

CANADA FOUNDATION FOR INNOVATION

# Getting started with the CFI Awards Management System

An overview document for  
institutional administrators

December 2024

**INNOVATION**

Canada Foundation  
for Innovation

Fondation canadienne  
pour l'innovation

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## About the Canada Foundation for Innovation

With a bold, future-looking mandate, the CFI equips researchers to be global leaders in their fields and to respond to emerging challenges. Our investments in state-of-the-art tools, instruments and facilities at universities, colleges, research hospitals and non-profit research institutions underpin both curiosity- and mission-driven research that cuts across disciplines and bridges all sectors. The research infrastructure we fund mobilizes knowledge, spurs innovation and commercialization, and empowers the talented minds of a new generation.

[The Canada Foundation for Innovation respectfully acknowledges that its head office is located on the traditional, unceded territory of the Anishinaabe Algonquin People.](#)

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# 1 Definitions

**institution:** CFI-eligible institution or an authorized representative acting on behalf of the institution.

**institutional administrators:** Individuals responsible for managing CFI projects on behalf of the institution. These individuals are responsible for pre-award and post-award activities.

**pre-award activities:** All activities related to applying for CFI funding, uploading supporting documents, collaborating with researchers to submit proposals, and viewing the funding decisions and review materials for proposals.

**post-award activities:** Encompasses all activities related to managing successful projects including award finalization, amendments, project progress reports and financial reports. This also includes managing the institution's Infrastructure Operating Fund (IOF) allocation and IOF annual reports.

**project leader:** Individuals mandated by the institution to lead CFI-funded projects.

**reviewer:** Individuals who participate in the review process of proposals submitted to the CFI.

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# 2 Reference material

This guide is intended for researchers. Other guides are available, depending on your role and the type of activity you perform in CAMS.

**Researchers:** If you are a researcher, please refer to [Getting started with CAMS: An overview document for researchers](#).

**Reviewers:** If you are a reviewer, please refer to [Getting started with CAMS: An overview document for reviewers](#).

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# 3 What is CAMS?

The Canada Foundation for Innovation Awards Management System (CAMS) is the secure online portal that allows universities, colleges, research hospitals and non-profit research institutions to apply for CFI funding and assists them in managing the full life cycle of a CFI-funded project.

CAMS allows institutional administrators to manage pre-award and post-award activities related to CFI funding. It also allows researchers to prepare proposals for internal submission to the institution, as well as have access to information related to the projects they lead. Finally, CAMS gives reviewers access, in a single location, to the information and documentation necessary to assess the proposals assigned to them.

## 4 Access to CAMS

The CFI liaison and account administrator are responsible for setting access privileges for all institutional administrators. Please contact them to obtain a CAMS account. If you are the CFI liaison or the account administrator for your institution, refer to section 15, “Managing institutional agreements and access privileges.”

If you are an individual with an institutional agreement role (i.e., president, authorized signatory, liaison or account administrator), the CFI will create or update your account in CAMS. This will be done by the CFI following the receipt of a signed institutional agreement from your institution.

Following the creation of a new account, an activation email notification will be sent to the user. The account must be activated within 30 days of receipt, so please ensure that the CFI’s automated activation messages (from [notification@cfi-fci.ca](mailto:notification@cfi-fci.ca)) will not be blocked by your institution’s firewall.

### 4.1 CAMS sign-in page

Once your CAMS account is created and the appropriate privileges assigned, you can access CAMS as follows:

- Navigate to [Innovation.ca](http://Innovation.ca)
- Click the “CAMS” icon in the menu bar at the top right
- The CAMS sign-in page will appear.

The screenshot shows the CAMS sign-in page. At the top left is the INNOVATION logo with the text "Canada Foundation for Innovation" and "Fondation canadienne pour l'innovation". At the top right is a "Help | Français" link and a "Getting started with CAMS" button. The main heading is "Welcome to the CFI Award Management System (CAMS)". Below this is a form with two input fields: "Username (email)" and "Password". There is a checkbox labeled "Remember me on this computer". A "Sign in" button is located below the password field. Below the button are two links: "Forgot password?" and "Create a new account". At the bottom left is a link for "Important notices" and at the bottom right is the copyright notice "© Canada Foundation for Innovation, 2011".

On this page:

- Registered users can sign in
- Registered users who have forgotten their password can reset their password
- Researchers and institutional administrators can create a CAMS account.

## 4.2 Two-step verification

**Welcome to the CFI Award Management System (CAMS)**

To enhance CAMS security, you are required to enter a security code to complete the authentication process.

You have the option of receiving the security code by email to your username, to an alternative email, or to your mobile device number.

If you have not already set up an alternative email or mobile device number, you can provide them in the security settings tab on your user profile after your log in.

Email (username)  Email (alternative)  Mobile device number

Email (alternative)

Mobile device number

Country code Area code Number

To enhance CAMS security, in addition to signing in using a username and password, you will be required to enter a security code to complete the authentication process.

You have the option of receiving the security code by email to your username, to an alternative email or to your mobile device number.

**Welcome to the CFI Award Management System (CAMS)**

A security code has been sent to either your username (email), alternative email or mobile device number.

It may take several minutes to receive the security code. If the security code was sent to your alternative email, you may need to check your spam folder.

Please enter the security code received to complete the sign in process:

Are you using a trusted computer/device?

Yes  No

When entering the security code, if you specify that your computer or device is trusted, you will not have to enter a security code again when using that device and browser. However, if you change devices or browsers, or clear your browser's cache, you will be required to use two-step verification when you sign in.

**CFI Awards Management System security setup**

**Security code - initial setup**

To enhance CAMS security, when logging in, you may be prompted to enter a security code that you will receive to either your username (email), to an alternative email, or to your mobile device number.

Use username (email) only  Use username (email) or other options

Enter an alternative email or mobile device number to have more than one option to receive the security code. Click "Verify" to receive a security code to verify the alternative email or mobile device number.

Email (alternative)

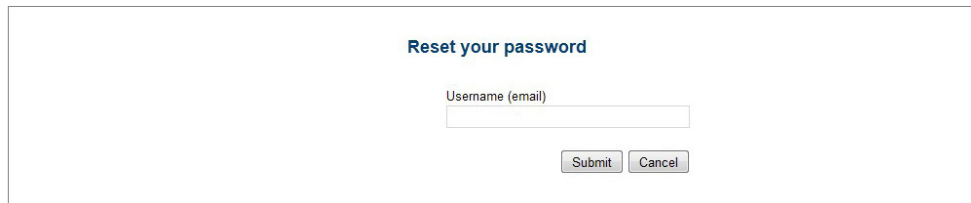
Mobile device number

Country code Area code Number

New users or users with a newly assigned institutional role will be prompted to set up a method of receiving security codes, either when creating a user account or when first logging into CAMS. You can modify the method of receiving security codes by navigating to the "My profile and preferences" screen.



## 4.3 Resetting your password

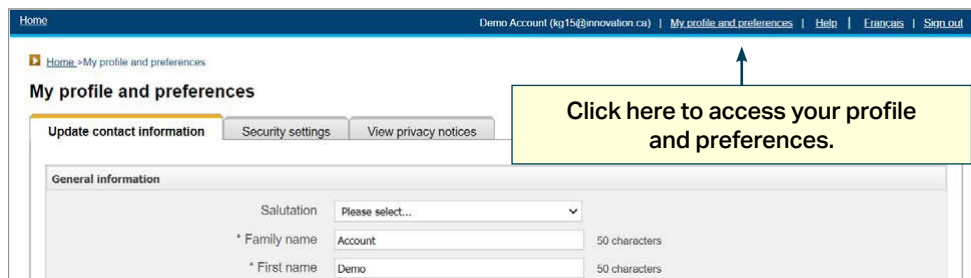


The screenshot shows a web form titled "Reset your password". It contains a single text input field labeled "Username (email)". Below the input field are two buttons: "Submit" and "Cancel".

If you have forgotten your password, you can request to have the password automatically reset by clicking "Forgot password?" on the sign-in page. You will be required to provide your username (email address). You will receive an email with a unique password reset link. Once you click on the link, you will be required to create a new password. If you require assistance, please contact the CFI help desk at [help@innovation.ca](mailto:help@innovation.ca).

## 4.4 Accessing user profile and preferences

These pages allow you to manage your contact information, security settings and password, as well as to view privacy notices from the CFI.



The screenshot shows a web page titled "My profile and preferences". The page has a navigation bar at the top with links for "Home", "Demo Account (kg15@innovation.ca)", "My profile and preferences", "Help", "Français", and "Sign out". Below the navigation bar, there are three tabs: "Update contact information" (which is active), "Security settings", and "View privacy notices". A yellow callout box with an arrow pointing to the "My profile and preferences" link in the navigation bar contains the text "Click here to access your profile and preferences." Below the tabs, there is a section titled "General information" with the following fields: "Salutation" (a dropdown menu with "Please select..." selected), "\* Family name" (a text input field with "Account" entered and a "50 characters" limit), and "\* First name" (a text input field with "Demo" entered and a "50 characters" limit).

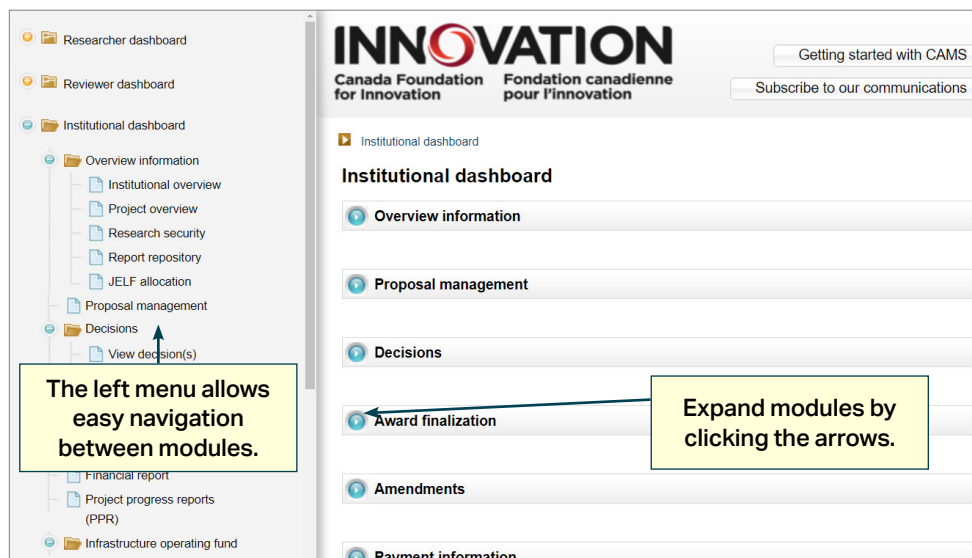
## 5 The institutional dashboard

### 5.1 Overview

Once signed in as an institutional administrator in CAMS, you are automatically directed to your institutional dashboard. The information you can access is dependent on the access privileges granted to you by your institution for every module.

### 5.2 Navigation

The institutional dashboard contains a number of sections. The following image describes these sections and illustrates their functionalities.



**Note:** You may not see all the sections displayed above. The sections displayed on your institutional dashboard will depend on the access privileges associated to your account.

A number of features are available in most CAMS modules that can help you navigate between screens or provide contextual information for certain fields.

**Search results**

Budget updates subsequent to the award finalization can be viewed in the amendment section

[Export search results to Excel](#)

175 entry(ies) found displaying 20 entry(ies)

Toggle page display for tables and search results.

For award finalizations prior to May 2014, the date displayed corresponds to the date the itemized list & summary of secured contributions was submitted to the CFI.

Click column header to sort table. Click again to reverse sort order.

Access additional information by hovering on "i" icons.

Project number	Project leader	Project title	Fund	CFI board decision date	Date received by the CFI	Budget at award finalization	Forms/ attachments
88888			Innovation Fund over \$350,000	1999-06-22	1999-12-13		

Researcher dashboard

Reviewer dashboard

Institutional dashboard

- Overview information
  - Institutional overview
  - Report repository
  - Project overview
- Infrastructure projects
  - Proposal management
- Decisions
  - View decision(s)

**Institutional dashboard > Payment information > Project #11111**

[Return to search page](#)

**Project payment details**

Click on the breadcrumbs to navigate and return to modules.

Project number 11111 Granted amount \$192,000

Project leader Leader, Project Date of award agreement 2014-01-01

Fund College-Industry Innovation Fund – Funding for research infrastructure Approved project end date 2016-08-31

**Validation**

Notice of intent

- [Total project cost' is a required field.](#)
- [Amount requested from the CFI' is a required field.](#)
- [Primary discipline' is a required field.](#)
- [Primary sub-discipline' is a required field.](#)
- [Primary area of application' is a required field.](#)
- [Title/position' is a required field.](#)

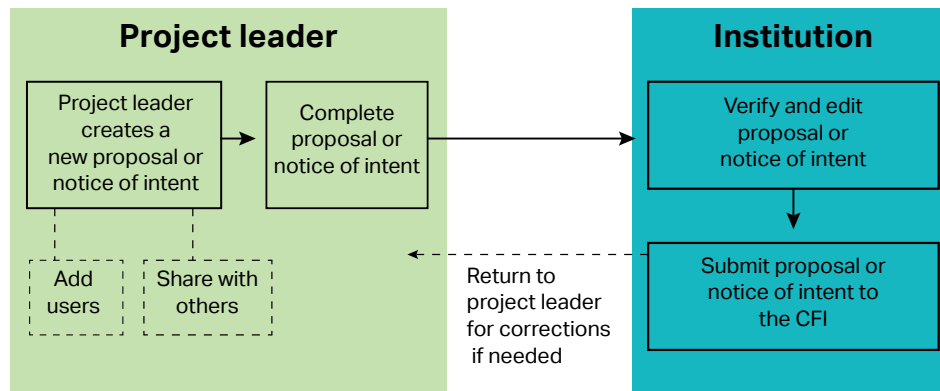
Click on error link in a validation window to navigate to the relevant section.

Print Close

## 6 The application process

The process to submit a notice of intent or proposal to the CFI typically involves three steps:

1. The project leader creates a new notice of intent or proposal and completes the forms online. Once the project leader has marked the form as complete, they will no longer have access to modify it. Institutional administrators with appropriate access can also complete the forms online on behalf of the project leader.
2. The institution may edit the form and/or return it to the project leader for revision. When the notice of intent or proposal is deemed final, the institution indicates that the form has been verified. The system will then generate the final PDF version of the notice of intent or the proposal.
3. An institutional administrator with submission privileges then submits the notice of intent or proposal to the CFI.



Application process



**Note:** For more information on the application process, refer to the specific instructions for each fund available through the "[Funding opportunities](#)" page of the [CFI website](#).

## 6.1 Managing proposals

As an institutional administrator involved in pre-award activities, you may have access to the CAMS proposal management section through your institution. The proposal management section allows you to view the status of your institution's notices of intent and proposals.

The screenshot displays the 'Proposal management' section of the CAMS system. At the top, there is a breadcrumb trail: 'Institutional dashboard > Proposal management'. Below this, the 'Proposal management' title is followed by a navigation bar with tabs for 'Status list', 'Search', 'Project archiving', and 'Collaboration requests'. The 'Status list' tab is active. The interface is divided into two main sections: 'Notice of intent' and 'Proposal'. Each section lists various statuses with corresponding counts in parentheses. For 'Notice of intent', the statuses are: In progress(1), Completed by researcher(0), Verified by institution(0), Submitted to the CFI(0), Previously submitted - available to institution for corrections(0), Previously submitted - available to researcher for corrections(0), Previously submitted - completed by researcher after corrections(0), Previously submitted - verified by institution after corrections(0), and Withdrawn(0). For 'Proposal', the statuses are: In progress(1), Completed by researcher(0), Verified by institution(0), Submitted to the CFI(0), Previously submitted - available to institution for corrections(0), Previously submitted - available to researcher for corrections(0), Previously submitted - completed by researcher after corrections(0), Previously submitted - verified by institution after corrections(0), and Withdrawn(0). Two yellow callout boxes provide instructions: one points to the status links with the text 'Click links to see the list of notices of intent or proposals in each status.', and another points to the counts with the text 'Numbers indicate the number of notices of intent or proposals in that status.'



