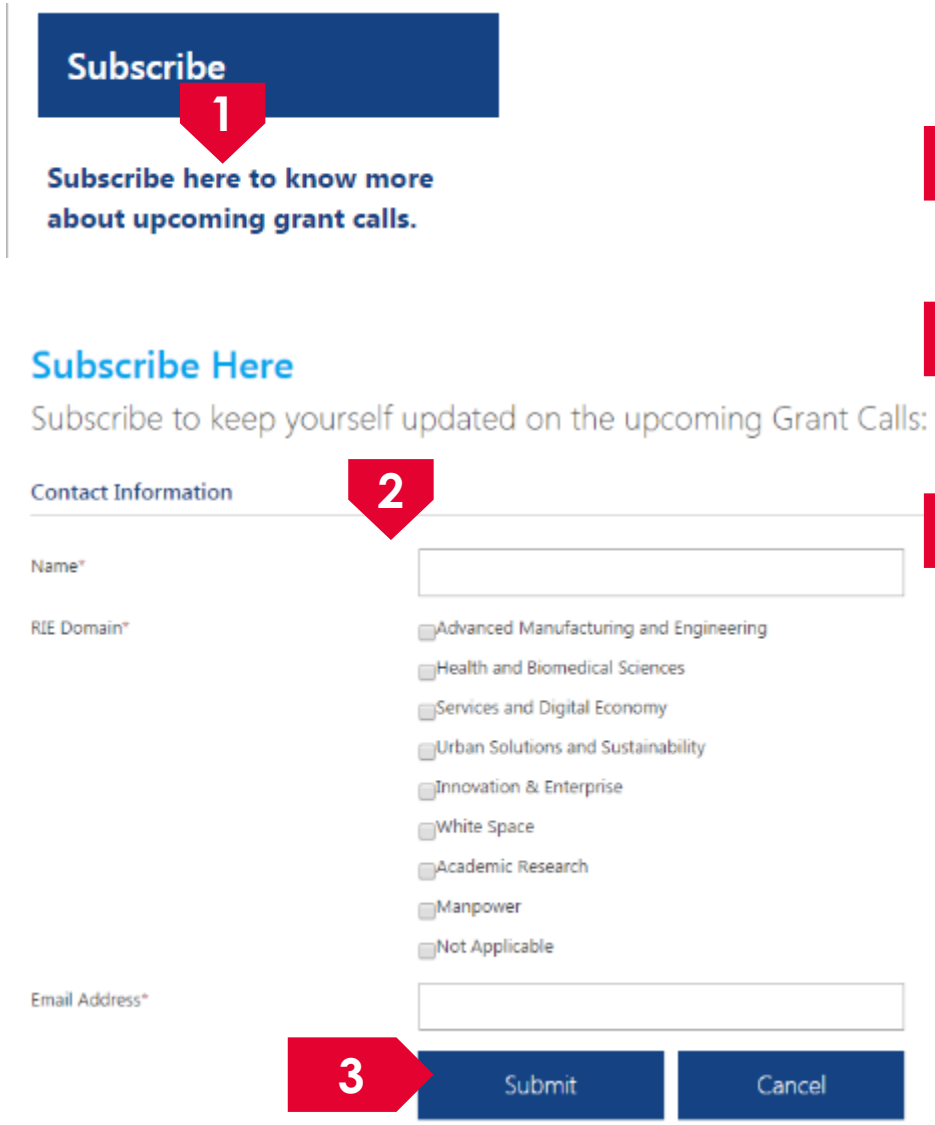
Subscribe/ Unsubscribe email alerts

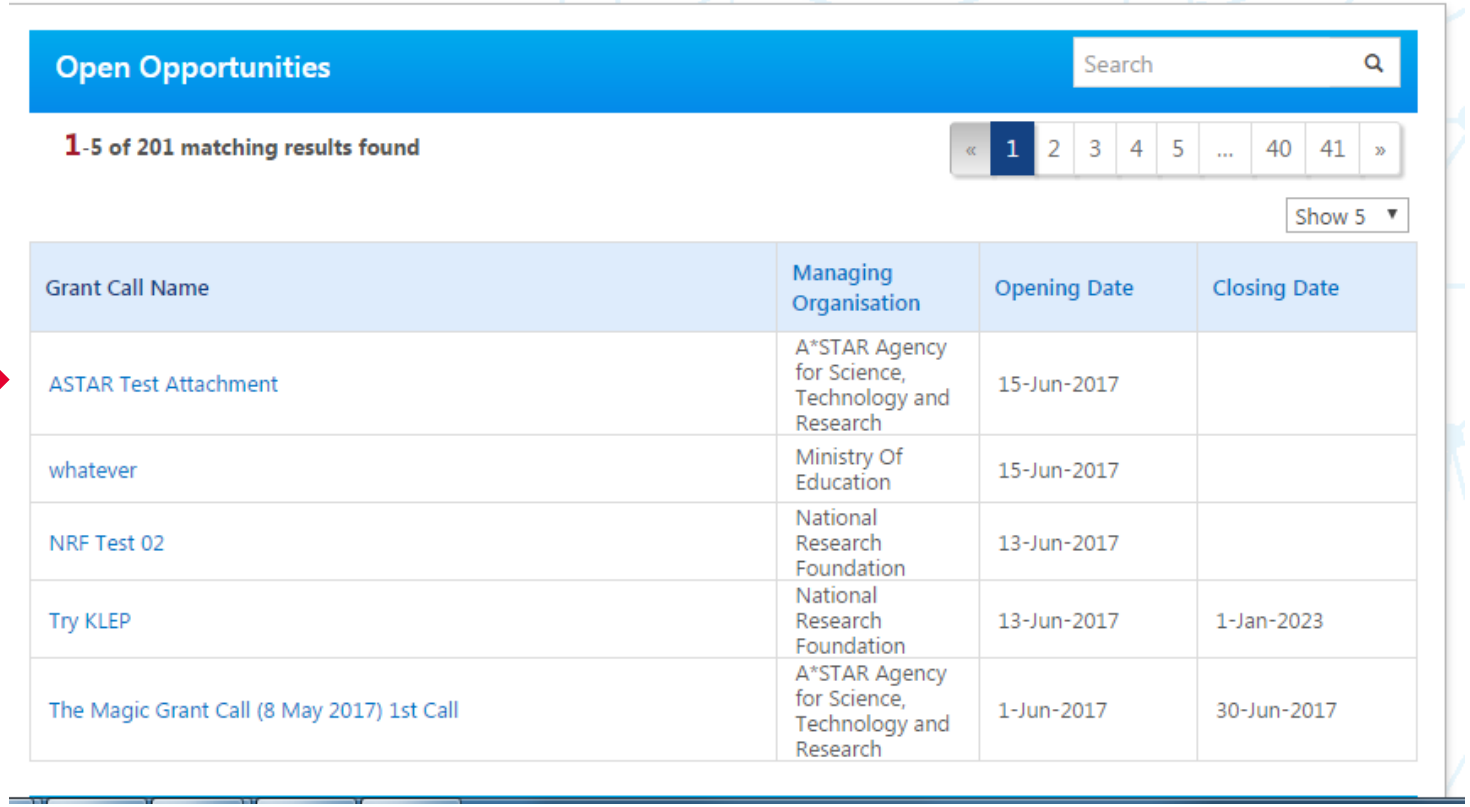


1. Click on **here** to go the subscribe page
2. Fill up the details on the subscribe page
3. Click on **Submit** button

To Note

To Unsubscribe, use the unsubscribe link on the email

Viewing Open Opportunities



1

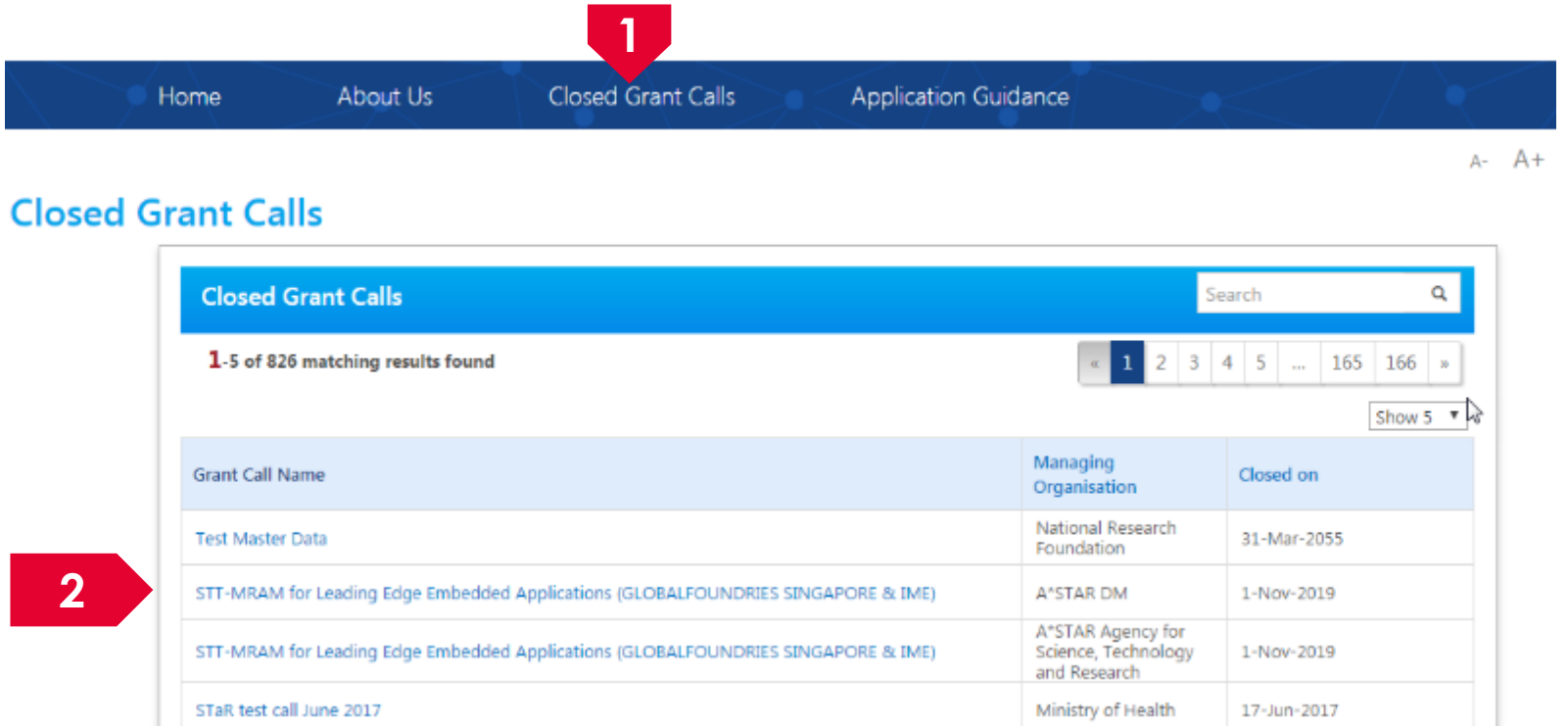
1 All the Grant Calls that are currently open are listed under open opportunities. To view the details click on the hyperlink on Grant Call name

Viewing Upcoming Opportunities

1

1 All the Grant Calls that are upcoming are listed under Upcoming Opportunities. To view the details click on the hyperlink on Grant Call name

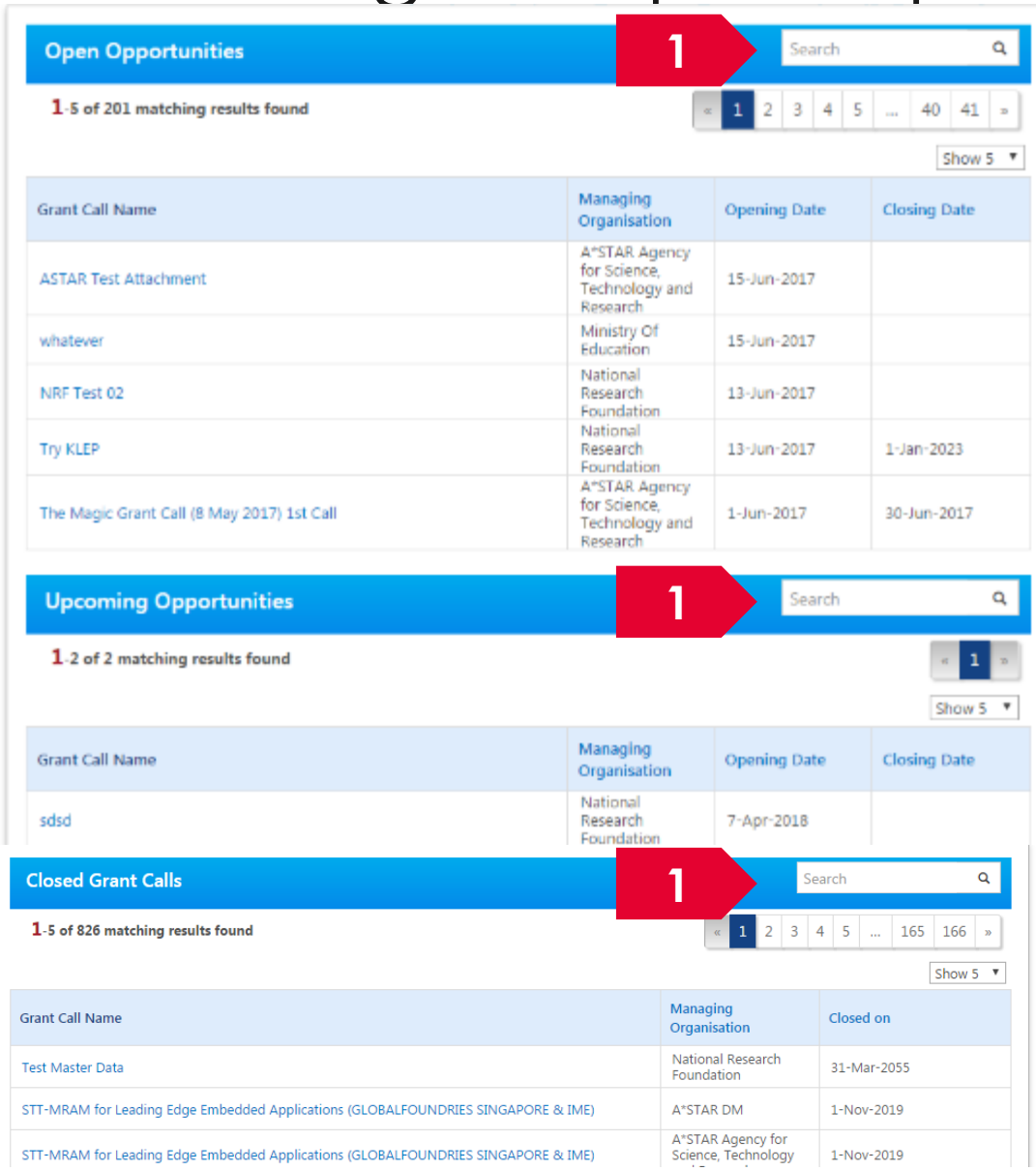
Viewing Closed Grant Calls



1 To view Closed Grant Calls, navigate to the Closed Grant Calls menu

2 All the Grant Calls that are closed are listed under Closed Grant Calls. To view the details click on the hyperlink on Grant Call name

Searching for Open, Upcoming and Closed Grant Calls – 1



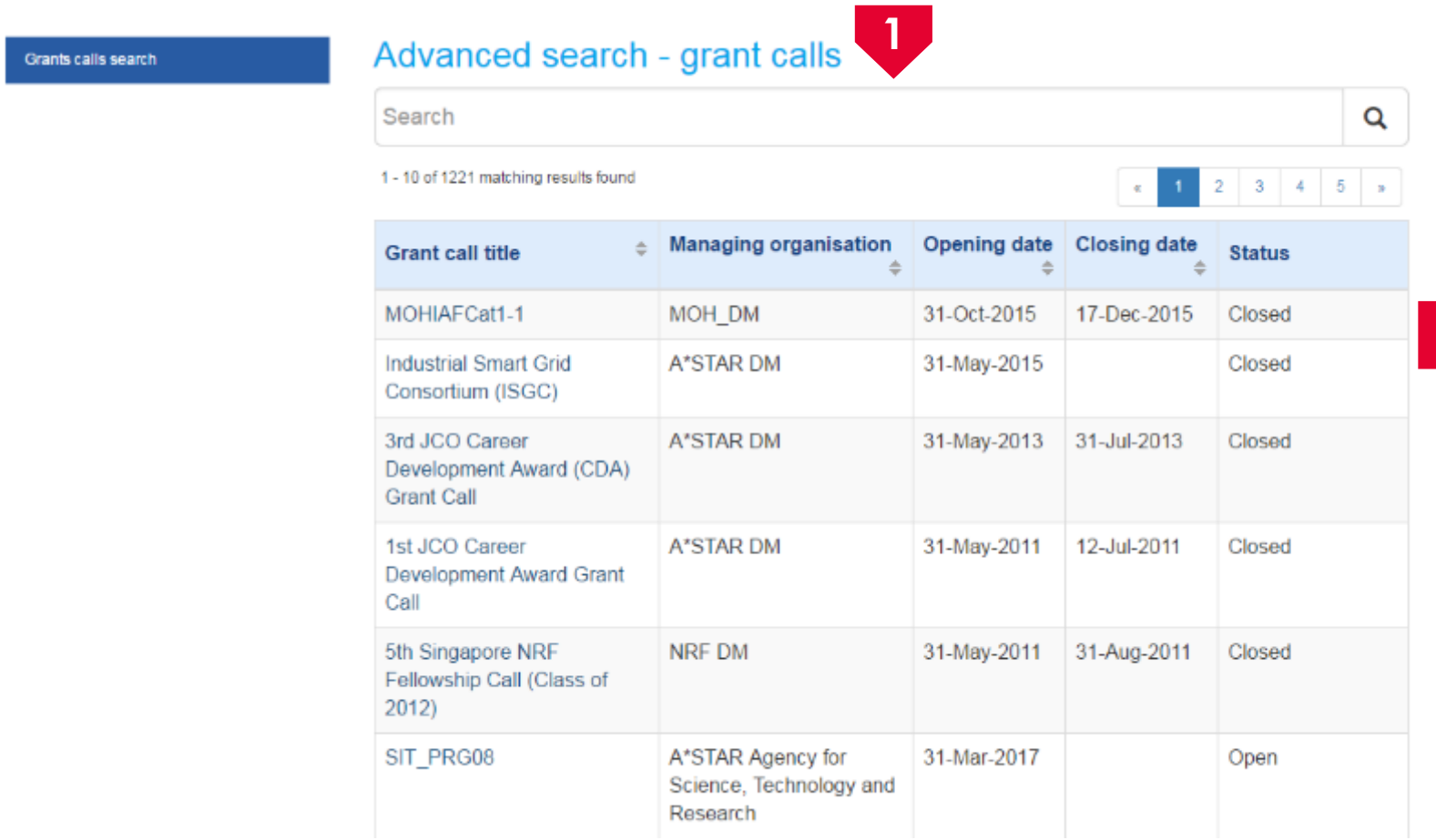
1

To search for Grant Calls, use the search box provided on Open Opportunities, Upcoming Opportunities or Closed Grant Calls

To Note

All the search boxes are linked and will search across Open, Upcoming and Closed grant calls

Searching for Open, Upcoming and Closed Grant Calls - 2



1 The search results will be displayed on this page

Module -3: Understand E-Service Portal

- Accessing IGMS
- Resetting your password
- Understanding the Menus and Links

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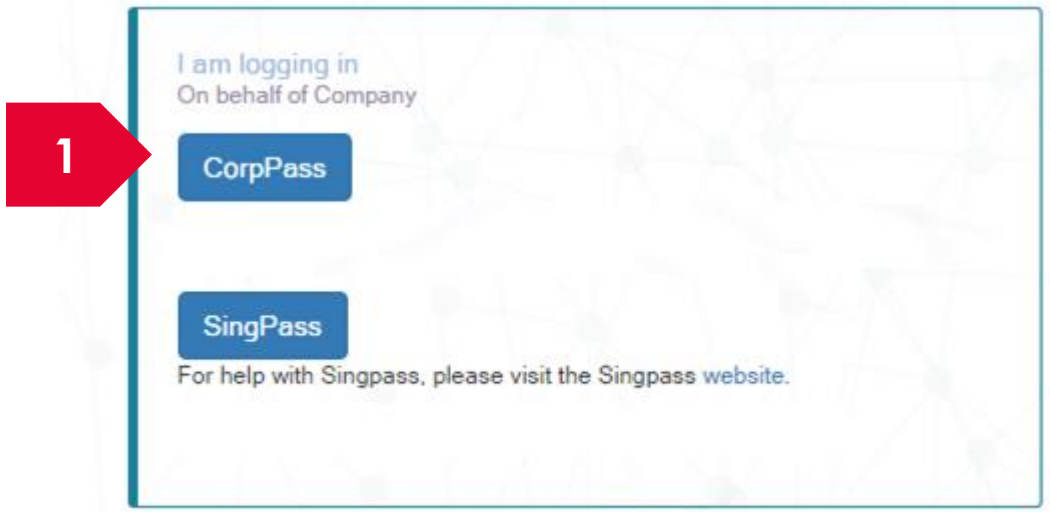
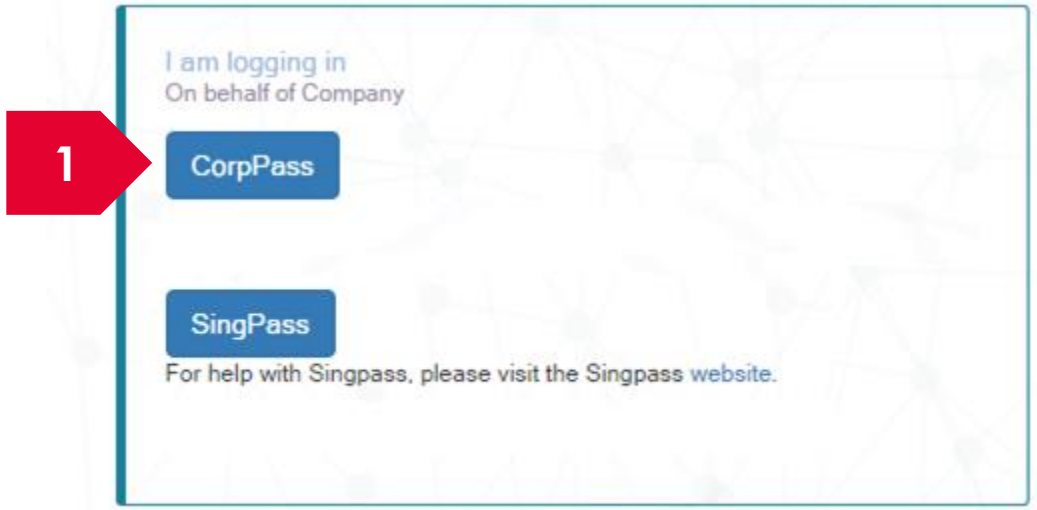
Logging into IGMS as an Institutional Administrator



1 **Institutional Administrators** and PI associated with an institution are only allowed to login via **CorpPass**.

Forget Password and Reset Password



Singapore Corporate A
CorpPass
BETA

1 To reset Password, visit https://www.corppass.gov.sg
Note: Reviewers cannot do review when logging in via CorpPass.

Links and Menus for Institutional Administrators

1 **Dashboard**: Displays the items pending user's actions

2 **Grants**: Displays the open and upcoming grant calls in IGMS

3 **Proposals**: Displays the proposals submitted under the user's institution

4 **User Profile**: Displays the user profile like name, id number, nationality, email address, etc.