**Note:** Archived projects are not listed or counted in this form.

## 6.1.1 Searching

CAMS provides a search functionality to help institutional administrators locate specific notices of intent or proposals. You can use this search functionality by providing a project number or other search criteria.

The screenshot shows the 'Proposal management' search interface. It includes a search form with fields for Project number, Status, Fund, Notice of intent or proposal?, and Project title. Below the form are 'Search', 'Clear', and 'Show all projects' buttons. Two callout boxes provide instructions: one points to the 'Search' button, and the other points to the 'Show all projects' button.

**Click to perform your search based on all selected criteria and display the results.**

**Click to display a list of all of your institution's projects.**

## 6.1.2 Listing and sorting

Whether you list items by status or search for specific projects, you will be presented with a table of results. The available actions will depend on the status of the notices of intent or proposals listed. Some basic features are available on each table, including the ability to sort by column and return to the search page.

The screenshot shows the 'Proposal management' results page. It features a table of results for 'Notice of intent - Submitted to the CFI'. The table has columns for Project number, Project title, Project leader, Fund, Comments from the CFI, Display/print, and Submission date. Two callout boxes provide instructions: one points to a 'Return to search page' link, and the other points to a 'Display/print' icon in the table.

**Click here to return to the search page or status list.**

Project number	Project title	Project leader	Fund	Comments from the CFI	Display/print	Submission date
29307	ml1 Test project - Kemptville	Lagacé, Mark1	CIIF - Stream 1	N/A		2011-07-22
29150	Test project ML2	Testor, ES	CIIF - Stream 1	N/A		2011-07-08

**Click "Display/print" to view the notice of intent or proposal.**

### 6.1.3 Completing and validating forms

The status of all newly created forms in CAMS is “in progress.” Project leaders have full access to the forms to enter data. If the institution wishes to mark the form as complete on behalf of the project leader, it will be able to do so from this table. Once the form is marked as complete the project leader will no longer be able to modify it.

**Run the validation to make sure all required data has been entered into the form.**

Project number	Project title	Project leader	Fund	Module	Display/print	Validation	Completed?
34028	Infrastructure for research	Account, Demo	CIIF	<a href="#">Project Finance Suggested reviewers</a>		<input type="button" value="Run"/>	<input type="button" value="Yes"/>

**Indicate on behalf of the project leader that the form is complete.**

### 6.1.4 Navigating within the form

**Click “Home” to return to your dashboard.**

**Use the left-hand menu to navigate across proposal sections.**

### 6.1.5 Verifying or returning to the project leader for corrections

Once the form has been marked as complete, the institution retains access to edit the forms and can return them to the project leader for corrections. Once the institution is satisfied that the notice of intent or proposal is final and ready for submission to the CFI, it must indicate this by clicking on the button in the “Verified?” column. Note: Depending on the funding program, additional validation rules might apply at this stage. Run the validation to check if all required data has been entered in the form.

For notices of intent and proposals that include several modules or CVs, the system will generate a complete PDF of the form by merging all components into a single file. The merged PDF will be available within two hours and will appear in the "Display/Print" window. Proposals can be submitted to the CFI prior to having the merged PDF available.

**Proposal management**  
[Return to search page](#)

Proposal - Completed by researcher  
Fund

1 entry(ies) found

Project number▲	Project title	Project leader	Fund	Module	Display/Print	Validation	Return to researcher?	Verified?
33029	Infrastructure project	Account, Demo	2015 IF	<a href="#">Project Finance</a> <a href="#">Suggested reviewers</a>		<input type="button" value="Run"/>	<input type="button" value="Return"/>	<input type="button" value="Confirm"/>

1 entry(ies) found

Callouts:  
- Click to return the notice of intent or proposal to the project leader, who will regain access to edit the form. (points to 'Return' button)  
- Click a module name to access the forms for editing. (points to 'Project Finance' link)  
- Click to indicate that the forms have been verified and are ready to be submitted. (points to 'Confirm' button)

## 6.1.6 Reopening or submitting to the CFI

Verified notices of intent and proposals can be submitted in bulk by institutional administrators with submission privileges. If the institution needs to modify a form, it must be reopened for editing.

**Proposal management**  
[Return to search page](#)

Notice of intent - Verified by institution

Show all  Show pages

1 entry(ies) found

<input type="checkbox"/>	Project number▲	Project title	Project leader	Fund	Display/Print	Edits required? ⚠
<input type="checkbox"/>	29439	NIF test project	Lagacé, Mark1	NIF2012		<input type="button" value="Yes"/>

1 entry(ies) found

Show all  Show pages

Callouts:  
- Click to reopen the notice of intent or proposal. The institution will regain access to edit the form. (points to 'Yes' button)  
- Click here to select the projects you wish to submit to the CFI. (points to checkbox)

In some cases, the CFI may return a notice of intent or proposal to your institution so that corrections can be made. These can be found in the status list (see [section 6.1](#)).



## 6.1.7 Project archiving

At any time, an institution may decide that it will not submit a particular project or group of projects. Institutions can archive these projects to remove them from the institutional and researcher dashboards. Note that you can only archive projects if the proposal for it has never been submitted.

Archived projects can be accessed in read-only mode from the “Project archiving” tab. Researchers may also access archived project forms from the researcher dashboard.

**Proposal management**

Status list Search **Project archiving** Collaboration requests

**Search**

This screen allows you to archive or un-archive projects from various lists displayed in your institution's dashboard and related researcher dashboards. Please note that projects pending submission will be automatically archived once the competition is closed. For competitions that are still open, you can also archive and un-archive projects that have not been submitted.

Project number

----- or -----

Fund

Project title

Project leader's first name

Project leader's last name

Archived

Archive type

**Search for a project either by project number or other criteria.**

---

Select: [All](#) [None](#)

1 entry(ies) found

**Use these buttons to archive or un-archive the selected projects.**

	Project number	Project leader	Fund	Archived	Archive type	Module	Display/print
<input type="checkbox"/>	22222	Smith, John	Leading Edge Fund 2012	Yes	Institutional action	<a href="#">Project</a> <a href="#">Finance</a> <a href="#">Suggested reviewers</a>	

1 entry(ies) found

Select: [All](#) [None](#)

**Select one or more projects from the search results.**

**Access a read-only version of the archived form.**

Show all  Show pages



**Note:** Once a competition is closed by the CFI, all notices of intent and proposals that were never submitted will be automatically and permanently archived.

## 6.1.8 Collaborating requests

If an institution has either accepted to collaborate, or is being requested to collaborating this tab will be displayed. The table will list all projects including those that have been archived or withdrawn.

**Drop down will list all statuses the institution can filter.**

**Drop down list will display all funding programs the institution has collaborated on.**

Project number	Project title	Project description	Project manager	Funding program	Amount of expense	Stage	Status	Display/Print	Accept participation
32240	CIIF-2	trente un	institution 3 EN - Test	Innovation Fund - CCI-IE	\$0	Proposal	In Progress	<a href="#">View</a>	
38273	TEST PROD RELEASE 11	Cook, Darlene Three	Test institution 3 EN - Test	College-Industry Innovation Fund - CCI-IE	\$0	Proposal	In Progress	<a href="#">View</a>	
38759	Testing of new competition	Cook admin, Darlene	Test institution 3 EN - Test	College-Industry Innovation Fund	\$0	Proposal	In Progress	<a href="#">View</a>	No

## 6.2 Guidelines for attachments

### 6.2.1 Pagination

CAMS will automatically paginate notices of intent and proposals when they are submitted. Documents **should not** be individually paginated prior to being uploaded to the electronic system.

### 6.2.2 Page formatting

Since reviewers will assess proposals electronically, the applicant should only use a standard, single column on an 8.5" x 11" page layout for documents. Avoid using a two-column or landscape format since it may reduce legibility.

The notice of intent and proposal must be clear and easily readable. Legibility is of paramount importance and should take precedence in the selection of an appropriate font for use in the notice of intent and proposal. The applicant is strongly encouraged to use a 12-point, black font and use single line spacing (six lines per 2.5 cm (1 inch)) with no condensed type or spacing.

Additionally, the CFI expects documents to conform to the following guidelines:

- **Header:** Indicate the administrative institution on the top left, the title of the section in the middle and the project number on the top right of each page.
- **Footer:** Do not include any information in the footer as this area will be used for automatic page numbering.
- **Page margin:** Insert a margin of no less than 2.5 cm (1 inch) around the page. The header may be within the margin.
- **File format and size:** Only PDF files may be uploaded. Documents in other formats should be converted to PDF prior to being uploaded and should not be encrypted or password protected. The file size must not exceed 20 megabytes.

Adherence to the page formatting guidelines noted above is necessary to ensure that the reviewers receive legible proposals and that no applicant will have an unfair advantage by using smaller type, line spacing or margins to provide more text in the notice of intent or in the proposal. Failure to adhere to these guidelines may result in the CFI returning a proposal for revision.

## 6.3 Notice of intent structure

Notices of intent will be used to assist the CFI in planning the review process, identifying the requisite expertise for the assessment of each proposal, recruiting committee members, and detecting potential eligibility issues with the infrastructure items requested. Therefore, notices of intent should contain accurate information about the infrastructure and its users, the proposed research or technology development and the expected outcomes.

Applicants will not be able to change the name of the project leader or administrative institution once a notice of intent is completed. That is because the CFI uses notices of intent to assemble review committees and changes to the project leader or administrative institution may result in a conflict of interest for a review committee member. **If such a change is deemed necessary, contact your Senior Programs Officer as soon as possible. The CFI will oversee the change to be made in CAMS.**

### 6.3.1 Project information

This section captures basic information about the project such as the title, administrative institution, keywords and research security information.

You may need to submit other documents as well, depending on the answer given to the research security questions (see sections 6.3.3 and [6.3.4](#)).

### 6.3.2 Collaborating institutions

Identify the institutions eligible for CFI funding collaborating in this project. Enter the amount to be provided from each collaborating institution's envelope for this competition. Do not include in this list the administrative institution identified in the Project information section.

### 6.3.3 Principal users/team members

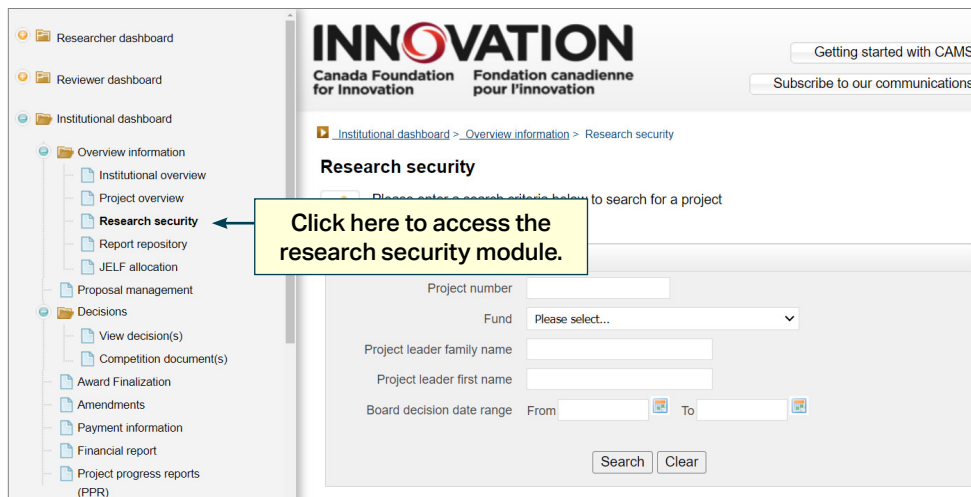
List the principal users of the infrastructure requested, including the project leader. Principal users must have a CAMS account and sign in to accept to participate in the project before a notice of intent can be submitted to the CFI. Researchers listed as principal users automatically gain read access to the notice of intent and proposal.

If the project aims to advance a sensitive technology research area (according to the answer given in the project information section), all team members must complete a CFI attestation form for Sensitive Technology Research and Affiliations of Concern (STRAC) in CAMS before they can accept to participate in the project (see [section 6.3.4](#)).

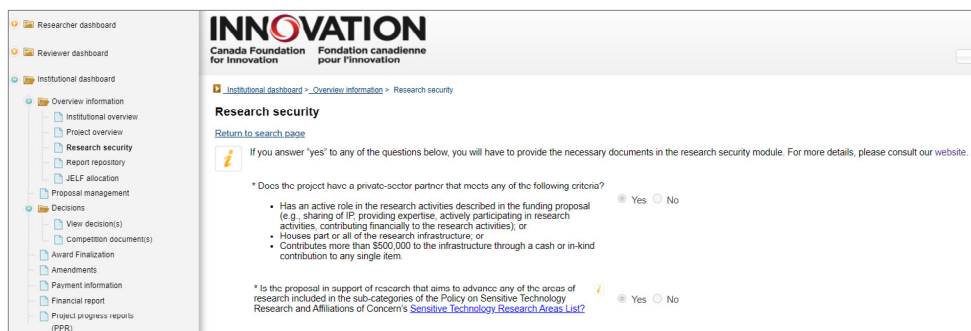
## 6.3.4 Research security

Project leaders can access the research security module for the project through their researcher dashboard.

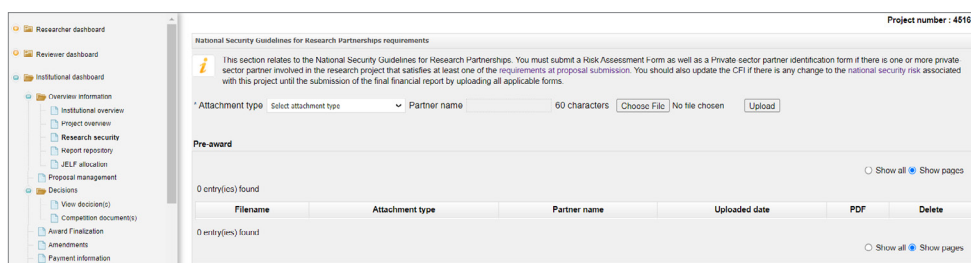
Institutional administrators can access the research security module through the menu on the left.



The top portion of the research security module displays, in read-only mode, the answers to the two research security questions as entered by the project leader in the project information section of the notice of intent.



If the answer to the first research security question is "yes," institutional users must upload a Risk Assessment Form (RAF) and one or more private-sector partner identification forms using the middle portion of the research security module. You can complete these forms at any time, but you don't have to submit them until the proposal stage.



If the answer to the second research security question is “yes,” the bottom portion of the research security module allows institutional users to monitor whether all team members have completed the attestation forms.

The screenshot displays a 'Policy on Sensitive Technology Research and Affiliations of Concern requirements' section. It features a table with the following data:

Team member name	Role	Attestation status	Attestation date	Attestation form	Participation confirmed?	Reset attestation
Tcostb, Tcost	Team member	Complete	2024-09-03		Awaiting reply	<input type="button" value="Reset"/>
Testa, Test	Team member	Not done			Awaiting reply	
Test, Test	Team leader	Complete	2024-08-29		Yes	<input type="button" value="Reset"/>

Two callout boxes are present:

- A yellow box with the text: "The attestation status column helps you follow the completion of all team members." with an arrow pointing to the 'Attestation status' column.
- A yellow box with the text: "Resetting attestation will remove the user's attestation and allow the user to complete the attestation again." with an arrow pointing to the 'Reset attestation' button.