5 **Maintain Institution**: Displays the user's institution profile (Visible only to HI Admin)

Module -4: How to use IGMS system (administration module)

- Viewing users profile
- Updating users profile
- Viewing institution profile
- Updating institution profile
- Granting access to other users in IGMS

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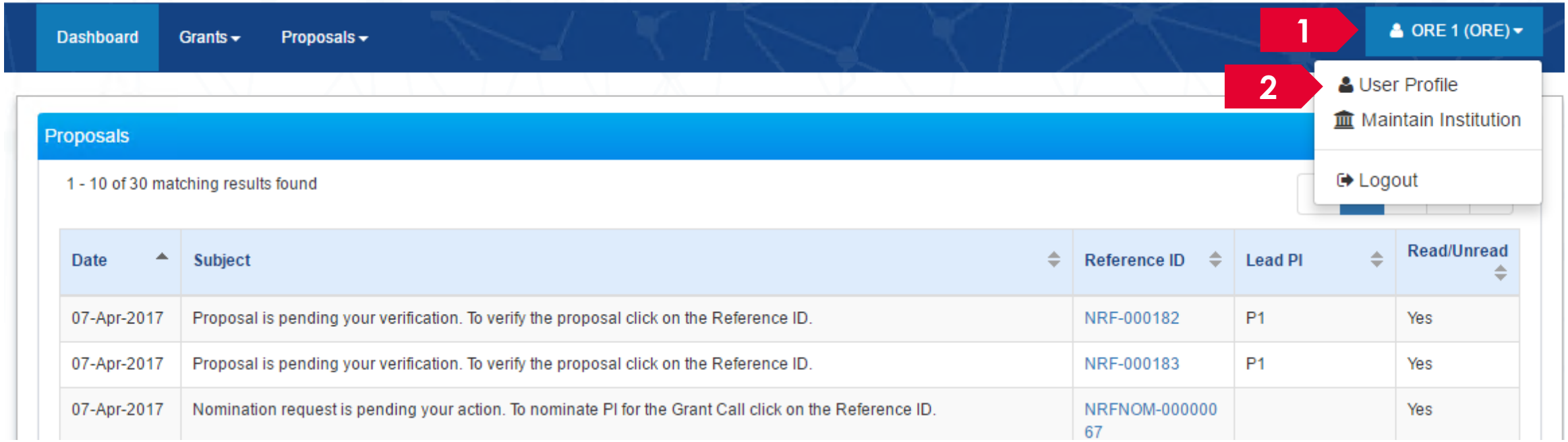
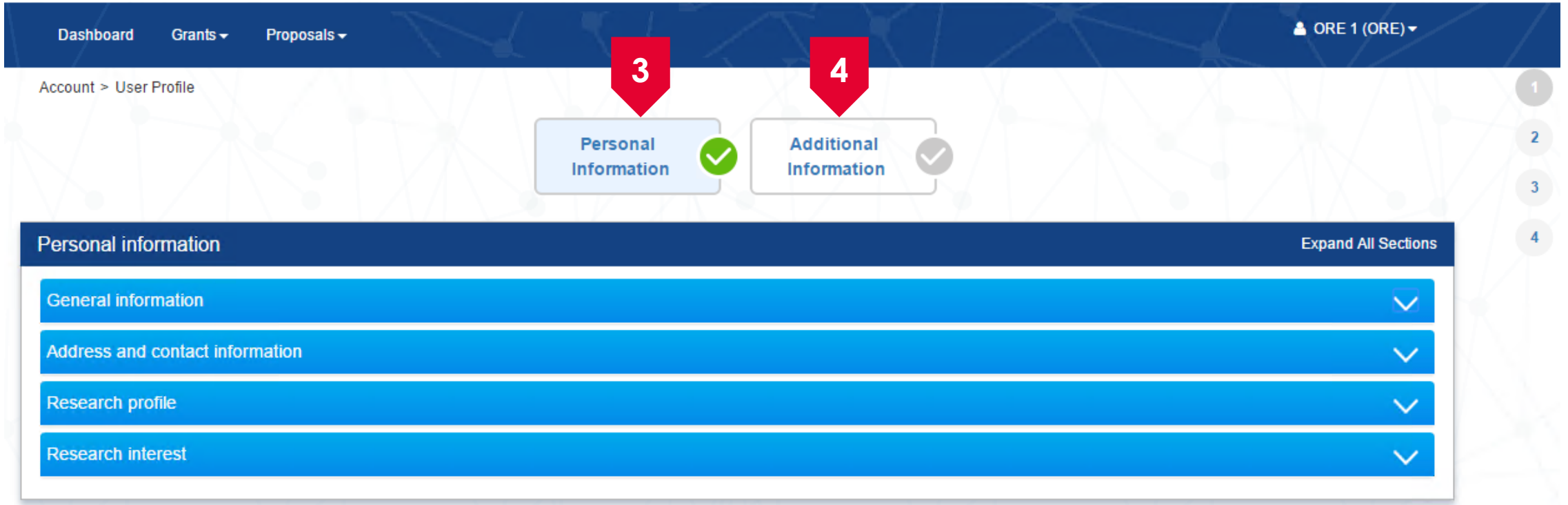
Viewing User Profile in IGMS - 1



1 Click on the **name** which is displayed on the top right hand corner of the screen

2 Click on the **User Profile** link

Viewing User Profile in IGMS - 2



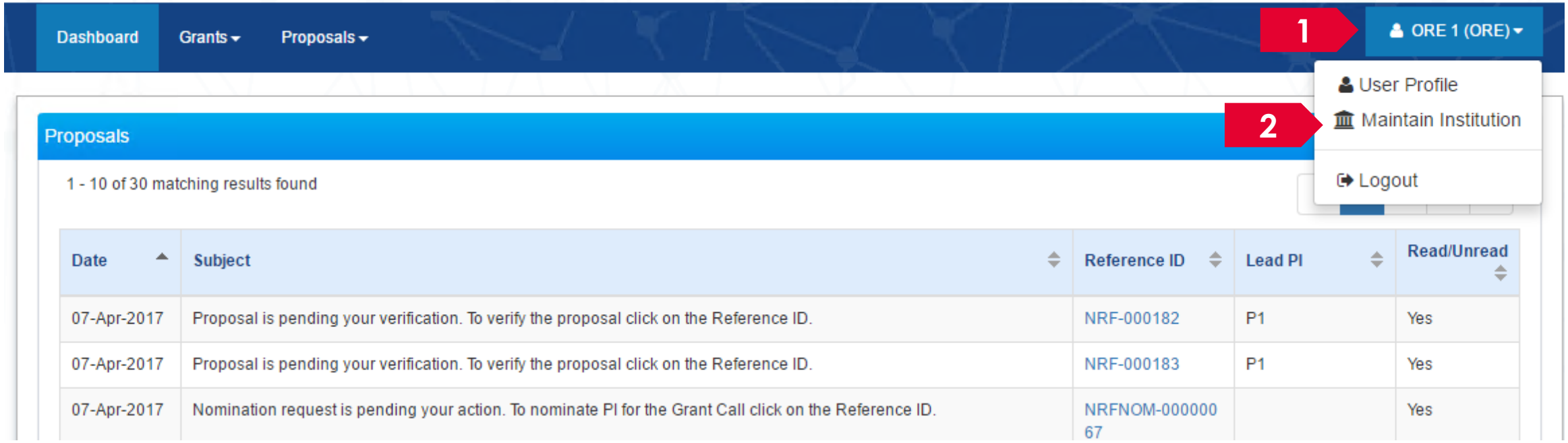
3

Personal Information screen: Contains the personal information of the logged in user like name, ID number, nationality, etc.
The Personal Information screen is split into 4 sub sections

4

Additional Information screen: Contains the information like professional information, educational information, etc.

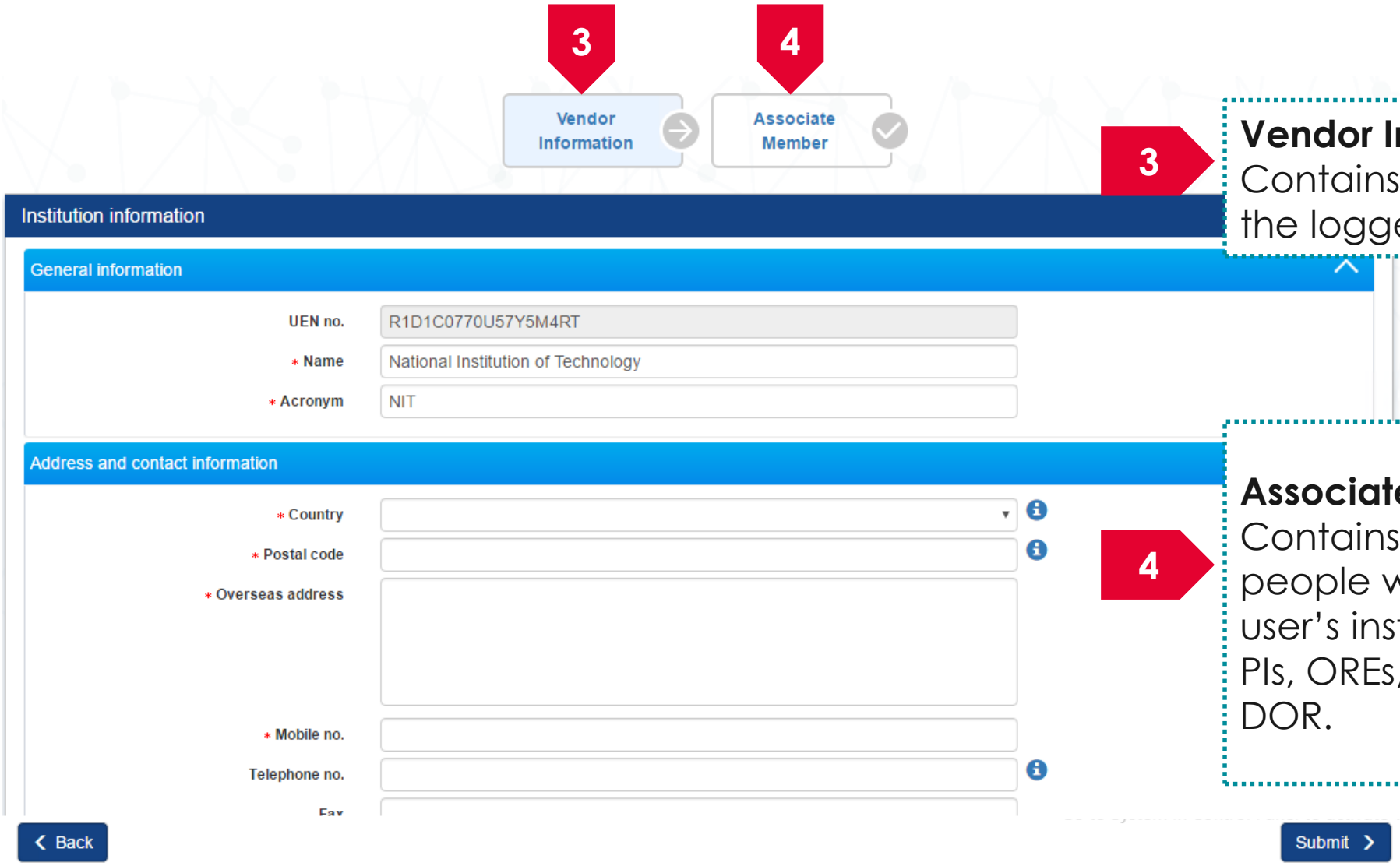
Viewing Institution Profile in IGMS – 1



1 Click on the **name** which is displayed on the top right hand corner of the screen

2 Click on the **Maintain Institution** link

Viewing Institution Profile in IGMS – 2



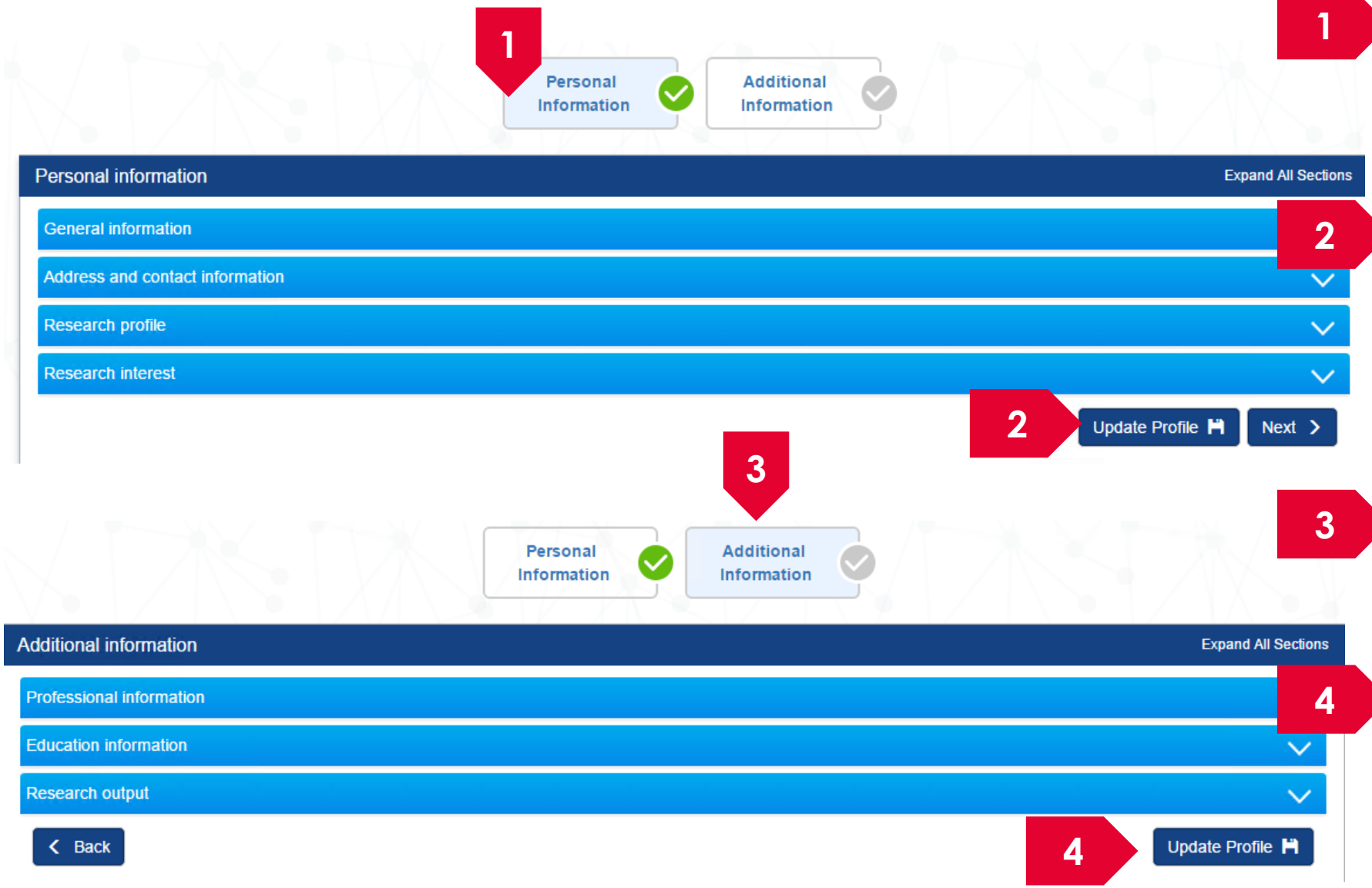
3

Vendor Information screen:
Contains the institution details of the logged in user.

4

Associate Member screen:
Contains the details of all the people who have access to the user's institution. The list will include PIs, OREs, DORs, AI OREs and AI DOR.

Update User Profile in IGMS



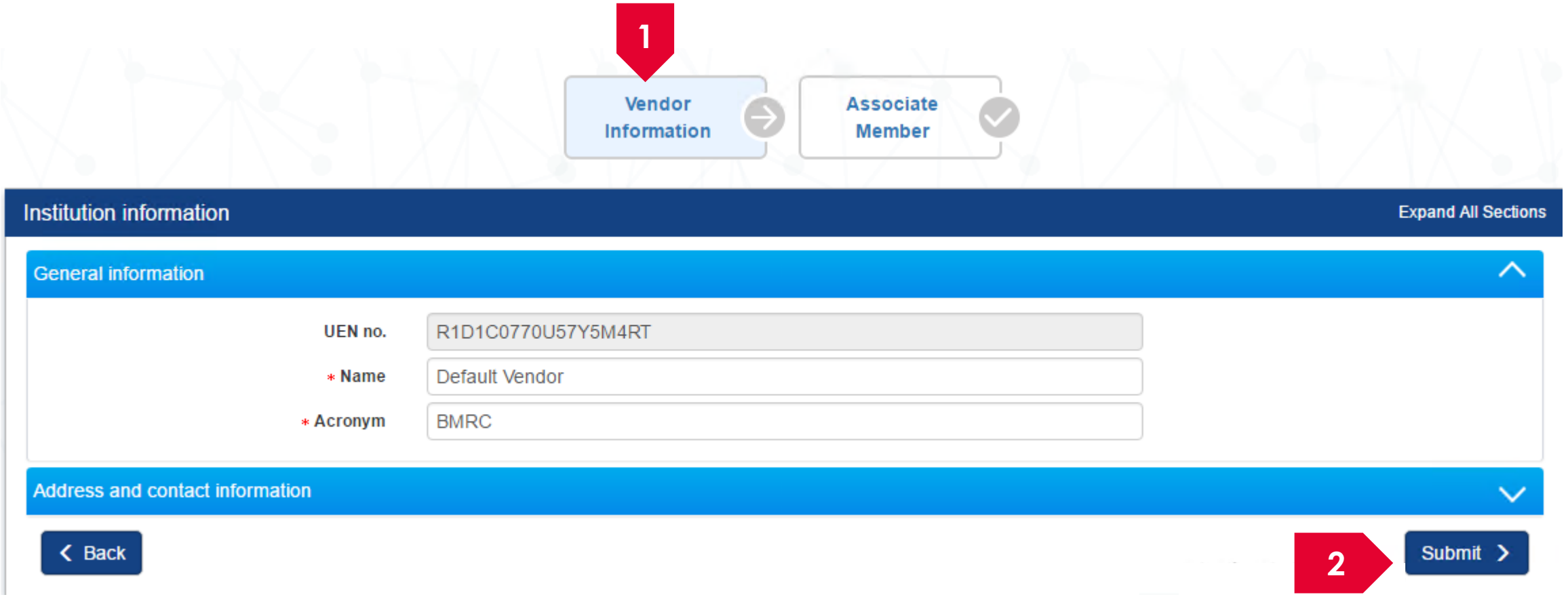
1 Fill up the **Personal Information** page.
Note: All the mandatory fields must be filled up

2 Click on **Update Profile** to update the personal information page. Click **Next** button to go the additional information page

3 Fill up the Additional Information page.

4 Click on **Update Profile** to update the Additional information page.

Update Institution Profile in IGMS

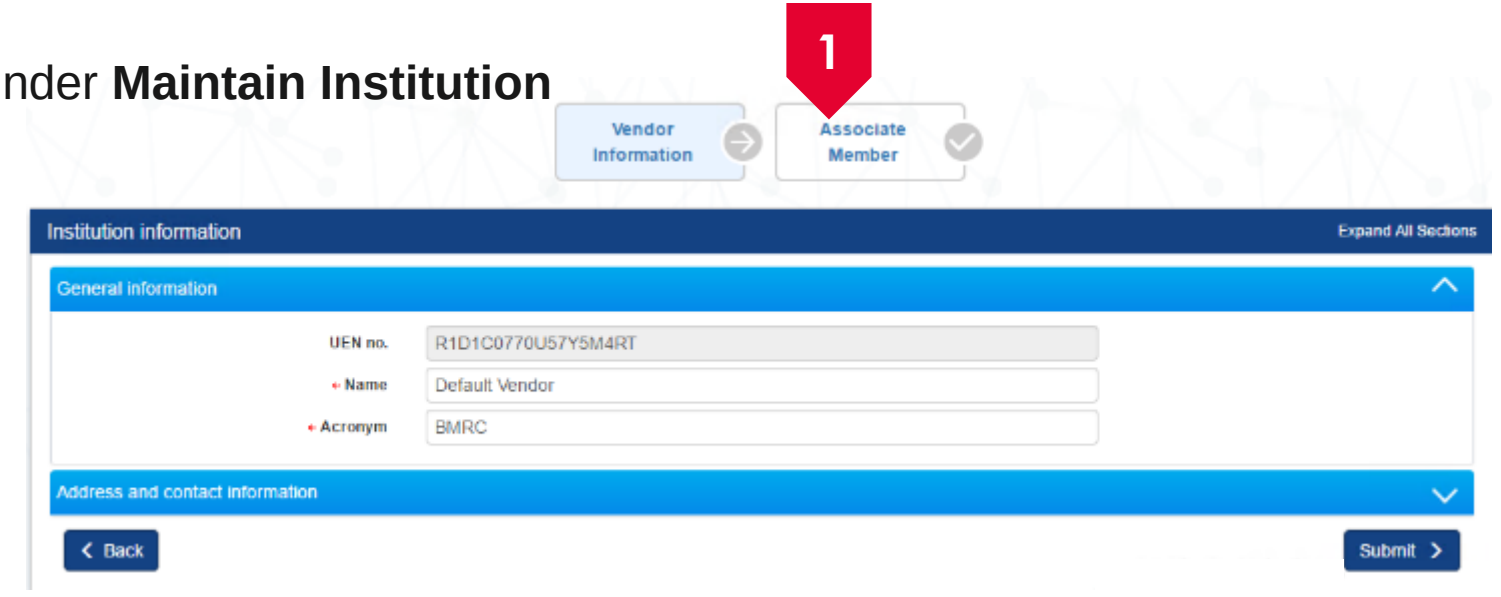


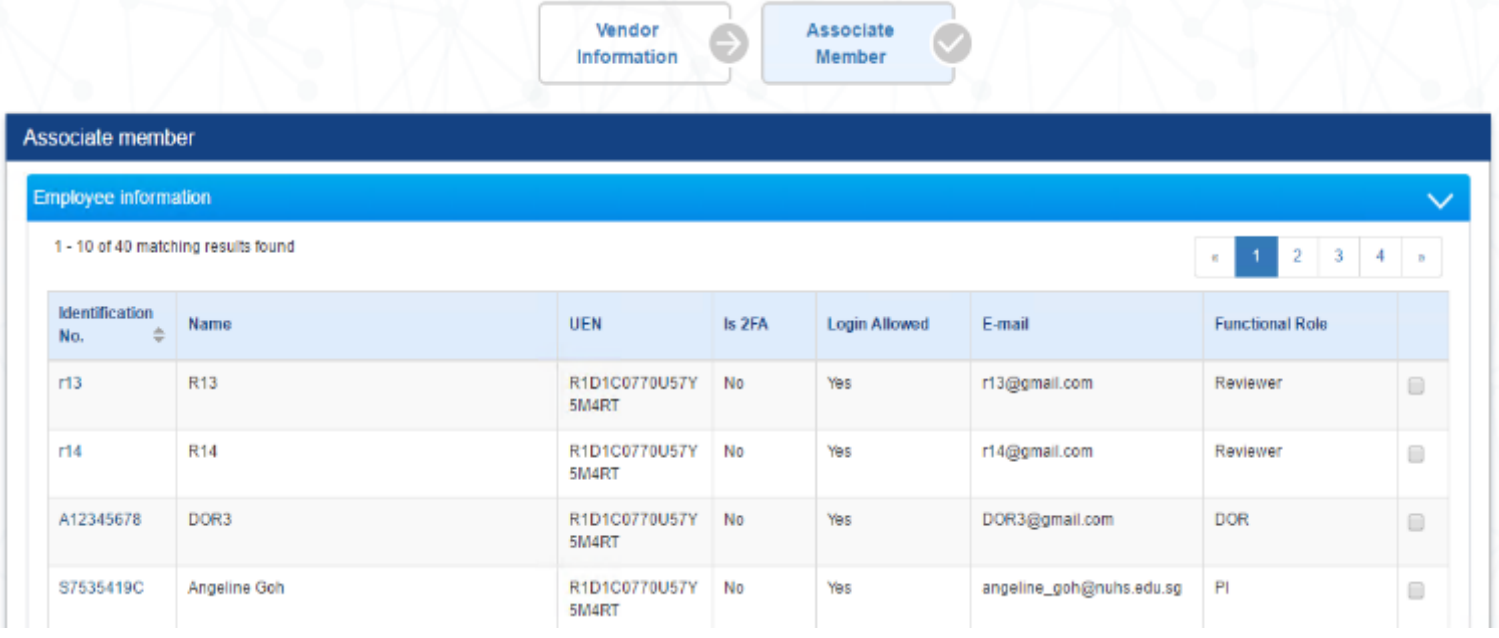
1 Fill up the Vendor Information page.
Note: All the mandatory fields must be filled up.

2 Click on **Submit** button to update the profile.

Granting access into IGMS

Under **Maintain Institution**



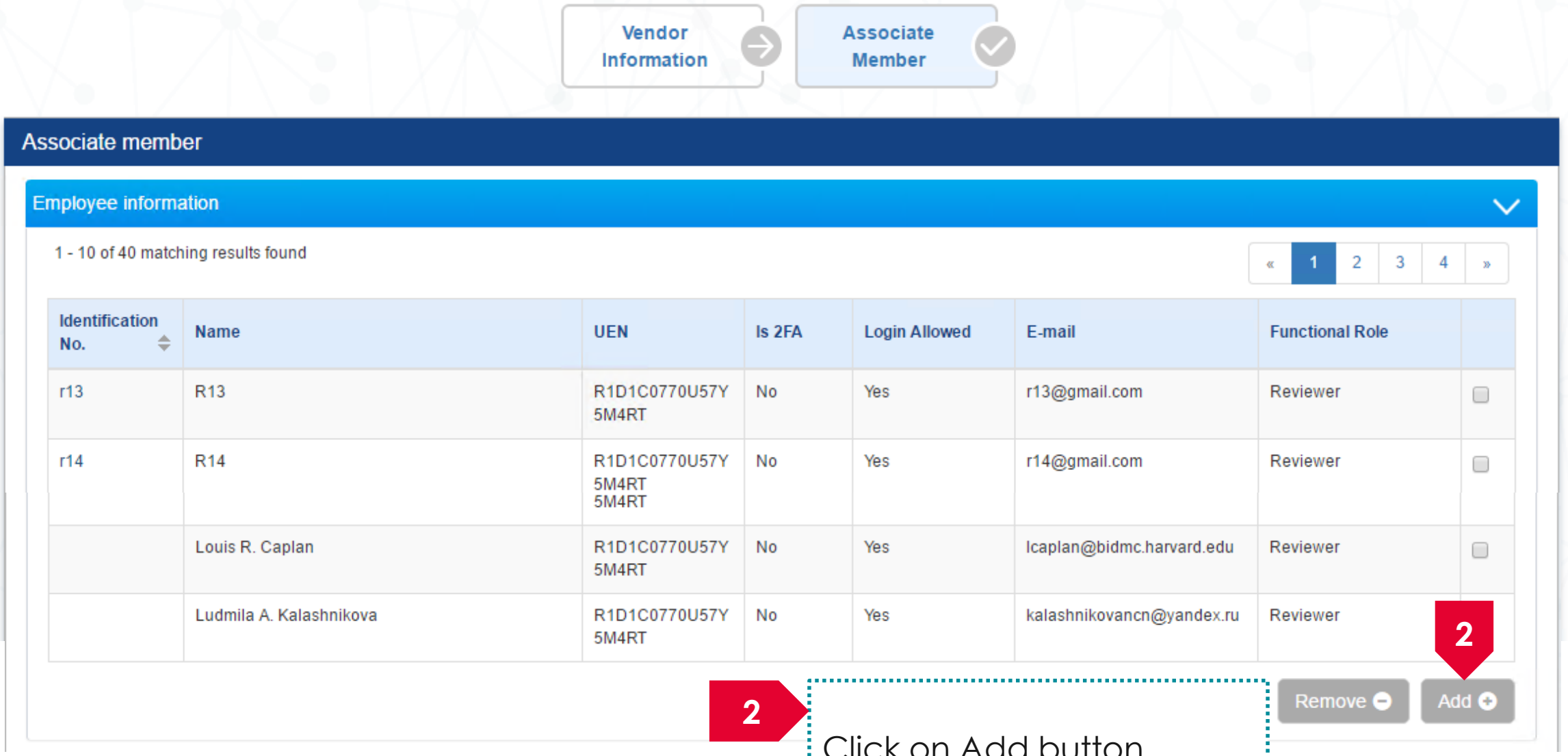


1 Click on the **Associate Member** Screen

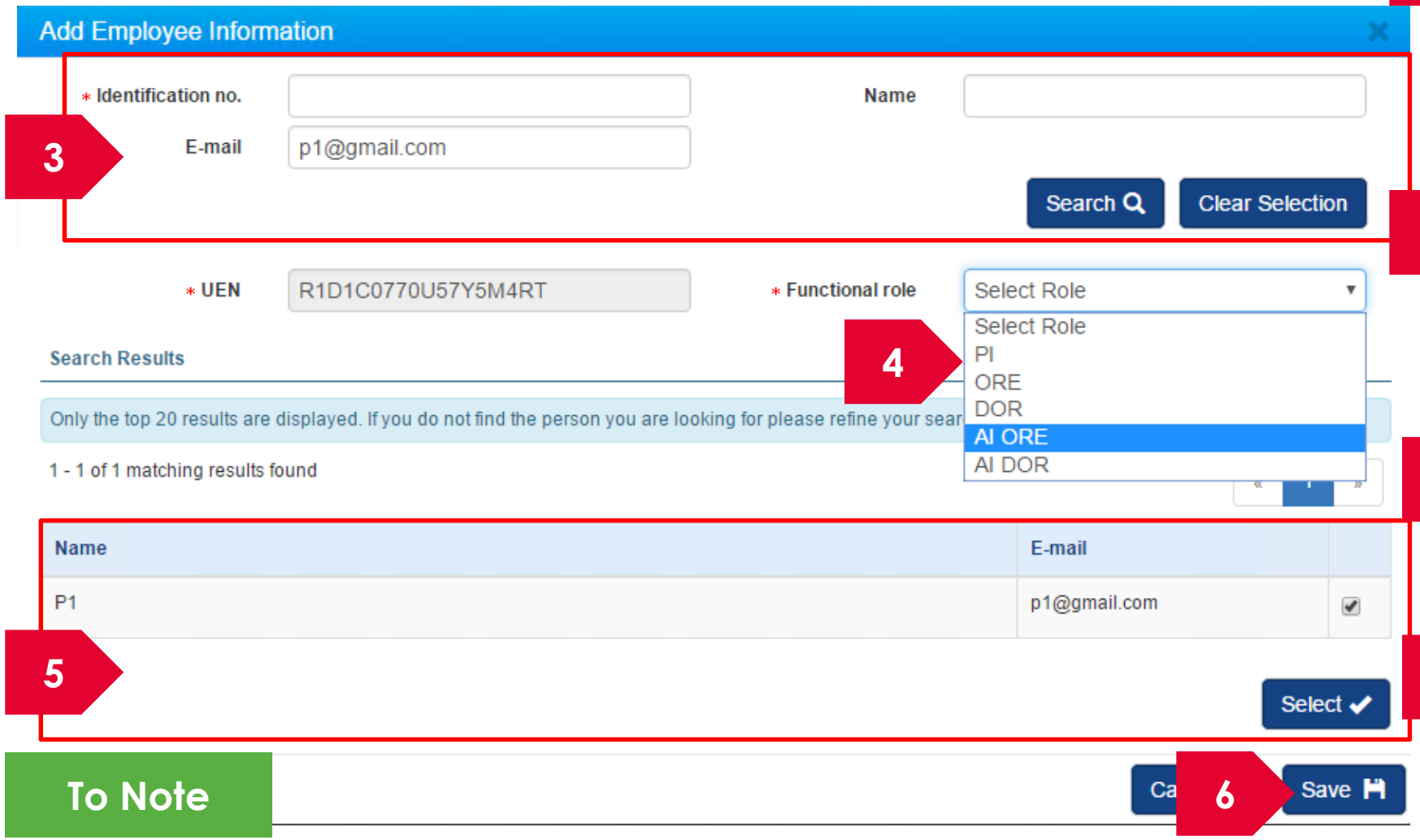
To Note

The Associate Member screen displays all the users who currently have access to the institution in IGMS

Granting access into IGMS - 2



Granting access into IGMS - 3



3 Search for the user using Identification Number, Name or Email. Click **Search**

4 Select the user by clicking on the **checkbox** and click **Select**

5 Choose the functional role

6 Click on **Save**

To Note

Only the top 20 results are displayed. If the person is not found then refine the search using identification number or email address.

Module – 5: How to use IGMS system (Proposal Submission)

- Understanding Institutional Administrators Dashboard
- View submitted proposals
- Verify submitted proposals
- Return submitted proposals
- Endorse submitted proposals
- Reject submitted proposals

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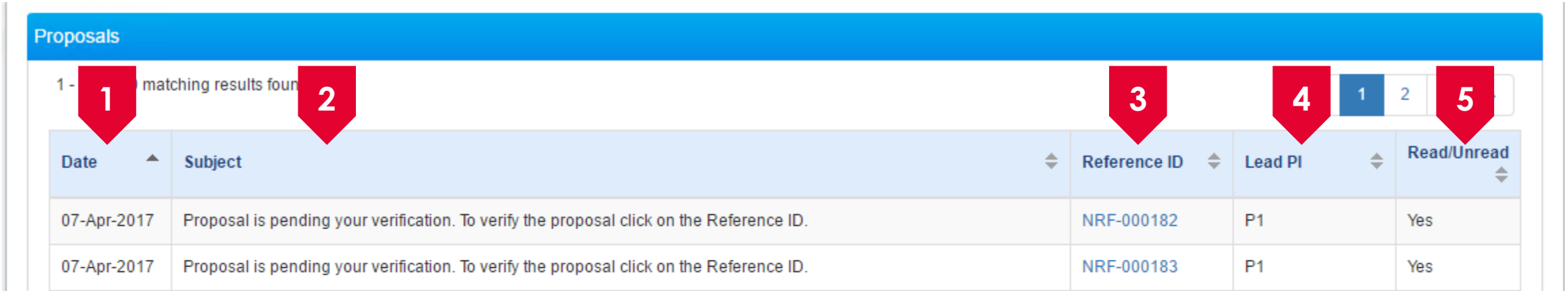
Institutional Administrators Dashboard



1. **Date**: When the item was created on the dashboard
2. **Subject**: Outstanding action that has to be performed by user
3. **Reference ID**: This is ID number of the record where the action need to be performed. Eg: Proposal ID
4. **Lead PI**: Lead Pis name of the proposal / project of the outstanding task
5. **Read / Unread**: Whether the user has read the item

To Note

The system would set the Read / Unread flag as Read when the user clicks the hyperlink on the reference ID column.

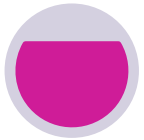
4 Stages of proposal submission

Submission

At this stage, PI submit the proposal to PM after ORE and DOR endorsement

Evaluation

At this stage, PM evaluate the proposal



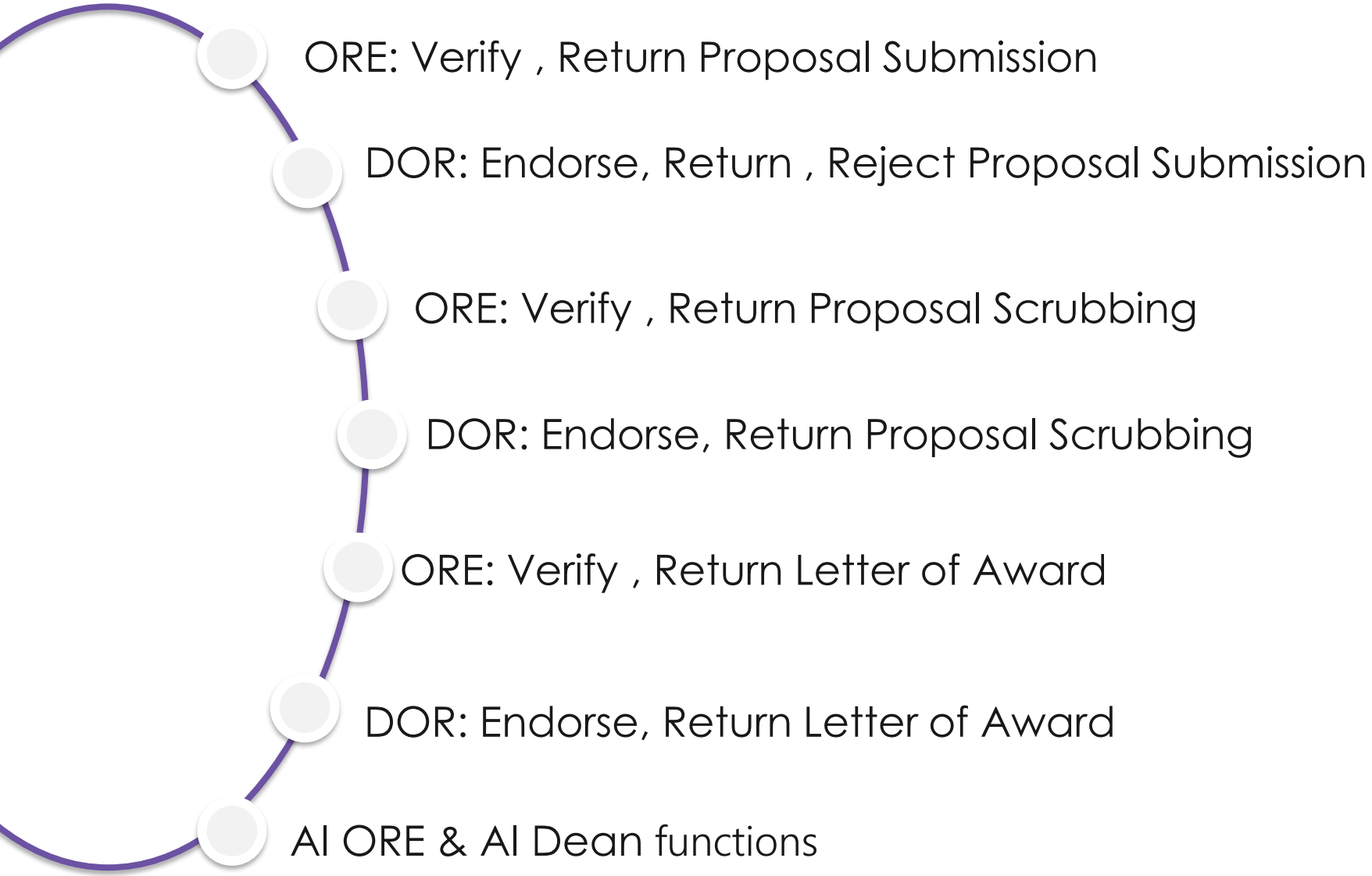
Scrubbing

At this stage, PM & PI agree on the budget, KPI and Milestone. The agreed budget, KPI and Milestone is submitted to PM after ORE and DOR endorsement

Award

At this stage, PM award the proposal. PI submit the Letter of acceptance after ORE and DOR endorsement

Institutional Administrators Functions



- ORE: Verify , Return Proposal Submission
- DOR: Endorse, Return , Reject Proposal Submission
- ORE: Verify , Return Proposal Scrubbing
- DOR: Endorse, Return Proposal Scrubbing
- ORE: Verify , Return Letter of Award
- DOR: Endorse, Return Letter of Award
- AI ORE & AI Dean functions

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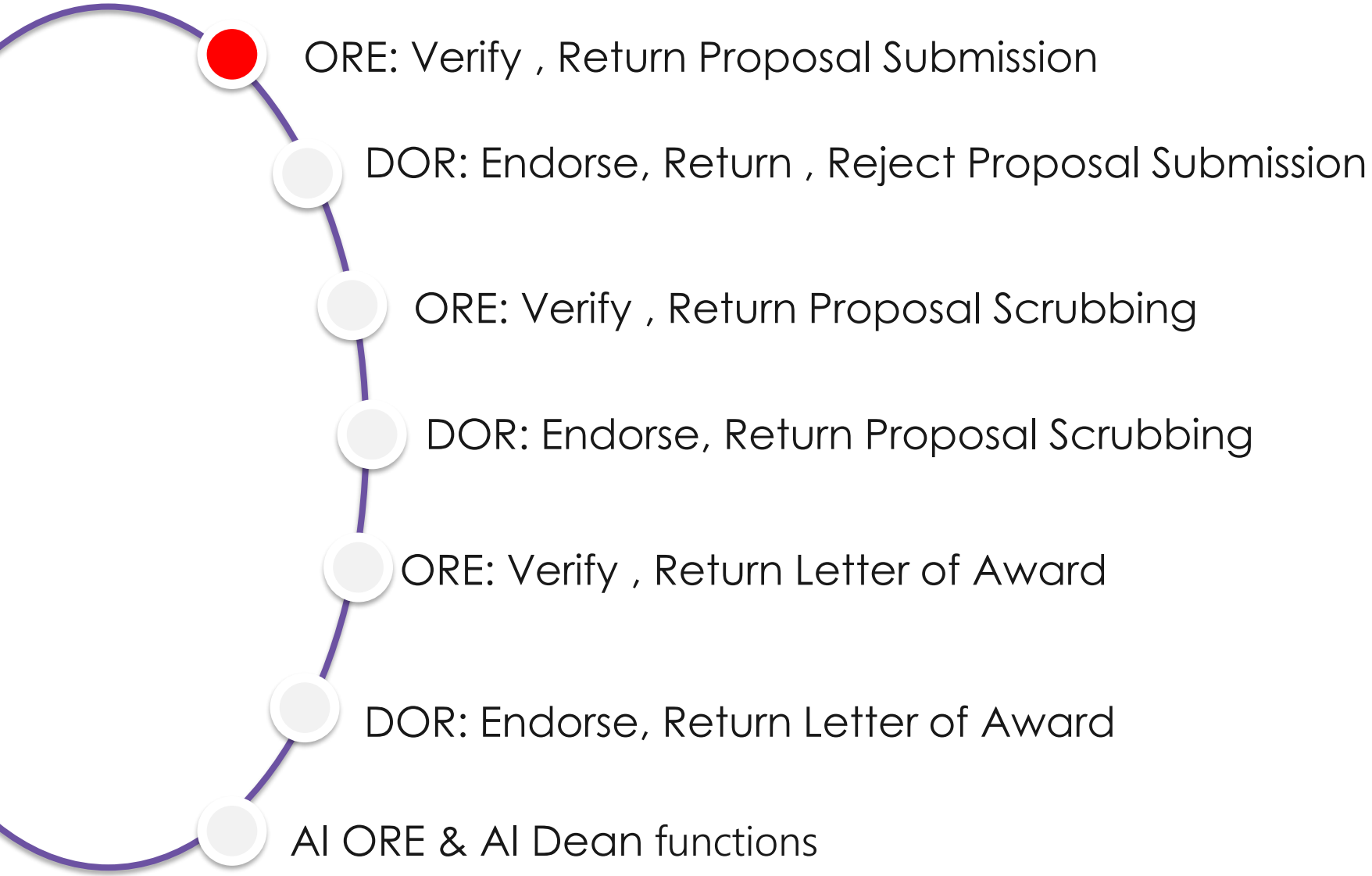
Institutional Administrators Functions



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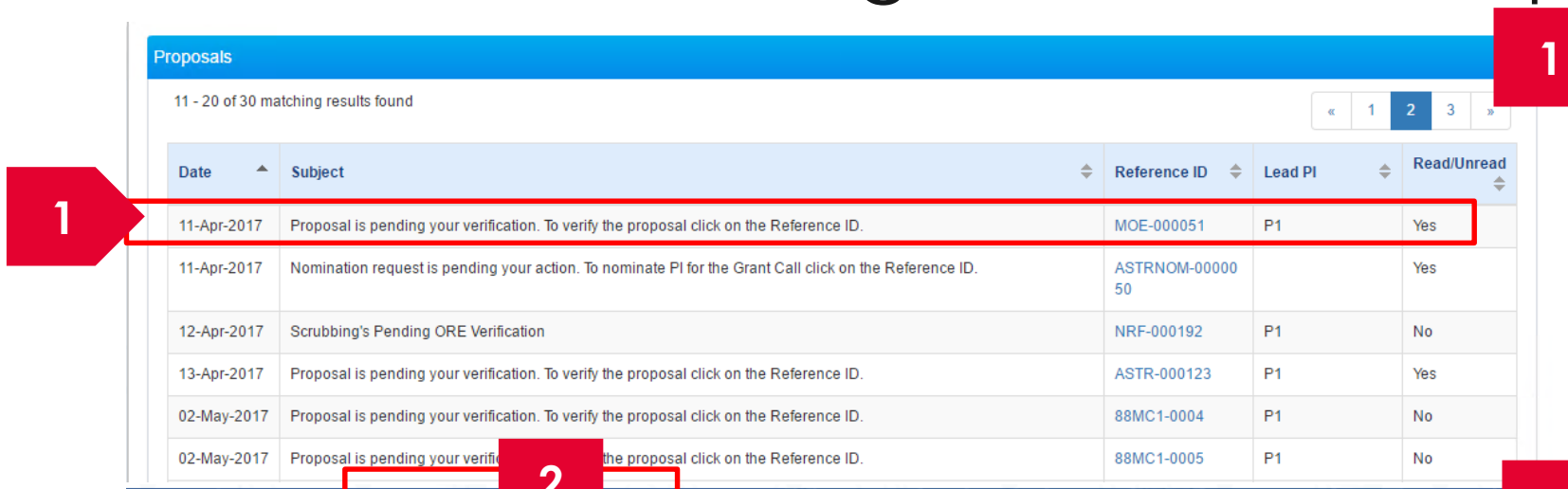
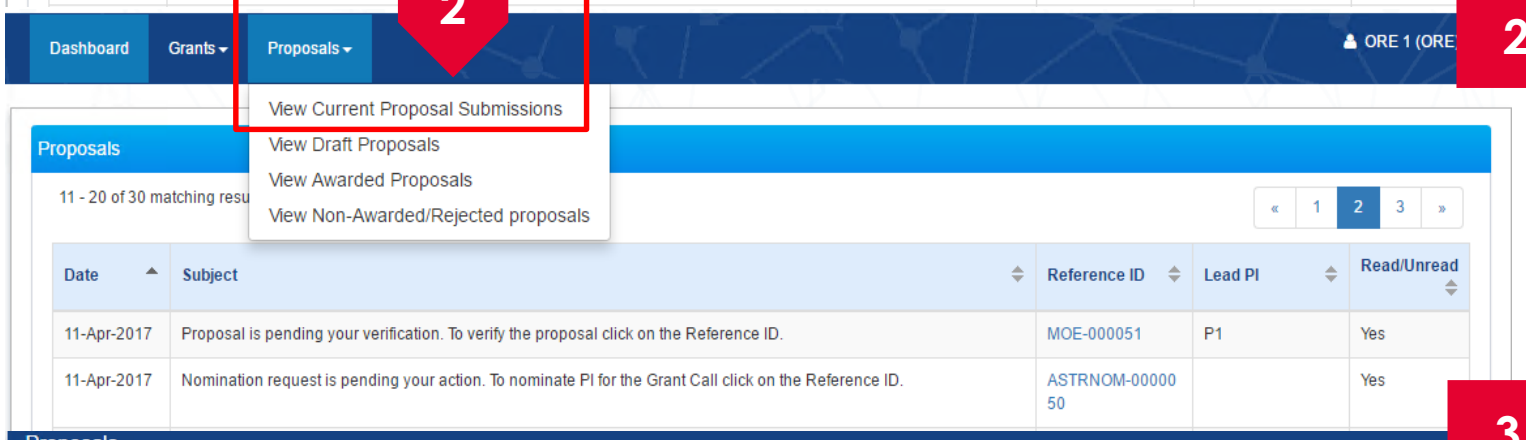
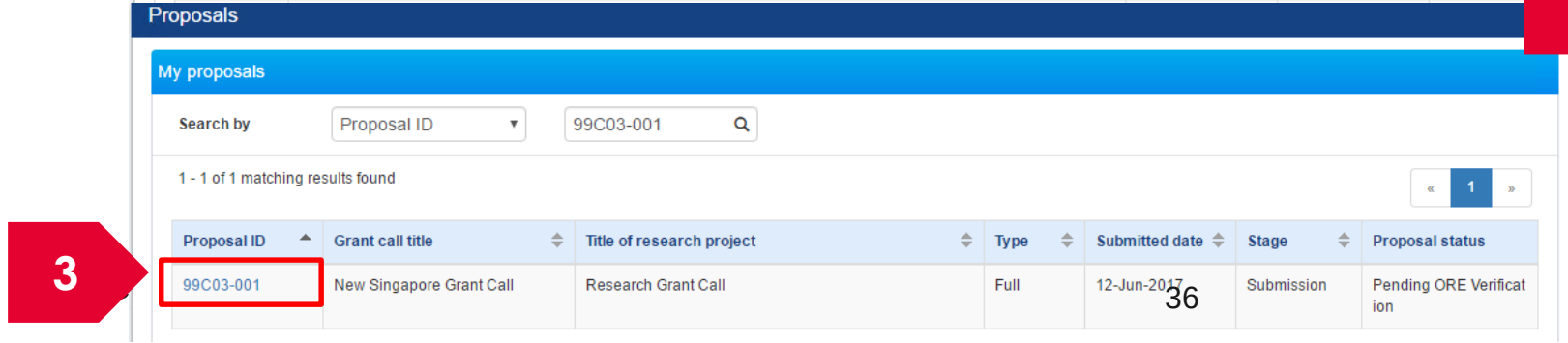
ORE: Access Pending Verification Proposals – 2 Options







1

Displays the proposals that require verification by ORE. Click on the hyperlink on the reference ID column to view the proposal