### 6.3.5 Project description (page limit varies by competition)

Provide a description of the major pieces of infrastructure requested, a short overview of the research or technology development activities to be enabled by the infrastructure, and the anticipated outcomes from these activities, including expected application(s).

Also use this section to clearly indicate if the proposal will include advanced research computing infrastructure. Similarly, specify if the proposed location of the infrastructure project would be either a national or international research facility. In both such cases, the institution must consult with the host facility, comply with the facility's established planning and project approval processes, and obtain the approval of the host facility.

### 6.3.6 Suggested reviewers

Identify a minimum of six reviewers who are well-qualified to review the proposal and who are not in a position of conflict of interest. A conflict of interest may be deemed to exist or perceived as such when reviewers:

- Are a relative or close friend, or have a personal relationship with the project leader or one of the principal users
- Are in a position to gain or lose financially/materially from the funding of the proposal
- Have had long-standing scientific or personal differences with the project leader or one of the principal users
- Are currently affiliated with the project leaders' or the principal users' institutions, organizations or companies — including research hospitals and research institutes
- Are closely professionally affiliated with the project leader or one of the principal users, as a result of having in the last six years:
  - Frequent and regular interactions with the project leader or one of the principal users in the course of their duties at their department, institution, organization or company
  - Been a supervisor or a trainee of the project leader or one of the principal users
  - Collaborated, published or shared funding with the project leader or one of the principal users, or have plans to do so in the immediate future
  - Been employed by the administrative institution
- Feel for any reason unable to provide an impartial review of the proposal. Note: The decision whether to contact the suggested reviewers remains with the CFI.

## 6.4 Proposal structure

The proposal should clearly present the merits and excellence of the proposed project. Sufficient information should be provided to enable reviewers to evaluate the proposal in accordance with the assessment criteria established by the CFI (please refer to the Assessment criteria section for the competition).

If the submission of a notice of intent was required, CAMS automatically populates the proposal with information provided in the notice of intent including the following: project information, collaborating institutions, principal users and suggested reviewers. Applicants will not be able to change the name of the project leader or administrative institution once the notice of intent is completed. This is because the CFI uses the notices of intent to assemble review committees and a change to the project leader or administrative institution may result in a conflict of interest for a review committee member. **If such a change is deemed necessary, contact your Senior Programs Officer as soon as possible. The CFI will oversee the change to be made in CAMS.**

Applicants are able to revise the details of the collaborating institutions, principal users, research security questions and suggested reviewers to reflect changes from the time of the notice of intent submission. However, we ask that you inform your Senior Programs Officer as soon as possible if any changes are made to the aforementioned lists.

The proposal consists of four separate CAMS modules:

- **Project module:** Information about the proposed project, how it meets the objectives and criteria of the competition
- **Finance module:** Information about the budgetary details of the proposal
- **Suggested reviewers module:** List of potential reviewers of the proposal
- **Research security module:** Information about research security requirements

The forms in CAMS will dictate the maximum number of characters that can be included in each section and/or the page limits for uploaded documents.

## 6.5 Project module

### 6.5.1 Project information

This section captures basic information about the project such as the title, administrative institution, keywords and research security information. The information in this section is automatically populated with information if it was provided in a notice of intent.

You might need to submit other documents as well, depending on the answers to the research security questions (see sections [6.5.4](#) and [6.8](#)).

### 6.5.2 Plain language summary

Provide a short summary in plain language of the proposed project: what is being researched, how it is being done and why it is important. Focus on the expected impacts and benefits to Canada, beyond academic accomplishments. This summary will not be used in the review process. Should the project be funded, it may be used in the CFI's communications products and website.

### 6.5.3 Project summary

In language appropriate for a Multidisciplinary Assessment Committee (MAC), provide a general description of the research or technology development activities to be undertaken and a general overview of the infrastructure being requested. This summary must concisely address the extent to which the proposal meets the competition objectives.

## 6.5.4 Principal and other users/team members

The list of principal users/team members is prepopulated if a notice of intent was required. Newly added principal users must have a CAMS account and accept to participate in this project before a proposal can be submitted to the CFI. The CVs of the principal users will be appended to the proposal. Researchers listed as principal users automatically gain read access to the proposal.

If the project aims to advance a sensitive technology research area (according to the answer given in the project information section), all team members must complete a CFI STRAC attestation form in CAMS before they can accept to participate in the project.

## 6.5.5 Collaborating institutions

Identify the institutions eligible for CFI funding collaborating in this project. The list of collaborating institutions should be filled out prior to completing the Finance module. The choice of infrastructure location in the Cost of individual items section of the Finance module will be populated based on this list. Do not include in this list the administrative institution identified in the Project information section.

## 6.5.6 Financial resources for operation and maintenance

This section of the Project module captures the annual costs and sources of committed support to ensure the effective operation and maintenance of the infrastructure for the first five years after implementation.

In cases where the useful life<sup>1</sup> of some of the infrastructure items requested are longer or shorter than five years, the Assessment criteria section of the proposal should provide complementary information regarding the operating and maintenance needs for these items over their useful life.

Do not include costs related to research and/or technology development. If funding sources include the CFI Infrastructure Operating Fund (IOF), list these in the “institutional contribution” category.

## 6.5.7 Assessment criteria

Upload a PDF document that contains key information on how the proposal meets the objectives and assessment criteria for the competition. Ensure that the document follows the guidelines for attachments ([Section 6.2](#)).

Each assessment criterion will be evaluated against a standard. Each criterion includes aspects that must be addressed in the proposal. Failure to do so will weaken the proposal.

The document allows the applicant maximum flexibility to address each criterion, including the use of figures or diagrams, where appropriate. The distribution of pages among criteria is at the applicant’s discretion, up to the total page limits.

## 6.6 Finance module

The Finance module consists of the following sections:

- Cost of individual items
- Construction or renovation plans (if applicable)
- Contributions from eligible partners
- Infrastructure utilization
- Overview of infrastructure project funding (generated automatically)

---

<sup>1</sup> The useful life of the research infrastructure is considered to be the period of time over which the infrastructure is expected to provide benefits and be usable for its intended purpose as per the proposal, factoring in normal repairs and maintenance.

The tables in the Overview of infrastructure project funding section in CAMS will be automatically populated with information taken from the other sections of the Finance module. Note that the amount requested from the CFI is calculated based on the difference between the total contributions from eligible partners and the total eligible costs.

### **6.6.1 Cost of individual items**

When completing the Cost of individual items section, the CFI recommends that the applicant bundle items into functional groupings. However, details and justification for each item within a group should be provided in addressing the infrastructure criterion in the Assessment criteria document. The CFI's [Policy and program guide](#) outlines the eligible costs for infrastructure projects.

List only the eligible infrastructure acquisition and development costs. List the full cost of each item. Retain documentation (price lists, quotes, etc.) so that you can provide it to the CFI upon request.

Please note:

- If the infrastructure will be used for purposes other than research or technology development, list only pro-rated research or technology development costs.
- The total eligible costs must include taxes (net of credits received), shipping and installation. However, taxes must not be calculated on the in-kind portion.
- When preparing budget estimates, the applicant must follow their existing institutional policies and procedures. Costs included in this budget must be close estimates of fair market value. Refer to the [Policy and program guide](#) for information on how in-kind contributions must be assessed.

### **6.6.2 Construction or renovation plans**

All proposals that include construction or renovation must provide the following information:

- A detailed breakdown of the overall cost of the construction or renovation project, categorized by cost component (i.e. direct, soft and contingency costs);
- A timeline identifying key dates for the various stages of the proposed construction or renovation;
- Floor plans of the proposed area(s), showing the location of the infrastructure and the scale of the plans for projects involving multiple rooms. The floor plans must be legible when printed in black and white on standard letter size paper (8.5" x 11").

Note: The cost breakdown, timeline and floor plans should be uploaded as a separate PDF document. These pages do not count towards the page limit for the Assessment criteria section of the proposal.

### **6.6.3 Contributions from eligible partners**

List all contributions from eligible partners. Do not include the amount requested from the CFI. Provide the partner name and type, as well as a breakdown of contributions (cash and in-kind) for each eligible partner. The applicant is encouraged to bundle all expected in-kind contributions from vendors into a single line. If partner contributions are expected but have not yet been confirmed, outline the plans for securing these funds.

### **6.6.4 Infrastructure utilization**

This section of the Finance module captures the use of the requested infrastructure for CFI-eligible and non-eligible purposes and any applicable pro-rating of costs.

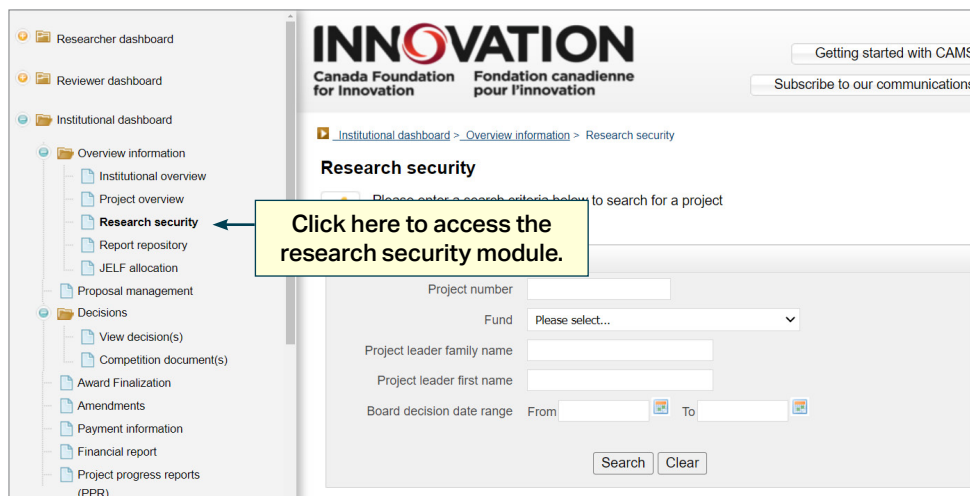


## 6.7 Suggested reviewers module

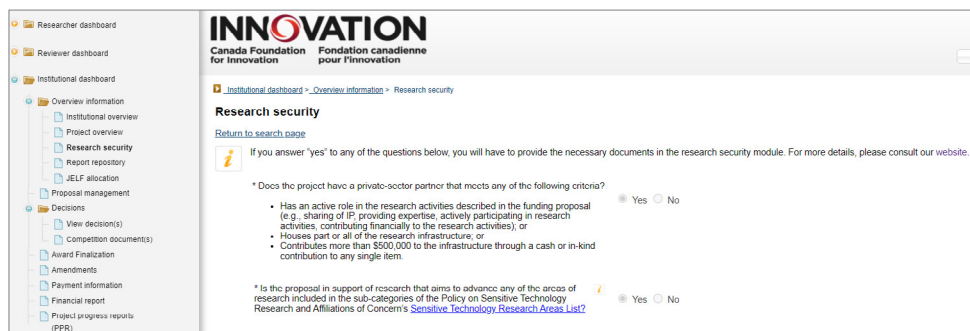
The list of suggested reviewers is prepopulated using the list if one was provided in a notice of intent. You may identify additional reviewers who are well-qualified to review the proposal. Refer to [Section 6.3.5](#) of this document for conflict of interest guidelines. The decision whether or not to contact the suggested reviewers remains with the CFI.

## 6.8 Research security module

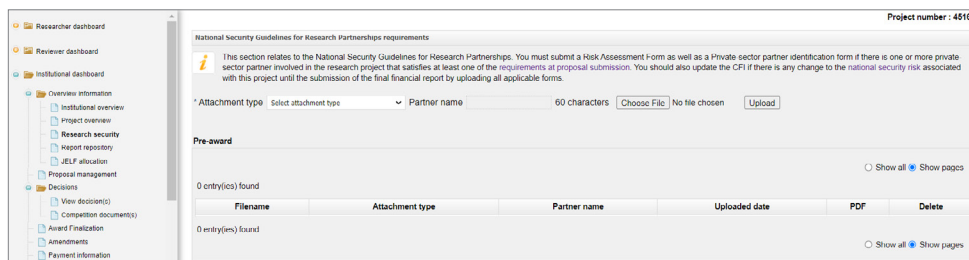
Project leaders can access the research security module for the project through their researcher dashboard. Institutional administrators can access the research security module through the menu on the left.



The top portion of the research security module displays, in read-only mode, the answers to the two research security questions, as it was entered in the project information section of the proposal.



If the answer to the first research security question is “yes,” institutional users must upload a Risk Assessment Form (RAF) and one or more private-sector partner identification forms using the middle portion of the research security module.



If the answer to the second research security question is "yes," the bottom portion of the research security module allows an institutional user to monitor whether all team members have completed the forms.

The screenshot displays a web interface for monitoring research security attestations. A table lists team members with columns for name, role, attestation status, date, form status, and participation confirmation. A 'Reset attestation' button is visible for the 'Awaiting reply' status.

Team member name	Role	Attestation status	Attestation date	Attestation form	Participation confirmed?	Reset attestation
Testb, Test	Team member	Complete	2024-09-03		Awaiting reply	<input type="button" value="Reset"/>
Testa, Test	Team member	Not done			Awaiting reply	
Test, Test	Team leader	Complete	2024-08-29		Yes	

**The attestation status column helps you follow the completion of all team members.**

**Resetting attestation will remove the user's attestation and allow the user to complete the attestation again.**

# 7 Decisions

As an institutional administrator, your institution may have given you access to the CAMS decisions module. This module allows you to view decisions related to proposals submitted to the CFI by your institution and gives you access to competition documents uploaded by the CFI.

## 7.1 View decisions

This search engine enables you to search and display subsets of decisions made by the CFI Board. Alternatively, you may click on "View all decisions" to list all decisions for your institution.

[Institutional dashboard > Decisions > View decisions](#)

**Decision**

This search engine enables you to search and display subsets of decisions made by the CFI Board. Alternatively, you may click on the link "View all decisions" to list all decisions for your institution.

[View all decisions](#) ← **Click to view all decisions for your institution.**

**Search**

Decision date

Fund

Project number

Project leader's family name

Project leader's first name

Decision

Decision date range From:  To:

\* This award has not been made public yet, please keep confidential

[Export search results to Excel](#)  Show all  Show pages

1 entry(ies) found ↑ **Click to export search results to Excel.**

Project #	Project leader	Project title	Fund	CFI Board decision	Funding amount	CFI Board decision date
* 33333	Smith, Joe	My research infrastructure project	John R. Evans Leaders Fund – Funding for research infrastructure	Full funding	\$180,000	2016-03-01

1 entry(ies) found  Show all  Show pages

## 7.2 Competition documents

This section allows you to view documents uploaded by the CFI in relation to competitions, such as review material.

[Institutional dashboard](#) > [Decisions](#) > Competition documents

### Competition documents

 Click on "View" to open the document.

Document title	Published date	View document
Review material	2014-10-14	<a href="#">View</a>

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## 8 Award finalization

As an institutional administrator involved in post-award activities, your institution may have given you access to the award finalization module. The award finalization module allows you to view award finalization status information related to projects at your institution, thereby helping you manage your award finalization process. The search features allow you to obtain/view lists of projects for various award finalization statuses. You can also view specific project-related information such as the award agreement, the budget at award finalization, the award finalization form, and award agreement special conditions (if any). Additionally, the award finalization module allows you to fill in award finalization forms.

This section provides additional information on the award finalization module within CAMS. You should consult the [Policy and program guide](#) for complete information on requirements and guidelines related to finalizing CFI awards.

If an updated budget is required prior to finalizing the award agreement, institutions must submit an amendment using the amendment module. Refer to the next section of this guide for further information regarding the amendment module.

### 8.1 Access

By default, all individuals identified in the institutional agreement can enter data in the award finalization form (i.e., president, director general, authorized signatories, liaison and account administrator).

The liaison and account administrator are responsible for setting appropriate access privileges to the award finalization forms. They can:

- Provide institutional administrators who have no institutional agreement role with data capture privileges in accordance with their institutional control framework and practices. They can do this using the “Privileges” tab of the “Institutional agreement and access privileges” section (see [section 15.2](#))
- Grant project leaders access to the award finalization module through the “Project leader access” tab of the “Institutional agreement and access privileges” section (see [section 15.4](#)).


Only individuals identified in the institutional agreement can submit an award finalization form in CAMS (i.e., president, director general, authorized signatories, liaison and account administrator).

## 8.2 Searching

You will have access to the award finalization form as soon as a positive funding decision is communicated to your institution. If the recipient institution is different from the applicant institution, the award finalization form will be available in the recipient institution's dashboard. The award finalization module allows you to search for a specific project, search by project leader, or search for projects based on their current award finalization status.


[Institutional dashboard](#) > Award finalization module

### Award finalization

 Please enter one or more search criteria to search for a specific project. Alternatively, you can select an award finalization status from the droplist (the list generated can help you manage the award finalization process).

Note: Project leaders have read-only access to this module.

#### Award finalization search

 Please enter one or more search criteria to search for a specific project. Alternatively, you can select an award finalization status from the droplist (the list generated can help you manage the award finalization process).

Project number

Project leader's family name

Project leader's first name


or


Award finalization status

## 8.3 Search results

Whether you search for a specific project or by award finalization status, you will be presented with a table of results listing the projects that match your search criteria. The list is by default sorted by project number ascending, but you can sort the information by clicking on most of the column headers in the table. You also have the option of exporting your search results to Excel.

Search results

 Budget updates subsequent to the award finalization can be viewed in the amendment section of the institutional portal.

 [Export search results to Excel](#)

1 entry(ies) found

<sup>1</sup> This award has not yet been made public. Please keep it confidential.

<sup>2</sup> This project has not yet been made public. Please keep it confidential.

Click to view a PDF version of the award finalization form, the award agreement and the budget at award finalization.

Click to access the project's main award finalization page.

Project number	Project/Team leader(s)	Project title	Fund	CFI board decision date	Award finalization form		Award agreement		Budget at award finalization	Forms/ attachments
					Status	Date submitted	Date issued	Special conditions		
<a href="#">40400</a>	1 Leblanc, Alex	Water chemistry	TEST Release 14 AFF	2021-05-13	In progress					<a href="#">View</a>

1 entry(ies) found

The search results will show you the status of the award finalization form, the date the award finalization form was submitted to the CFI, the date the award agreement was issued by the CFI and which budget was used at award finalization (itemized list<sup>2</sup>, amendment or proposal). You will also be able to view special conditions included in the award agreement and whether these have been met or not.

You can complete and modify unsubmitted award finalization forms by clicking on the project number. In addition, if you are identified in the institutional agreement (i.e., president, director general, authorized signatories, liaison and account administrator), clicking the project number will also provide you with the option of submitting the award finalization form.

Finally, you will be able to view the forms and attachments related to a project such as the award finalization form, the award agreement and the budget at award finalization (in both PDF and Excel format) by clicking on "View." If applicable, you will also be able to view all revised award agreements issued for the project.

## 8.4 Project's main award finalization page

Each project has a main award finalization page where you can view the status of the award finalization form, access it for modification or submit it to the CFI.

[Institutional dashboard](#) > [Award finalization](#) > Project # 40400

[Return to search page](#)

The submission of the award finalization form is required before an award agreement can be issued. Only users that have roles designated in the institutional agreement can submit the award finalization form.

If a budget update is required before award finalization, please submit the amendment request in CAMS before submitting the award finalization form.

**Award finalization form**

**Click to access the award finalization form.**

**Total eligible costs** \$5,000,000

**Project/Team leader(s)** Leblanc, Alex

**Maximum CFI contribution** \$2,000,000

**Fund** TEST Release 14 AFF

**Click to verify if the award finalization form has been filled in properly.**

**Click to view a PDF version of the award finalization form.**

**Award finalization form**

Webform		Status	Submit to the CFI	Submission date	CFI comments	Display/Print
Display	Validate					
<a href="#">View/edit</a>	<input type="button" value="Run"/>	In progress	<input type="button" value="Submit"/>			

2 The use of the itemized list form has been discontinued by the CFI in December 2014.

## 8.5 Award finalization form

The award finalization form consists of four tabs. When an award finalization form is first opened, the “Overview” tab is selected by default. You will always have access to the “Certification” and “Research security” tabs, but the eligible costs tab will only be available for projects requesting more than \$1 million from the CFI.

The screenshot shows the 'Overview' tab of the award finalization form. At the top, there are four tabs: Overview, Eligible costs, Certification, and Research security. A callout box points to these tabs with the text: "Use tabs to navigate through the sections." Below the tabs, there is a message: "Please fill out the information requested in each tab. You may return to modify information in any of these tabs if you need to. The Eligible cost tab is only active if the CFI contribution to the project is superior to \$1M." On the right side, there are buttons for "Display/Print" and "Save". A callout box points to these buttons with the text: "Save changes before navigating to other sections (tabs)." Below this, there is a form section titled "Award finalization form" with the following fields: "Institution" (Test), "Project number" (45190), "Project/Team leader(s)" (Test, Test), and "\* Anticipated project end date" (YYYY-MM-DD). Another callout box points to the "Save" button with the text: "Save changes before navigating to other sections (tabs)." The breadcrumb trail at the top reads: "Institutional dashboard > Award finalization > Project #45190 > Award finalization form > Overview".

You can use the “Research security” tab to inform the CFI of any changes to the project related to the research security requirements that pertain to the [Government of Canada’s National Security Guidelines for Research Partnerships](#). Answering “yes” to the question will give you access to the research security module. For this reason, you should upload relevant documents (updated Risk Assessment Form and private-sector partner identification form(s)) to the system.

The screenshot shows the 'Research security' tab of the award finalization form. At the top, there are four tabs: Overview, Eligible costs, Certification, and Research security. A callout box points to the 'Research security' tab with the text: "Use the 'Research security' tab to inform the CFI of any changes related to research security requirements." Below the tabs, there is a message: "This research security tab should be used to inform the CFI of any changes to the project related to the CFI research security requirements until the submission of the final financial report. It will provide you with easy access to the research security module to share any applicable additional information. Contact your Senior Programs Officer if you need to submit new attestations, as this cannot be done in CAMS. For more information, please consult our [website](#)." On the right side, there are buttons for "Display/Print" and "Save". Below this, there is a question: "Is there any change to the project related to the security requirements that pertain to the Government of Canada’s National Security Guidelines for Research Partnerships (e.g., change to or new private-sector partner)?" with radio buttons for "Yes" and "No". A callout box points to the "Research security module" button with the text: "Research security module". The breadcrumb trail at the top reads: "CFI Dashboard > Project #45311 > Award finalization form > Research security".

If the project was not aiming to advance a sensitive technology research area when you submitted the proposal, remain aware of any change in the nature of the project that would mean it now does. In such an instance, each project/team leader and team member is required to immediately submit an attestation form. Contact your Senior Programs Officer for detailed instructions on how to submit those forms. (In this instance, you cannot submit the attestation forms in CAMS.)



## 8.6 Submit the award finalization form

Only individuals identified in the institutional agreement can submit an award finalization form in CAMS (i.e., president, director general, authorized signatories, liaison and account administrator). This is done by clicking the “submit” button in the main award finalization page.

[Institutional dashboard](#) > [Award finalization](#) > Project # 40400

[Return to search page](#)



The submission of the award finalization form is required before an award agreement can be issued. Only users that have roles designated in the institutional agreement can submit the award finalization form.

If a budget update is required before award finalization, please submit the amendment request in CAMS before submitting the award finalization form.

### Award finalization form

<b>Project number</b>	40400	<b>Total eligible costs</b>	\$5,000,000
<b>Project/Team leader(s)</b>	Leblanc, Alex	<b>Maximum CFI contribution</b>	\$2,000,000
<b>Fund</b>	TEST Release 14 AFF		
<b>Project title</b>	Water chemistry		

**Click 'Submit' to submit the award finalization form to the CFI.**

Webform		Status	Submit to the CFI	Submission date	CFI comments	Display/Print
Display	Validate	In progress	<input type="button" value="Submit"/>			
<a href="#">View/edit</a>	<input type="button" value="Run"/>					

## 9 Amendments

As an institutional administrator involved in post-award activities, your institution may have given you access to the amendment module. The amendment module allows you to view amendment status information related to your institution's projects, thereby helping you manage the amendment request process at your institution. The search features allow you to obtain/view lists of projects based on the project or amendment status (e.g., in progress, approved, rejected). The amendment module allows you to create, update, delete and submit amendment requests, as well as view CFI comments (if any) related to a specific amendment.

This section provides additional information on the amendment module within CAMS. You should consult the Policy and program guide for complete information on requirements and guidelines related to changes to infrastructure projects and instances where a change request must be submitted via the amendment module in CAMS.

If an updated budget is required prior to finalizing the award agreement, institutions must submit an amendment using the amendment module. This same module must be used to submit an amendment request following the finalization of an award agreement.



**Note:** Amendment requests can only be created if a final financial report has not yet been created for a project. Inversely, a final financial report cannot be created if an amendment request is in progress.

### 9.1 Searching

The amendment module allows you to search for a specific project, or to search for projects based on the project leader's name, the fund, the status of the latest amendment request or the status of the project. You can also view all projects or only projects with an amendment request.

When you search for a specific project using the project number, you will be brought directly to the project's main amendment page (see [section 9.3](#), "Project's main amendment page").

The screenshot shows the 'Amendments' section of the CAMS system. At the top, there is a breadcrumb trail: 'Institutional dashboard > Amendment module'. Below this, the heading 'Amendments' is followed by an information icon and a paragraph: 'Please enter one or more criteria to search for a specific project. Alternatively, you can view all projects or only those with amendments by clicking on one of the links below. You may also select a status/fund from the dropdown lists (the list generated can help you manage the amendment request process)'. There are two links: 'View all projects' and 'View all projects with amendments'. The main search area is titled 'Search' and contains several input fields: 'Project number' (with a search icon), 'Project leader's family name', 'Project leader's first name', 'Fund' (dropdown menu), 'Status of latest amendment' (dropdown menu), and 'Status of project' (dropdown menu). There are 'Search' and 'Clear' buttons at the bottom of the search area.

## 9.2 Search results

When you search using family name, first name, statuses or by using “View all projects” or “View all projects with amendment requests”, you will be presented with a table of results listing the project(s) that match your search criteria. The list is by default sorted by project number ascending, but you can sort the information by clicking on any of the column headers in the table.

**Search results**

1 entry(ies) found

<sup>1</sup> This award has not yet been made public. Please keep it confidential.  Show all  Show pages

<sup>2</sup> This project has been withdrawn.

Project number	Project leader	Project title	Fund	Number of amendments created	Status of latest amendment	Submission date of latest amendment	Date of award agreement	Approved project end date
<a href="#">34063</a> <sup>1</sup>	Account, Demo	Infrastructure for breakthrough research	Innovation Fund	0	N/A			

1 entry(ies) found

Show all  Show pages

**Click a project number to access this project's main amendment page.**

## 9.3 Project's main amendment page

Each project has a main amendment page where you can view the status of previous amendment requests submitted to the CFI for this project (if any) and create new amendment requests.

[Institutional dashboard](#) > [Amendment module](#) > Project amendment(s): Project # 12345

[Return to search page](#)

**i** The amendment request should be used to request changes requiring prior CFI approval. All other changes to the infrastructure from what was initially described in the proposal must be described in the final financial report.

Changes requested in amendment requests will be reflected in future financial reports once they have been approved by the CFI.

**Click this button to create an amendment request.**

**Click to view a PDF version of the amendment request.**

**Click to view CFI comments on amendment request.**

Project # 12345 Fund Innovation Fund

Project leader Account, Demo Date of award 2014-09-03

Project title In-situ visualization lab

[Create amendment request](#)

#	Webform		Status	Action	Submission date	Approval/Rejection date	CFI comments	Display/Print	Delete
	Display	Validation							
1	N/A	N/A	Approved		2014-09-03	2014-09-03	<a href="#">View</a>	<a href="#">View</a>	

Note that only amendment requests that relate to changes to the infrastructure will include an Excel version in addition to the PDF version. If the amendment request pertains only to a change in the project end date, only the PDF version of the amendment request will be available.

For amendments that are in progress, you will be able to run a validation (to check for errors in the amendment form) and perform various actions, depending on the status of the amendment. You can also delete an amendment request previously created but not yet submitted to the CFI.

Institutional dashboard > Amendment module > Project amendment(s): Project # 34063

[Return to search page](#)

**i** The amendment request should be used to request changes requiring prior CFI approval. All other changes to the infrastructure from what was initially described in the proposal must be described in the final financial report.

Changes requested in amendment requests will be reflected in future financial reports once they have been approved by the CFI.

Project amendment details:

- Project number: [redacted]
- Project lead: [redacted]
- Project title: Infrastructure for breakthrough research
- Fund: Innovation Fund
- Date of award agreement: [redacted]
- Approved project end date: [redacted]

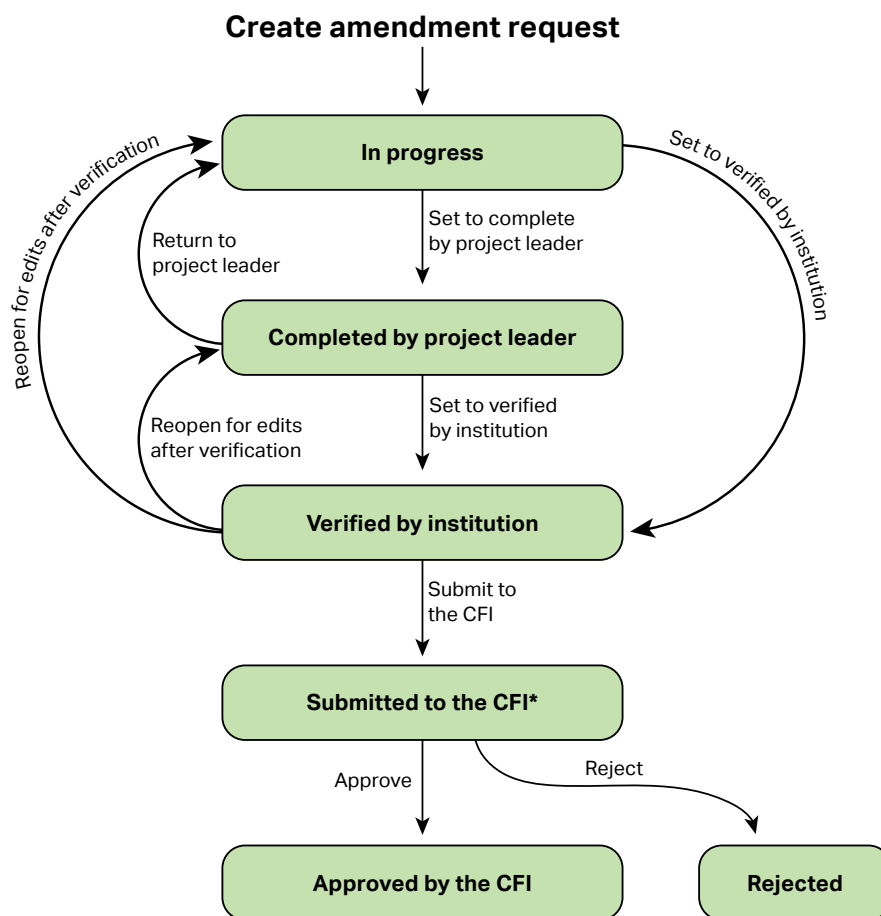
You cannot create another amendment for this project as one has either been approved or rejected by the CFI.