OR

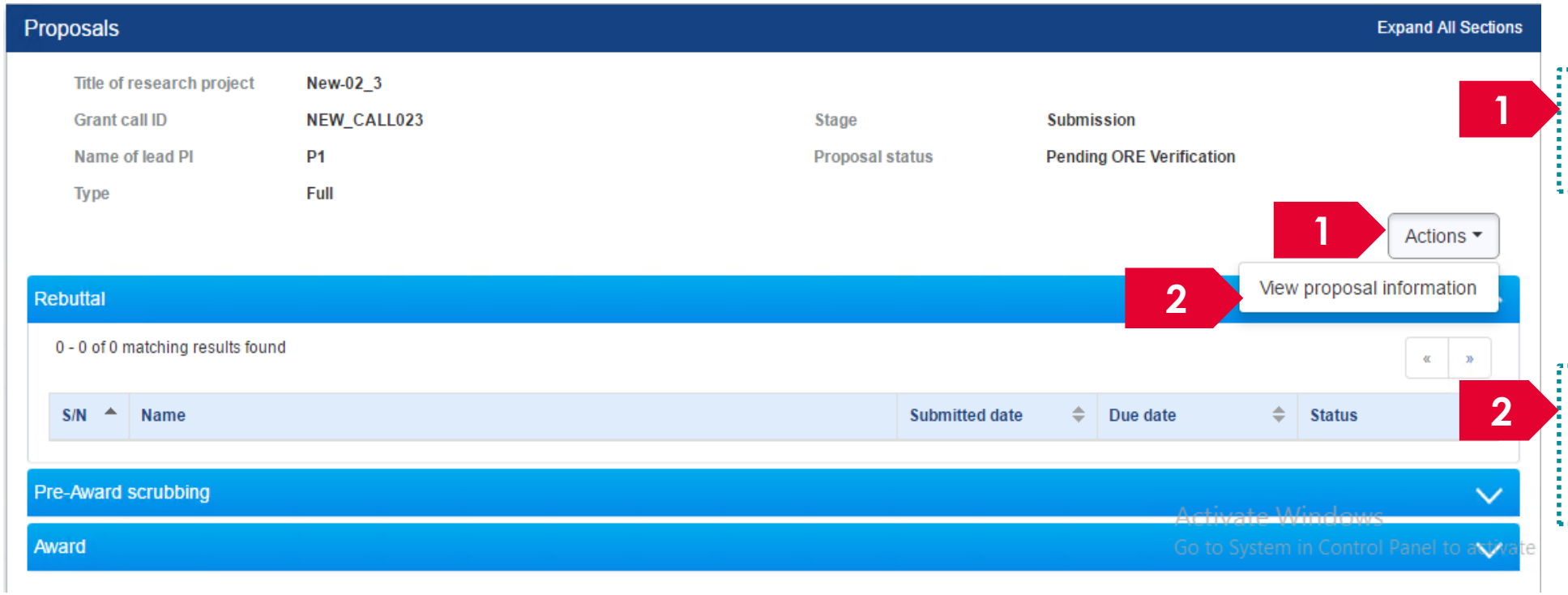
2

Click on **Proposals> View Current Proposal Submission**

3

Click on the **Proposal ID**

ORE: Viewing Proposals Details – 1



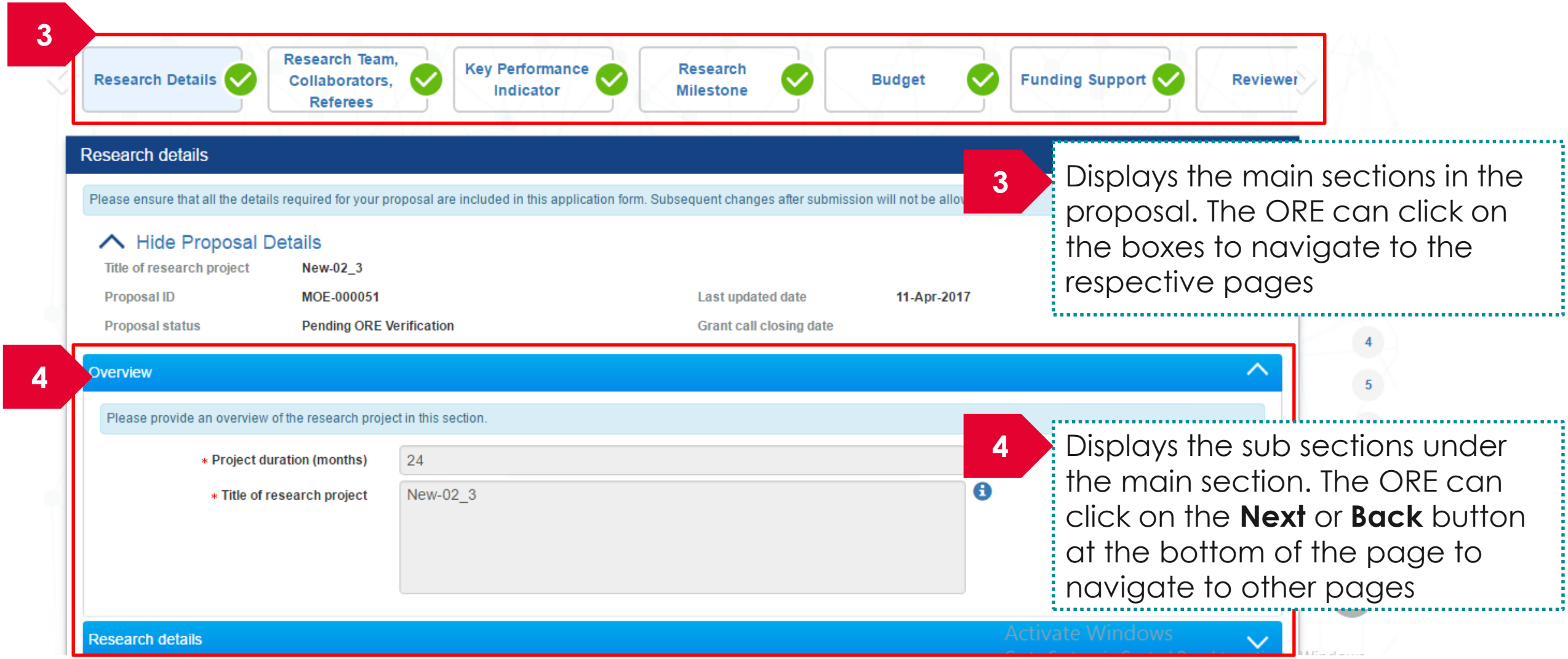
1 Click on **Actions**

2 Click on **View proposal information**

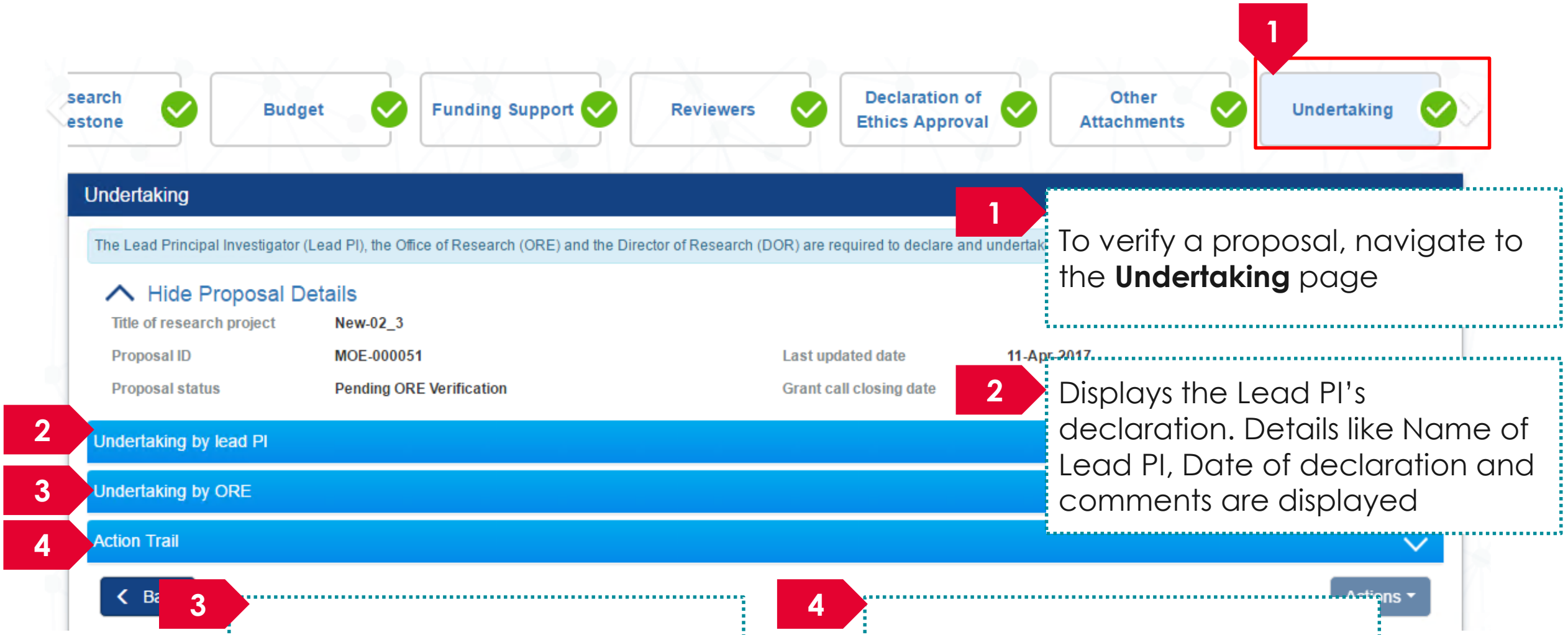
To Note

The ORE is not allowed to edit and change any information keyed in by the PI. The status of the proposals that are pending ORE's verification would read as Pending ORE Verification

ORE: Viewing Proposals Details – 2



ORE: Verifying or Returning a Proposal - 1



1 To verify a proposal, navigate to the **Undertaking** page

2 Displays the Lead PI's declaration. Details like Name of Lead PI, Date of declaration and comments are displayed

3 This is the ORE verification section

4 Displays the comments keyed in by Lead PI, ORE, DOR, AI ORE, AI Dean and PM

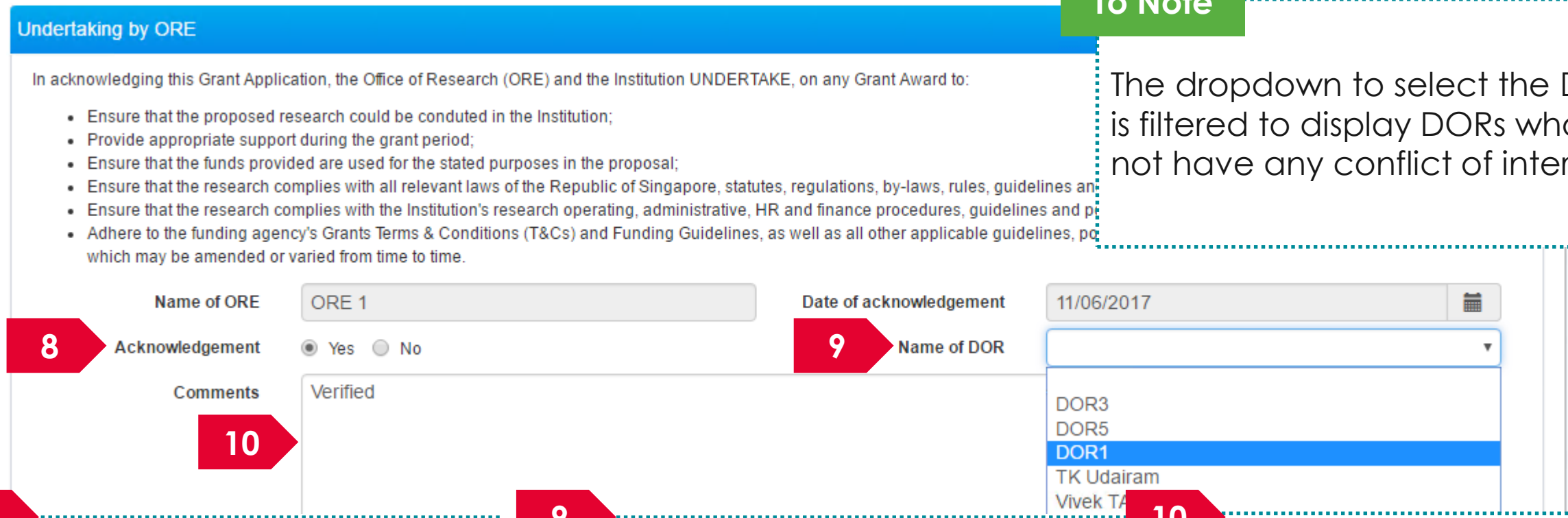
Understanding the Action Trail Section

5 **Date:** When the action was performed

6 **Submitted by:** The person who performed the action

7 **Comments:** The comments keyed in by the user

ORE: Verifying or Returning a Proposal - 2



To Note

The dropdown to select the DOR is filtered to display DORs who do not have any conflict of interest

8

To verify or return a proposal select **Yes** for the acknowledgement field

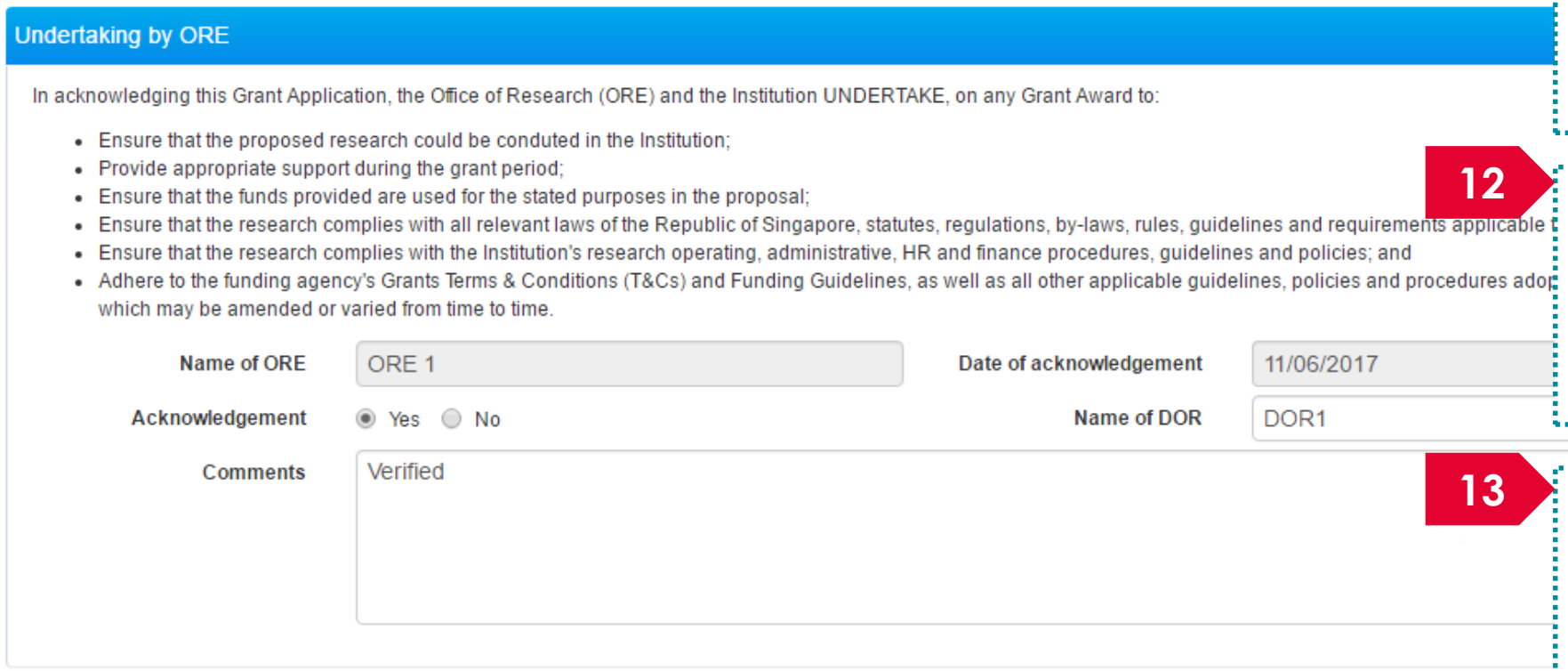
9

Select the **DOR** to route the proposal after verification. DOR selection is not required if the proposal is being returned to PI for amendments

10

Key in the comments for DOR or for PI

ORE: Verifying or Returning a Proposal - 3



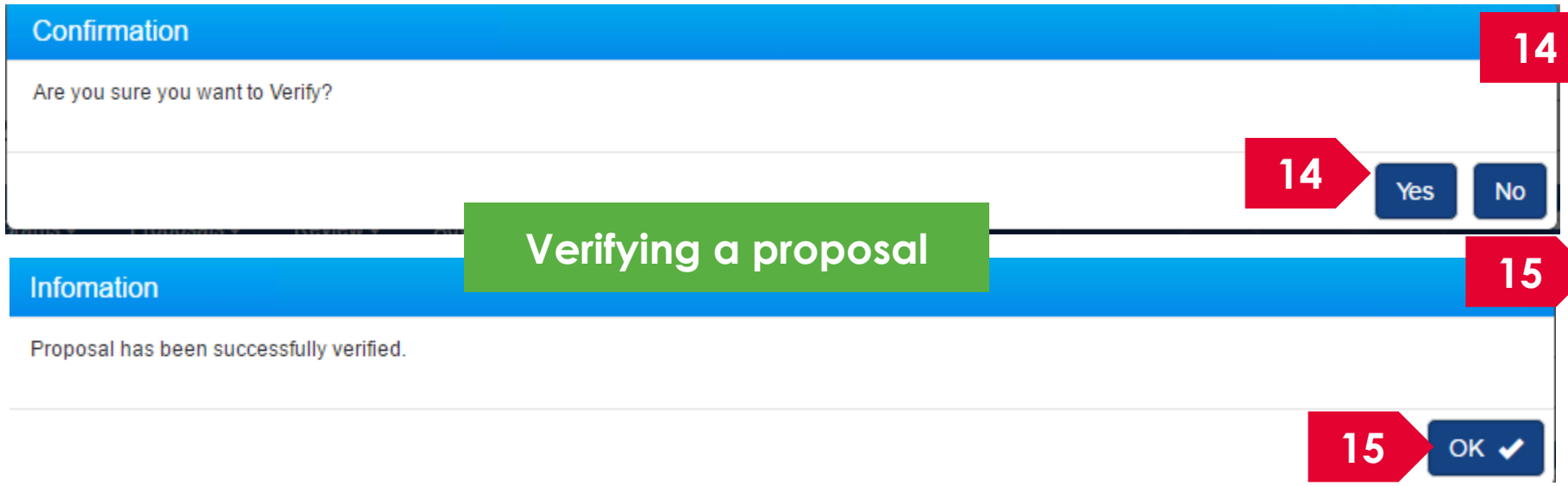
11 To Verify or Return a proposal, click on **Actions**

12 To verify a proposal click on **Verified**

13 To return a proposal click on **Return**

ORE: Verifying or Returning a Proposal - 4

Verifying a proposal

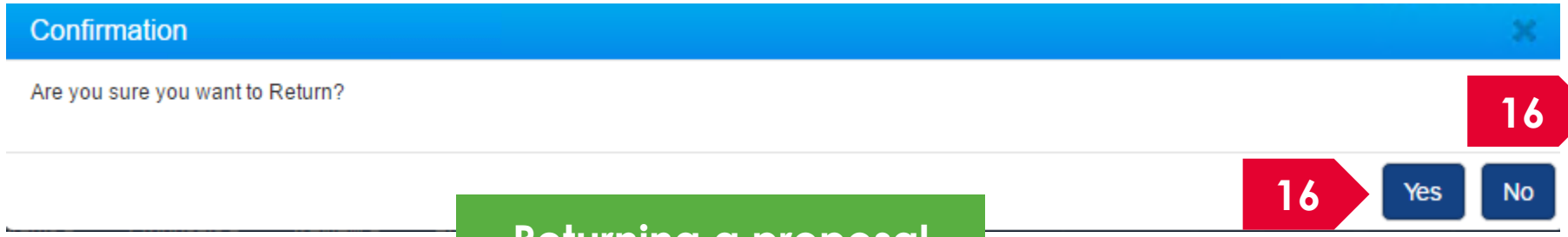


14 Click on **Yes** to proceed verifying

Verifying a proposal

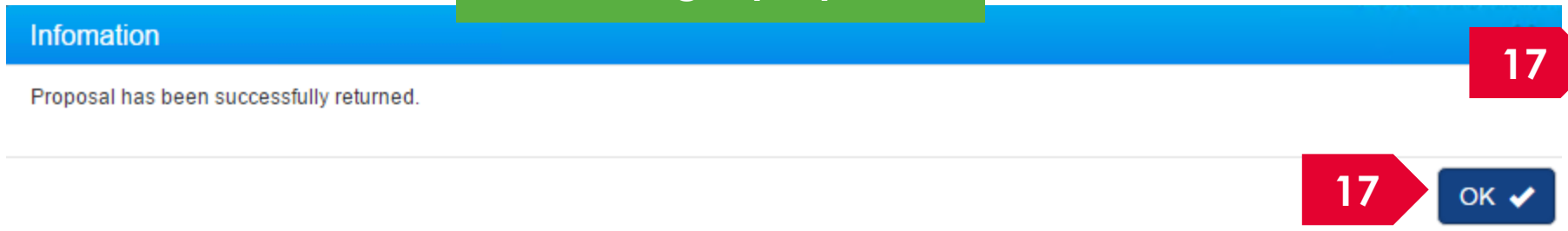
15 Click on **Ok**

Verifying a proposal



16 Click on **Yes**

Returning a proposal



17 Click on **Ok**

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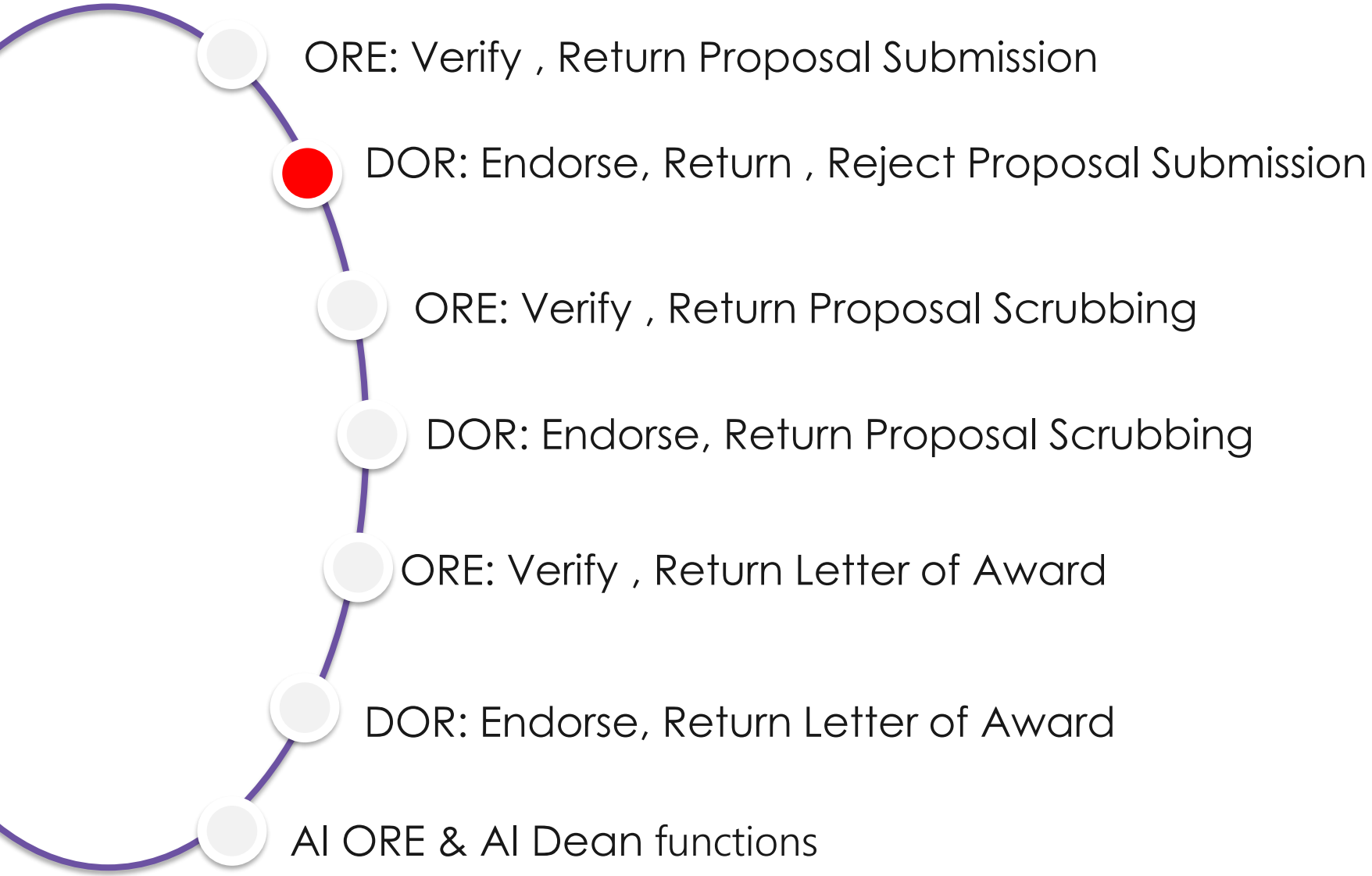
Institutional Administrators Functions



- ORE: Verify , Return Proposal Submission
- DOR: Endorse, Return , Reject Proposal Submission
- ORE: Verify , Return Proposal Scrubbing
- DOR: Endorse, Return Proposal Scrubbing
- ORE: Verify , Return Letter of Award
- DOR: Endorse, Return Letter of Award
- AI ORE & AI Dean functions

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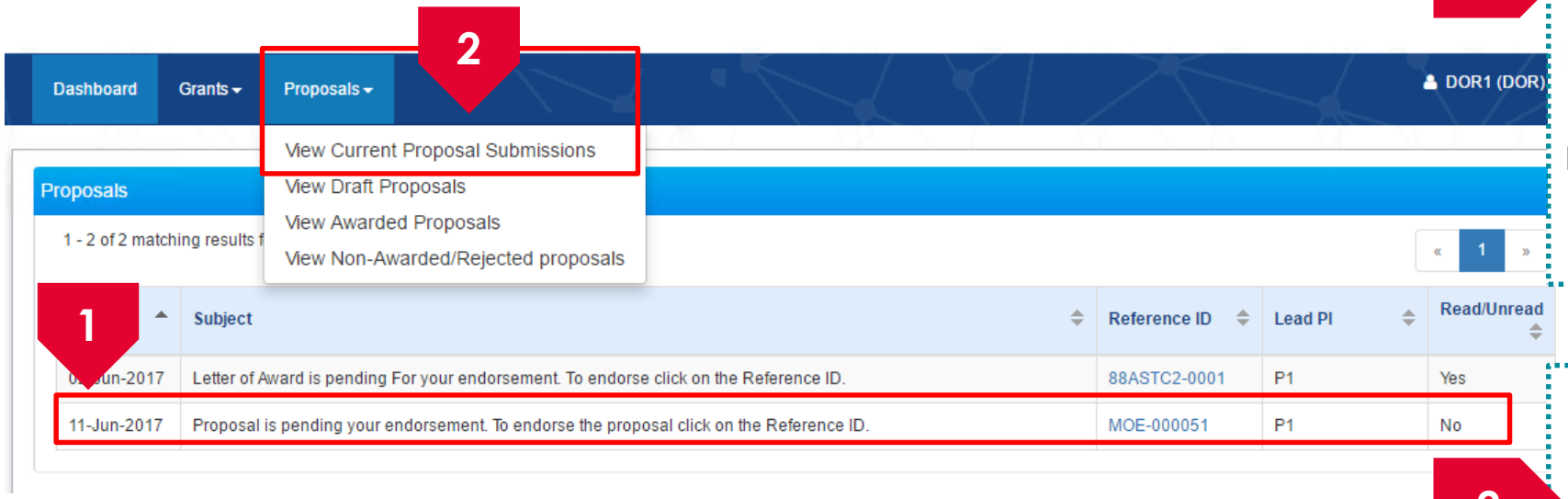
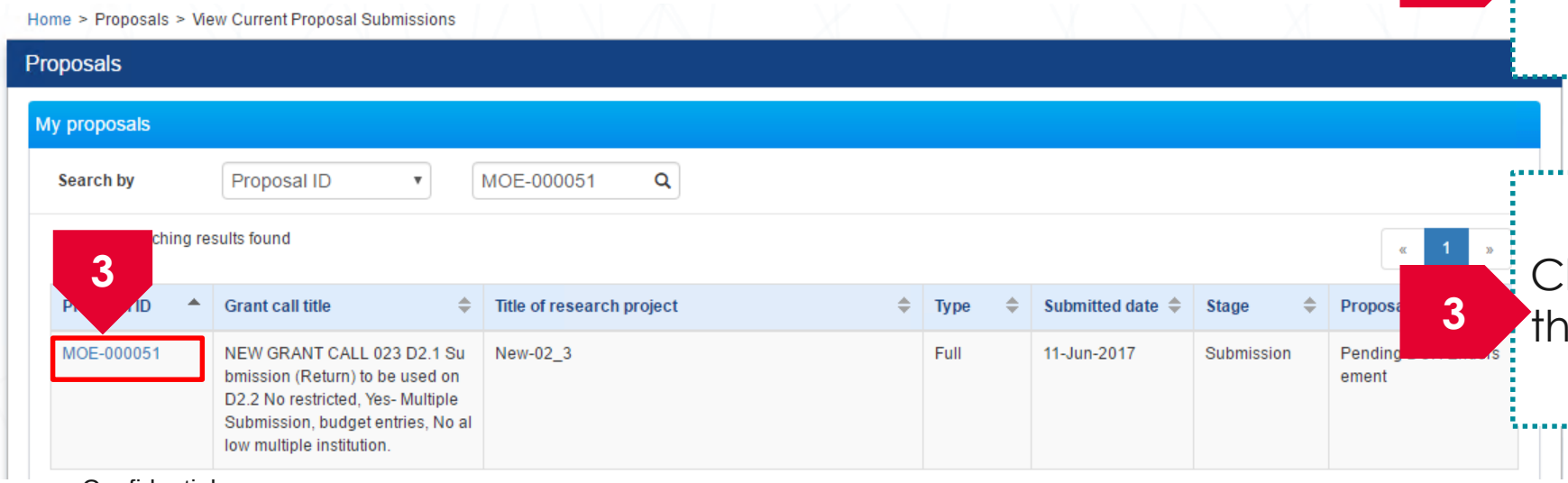
DOR: Access Pending Endorsement Proposals – 2 Options