#	Webform		Status	Action	Submission date	Approval/Rejection date	CFI comments	Display/Print	Delete
	Display	Validation							
1	<a href="#">Open</a>	<input type="button" value="Run"/>	In-progress	Please select...			N/A	<a href="#">View</a>	<input type="button" value="X"/>

Annotations:

- Click "Run" to perform a validation of the information entered in the form.
- Click to delete the amendment request.
- Select a value to perform an action.
- Click "Open" to access the amendment request form

## 9.4 Amendment requests: statuses and actions



\* In some cases, the CFI may return an amendment request to your institution so that corrections can be made.

The status of all newly created amendment requests in CAMS is “in progress.” The amendment requests can be created only by institutional administrators with appropriate access. They can then be accessed by the project leader if institutional access has been granted.

If given access, and once a project leader has finished entering data in the amendment request, he/she will be required to confirm that the form is complete. Once this is done, he/she will no longer have access to modify it.

Note that completion of the amendment request by a project leader is not a mandatory step. An institutional administrator with the appropriate privileges can fill in the form and set its status as verified, even if project leaders have been granted access to the amendment module.

You will then verify the amendment request and set the status as verified. If changes are required, you can also return the amendment request to the project leader so that he/she can make the appropriate changes.

Once an amendment request has been set as verified, it can be reopened to make additional changes. If no further changes are required, the amendment request can be submitted to the CFI. No further changes are possible at this point, and the status of the amendment request changes to “submitted to the CFI.”

The CFI will approve, reject or return the amendment request to your institution for corrections. Note that it is possible to delete an amendment request at any stage in the process, except after it has been submitted to the CFI.

## 9.5 Amendment request form

The amendment request form has seven tabs. When an amendment request is first opened, the default tab is the “Overview” and the other tabs are not accessible. You will first need to indicate the nature of your change (i.e., change to the end date of the project or change to the infrastructure, including new items, or both). This will determine which tabs will become available and need to be filled out. The “Attachments” tab allows you to attach up to three documents (PDF format) to further explain changes made to the project.

The screenshot shows the 'Overview' tab of the amendment request form. At the top, a navigation bar contains tabs: Overview, Change to end date, Change(s) to budget, Eligible costs, Contributions, Attachments, and Research security. Below the navigation bar, the 'Overview' section contains an information icon and the text: 'Amendment requests should be used by institutions to request changes requiring prior CFI approval.' A callout box points to the 'Display/Print' button with the text: 'Click “Display/Print” to access the PDF version of the amendment request form.' Below this, a form displays project details: Institution (Dalhousie University (69)), Project number (45190), Fund (Innovation Fund 2025 Stream 2 (SSH)), Project/Team leader(s) (Test, Test), Project title (pP UAT - RS testing - checking how to submit new RAF in post if RAF answer at proposal = No), and Date of award agreement. A 'Prepared by' field is also present. A callout box points to the 'Save' button with the text: 'Save changes before navigating to other sections (tabs)'. Below the form, a section titled '\* Please indicate the nature of your change (select all that apply)' has two checked options: 'Change to end date' and 'Change to the infrastructure, including new items'. A callout box points to this section with the text: 'Selecting nature of change will enable relevant sections (tabs)'. At the bottom right, there are 'Display/Print' and 'Save' buttons.

You can use the “Research security” tab to inform the CFI of any changes to the project related to the research security requirements that pertain to the [Government of Canada’s National Security Guidelines for Research Partnerships](#). Answering “yes” to the question will give you access to the research security module. For this reason, you should upload relevant documents (updated Risk Assessment Form and private-sector partner identification form(s)) to the system.

The screenshot shows the 'Research security' tab of the amendment request form. At the top, a navigation bar contains tabs: Overview, Change to end date, Change(s) to budget, Eligible costs, Contributions, Attachments, and Research security. Below the navigation bar, the 'Research security' section contains an information icon and the text: 'This research security tab should be used to inform the CFI of any changes to the project related to the CFI research security requirements until the submission of the final financial report. It will provide you with easy access to the research security module to share any applicable additional information. Contact your Senior Programs Officer if you need to submit new attestations, as this cannot be done in CAMS. For more information, please consult our [website](#).' A callout box points to the 'Research security' tab with the text: 'Use the “Research security” tab to inform the CFI of any changes related to research security requirements.' Below this, a form displays a question: '\*Is there any change to the project related to the security requirements that pertain to the Government of Canada’s National Security Guidelines for Research Partnerships (e.g., change to or new private-sector partner)?'. The question has radio buttons for 'Yes' and 'No', with 'Yes' selected. A callout box points to the 'Research security module' button with the text: 'Research security module'. At the bottom left, there is a note: '\* Indicates a required field'. At the bottom right, there are 'Display/Print' and 'Save' buttons.

If the project was not aiming to advance a sensitive technology research area when you submitted the proposal, remain aware of any change in the nature of the project that would mean it now does. In such an instance, each project/team leader and team member is required to immediately submit an attestation form. Contact your Senior Programs Officer for detailed instructions on how to submit those forms. (In this instance, you cannot submit the attestation forms in CAMS.)

# 10 Payment

As an institutional administrator involved in post-award activities, your institution may have given you access to the payment module. The payment module allows you to view payment information related to an infrastructure project or the IOF. You can also view payment information by transaction date or for a specific period for all projects. Finally, payment information can be viewed by type or status.

## 10.1 Searching

The payment module allows you to search at either a detailed level or at a summary level.

Searching at a detailed level will allow you to view individual payment transactions. You can use various search criteria such as project number, transaction date, payment type, payment status or a combination of these. You also have the option of displaying only IOF payments.

[Institutional dashboard](#) > [Payment information](#)

### Payment information

You can view payment information at either a detailed or a summary level, by clicking on the appropriate tab below.

**"Details" tab:** will generate search results at a transaction level (i.e. a different row for each transaction). Note that only projects that have received a payment from the CFI will be displayed in the search results.

**"Summary" tab:** will generate search results at a summary level by project, which can then be drilled down to the transaction level. Note that all projects for which an award agreement is in place will be displayed in search results.

**Details** | Summary

#### Search

Please enter one or more search criteria below. If searching by transaction date, the period entered must not exceed ten years. As well, if searching for all payment types or for all payment statuses, you must enter at least one other search criteria. Search results will be displayed at a transaction level.

Note that if you search by transaction date with no other filter, search results will include both infrastructure and IOF payment details (when applicable).

Project number

or

Display only IOF payments

**Transaction date**

from

to


Payment type

Payment status

Searching at a summary level will allow you to view summary payment information. You can search for a specific project or by status of project (all, on-going or completed).

[Institutional dashboard](#) > Payment information

### Payment information


 You can view payment information at either a detailed or a summary level, by clicking on the appropriate tab below.

**"Details" tab:** will generate search results at a transaction level (i.e. a different row for each transaction). Note that only projects that have received a payment from the CFI will be displayed in the search results.

**"Summary" tab:** will generate search results at a summary level by project, which can then be drilled down to the transaction level. Note that all projects for which an award agreement is in place will be displayed in search results.

Details | **Summary**

**Search**

 You can search for payment information relating to infrastructure projects by entering one of the following in the boxes below: (a) project number, (b) project leader's name, (c) selecting a status. Search results will be displayed at a project summary level.

To search for Infrastructure Operating Fund (IOF) payment information, click on the Details tab.

Project number

\_\_\_\_\_ or \_\_\_\_\_

Project leader's family name

Project leader's first name


\_\_\_\_\_ or \_\_\_\_\_

Status of project

## 10.2 Search results


The search results displayed for the "Details" tab will list all individual transactions that match the search criteria entered. The search results can be exported to Excel.

**Search results**

 [Export results to Excel](#) ← **Click to generate an Excel file from search results.**

Show all  Show pages

5 entry(ies) found

Project number ▲	Payment type 	Date	Net amount	Holdback	Gross amount	Payment status	Comments
12345	Regular	2016-10-15	32,819	3,647	36,466	Scheduled	
12345	Regular	2015-10-15	32,183	3,576	35,759	Scheduled	<a href="#">View</a>
12345	Regular	2014-10-15	31,554	3,506	35,060	Scheduled	
12345	Regular	2013-10-15	475,314	52,813	528,127	Paid by CFI	
12345	Regular	2012-10-15	148,129	16,459	164,588	Paid by CFI	


5 entry(ies) found


Show all  Show pages







The search results displayed from the "Summary" tab will list all projects that match the search criteria entered. From the search results displayed, you will be able to drill down to transaction level information by clicking on the project number link. The search results can be exported to Excel.

**Search results**

 Transaction level details can be viewed by clicking on the related project number link within the search results table.  
Please note that the final granted amount and any remaining balance to be paid are fully dependent on the actual **eligible** costs incurred by the institution and the institution's compliance with CFI policies and the award conditions.

 [Export results to Excel](#) ← **Click to generate an Excel file from search results.**

1 entry(ies) found  Show all  Show pages

Project number ▲	Project leader	Fund	Granted amount 	Amount paid to date 	Remaining balance			Payments not yet scheduled (gross) 	Approved project end date
					Scheduled payments (net)	Held payments (net) 	Holdback		
<a href="#">12345</a>	Account, Demo	FL 1 M\$-2 M\$	800 000	623 443	96 556	0	80 001	0	2016-12-31

1 entry(ies) found  Show all  Show pages

**Click a project number to access transaction level information for that project.**

# 11 Financial reports

As an institutional administrator involved in post-award activities, your institution may have given you access to the financial report module. The financial report module allows you to view financial report status information related to a project, thereby helping you manage the financial reporting process at your institution. The search features allow you to obtain lists of projects by financial report status or type (e.g., in progress, submitted, approved, interim, final). The financial report module allows you to create, update, delete and submit financial reports, as well as view CFI comments (if any) related to a specific financial report.

This section provides additional information on the financial report module within CAMS. You should consult the [Policy and program guide](#) for complete information on requirements and guidelines related to the financial reporting process.

## 11.1 Searching

The financial report module allows you to search for a specific project (using project number or project leader name), or to search for projects based on the status of the latest report created or the financial report type. You can also view the information for all projects or view a list that includes information of the next report due for each project.

When you search for a specific project using the project number, you will be brought directly to this project's main financial report page (see [section 11.3](#), "Project's main financial report page").

The screenshot shows the 'Financial reports' section of the CAMS system. At the top, there is a breadcrumb trail: 'Institutional dashboard > Financial report module'. Below this, the heading 'Financial reports' is followed by an information icon and a paragraph: 'This screen allows you to perform the following searches:'. A numbered list of four instructions follows, detailing how to use various search links and filters. A note below the list states: 'Note that only projects that have received a payment from the CFI will be displayed in the search results.' Below the instructions are two links: 'View reports to be submitted' and 'View all projects'. A yellow callout box with a black border points to the 'View all projects' link and contains the text: 'Use these links to quickly retrieve relevant project lists.' Below the links is a search form titled 'Search'. The form contains several input fields: 'Project number' (with a text input), 'Project leader's family name' (with a text input), 'Project leader's first name' (with a text input), 'Status of latest report created' (with a dropdown menu showing 'Please select...'), and 'Financial report type' (with a dropdown menu showing 'All'). At the bottom of the form are 'Search' and 'Clear' buttons.

# 11.2 Search results

When you search using family name, first name, status of latest financial report created, financial report type or by using the "View all projects" link, you will be presented with a table of results listing the projects that match your search criteria. The list will indicate the status of the latest financial report created.

**Search results**

Financial report details, including PDFs and status information can be viewed by clicking on the related project number link within the search results table.

[Export search results to Excel](#) ← **Click to generate an Excel file from search results.**  Show all  Show pages

2 entry(ies) found

Project number	Project leader	Project title	Fund	Latest financial report created			Final report created?	Approved project end date	Reporting frequency
				Reporting period end date	Status	Submission date			
<a href="#">12345</a>	Account, Demo	Leading edge infrastructure	On-going New Opportunities Fund	2000-03-31	Approved	2000-11-07	Yes	2000-03-31	Annual
<a href="#">67890</a>	Smith, John	Interactive lab	CRC Infrastructure Fund	2010-03-31	Approved	2010-11-30	Yes	2010-03-31	Annual

2 entry(ies) found  Show all  Show pages

**Click a project number to access transaction level information for that project.**

When you use the "View reports to be submitted" link, you will be presented with a table of results listing the next report due for the ongoing project(s) at your institution.

**Search results**

Financial report details, including PDFs and status information can be viewed by clicking on the related project number link within the search results table.

[Export search results to Excel](#)  Show all  Show pages

24 entry(ies) found displaying 20 entry(ies) ⏪ ⏩ 1 2 ⏪ ⏩

**Notice the difference in columns when clicking "View reports to be submitted".**

Project number	Project leader	Project title	Fund	Next report due		Approved project end date	Reporting frequency
				Reporting period end date	Date report was created		
<a href="#">24680</a>	Doe, Jane	Sound quality lab	New Initiatives Fund 2009	2015-03-31		2013-12-31	Annual


# 11.3 Project's main financial report page

Each project has a main financial report page where you can view the status of previous financial reports submitted to the CFI for the project (if any) and create a new financial report.

Institutional dashboard > Financial report module > Project # 54321

[Return to search page](#)

**Quick search**

 To view financial report details for another project, enter the project number in the below box. Note that only projects that have received a payment from the CFI will be displayed in the search results.

Project number

**General information**

Project number 54321	Date of award agreement 2013-03-28
Project leader Smith, John	Approved project end date 2014-03-31
Fund Leaders Opportunity Fund - Funding for infrastructure associated with a Canada Research Chair	Maximum CFI contribution \$93,400
Project title Structured database	Current reporting frequency Every two years

**Financial reports**

Click to create a financial report for this project.

Reporting period end date	Final report?	Webform		Status	Submit to CFI	Submission date	CFI approval date	CFI comments	Display/print	Delete
		Display	Validation							
2014-03-31	No	N/A	N/A	Approved	N/A	2014-06-09	2014-06-09	<a href="#">View</a>	<a href="#">View</a>	

Click to view comments from the CFI.

Click to view a PDF version of the financial report.

For financial reports that are in progress, you will be able to run a validation (to check for errors in the financial report form) and submit the financial report to the CFI. You can also delete a financial report previously created but not yet submitted to the CFI.

Institutional dashboard > Financial report module > Project # 54321

[Return to search page](#)

**Quick search**

To view financial report details for another project, enter the project number in the below box. Note that only projects that have received a payment from the CFI will be displayed in the search results.

Project number

**General information**

Project number	54321	Date of award agreement	2013-03-28
Project leader	Smith, John	Approved project end date	2014-03-31
Fund	Leaders Opportunity Fund - Funding for infrastructure associated with a Canada Research Chair	Maximum CFI contribution	\$93,400
Project title	Structured database	Current reporting frequency	Every two years

**Click to change the reporting date.**

A financial report is in progress, therefore you cannot create another financial report at this time.

**Click to access the financial report form.**

Reporting period end date	Final report?	Display	Validation	Status	CFI	date	approval date	CFI comments	Display/print	Delete
<a href="#">2014-03-31</a>	No	N/A	N/A	Approved	N/A	2014-06-09	2014-06-09	<a href="#">View</a>	<a href="#">View</a>	
<a href="#">2014-10-08</a>	Yes	<a href="#">View/edit</a>	<input type="button" value="Run"/>	In progress	<input type="button" value="Submit"/>				<a href="#">View</a>	<input type="button" value="X"/>

**Click to delete the financial report.**

## 11.4 Financial report statuses

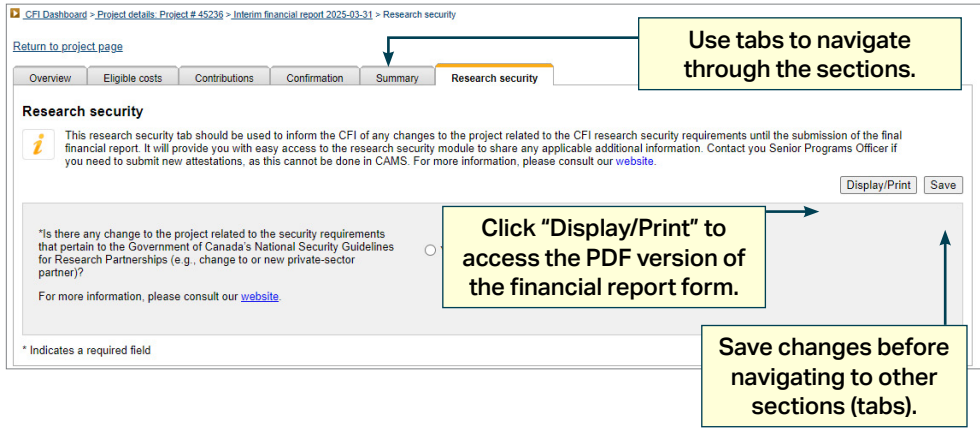
Once a financial report is submitted to the CFI, the CFI will assign one of the following statuses to the report:

- **Approved:** the financial report has been reviewed by the CFI and approved. No further action is required from your institution.
- **Returned to institution for corrections:** the financial report has been reviewed by the CFI, but corrections are required. You will need to view the CFI comments for this report, make the appropriate corrections, and re-submit the report to the CFI.
- **Issue pending:** the financial report has been reviewed by the CFI but there is an issue pending that requires follow-up by your institution. You will need to view the CFI comments for this report and address the issue described.
- **Submitted to the CFI — no CFI action required:** In some cases, your institution may choose to create a financial report even if one is not required by the CFI. In those cases, the CFI will not review the financial report and will indicate that no CFI action is required. Please note that this status only applies to interim financial reports.

# 11.5 Financial report form

When you create a financial report for a project, you will first need to indicate whether the report is an interim report or a final report for the project. Depending on your answer, the appropriate form (i.e., interim financial report or final financial report) will be created.

The interim financial report form consists of six tabs. When an interim financial report is first opened, the default tab is the "Overview," which is a read-only section and is provided for your reference only. Each of the three tabs, "Eligible costs," "Contributions" and "Changes," needs to be filled out by your institution. The fifth tab, "Summary," is read-only and is updated every time information is entered in the "Eligible costs" or the "Contributions" tab.



You can use the "Research security" tab to inform the CFI of any changes to the project related to the research security requirements that pertain to the [Government of Canada's National Security Guidelines for Research Partnerships](#). Answering "yes" to the question will give you access to the research security module. For this reason, you should upload relevant documents (updated Risk Assessment Form and private-sector partner identification form(s)) to the system.



If the project was not aiming to advance a sensitive technology research area when you submitted the proposal, remain aware of any change in the nature of the project that would mean it now does. In such an instance, each project/team leader and team member is required to immediately submit an attestation form. Contact your Senior Programs Officer for detailed instructions on how to submit those forms. (In this instance, you cannot submit the attestation forms in CAMS.)

The final financial report form consists of five tabs. When a final financial report is first opened, the default tab is the "Overview." You will need to indicate whether this project is a multi-institutional project. Each of the four tabs, "Eligible costs," "Contributions," "Changes" and "Certification," needs to be filled out by your institution. The "Changes" tab also contains a section where you can attach a document (PDF format) to further explain changes made to the project.

**Overview** | Eligible costs | Contributions | Changes | Certification

**Overview**

Please fill out each of the five tabs in the order that they are presented. After the initial data entry, you may return to modify information in any of these tabs, if required.

[Display/Print](#) [Save](#)

**Final financial report**

<b>Institution</b>	My institution	<b>Fund</b>	Leaders Opportunity Fund - Funding for infrastructure associated with a Canada Research Chair
<b>Project number</b>	99999	<b>Date of award agreement</b>	2013-03-28
<b>Project leader</b>	Smith, John	<b>Actual project end date</b>	2014-10-15
<b>Project title</b>	Leading-edge biology equipment		

**Maximum CFI contribution per award agreement** \$93,400

**CFI payments to date (net of holdback)** \$83,400

**Is this a multi-institutional project?**

[Display/Print](#) [Save](#)

# 12 Project progress report

As an institutional administrator involved in post-award activities, your institution may have given you access to the *Project progress report* (PPR) module. The PPR module allows you to view the infrastructure operational statuses and PPR submission statuses related to the projects at your institution, thereby helping you manage the PPR reporting process at your institution.

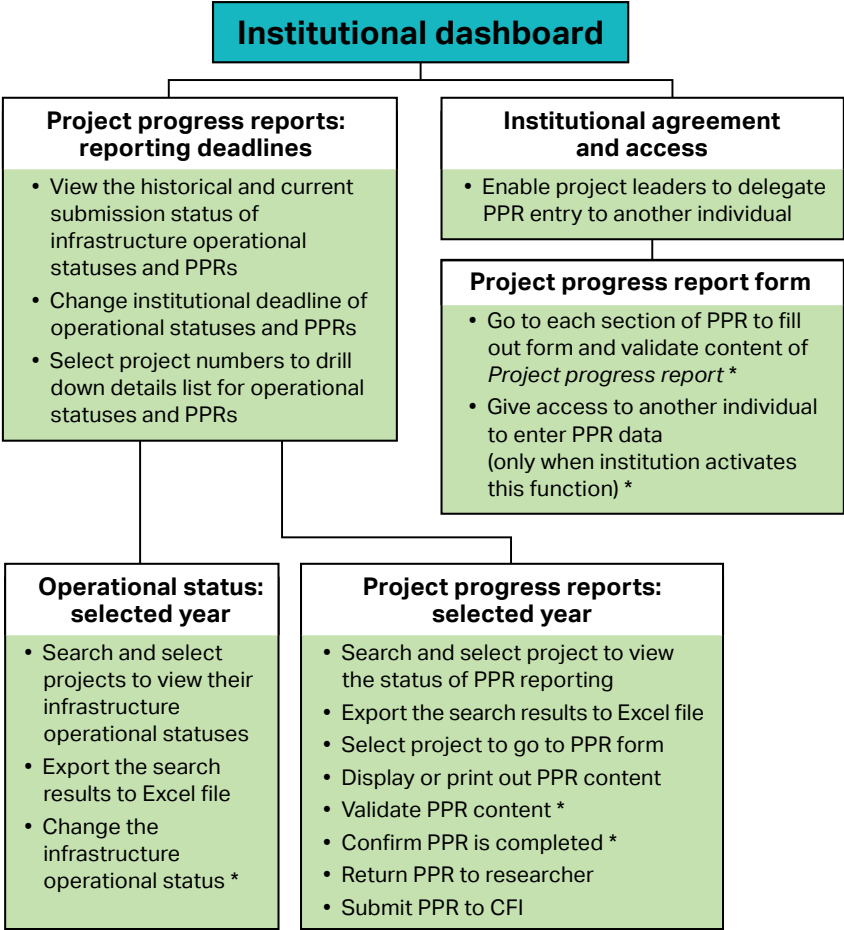
This section provides additional information on the PPR module within CAMS. You should consult the [Policy and program guide](#) for information on requirements and guidelines related to completing the PPR.

The process to submit a PPR to the CFI typically involves three steps:

1. The project leader indicates infrastructure operational status online (if applicable). Institutional administrators with appropriate access can also indicate operational status online on behalf of the project leader.
2. The project leader fills out, validates, and completes the PPR.
3. The institution may edit the PPR and/or return it to the project leader for revision. An authorized institutional administrator submits the PPR to the CFI.

Although completion of the PPR is under the responsibility of the project leader, a delegation tool allows her/him to share access to the online form with another individual with a CAMS account to support data entry.

The graphic below depicts the overview of CAMS PPR modules and associated tasks for institutions.



\* Indicates tasks for which the project leader has primary responsibility. Institutional administrators with appropriate access can also complete these tasks on behalf of project leaders.



# 12.1 Operational statuses and PPR submissions: reporting deadlines

The summary table indicates annual requirements and the latest submissions for infrastructure operational statuses and the PPRs. From this list, you will be able to drill down to the page in the selected year to manage operational statuses and the PPRs. You will be able to set the institutional deadlines if applicable.

[Institutional dashboard](#) > Project progress reports

**Project progress reports: reporting deadlines**

*i* The table below displays the CFI deadline that applies to submitting both infrastructure operational status and project progress reports. Through this screen, you can create an earlier, internal report deadline for your institution. To see a more detailed list of projects, click on the links provided in the "Operational status" and "Project progress reports" columns. To modify your internal deadlines for the current year, select the fields under "Institution deadlines", choose new dates and click on the 'Save institution deadlines' button at the top of the table. These deadlines will be displayed to all project leaders that have a report due for the year. Refer to the *Instruction manual for completing p...*

Change the default deadlines to an earlier date (if desired).

19 entry(ies) found

Save institution deadlines

Show all  Show pages

Click to access detailed annual listings of operational status/PPRs expected (submitted).

Year	Institution deadlines		CFI deadline	Operational status	Project progress reports
	Operational status	Project progress report			
2016	<input type="text" value="2016-06-30"/>	<input type="text" value="2016-06-30"/>	2016-06-30	<a href="#">48 (5 submitted)</a>	<a href="#">75 (0 submitted)</a>
2015	2015-04-30	2015-06-01	2015-06-30	<a href="#">32 (32 submitted)</a>	<a href="#">108 (106 submitted)</a>
2014	2014-06-30	2014-06-30	2014-06-30	<a href="#">37 (37 submitted)</a>	<a href="#">132 (131 submitted)</a>
2013	2013-06-30	2013-06-30	2013-06-30	<a href="#">35 (35 submitted)</a>	<a href="#">182 (180 submitted)</a>

# 12.2 Managing required operational statuses

The detailed listing of operational statuses for the current year allows institutional administrators with appropriate access to view, set or change the operational statuses of projects on behalf of the project leaders. Four different statuses can be displayed under the "Infrastructure operational" column:

- **Status not submitted yet:** Infrastructure operational status needs to be reported.
- **Operational (FFR submitted):** PPR will be required in the next reporting period following final financial report (FFR) being submitted.
- **Operational:** PPR is due in the current reporting period.
- **Not yet operational:** PPR is not required this year unless the status is changed to operational. The status can be changed to operational any time before the institutional deadline indicated.

**Operational status: 2016**

This screen lists all projects for which the infrastructure operational status should be provided in the year selected. Through the researcher portal, project leaders are asked to indicate whether the CFI-funded infrastructure is operational to the extent that they have been able to initiate the research activities described in the CFI proposal.

Through the project leader portal, project leaders are also able to respond in the "Operational status" column on behalf of the project leader. Operational status can be changed from "Not yet operational" to "Operational" through the submission of a positive response to the submitted final financial report, a reporting schedule will be required annually until completion.

**Operational status:** Show all statuses

**Institutional deadline:** 2016-06-30  
**CFI deadline:** 2016-06-30

[Export search results to Excel](#) ← Click to generate an Excel file.

48 entry(ies) found displaying 20 entry(ies)

Project number	Fund	Project leader	Project title	Operational status	Date submitted
12345	LEF 2012	Tester, Montreal	Project test 1	<input type="radio"/> Operational <input type="radio"/> Not yet operational	N/A
23456	JELF	Reporte St.Cath		<input checked="" type="radio"/> Operational	2016-02-11
34567	JELF	Pharmacist, Tokyo	Project test 3	<input type="radio"/> Operational <input checked="" type="radio"/> Not yet operational	2016-02-11
45678	JELF	Runner, Laval	Project test 4	<input type="radio"/> Operational	2016-02-11

“Not yet operational” can be changed to “Operational” any time before institutional deadline.

## 12.3 Filling out, validating and completing project progress reports

The statuses of all newly created PPRs in CAMS are shown as “in progress.” Project leaders have full access to the PPR form to enter, validate data and complete the PPR. Institutional administrators with appropriate access can also enter, validate and complete the forms on behalf of the project leader.

**Project progress reports: 2016**

This screen lists all projects for which Project progress reports are due in the year selected, and allows you to take actions such as printing, validating, and submitting progress reports. Note that if you make changes to a report after it has been completed, you will need to run validation prior to submitting to the CFI. Only reports with a status of 'Completed' can be submitted to the CFI.

Fund: Show all funds  
 Status: Show all statuses

Submit to the CFI | Export search results to Excel

Select: All None | Show pages

58 entry(ies) found display

Project number	Fund abbreviation	Project leader	Display/Print	Reporting year	Status	Validated?	Completed?	Return to researcher?
<a href="#">76543</a>	JELF	Scientist, Amsterdam		2 of 4	Completed	Yes	Yes	Yes
<a href="#">87654</a>	JELF	Researcher, NY		3 of 4	Requires validation by institution	Validate	Yes	Yes
<a href="#">65432</a>	JELF	Teacher, Hanoi		4 of 4	In progress	Validate	Confirm	N/A

Click project number to access PPR form.

Run the validation to ensure all required information has been entered into the form.

Click to preview/print out the PPR content.

Click to confirm that the forms have been validated and are ready to be submitted (completed).

## 12.4 Navigating within the project progress report form

To navigate between Project progress report sections, use the left-hand side menu. For additional reference, you can find a page-by-page view of each screen of the PPR in the [PPR template document](#).

PPR #56789 | Researcher dashboard > Project progress report details: #56789 > Year: 2016 > Retention of researchers

**Retention of researchers**

One of the CFI's key objectives is to promote the attraction and retention of high-calibre researchers.

Validate | Display/Print | Save

\* Between April 2015 and March 2016, how important was the availability of the infrastructure funded through this award in your decision to stay at the institution?  
 Not applicable

\* Please explain  
 test

120 characters

\* Indicates a required field

Validate | Display/Print | Save

Validation can also be performed all at once in PPR main page.

Save before leaving each page.

## 12.5 Returning project progress reports to project leaders or submitting them to the CFI

Once the form has been marked as “complete,” the project leader will no longer be able to modify the PPR. The institution retains access to edit the forms and can return them to the project leader for corrections as needed. Once the institution ensures that the PPR is completed and ready for submission, an authorized institutional administrator may submit one or more PPRs to the CFI.

Once the PPR has been submitted to the CFI, the institution will no longer be able to edit the forms.