1

Displays the proposals that require endorsement by DOR. Click on the hyperlink on the **reference ID** column to view the proposal

OR



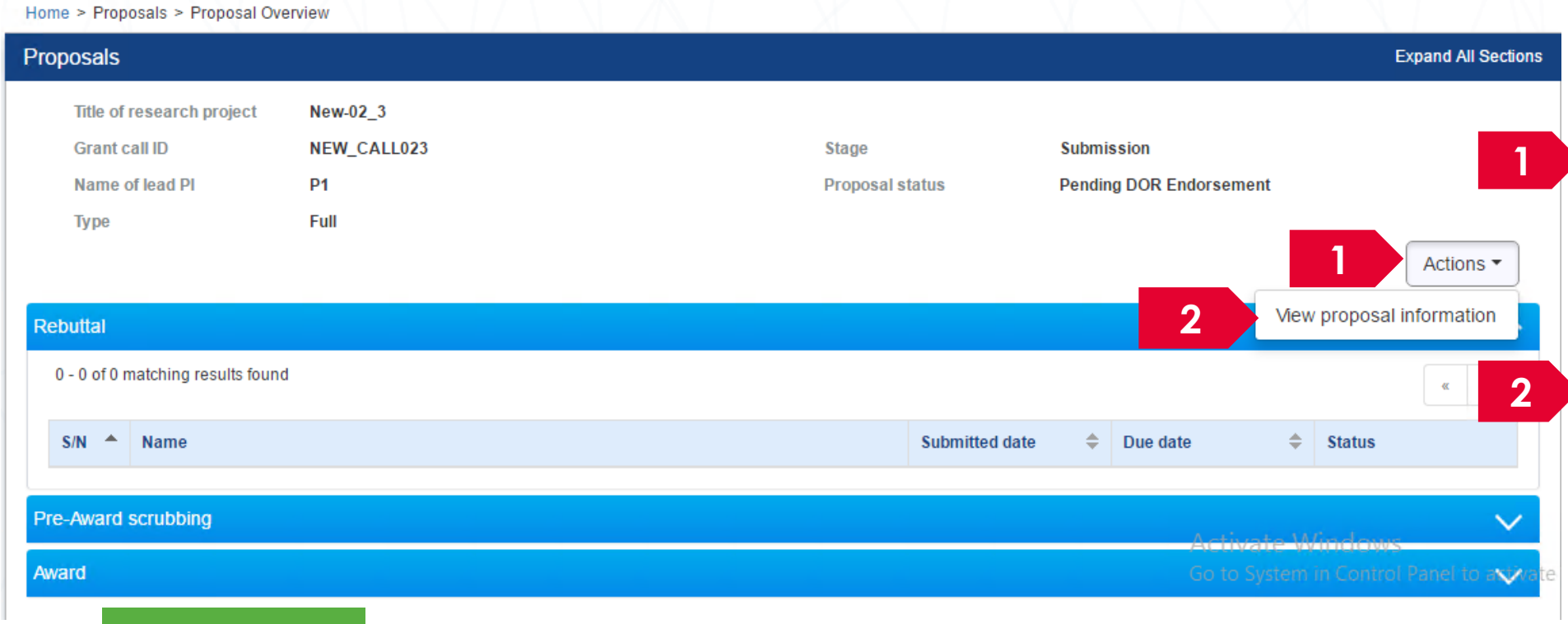
2

Click on **Proposals> View Current Proposal Submission**

3

Click on the **Proposal ID** under the Proposal ID column

DOR: Viewing Proposals Details – 1



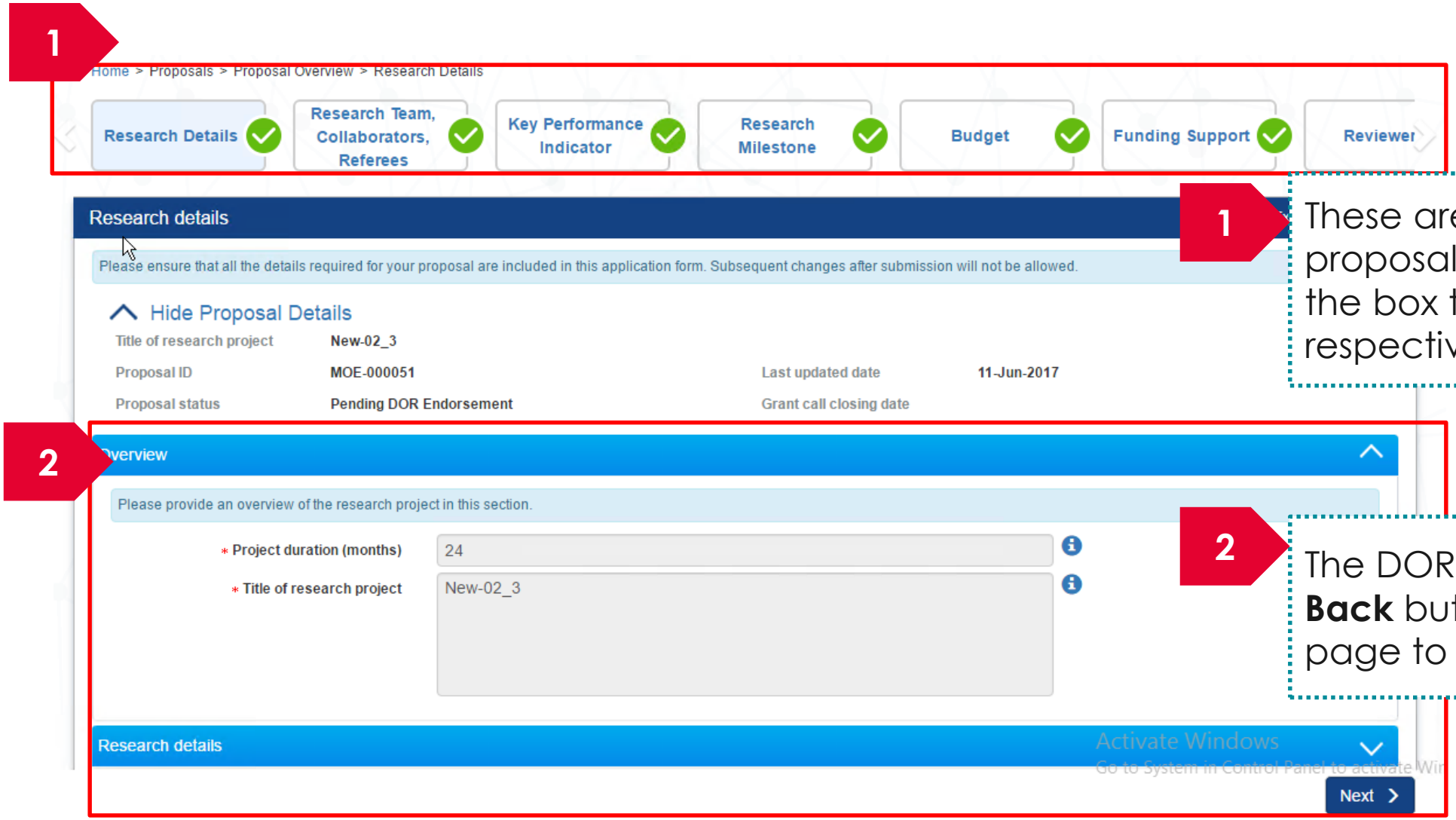
1 Click on **Actions**

2 Click on **View proposal information**

To Note

The DOR is not allowed to edit and change any information keyed in by the PI. The status of the proposals that are pending DOR's verification would read as Pending DOR Endorsement

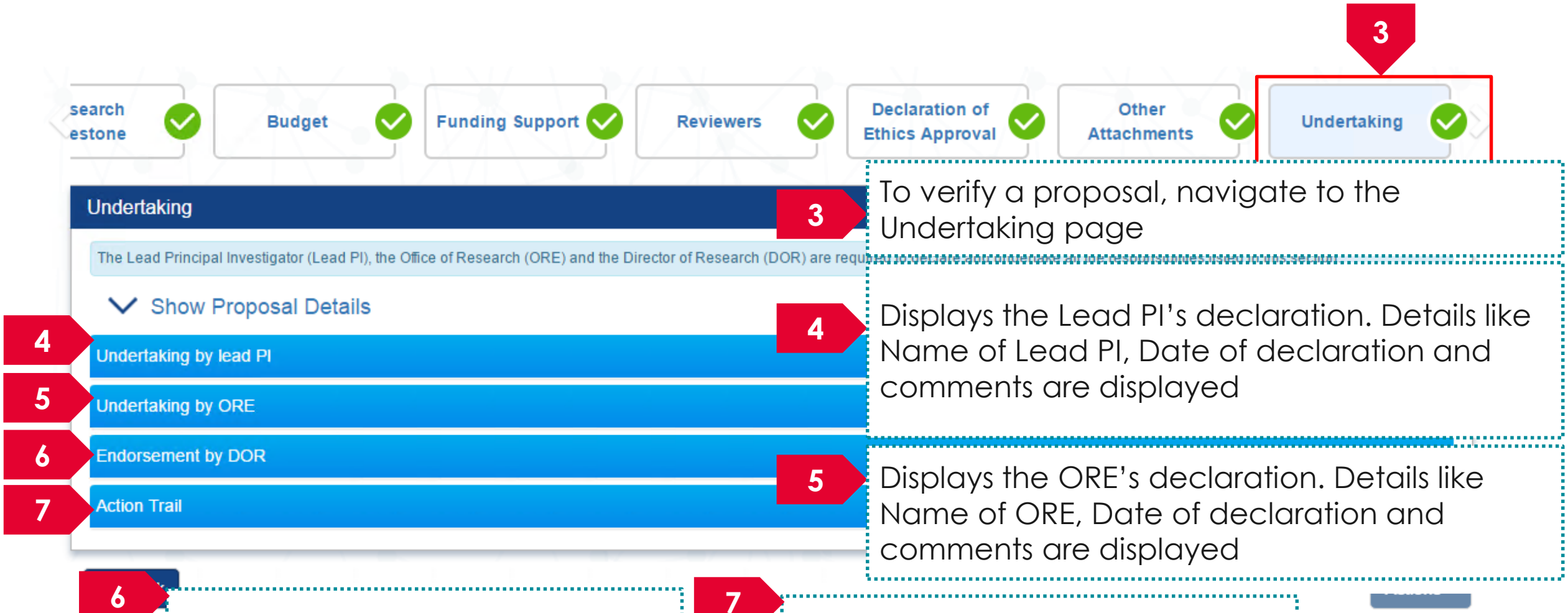
DOR: Viewing Proposals Details – 2



1 These are the main sections in the proposal. The DOR can click on the box to navigate to the respective pages

2 The DOR can click on the **Next** or **Back** button at the bottom of the page to navigate to other pages

DOR: Endorsing, Returning or Rejecting a Proposal - 1



3 To verify a proposal, navigate to the Undertaking page

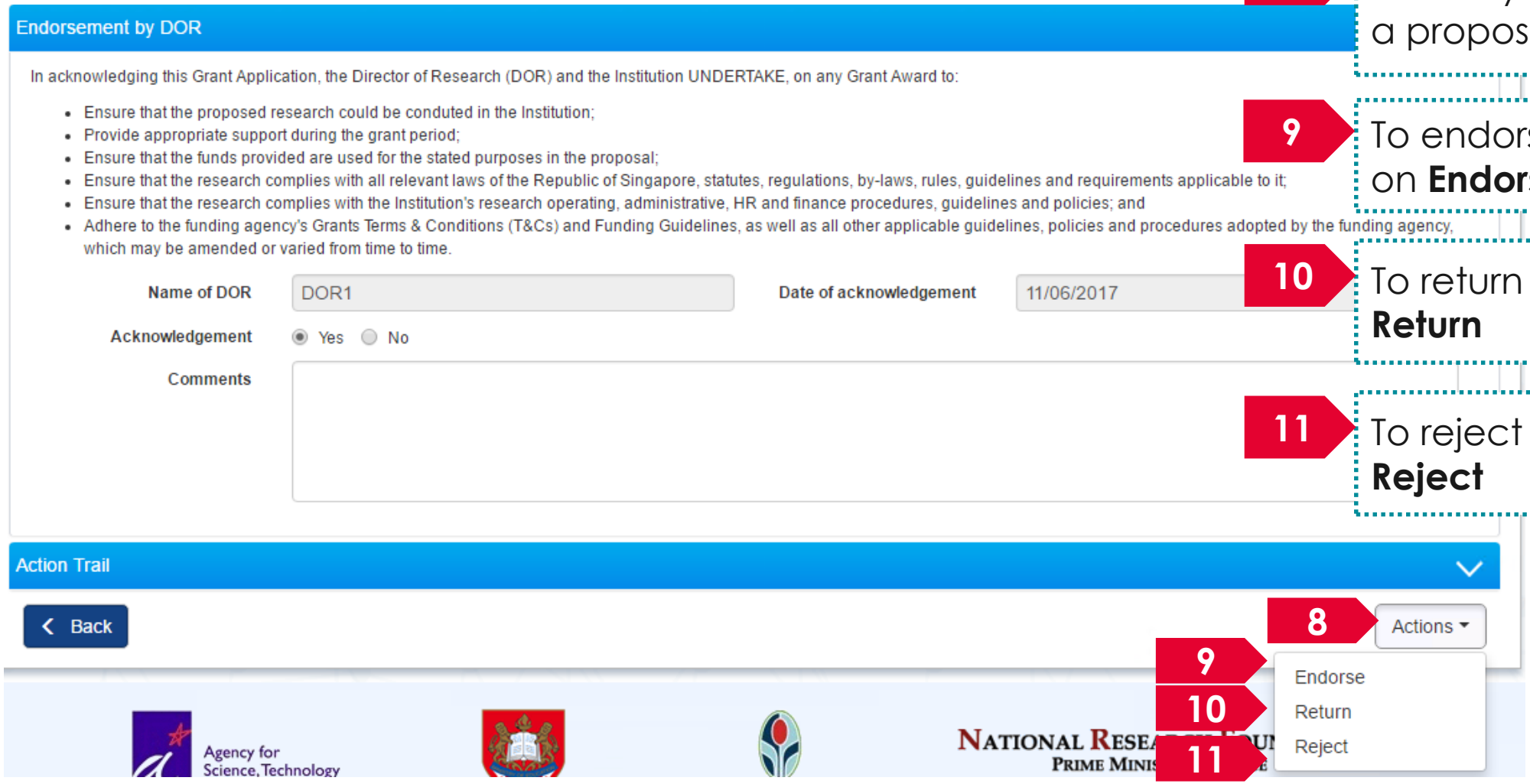
4 Displays the Lead PI's declaration. Details like Name of Lead PI, Date of declaration and comments are displayed

5 Displays the ORE's declaration. Details like Name of ORE, Date of declaration and comments are displayed

6 This is the DOR endorsement section

7 This section displays the comments keyed in by Lead PI, ORE, DOR, AI ORE, AI Dean and PM

DOR: Endorsing, Returning or Rejecting a Proposal - 2



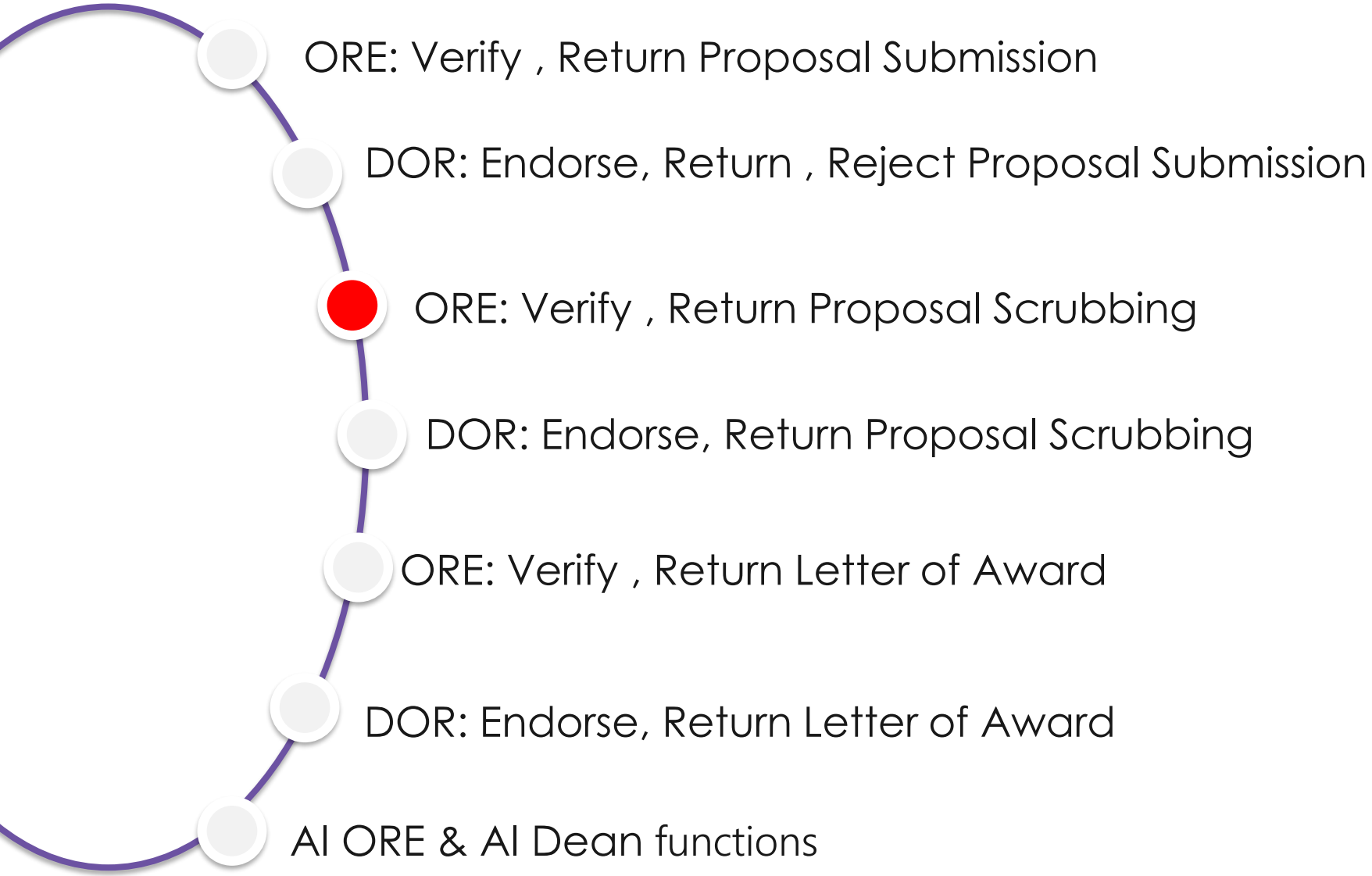
8 To Verify or Return or Reject a proposal, click on **Actions**

9 To endorse a proposal click on **Endorse**

10 To return a proposal click on **Return**

11 To reject a proposal click on **Reject**

Institutional Administrators Functions



ORE: Verify , Return Proposal Submission

DOR: Endorse, Return , Reject Proposal Submission

ORE: Verify , Return Proposal Scrubbing

DOR: Endorse, Return Proposal Scrubbing

ORE: Verify , Return Letter of Award

DOR: Endorse, Return Letter of Award

AI ORE & AI Dean functions

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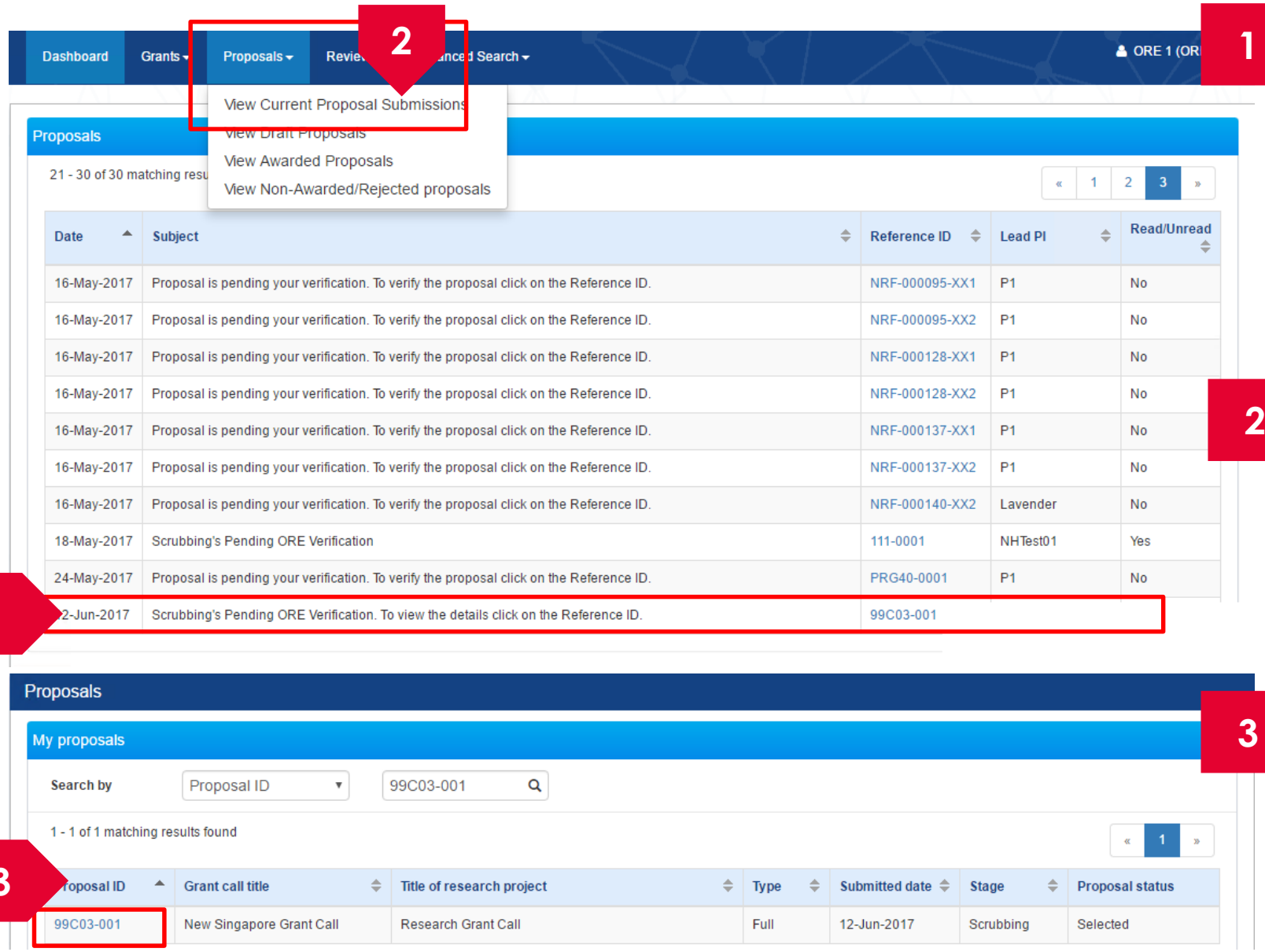
ORE: Access Pending Verification Proposals – 2 Options



1

Displays the proposals which are in scrubbing stage that require verification by ORE. Click on the hyperlink on the **Reference ID** column to view the proposal

OR

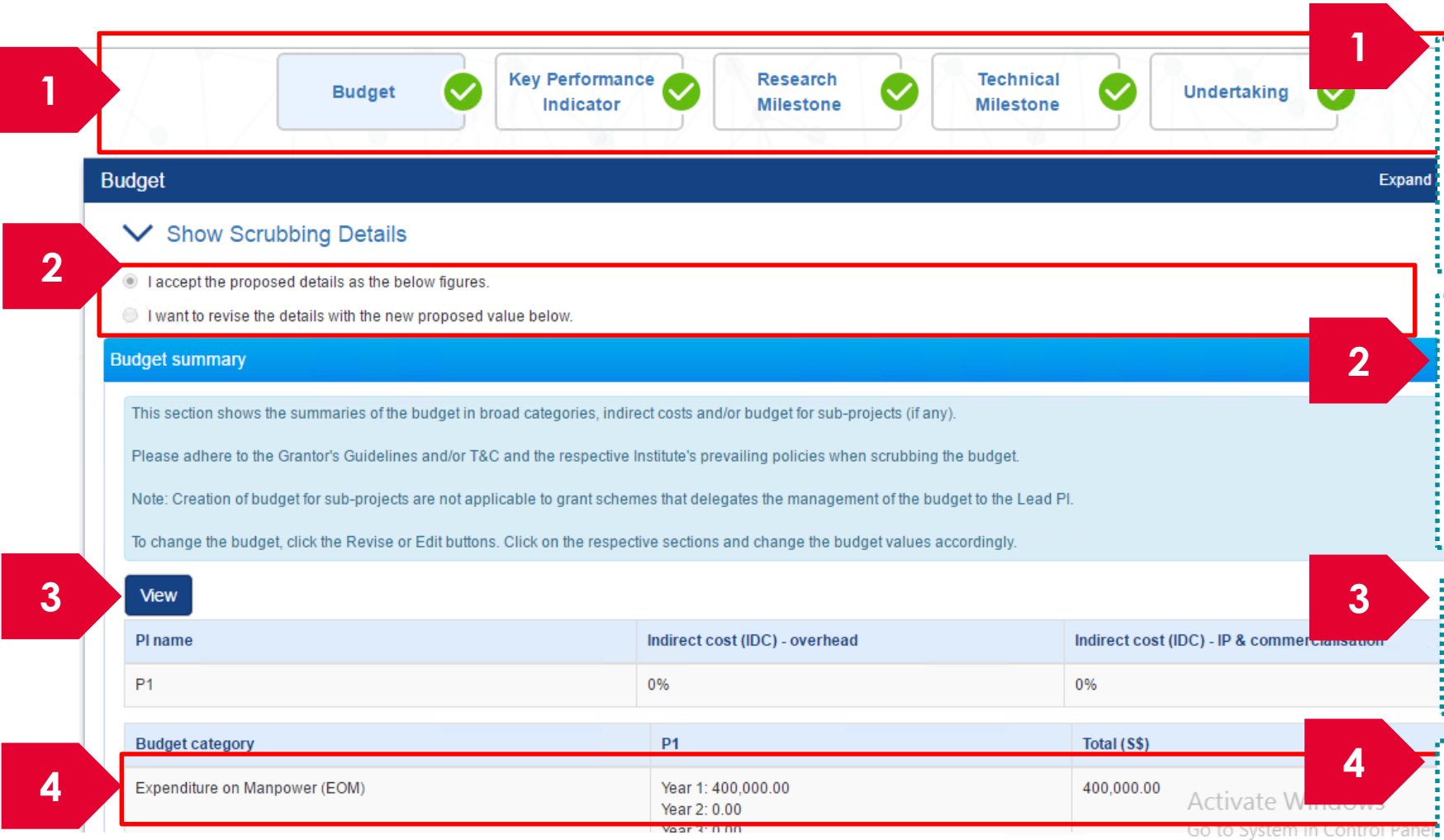
2

Click on **Proposals> View Current Proposal Submission**

3

Click on the **Proposal ID** under the Proposal ID column

ORE: Verifying a Proposal – 1



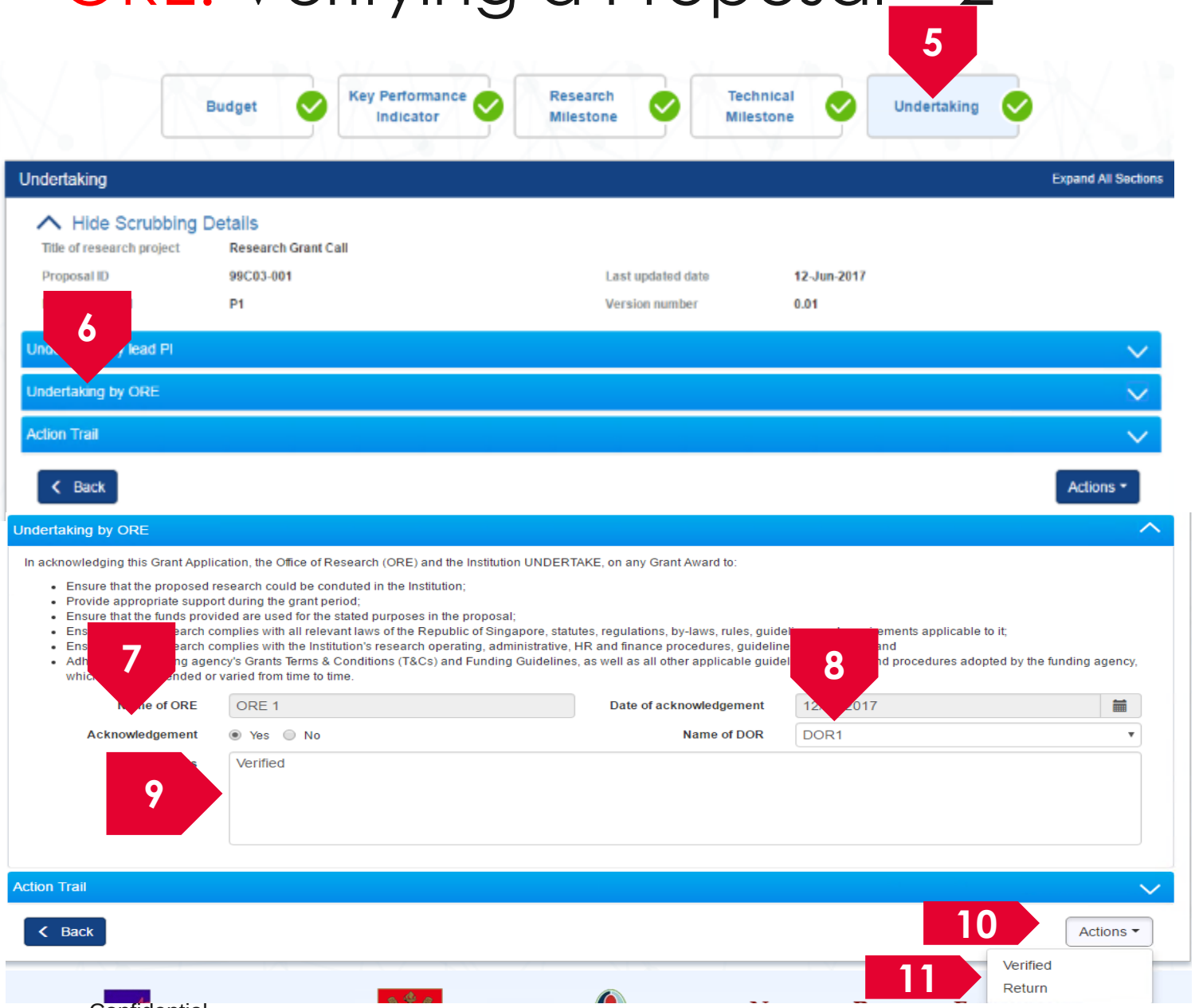
1 The ORE can click on the box to navigate to the respective pages to view the information keyed in by PI

2 This section displays whether the PI accepted the budget, KPI and Milestones

3 Click **View** to view the budget line items for each vote

4 This section displays the budget summary

ORE: Verifying a Proposal – 2



5 Navigate to the **Undertaking** page

6 Click **Undertaking by ORE** section

7 Click on **Yes** for acknowledgment

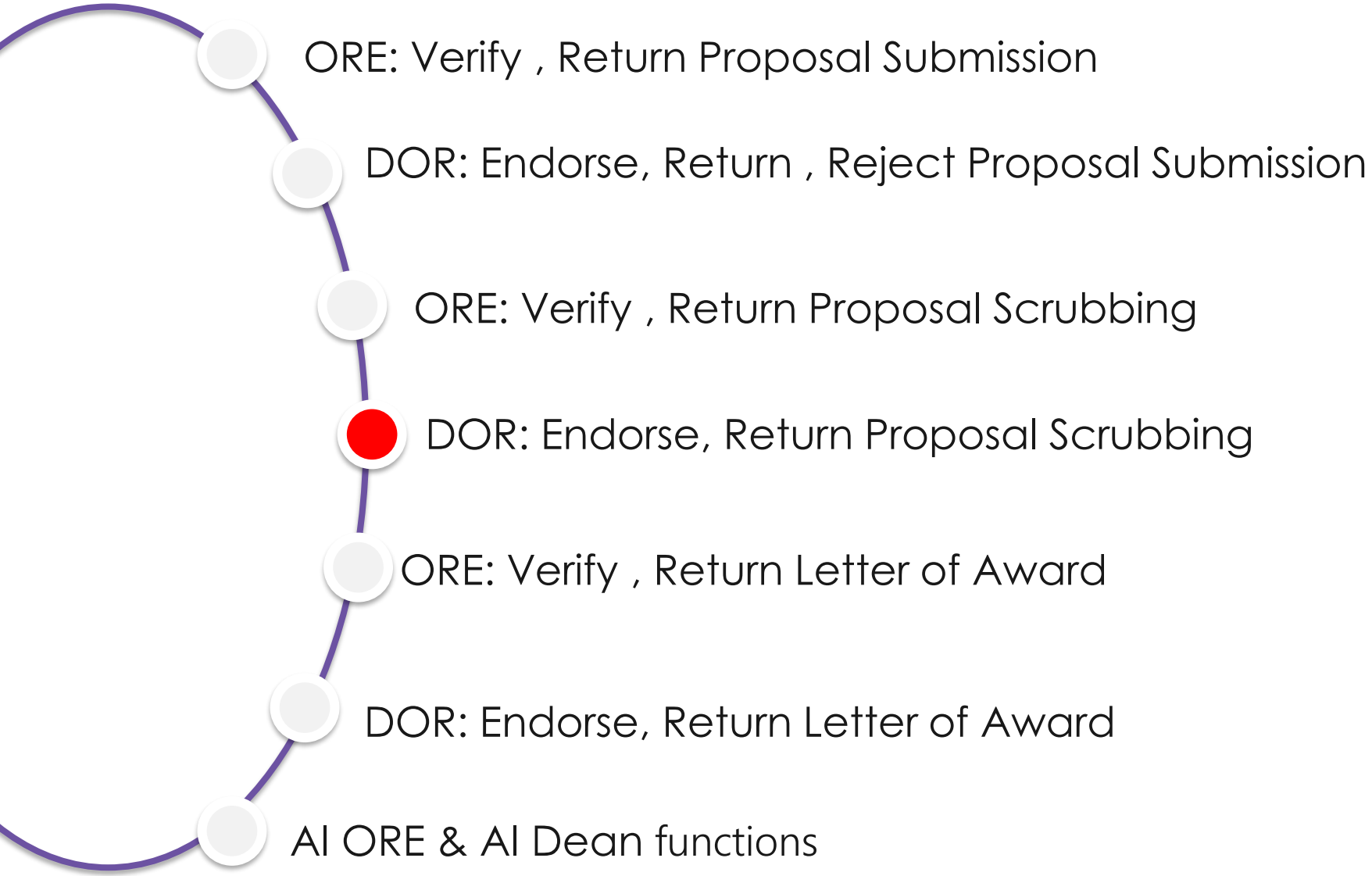
8 Select the DOR if you are verifying the proposal

9 Key in comments

10 Click on **Actions**

11 Click on **Verified** to verify or **Return** to return

Institutional Administrators Functions



ORE: Verify , Return Proposal Submission

DOR: Endorse, Return , Reject Proposal Submission

ORE: Verify , Return Proposal Scrubbing

DOR: Endorse, Return Proposal Scrubbing

ORE: Verify , Return Letter of Award

DOR: Endorse, Return Letter of Award

AI ORE & AI Dean functions

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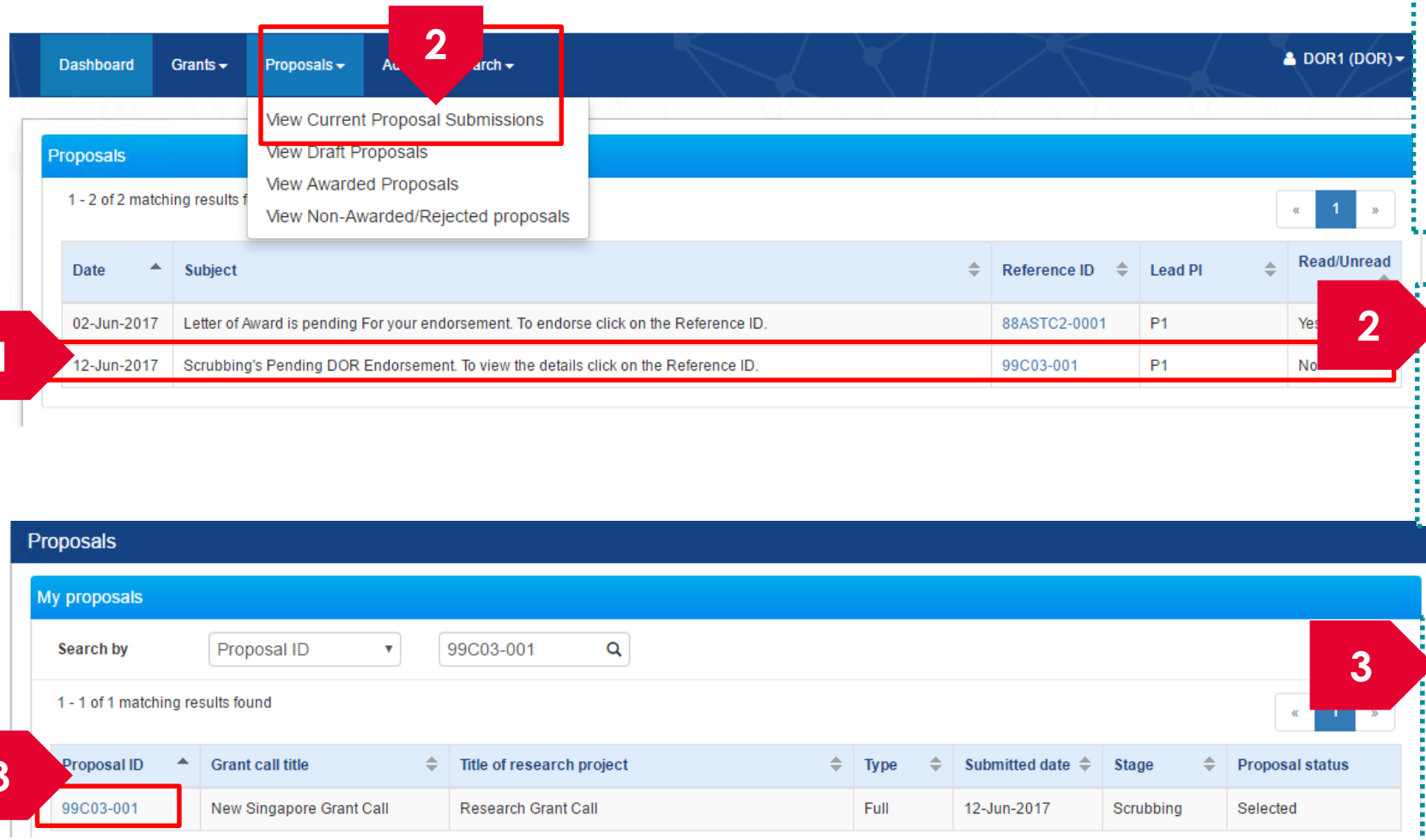
DOR: Access Pending Endorsement Proposals – 2 Options



1

Displays the proposals which are in scrubbing stage that require endorsement by DOR. Click on the hyperlink on the **Reference ID** column to view the proposal