The screenshot shows the 'Project progress reports: 2016' interface. At the top, there is a breadcrumb trail: Institutional dashboard > Project progress reports > Project progress reports: 2016. Below this is the title 'Project progress reports: 2016' and a descriptive paragraph. The interface includes a 'Fund' dropdown menu set to 'Show all funds' and a 'Status' dropdown. Below these are two buttons: 'Submit to the CFI' and 'Export search results to Excel'. There are also 'Select: All None' and 'Show all Show pages' options. A table lists 58 entries, with 20 displayed. The table has columns for Project number, Fund abbreviation, Project leader, Display/Print, Reporting year, Status, Validated?, Completed?, and Return to researcher?. Three callout boxes provide instructions: one points to the 'Submit to the CFI' button, another points to the 'Return to researcher?' column, and a third points to the 'Project number' column.

**Click here to submit selected PPRs.**

**Click to return the PPR to the project leader, who will regain access to edit PPR form.**

**Select one or more projects to submit their PPR.**

Project number	Fund abbreviation	Project leader	Display/Print	Reporting year	Status	Validated?	Completed?	Return to researcher?
<input type="checkbox"/> 76543	JELF	Scientist, Amsterdam		2 of 4	Completed	Yes	Yes	Yes
<input type="checkbox"/> 87654	JELF	Researcher, NY		3 of 4	Requires validation by institution	Validate	Yes	Yes
<input type="checkbox"/> 65432	JELF	Teacher, Hanoi		4 of 4	In progress	Validate	Confirm	N/A

## 12.6 Enabling project leaders to delegate project progress report data entry

An institution can grant project leaders to delegate PPR entry to another individual who has a CAMS account. Data entry privileges of the designated individual are limited to PPR forms only and must be re-created every year.

To manage access levels for project leaders, refer to section 15.4.

## 12.7 Delegating completion of the project progress reports

Project leaders can give access to someone with a CAMS account to enter data in their project progress report. Institutional administrators with appropriate access can also delegate entry on behalf of the project leader.

**Project progress report delegation**

This feature enables you to give access to someone to enter data in your project progress report. **The project leader continues to have responsibility** for ensuring the data is accurate and complete. You may only delegate data entry to one person at a time. This person must have a CAMS account.

Note: The delegate will **not** have the ability to set the report as "Complete". This action must be carried out by the project leader or an authorized member of the institutional research office.

[Delegate data entry to someone](#)

**Click to enter the username (email) of delegate.**

**Delegate data entry to someone**

\* Username (email)  70 characters

**Enter the CAMS username (email) of delegate, and validate.**

**Delegate data entry to someone**

\* Username (email)  70 characters  
Tom Testing, CFI University

**The message entered here will be included in the email sent to the delegate.**

Message for Tom Testing

Note: An e-mail notification will be sent to Tom Testing su

**By clicking "Save," an email notification will be automatically sent to the delegate.**

In order to deactivate delegate function, click "Remove access."

**Project progress report delegation**

This feature enables you to give access to someone to enter data in your project progress report. **The project leader continues to have responsibility** for ensuring the data is accurate and complete. You may only delegate data entry to one person at a time. This person must have a CAMS account.

Note: The delegate will **not** have the ability to set the report as "Complete". This action must be carried out by the project leader or an authorized member of the institutional research office.

Delegated to	Action
Tom, Testing	<a href="#">Remove access</a>

**Click to disable delegation for this PPR.**



**Note:** The project leader and institution will still be responsible for the PPR "complete" and "submit" functions through their CAMS dashboards, and for ensuring the completeness and accuracy of the data entered in their PPRs. The delegate will NOT have the ability to set the PPR as "complete."

# 13 Infrastructure Operating Fund module

As an institutional administrator involved in post-award activities, your institution may have given you access to the Infrastructure Operating Fund module. The Infrastructure Operating Fund (IOF) module allows you to view the details of your institution’s IOF allocation and adjustments (if any), as well as IOF payment information. It also allows you to create, update, delete and submit IOF annual reports, as well as view the status and CFI comments (if any) related to an IOF annual report.

This section provides additional information on the IOF module within CAMS. You should consult the [Policy and program guide](#) for complete information on requirements and guidelines related to the IOF.

[Institutional dashboard](#) > IOF module

**Infrastructure operating fund**

**IOF allocation summary**

Overall allocation	\$13,764,871	<a href="#">View</a>	<a href="#">Obtain description of allocation</a>
Available allocation	\$12,551,782	<a href="#">View</a>	<a href="#">View IOF adjustment details</a>
Less CFI payments	(\$7,273,434)	<a href="#">View</a>	<a href="#">View IOF award agreement</a>
<b>Unused available allocation</b>	<b>\$5,278,348</b>		

**Click to view IOF allocation details in Excel format.**

**Click to view details of CFI IOF payments.**

**IOF annual report(s)**

[Create an IOF annual report](#) ← **Click to create a new report.**

Reporting period end date	Webform		Status	Submit to the CFI	Submission date	CFI approval date	CFI comments	Display/print	Delete
	Display	Validation							
2013-03-31	N/A	N/A	Approved	N/A	2013-06-20	2013-09-23		<a href="#">View</a>	
2012-03-31	N/A	N/A	Approved	N/A	2012-06-29	2012-07-09		<a href="#">View</a>	
2011-03-31	N/A	N/A	Approved	N/A	2011-06-30	2011-07-26	<a href="#">View</a>	<a href="#">View</a>	
2010-03-31	N/A	N/A	Approved	N/A	2010-06-21	2010-08-24		<a href="#">View</a>	
2009-03-31	N/A	N/A	Approved	N/A	2009-06-18	2009-07-08		<a href="#">View</a>	
2008-03-31	N/A	N/A	Approved	N/A	2008-06-16	2008-07-11		<a href="#">View</a>	
2007-03-31	N/A	N/A	Approved	N/A	2007-06-15	2007-07-30		<a href="#">View</a>	
2006-03-31	N/A	N/A	Approved	N/A	2007-06-11	2006-10-05		<a href="#">View</a>	
2005-03-31	N/A	N/A	Approved	N/A	2005-03-31	2005-03-31	<a href="#">View</a>	<a href="#">View</a>	

Infrastructure operating fund

IOF allocation summary

Overall allocation	\$13,764,871	<a href="#">View</a>	<a href="#">Obtain description of allocation</a>
Available allocation	\$12,551,782		<a href="#">View IOF adjustment details</a>
Less CFI payments	⚠ (\$7,273,434)	<a href="#">View</a>	<a href="#">View IOF award agreement</a>
Unused available allocation	\$5,278,348		

IOF annual report(s)

Click to change the reporting date.

An IOF annual report is in progress therefore you cannot create another report at this time.

Reporting period end date	Webform		Status	Submit to the CFI	Submission date	CFI approval date	CFI comments	Display/print	Delete
	Display	Validation							
<a href="#">2015-03-31</a>	<a href="#">View</a>	<input type="button" value="Run"/>	In progress	<input type="button" value="Submit"/>				<a href="#">View</a>	<input type="button" value="X"/>
2013-03-31	N/A	N/A	Approved	N/A	2013-06-20	2013-09-23		<a href="#">View</a>	<input type="button" value="X"/>
2012-03-31	N/A	N/A	Approved	N/A	2012-06-29	2012-07-09		<a href="#">View</a>	<input type="button" value="X"/>
2011-03-31	N/A	N/A	Approved	N/A	2011-06-30	2011-07-26	<a href="#">View</a>	<a href="#">View</a>	<input type="button" value="X"/>
2010-03-31	Click to access the IOF annual report form.			N/A	2010-06-30				Click to delete the IOF annual report.
2009-03-31				N/A	2009-06-18	2009-07-08		<a href="#">View</a>	
2008-03-31				N/A	2008-06-16	2008-07-11		<a href="#">View</a>	
2007-03-31	N/A	N/A	Approved	N/A	2007-06-15	2007-07-30		<a href="#">View</a>	
2006-03-31	N/A	N/A	Approved	N/A	2007-06-11	2006-10-05		<a href="#">View</a>	
2005-03-31	N/A	N/A	Approved	N/A	2005-03-31	2005-03-31	<a href="#">View</a>	<a href="#">View</a>	

# 13.1 Infrastructure Operating Fund annual report form

[Institutional dashboard](#) > [Infrastructure Operating Fund \(IOF\)](#) > [IOF module](#) > IOF annual report 2015-03-31

[Return to IOF module](#)

**Infrastructure Operating Fund annual report**

**Click "Display/Print" to access the PDF version of the IOF annual report.**

**Display/Print** **Save**

**IOF annual report** Period ending 2015-03-31

**Actual expenditures and CFI payments**

Description	Cumulative as of March 31, 2014	Actual expenditures for the period April 1, 2014 to March 31, 2015	Cumulative as of March 31, 2015	% of total cumulative
Personnel, technical and other operational	5,161,293	<input type="text"/>	5,161,293	83.92%
Supplies (maximum 10%)	401,655	<input type="text"/>	401,655	6.53%
Maintenance and repairs	349,681	<input type="text"/>	349,681	5.69%
Services	233,475	<input type="text"/>	233,475	3.80%
Other (specify)	4,073	<input type="text"/>	4,073	0.07%
<small>100 characters</small>				
<b>Total</b>	<b>\$6,150,177</b>	<b>\$0</b>	<b>\$6,150,177</b>	<b>100%</b>
Less CFI payments to date	(7,273,434)	(0)	(7,273,434)	
<b>Shortfall(excess payment)</b>	<b>(\$1,123,257)</b>	<b>\$0</b>	<b>(\$1,123,257)</b>	

**Forecasted expenditures**

Description	Cumulative as of March 31, 2015	Forecasted expenditures for the period April 1, 2015 to March 31, 2016	Cumulative as of March 31, 2016	% of total cumulative
Personnel, technical and other operational	5,161,293	<input type="text"/>	5,161,293	83.92%
Supplies (maximum 10%)	401,655	<input type="text"/>	401,655	6.53%
Maintenance and repairs	349,681	<input type="text"/>	349,681	5.69%
Services	233,475	<input type="text"/>	233,475	3.80%
Other (specify)	4,073	<input type="text"/>	4,073	0.07%
<small>100 characters</small>				
<b>Total</b>	<b>\$6,150,177</b>	<b>\$0</b>	<b>\$6,150,177</b>	<b>100%</b>

**Certification**

We certify that:

- The information provided in the IOF annual report is accurate.
- Expenditures included have not been claimed for reimbursement from another source.
- Actual expenditures reported have all been incurred in the period April 1, 2014 to March 31, 2015. Outstanding commitments included in actual expenditures consists only of expenditures that were incurred in this period, but for which the invoice was paid subsequently.
- Actual and forecasted expenditures reported are eligible costs as per the CFI Policy and program guide.
- Actual and forecasted expenditures reported are related to infrastructure projects which are admissible under the IOF, as per the CFI Policy and program guide.
- Actual and forecast expenditures reported were and will be subject to the institution's usual tendering and purchasing policies and procedures.
- All confirmations have been obtained from project leaders to attest that the infrastructure for which IOF is being requested is still used for research purposes.
- The forecasts presented are realistic and take into consideration the most recent information at the time the IOF annual report was submitted.
- Infrastructure for which IOF is requested is expected to be used for research purposes in the upcoming year.
- The administration of the funding received/requested has/will be in accordance with the Institutional Award Agreement regarding the use of Infrastructure Operating Funds.

I have read, understood and agree with the above.

**Save changes before submitting the report.**

**Display/Print** **Save**



## 14 Overview information

As an institutional administrator involved in managing CFI-funded projects, your institution may have given you access to the institutional overview, report repository, project overview and/or research security.

### 14.1 Institutional overview

The institutional overview will allow you to view important institutional information on one screen, such as:

- Summary information related to proposals and awards;
- Summary information related to the IOF (IOF allocation, payments, award agreement, annual report);
- Summary information related to financial reports, amendment requests and *Project progress reports* to help the institution identify action items (e.g., in progress, reports due, reports returned to the institution for corrections, payments on hold, projects past end dates); and,
- Your institution's strategic research plan.

### 14.2 Report repository

The report repository provides access to information in Excel format that is specific to your institution and that can be used to facilitate data analysis, project monitoring and other institutional activities.

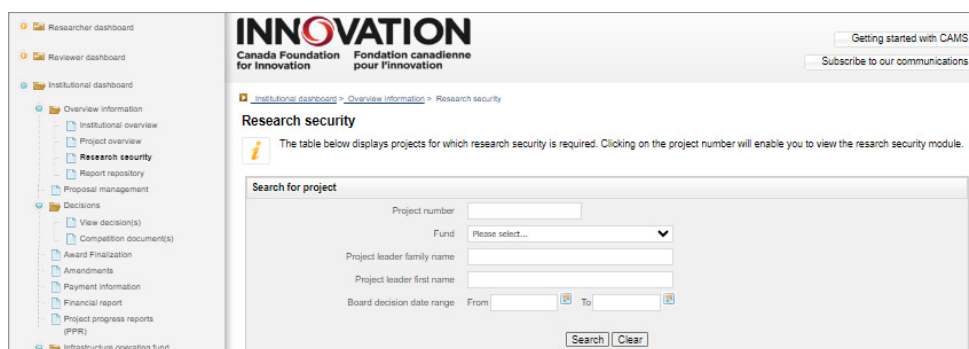
### 14.3 Project overview

The project overview will allow you to view important summary information related to one project in one screen, such as:

- Approved budget and amendment requests;
- Award finalization form;
- Award agreement and special conditions (if any);
- Summary payment and expenditure information; and
- Summary reporting information (e.g., latest financial report, *Project progress reports*).

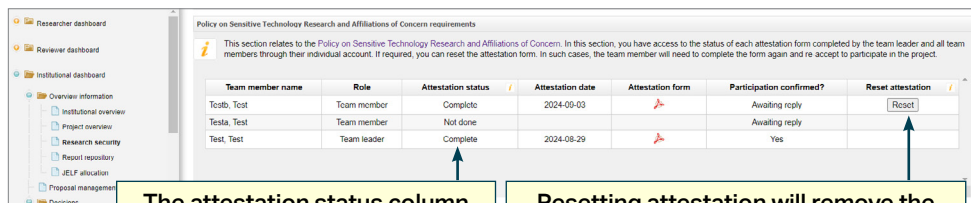
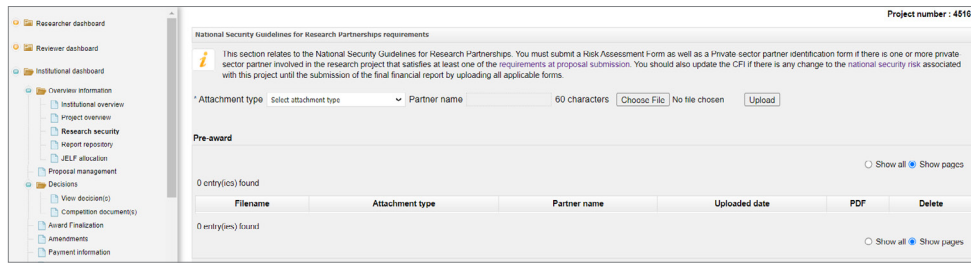
### 14.4 Research security

The research security module allows you to access a project's research security module using search options.



The screenshot displays the 'Research security' module within the CFI Awards Management System. The interface includes a navigation menu on the left with options like 'Researcher dashboard', 'Reviewer dashboard', and 'Institutional dashboard'. The main content area features the 'INNOVATION' logo and navigation breadcrumbs: 'Institutional dashboard > Overview information > Research security'. A search box titled 'Search for project' contains fields for 'Project number', 'Fund' (with a dropdown menu), 'Project leader family name', 'Project leader first name', and 'Board decision date range' (with 'From' and 'To' date pickers). 'Search' and 'Clear' buttons are located at the bottom of the search box. A message above the search box states: 'The table below displays projects for which research security is required. Clicking on the project number will enable you to view the research security module.'