OR

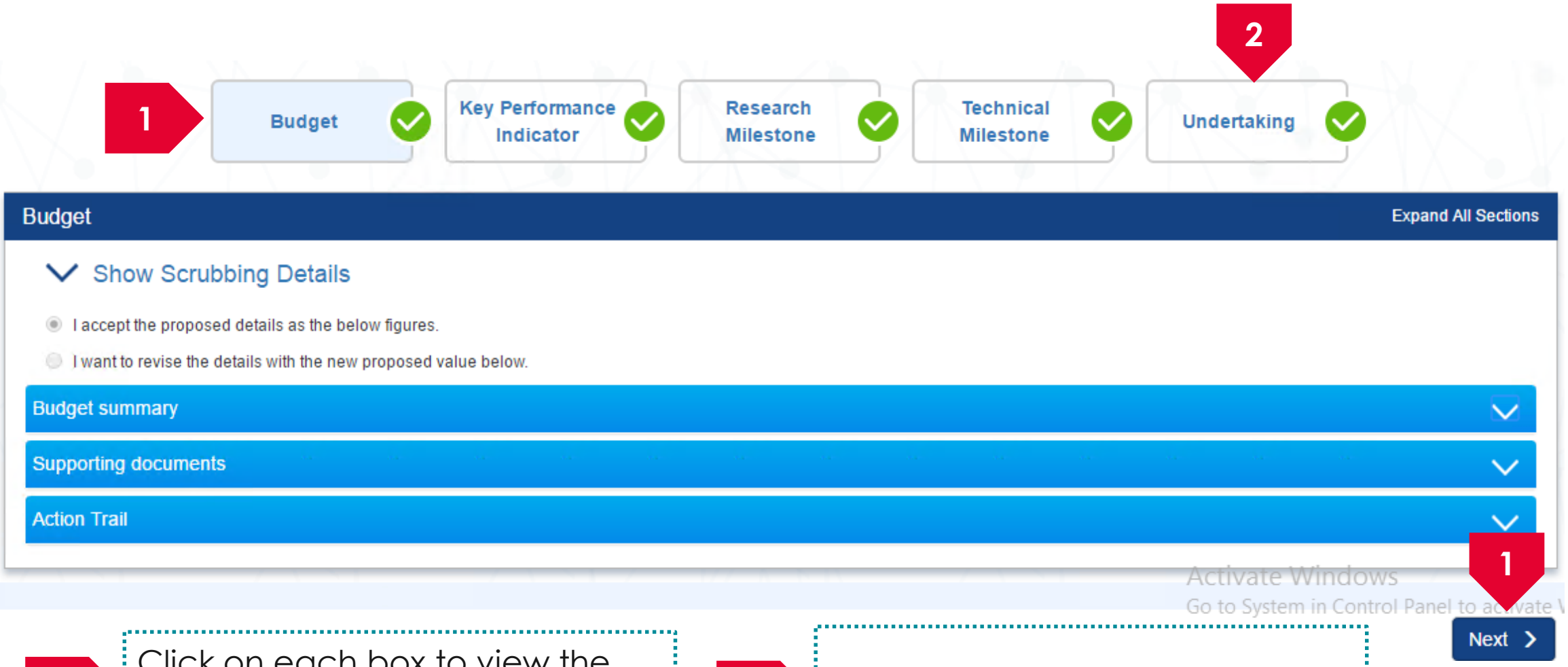
2

Click on **Proposals> View Current Proposal Submission**

3

Click on the **Proposal ID** under the Proposal ID column

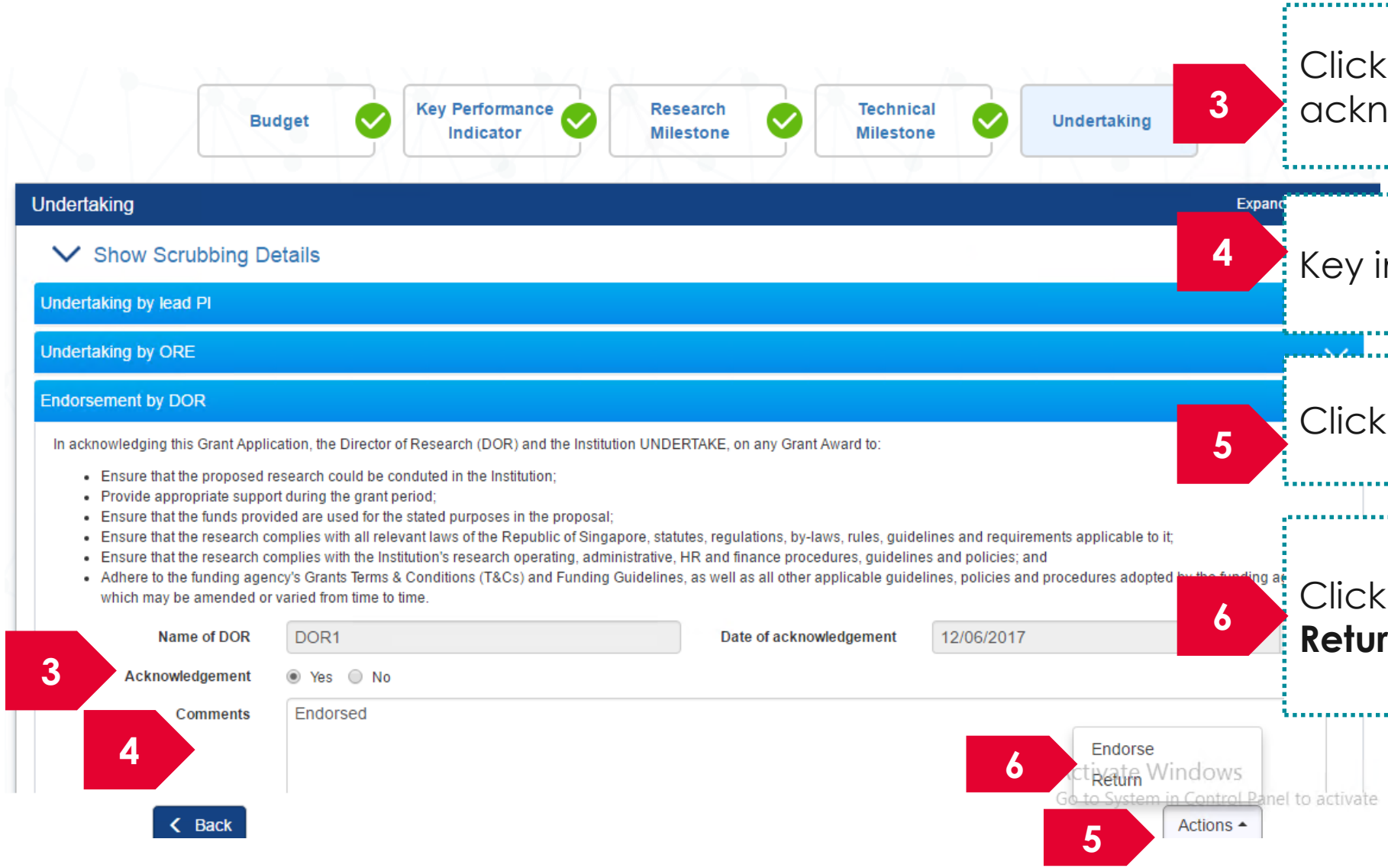
DOR: Endorsing a Proposal – 1



1 Click on each box to view the details under each section or click on **Next** button at the bottom of the page

2 To endorse, navigate to the **Undertaking** section

DOR: Endorsing a Proposal – 2



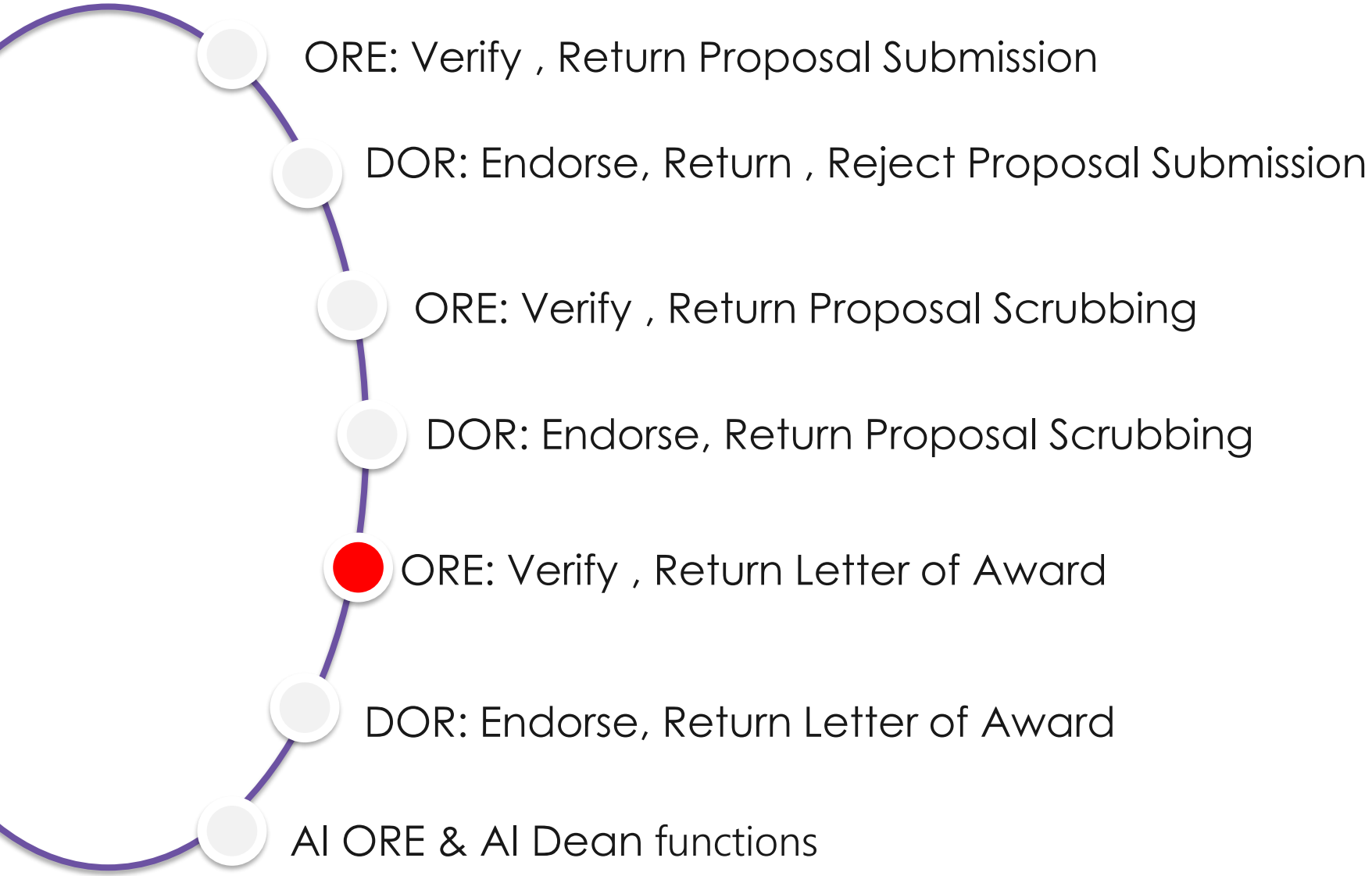
3 Click on **Yes** for acknowledgment

4 Key in comments

5 Click on **Actions**

6 Click on **Endorse** to endorse or **Return** to return

Institutional Administrators Functions



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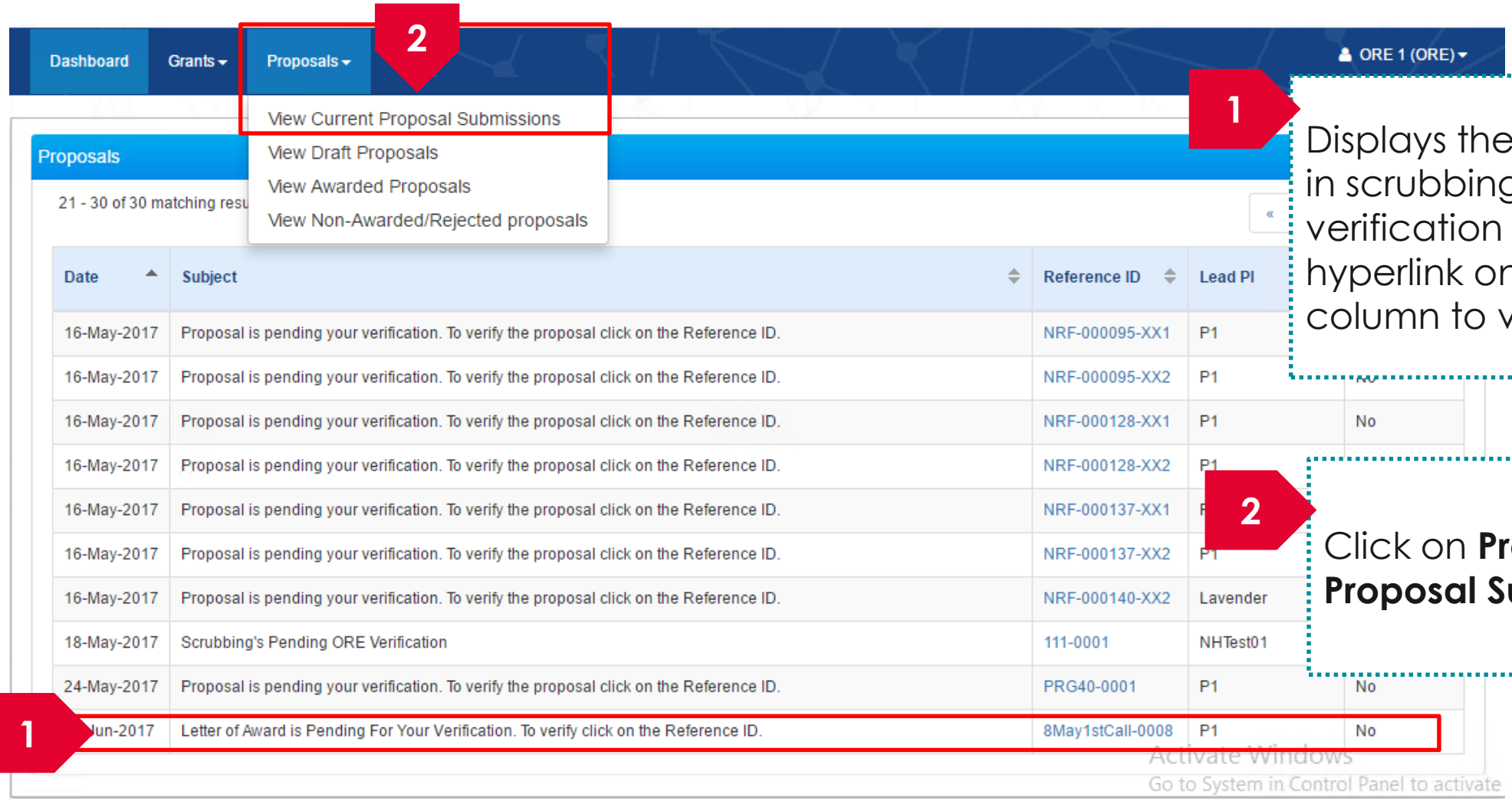
ORE: Access Pending Acceptance Proposals – 2 Options



1

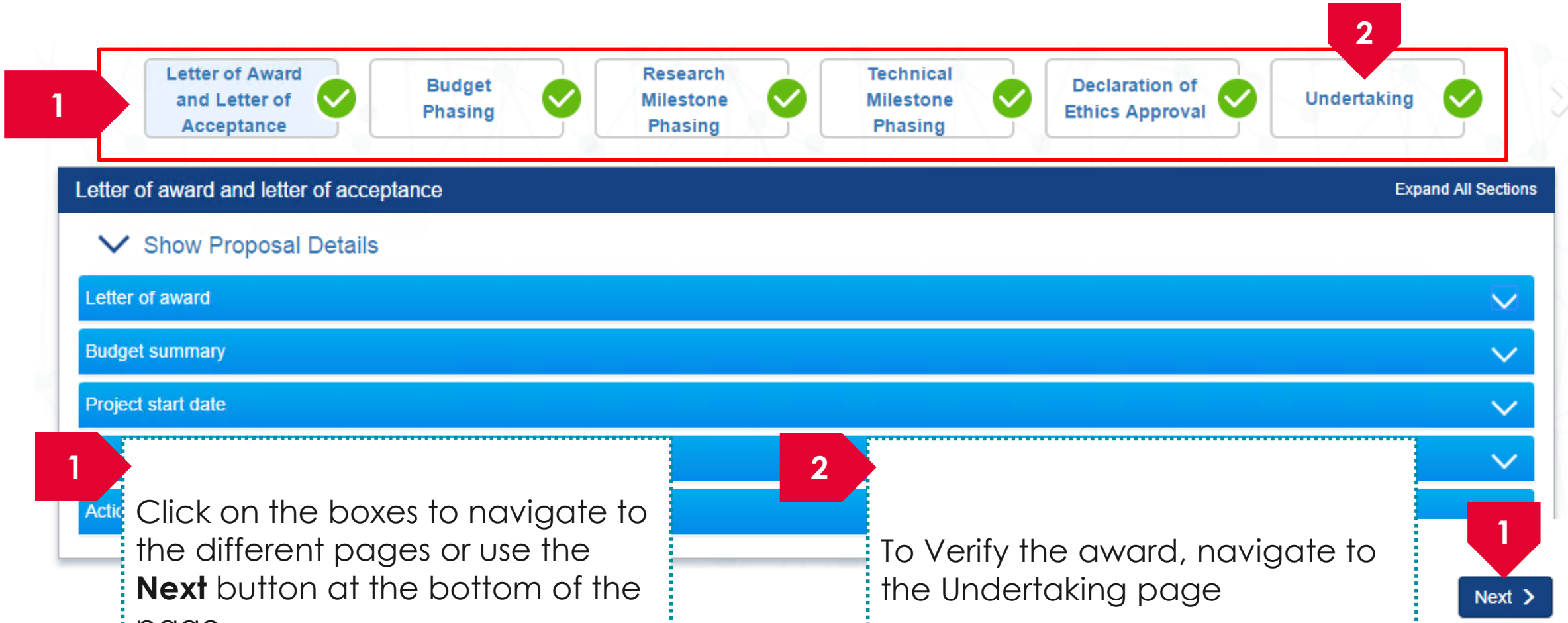
Displays the proposals which are in scrubbing stage that require verification by ORE. Click on the hyperlink on the **Reference ID** column to view the proposal

OR

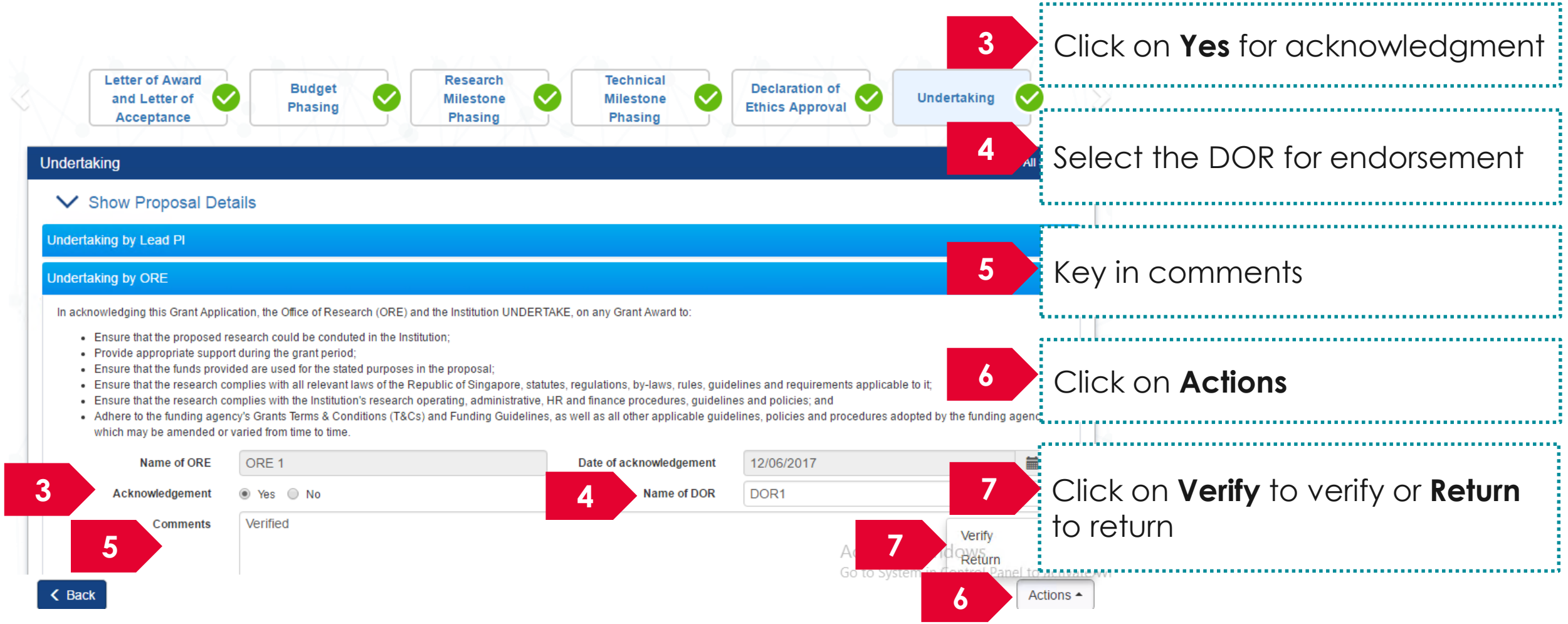
2

Click on **Proposals> View Current Proposal Submission**

ORE: Verifying a Letter of Award - 1



ORE: Verifying a Letter of Award - 2



3 Click on **Yes** for acknowledgment

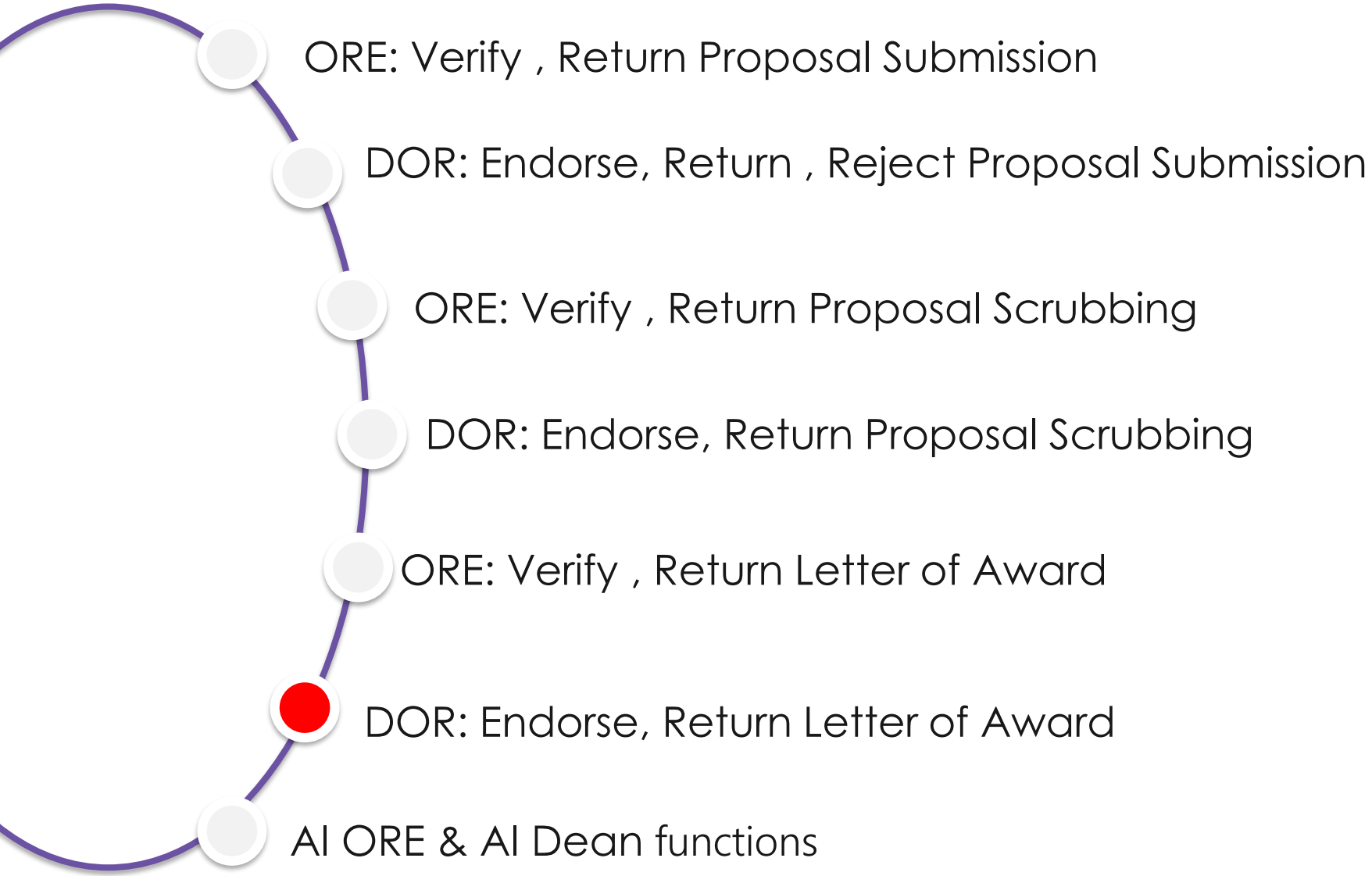
4 Select the DOR for endorsement

5 Key in comments

6 Click on **Actions**

7 Click on **Verify** to verify or **Return** to return

Institutional Administrators Functions



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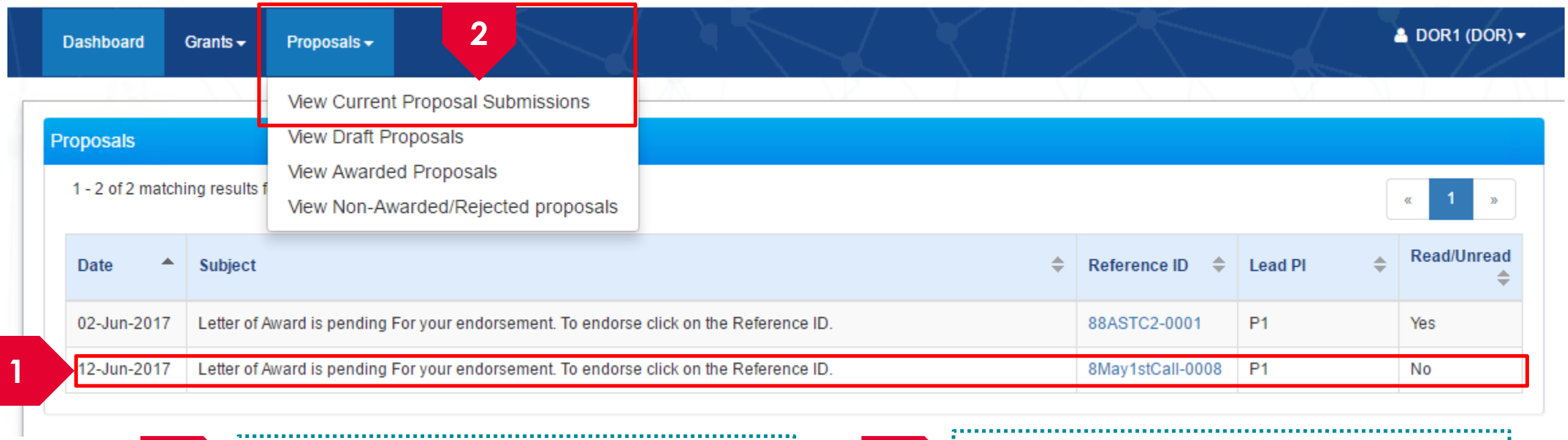
DOR: Access Pending Acceptance Proposals – 2 Options



1

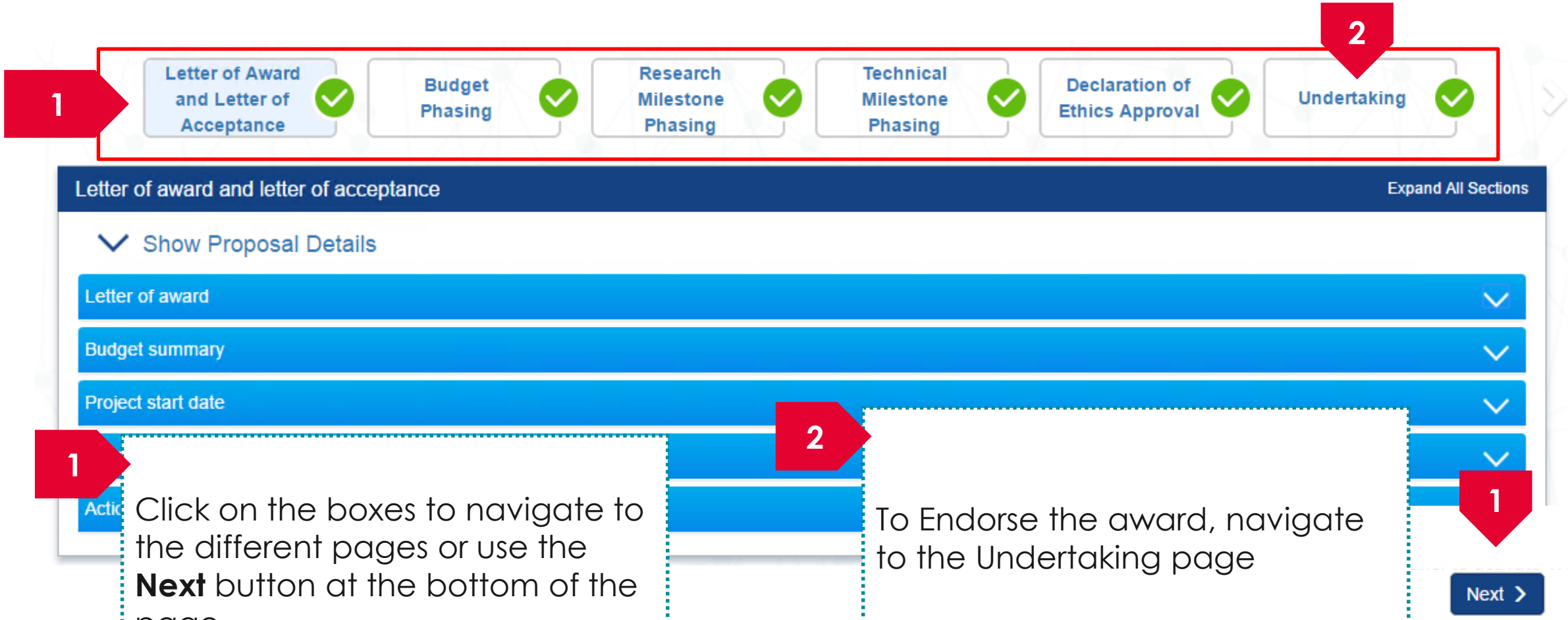
Display the proposals which pending letter of acceptance that require endorsement by DOR. Click on the hyperlink on the **Reference ID** column to view the proposal

OR

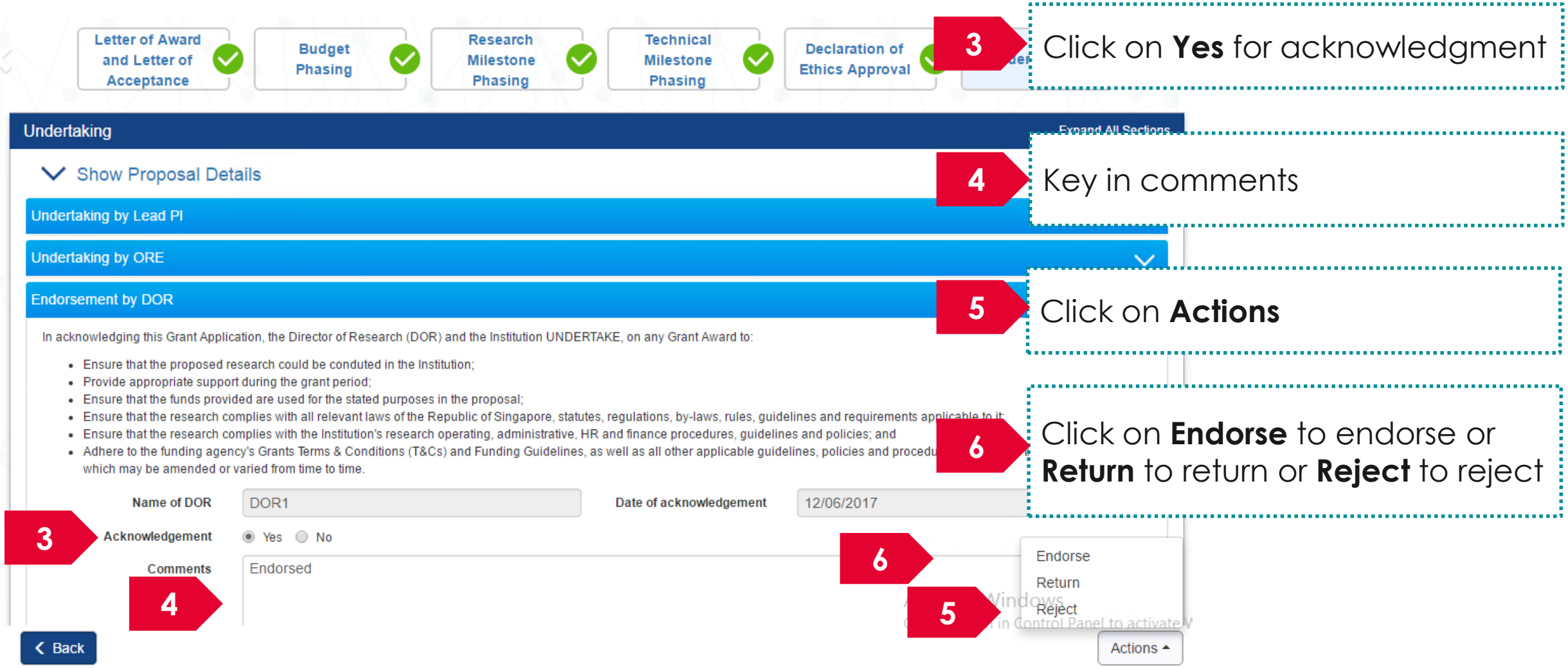
2

Click on **Proposals> View Current Proposal Submission**

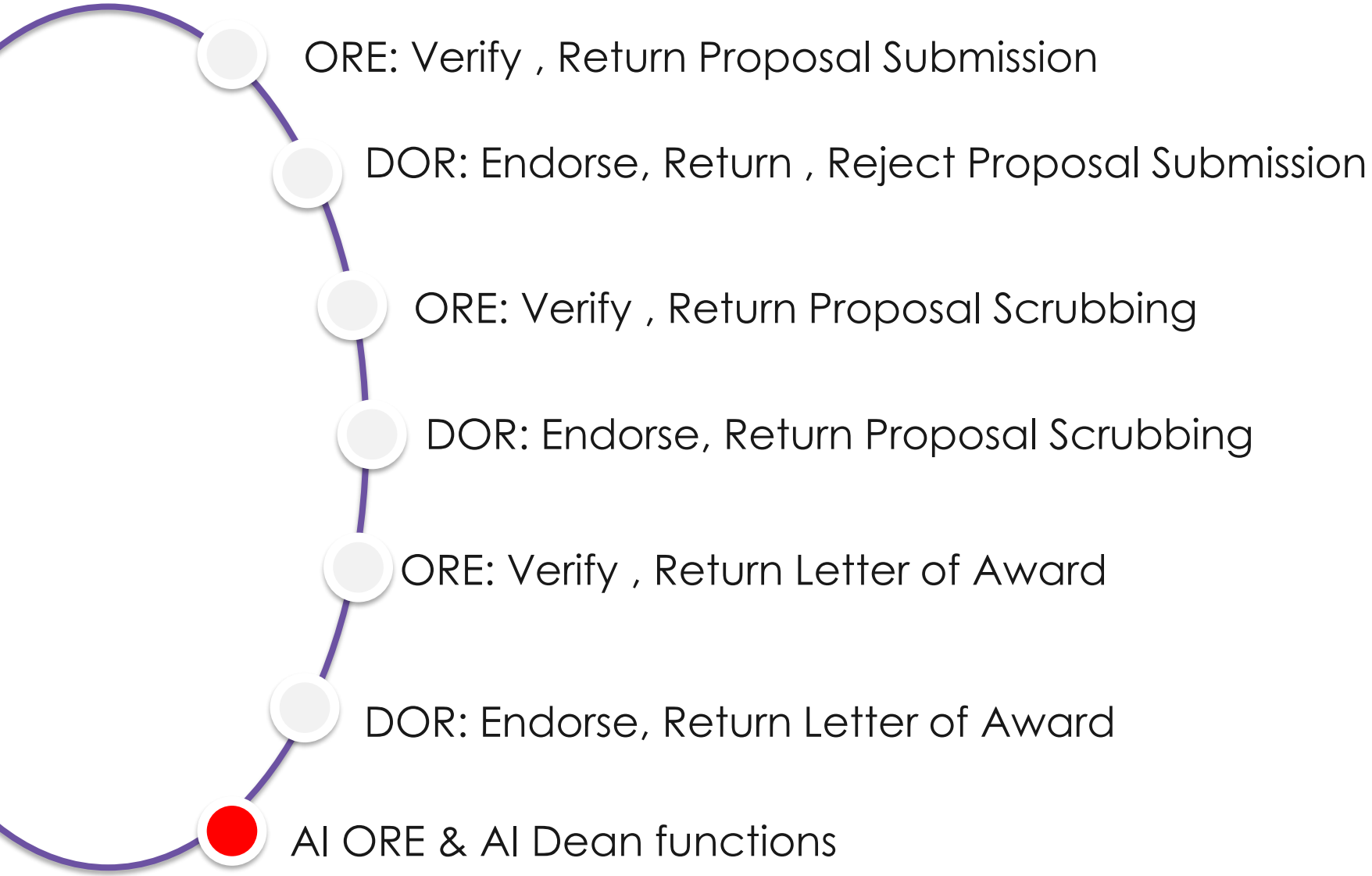
DOR: Endorsing a Letter of Award - 1



DOR: Endorsing a Letter of Award - 2



Institutional Administrators Functions



ORE: Verify , Return Proposal Submission

DOR: Endorse, Return , Reject Proposal Submission

ORE: Verify , Return Proposal Scrubbing

DOR: Endorse, Return Proposal Scrubbing

ORE: Verify , Return Letter of Award

DOR: Endorse, Return Letter of Award

AI ORE & AI Dean functions

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AI ORE & AI Dean functions

- AI ORE follow the same process as ORE
- AI Dean follow the same process as DOR

Module – 6: How to use IGMS system (Respond to nomination invitation)

- View nomination request
- Nominate PIs
- Endorse & Return Nomination

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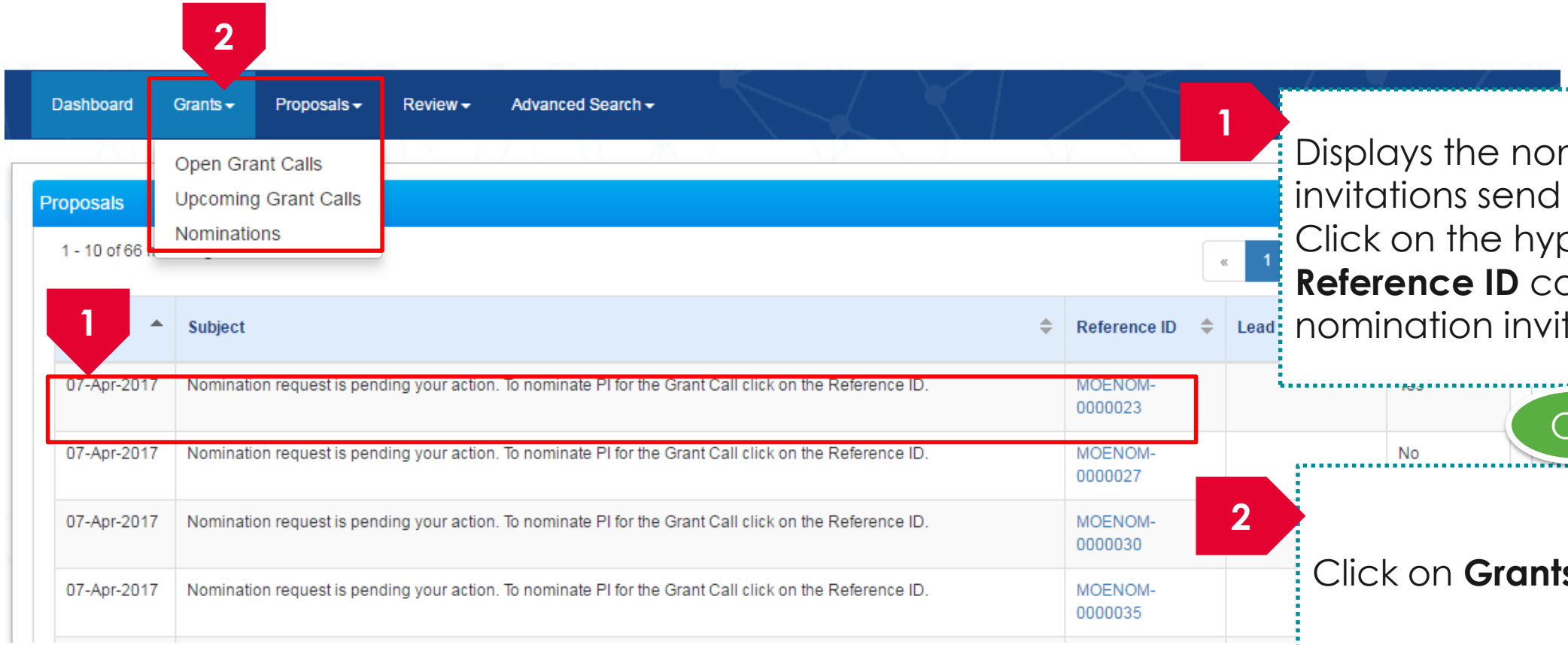
ORE: Access Pending Nomination Request– 2 Options



1

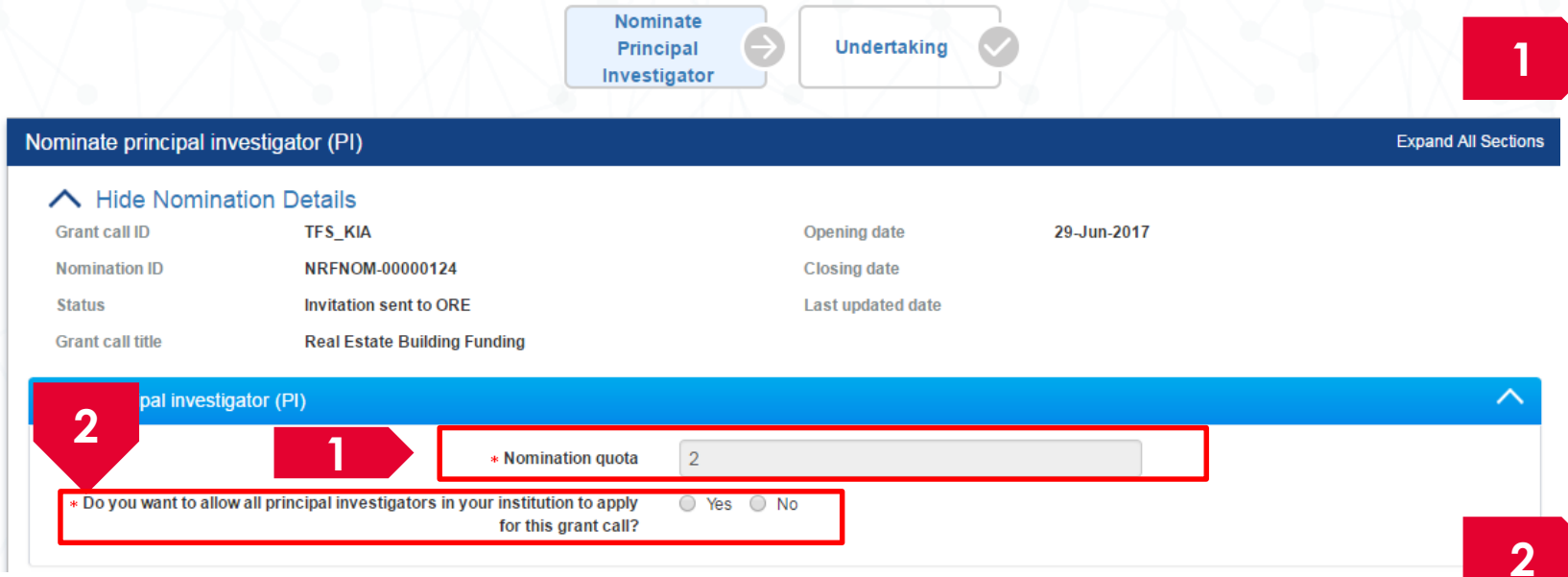
Displays the nomination invitations send by PM to ORE. Click on the hyperlink on the **Reference ID** column to view the nomination invitation request

OR

2

Click on **Grants> Nominations**

ORE: Nominate PIs



1

Displays the nomination quota set by the PM

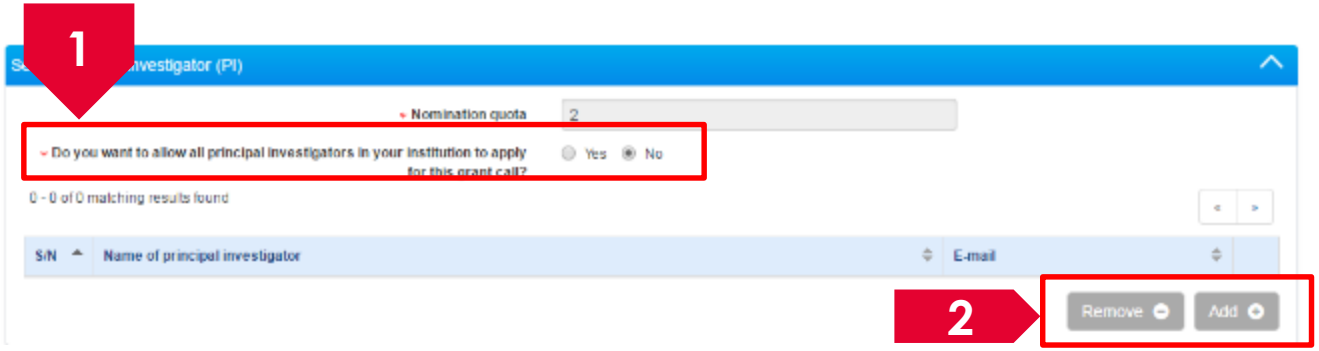
2

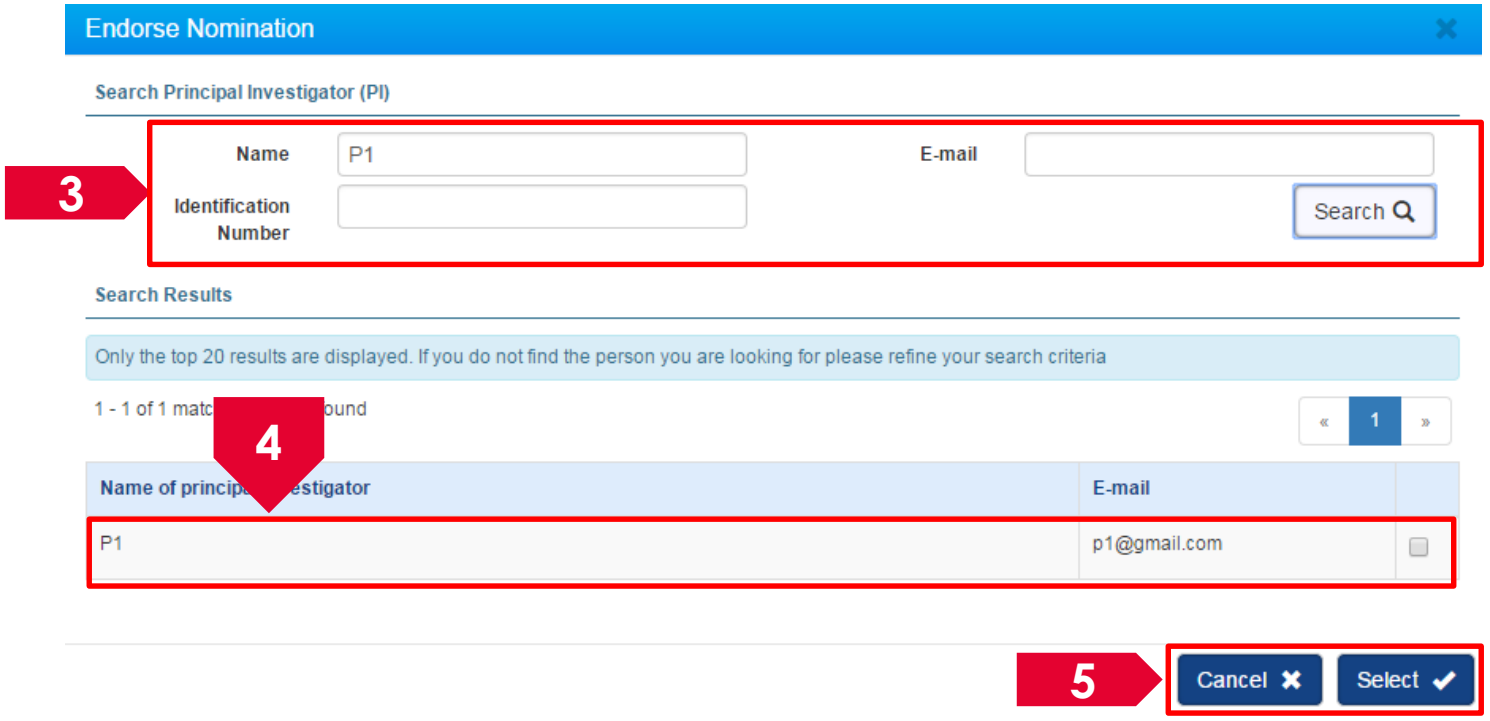
Choose Yes or No.
Yes: All the PIs will be able to submit proposal for the grant call
No: Only the PIs chosen by the ORE can view and submit proposal

Note

System does not check for nomination quota if "Yes" is selected. PM will reject proposals if it exceeds the nomination quota

ORE: Selection of PIs – when ORE selects No

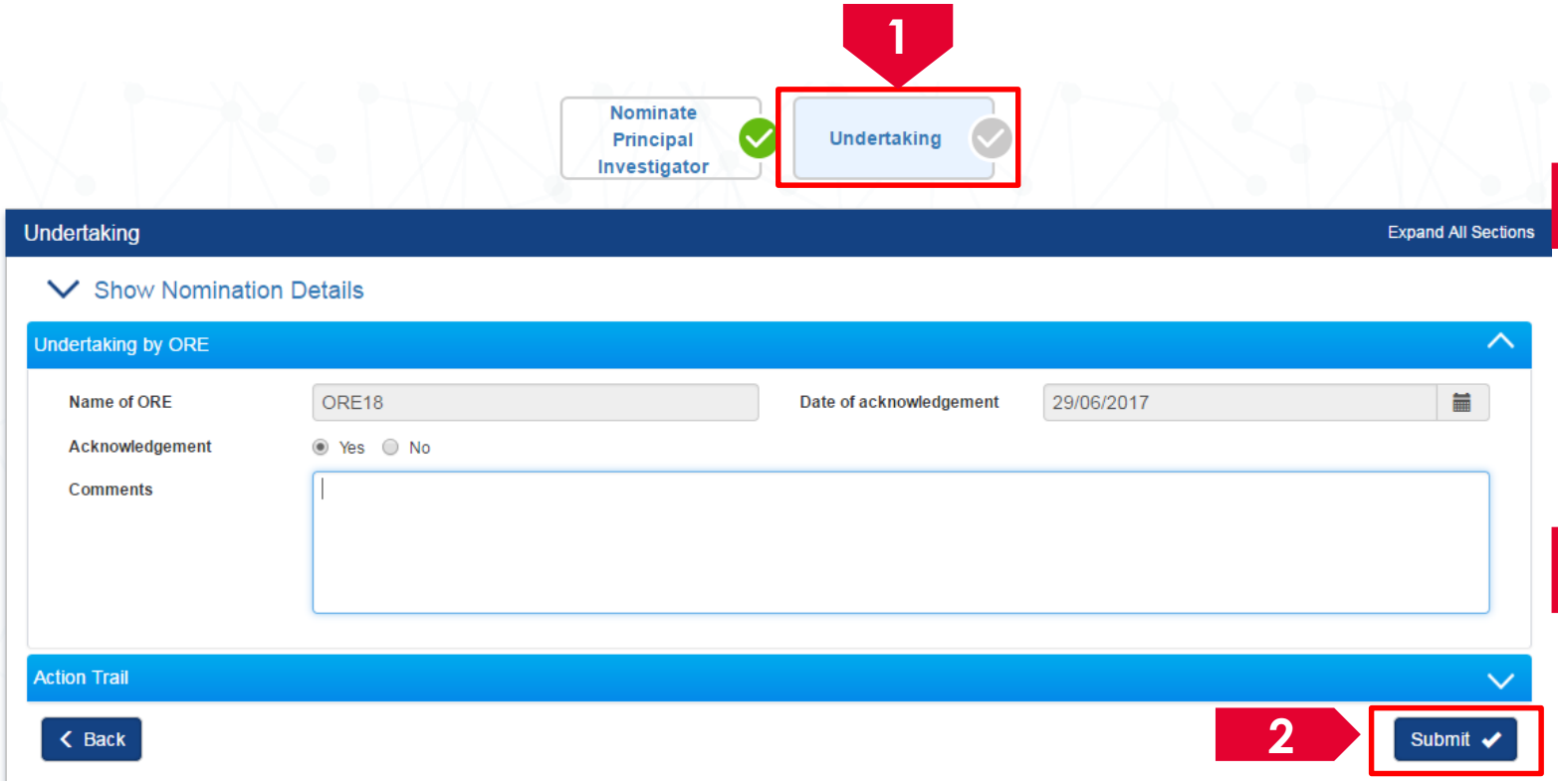




1. ORE selects "**No**"
2. Click on **Add** button
3. Search for the PIs using Name, identification number or Email ID.

   Enter the search criteria and click on **Search**
4. Select the PI from the search results
5. Click on **Select**

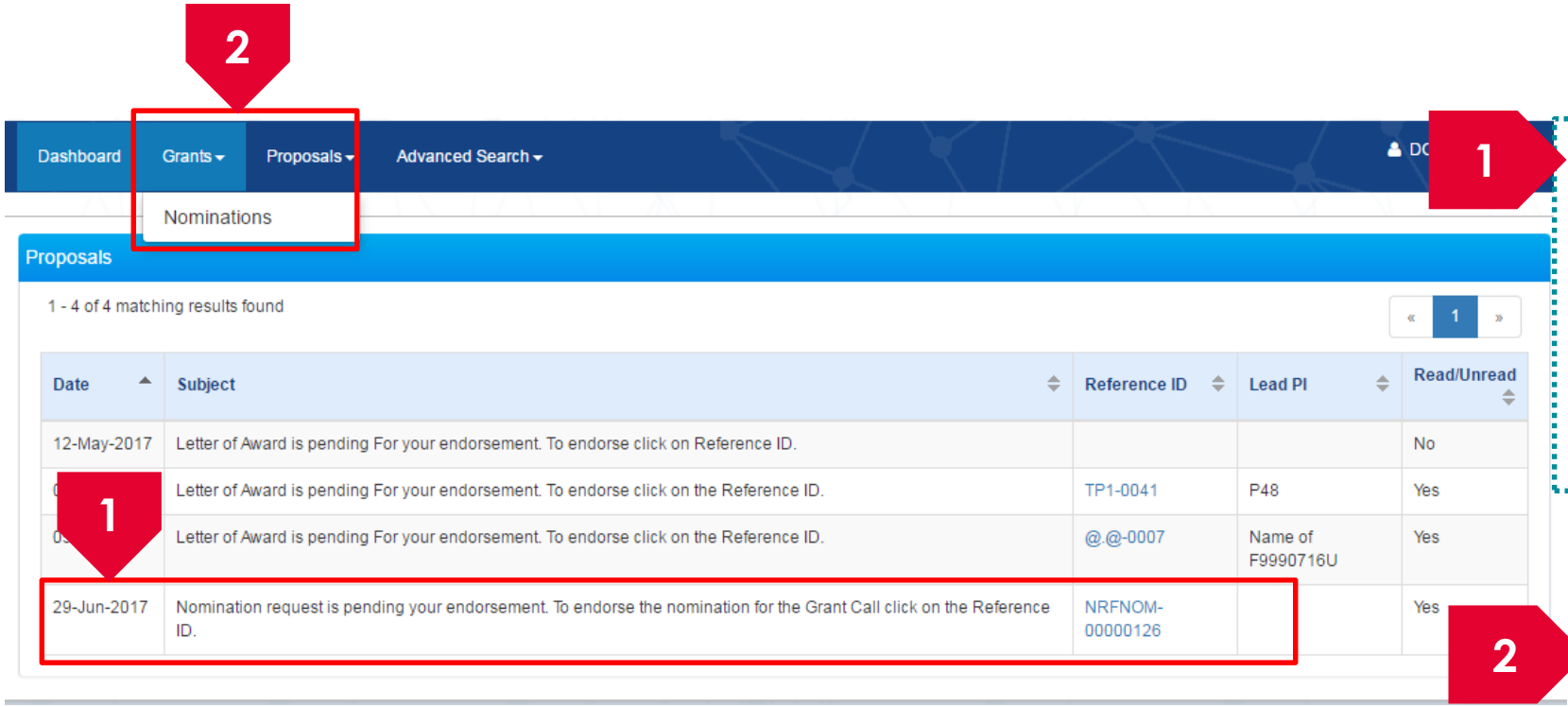
ORE: Submit Nomination Request



1 Navigate to the Undertaking page

2 Click on **Submit**

DOR: Access Pending Nomination Request– 2 Options



1

Displays the nomination endorsements send by ORE to DOR. Click on the hyperlink on the **Reference ID** column to view the nomination endorsement request

OR

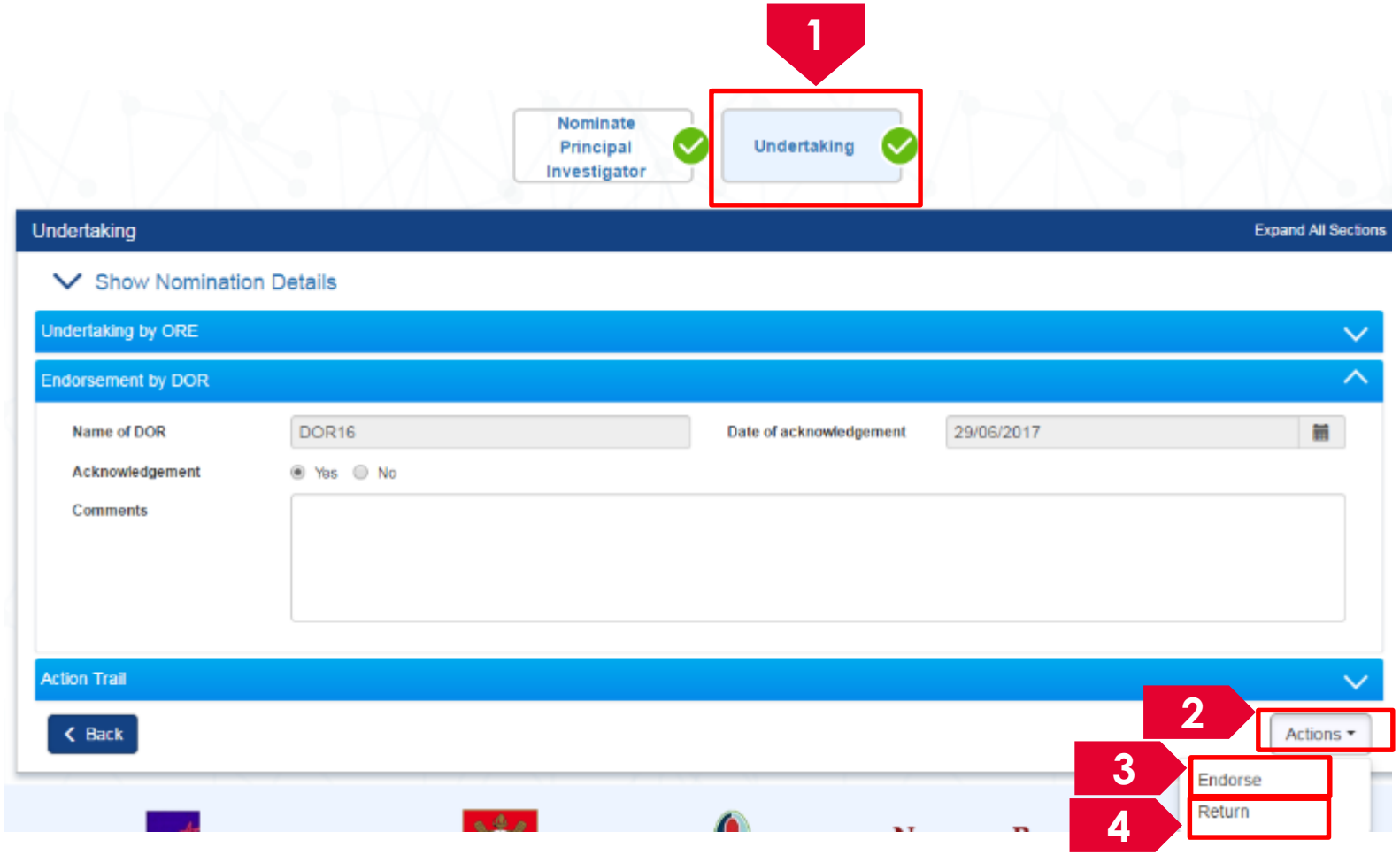
2

Click on **Grants> Nominations**

Note

PM will decide whether DOR endorsement is required or not.

DOR: Endorse & Return Nomination



1. Navigate to the Undertaking page
2. To Verify or Return nomination, click on **Actions**
3. To endorse a nomination click on **Endorse**
4. To return a nomination click on **Return**

SINGTEL GROUP ENTERPRISE

OPTUS

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