In this module, you can manage the requirements related to research security for each project. You can upload Risk Assessment Forms (RAFs) and private-sector partner identification forms and monitor whether all team members have completed attestation forms.

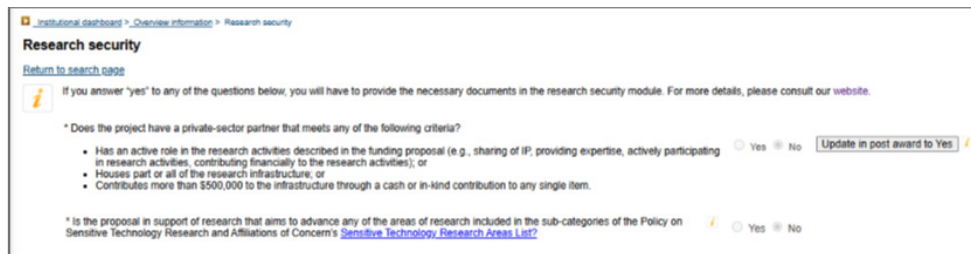


The attestation status column helps you follow the completion of all team members.

Resetting attestation will remove the user's attestation and allow the user to complete the attestation again.

If the risks related to national security change during the life of the project, institutional users can also use this functionality to complete RAFs and private-sector partner identification forms [after funding is awarded](#).

If the answer pertaining to the National Security Guidelines for Research Partnerships was "No" when the proposal was submitted and you need to inform the CFI of any change. You can inform the CFI by clicking on the Update to post-award tab and it will enable the research security module of the project.



If the project was not aiming to advance a sensitive technology research area when you submitted the proposal, remain aware of any change in the nature of the project that would mean it now does. In such an instance, each project/team leader and team member is required to immediately submit an attestation form. Contact your Senior Programs Officer for detailed instructions on how to submit those forms. (In this instance, you cannot submit the attestation forms in CAMS.)

Please consult our [website](#) for more information on CFI's research security requirements.

# 15 Managing institutional agreements and access privileges

The institutional agreement and access privileges module is only accessible if you are the President, the liaison or the account administrator, as indicated in the institutional agreement submitted to the CFI by your institution. It allows you to view the institutional agreements submitted to the CFI by your institution, and the list of individuals that have designated institutional agreement roles. It also allows you to manage the CAMS access privileges for institutional administrators and project leaders.

A video highlighting the various functions available in this module is also available on the [CFI website](#).



## 15.1 Institutional agreement

The “Institutional agreement” tab allows you to view the institutional agreements submitted to the CFI by your institution, and the list of individuals that have designated institutional agreement roles.

The screenshot shows the 'Institutional agreement and access privileges' page. It has tabs for 'Institutional agreement', 'Privileges', 'Award agreements signed by', and 'Project leader access'. The 'Institutional agreement' tab is active. It contains a section for 'Signed institutional agreements' with a table of received dates and a 'Display/Print' button. Below that is a section for 'Institutional agreement roles' with a table of roles, usernames, and account statuses. Three callout boxes are overlaid on the screenshot:

- A yellow box with the text "View electronic copies of institutional agreements submitted to the CFI." has an arrow pointing to the "Display/Print" button in the "Signed institutional agreements" table.
- A yellow box with the text "View minimum privileges associated to each role." has an arrow pointing to the "View minimum privileges for each role" link in the "Institutional agreement roles" section.
- A yellow box with the text "Click to add or remove additional privileges." has an arrow pointing to the "Manage" link in the "Privileges" column of the "Institutional agreement roles" table.

Role	Username	Account status	Privileges
President	Tester, One abc@test.ca	Pending activation	Manage
Liaison	Tester, Two def@test.ca	Active	Manage
Authorized signatory	Tester, Three tester@test.ca	Active	Manage
Account administrator	Tester, Four camstest@test.ca	Active	Manage
	Tester, Three tester@test.ca	Active	Manage

Upon receiving a signed institutional agreement from the institution, the CFI will update or create respective accounts in CAMS for the individuals who have designated institutional agreement roles (i.e., president, authorized signatory, liaison and account administrator). Privileges will be assigned according to the responsibilities and privileges indicated in the institutional agreement. Note that these individuals have minimum privileges that are automatically assigned to them in the institutional agreement and that cannot be revoked.

Appendix A – Minimum privileges describes the minimum privileges automatically assigned by the CFI and the ones that can be modified for each institutional agreement role. If needed, you can modify certain privileges for these individuals by clicking the “Manage” link.



**Note:** The institution must inform the CFI as soon as possible of any changes to the President, designated authorized signatories, account administrator and/or liaison by submitting a revised institutional agreement to the CFI senior programs officer responsible for your institution.

## 15.2 Manage privileges

The “Privileges” tab allows you to assign and revoke access privileges for institutional administrators, whether they have an institutional agreement role or not. The liaison and account administrator are responsible for setting appropriate access privileges for institutional administrators with no institutional agreement role in accordance with institutional control framework and practices.

**Institutional agreement and access privileges**

The “institutional agreement” tab allows you to view the institutional agreements submitted to the CFI by your institution, and the list of individuals that have designated institutional agreement roles.

The institution can also manage the CAMS access privileges for institutional administrators and project leaders by clicking on the appropriate tab below.

Only the president, the account administrators and/or the liaison can manage or modify privileges assigned to the other institutional administrators and project leaders.

**Privileges**

**Search for institutional administrators**

Please enter one or more search criteria to search for a specific individual at your institution. You will then be able to manage the access privileges for this individual by clicking on the “Manage” link in the search results table.

If an individual is not found in CAMS, click on the “Create a new CAMS account” link below to create a new CAMS account for this individual.

**Notes:**

- The “Amendment – data capture and submit” privilege can only be assigned to individuals with an institutional agreement role.
- The “Award finalization – data capture and submit” privilege can only be assigned to individuals with an institutional agreement role.
- The “Proposal – data capture and submit” privilege can be assigned to all individuals with an institutional agreement role and ONE additional individual (if necessary).

Certain privileges can only be assigned by individuals that have a specific institutional agreement role. To view the privileges that each institutional agreement role can assign, click on the “View privileges that can be assigned by each role” link.

If an individual is no longer working at your institution, please do not forget to remove his/her privileges in CAMS.

[View privileges that can be assigned by each role](#)

First name

Family name

Username (email)

[Create a new CAMS account](#)

[Export list of all institutional administrators with privileges](#)

1 entry(ies) found

Name	Username	Account status	Privileges	History
Test Account	abc@test.ca	Active	<a href="#">Manage</a>	<a href="#">View</a>

1 entry(ies) found



**Note:** Some privileges can only be assigned to a limited number of individuals:

- For amendments, data capture and submit can only be assigned to individuals with an institutional agreement role.
- For proposals, data capture and submit can only be assigned to individuals with an institutional agreement role and ONE additional individual (if necessary).

All other privileges can be assigned to an unlimited number of individuals.

From this screen you can create a new CAMS account for institutional administrators who do not yet have one.

As well, some privileges can only be assigned by either the liaison or the account administrator. These limitations are described in Appendix B – Privileges that can be assigned by each institutional agreement role.

Since the institution is responsible for privilege delegation and its impact on data access and integrity, CAMS accesses and privileges for all institutional administrators should be reviewed on a regular basis to ensure that they remain appropriate. You can obtain a list of all institutional administrators and their privileges in CAMS.

You can search for an individual by first name, family name or username (email). If no results are found, you will need to create a CAMS account for the individual.

Note that this module must not be used to create new accounts for project leaders. Project leaders can create new CAMS accounts online. Their access levels related to post-award modules can be set in CAMS by the CFI liaison or the CFI account administrator (refer to [section 15.4](#)).

## 15.2.1 Search results

You will be presented with a table of results listing the individuals that match your search criteria.

Name ▲	Username	Account status	Privileges	History
Davis, Tom	tom@myinstitution.ca	Active	<a href="#">Manage</a>	<a href="#">View</a>

Click to add or remove privileges from this user.

Click to view a detailed history of privileges for this user.

# 15.2.2 Setting individual privileges

You can assign different access privileges for every CAMS module and will generally be able to choose from the following access privileges:

- Read only
- Data capture (no submission capabilities)\*
- Data capture and submit \*

\* Available only for modules that involve the completion and submission of forms and reports.

The screenshot shows the 'Privileges' tab in the CAMS system. At the top, there are tabs for 'Institutional agreement', 'Privileges', and 'Project leader access'. Below the tabs, there is a link: 'Go to "Search for institutional administrators"'. The main section is titled 'Manage privileges for the selected individual'. It displays the following information for the individual:

- First name: Tom
- Family name: Davis
- CAMS username: tom@myinstitution.ca
- CAMS account status: Active
- Institutional agreement role: Account administrator

Below this information is a 'Select privilege to assign:' dropdown menu. A callout box points to this menu with the text: 'Click to assign the selected privilege.' The dropdown menu is open, showing a list of privileges:

- Please select...
- Amendment – Data capture
- Amendment – Data capture and submit
- Award Finalization – Read-only
- Financial report – Read-only
- Infrastructure operating fund – Read-only
- Project progress report – Data capture
- Project progress report – Data capture and submit
- Proposal – Data capture
- Proposal – Data capture and submit

To the right of the dropdown is an 'Assign' button. Below the dropdown is a table with columns for 'Privilege' and 'Revoke'. The table lists various privileges, each with a 'Revoke' button (represented by an 'X' icon) in the 'Revoke' column. A callout box points to one of the 'Revoke' buttons with the text: 'Click to revoke a privilege from this account.'

Privilege	Revoke
Infrastructure operating fund – Data capture and submit	X
Institutional overview – Read-only	X
Institutional privilege management	X
Payment – Read-only	X
Project overview – Read-only	X
Project progress report – Read-only	X
Proposal – Read-only	X



**Note:** If an individual is no longer working at your institution, please do not forget to revoke his/her privileges in CAMS. If the responsibilities of an institutional administrator changes, you may need to modify his/her access privileges.

### 15.2.3 History

You can view the history of the changes made to an individual's privileges (e.g., dates of changes and author of the change).

**Privilege history**

Below you will find a history of operations performed on the selected individual's privileges.

First name: **Tom**  
 Family name: **Davis**  
 CAMS username: **tom@myinstitution.ca**

Date	Author	Action	Privilege
2016-04-22 17:02	paul@myinstitution.ca	Revoke	Project progress report – Data capture and submit
2016-04-22 17:02	paul@myinstitution.ca	Revoke	Proposal – Data capture
2016-04-22 17:02	paul@myinstitution.ca	Revoke	Proposal – Data capture and submit
2016-04-22 16:59	paul@myinstitution.ca	Assign	Proposal – Data capture and submit
2016-04-22 16:57	paul@myinstitution.ca	Assign	Proposal – Data capture
2016-04-22 16:46	paul@myinstitution.ca	Assign	Project progress report – Data capture and submit
2016-04-22 16:32	CFI	Assign	Amendment – Read-only
2016-04-22 16:32	CFI	Assign	Institutional overview – Read-only
2016-04-22 16:32	CFI	Assign	Proposal – Read-only
2016-04-22 16:32	CFI	Assign	Award finalization – Submit

### 15.3 Award agreements signed by

The individuals mentioned in this tab will receive award agreements electronically for signature. If more than one authorized signatory or account administrator have been identified in the institutional agreement, you need to identify the one to receive the award agreements for signature by clicking the edit link.

**Institutional agreement and access privileges**

The "institutional agreement" tab allows you to view the institutional agreements submitted to the CFI by your institution, and the list of individuals that have designated institutional agreement roles. The institution can also manage the CAMS access privileges for institutional administrators and project leaders by clicking on the appropriate tab below. Only the president, the account administrators and/or the liaison can manage or modify privileges assigned to the other institutional administrators and project leaders.

Institutional agreement
Privileges
Award agreements signed by
Project leader access

Award agreements signed by [Edit](#)

The individuals below will receive award agreement electronically for signature. Click "Edit" to modify.

	<b>Default signatory</b>	<b>Account administrator</b>
* Award agreements signed by	Peter MacKinnon	Gabriela Manóu

Award agreement cover letter

The award agreement cover letter will be addressed to the default signatory identified in the above section. Click "Edit" to change the address. The CFI uses a digital signature process to approve award agreements. We will upload these into CAMS once all parties have digitally signed.

Peter MacKinnon  
 Interim President and Vice-Chancellor  
 6299 South Street, Suite 200  
 Halifax, Nova Scotia  
 B3H 4R2

# 15.4 Access levels for project leaders

Project leaders must create their own CAMS accounts online. When creating an account, the project leader will automatically be given access to the Curriculum vitae, the application and the decision modules in CAMS.

The liaison and account administrator can grant project leaders access to perform any or all of the following actions in relation to the project(s) for which they are the designated project leader:

- View award finalization information (e.g., status, award agreement, budget at award finalization, CFI conditions) and complete award finalization forms for internal submission to the institution;
- View amendment information (e.g., status, amendment in progress or submitted, CFI comments) and complete amendment requests for internal submission to the institution;
- Delegate data entry for the research security module;
- View financial report information (e.g., status, financial reports in progress or submitted, CFI comments);
- View payment information and associated CFI comments; and,
- Delegate PPR data entry to one other individual.



**Note:** The access level option ("Yes" or "No") selected for each of the modules will apply to all project leaders at the institution, as this cannot be customized at the individual project leader level.

Institutional agreement
Privileges
Award agreements signed by
Project leader access

**Manage project leaders' accesses**

*i* Please indicate whether project leaders at your institution should be given access to the following modules for their projects.  
 Note: These permission levels will be applied to all project leaders at your institution.

Module	Access level	Access to project leaders
Award finalization	Data capture	<input checked="" type="radio"/> Yes <input type="radio"/> No
Amendments	Data capture	<input checked="" type="radio"/> Yes <input type="radio"/> No
Payment information	No access	<input type="radio"/> Yes <input checked="" type="radio"/> No
Financial reports	Data capture	<input type="radio"/> Yes <input checked="" type="radio"/> No
Research security	No access	<input type="radio"/> Yes <input checked="" type="radio"/> No

*i* Enabling this option will allow project leaders from your institution to delegate PPR data entry to one other individual who has a CAMS account. Once you have enabled delegation for your institution, this will be the default setting for future years unless you turn this feature off.  
 Note: If delegation is turned on and then subsequently disabled, any delegation relationships created while delegation was enabled will remain active until the reporting year is closed. Any pre-existing delegation will remain active even if you select "No".

Module	Allow project leaders to delegate PPR data entry
Project progress report delegation	<input type="radio"/> Yes <input checked="" type="radio"/> No



# Appendix A – Minimum privileges

Institutional agreement role	Minimum access privileges (cannot be revoked)	Additional privileges that can be modified*
<b>President</b>	Amendment – Data capture and submit Award finalization – Data capture and Submit Financial report – Data capture and submit Infrastructure Operating Fund – Data capture and submit Institutional overview – Read-only Institutional privilege management Payment – Read-only Project overview – Read-only Project progress report – Data capture and submit Proposal – Data capture and submit	Research security – Data capture
<b>Authorized signatory</b>	Amendment – Read-only Award finalization – Data capture and Submit Financial report – Read-only Infrastructure Operating Fund – Read-only Institutional overview – Read-only Payment – Read-only Project overview – Read-only Project progress report – Data capture and submit Proposal – Data capture and submit	Amendment – Data capture Amendment – Data capture and submit Financial report – Data capture Financial report – Data capture and submit Infrastructure Operating Fund – Data capture Infrastructure Operating Fund – Data capture and submit Research security – Data capture
<b>Liaison</b>	Amendment – Data capture and submit Award finalization – Data capture and Submit Financial report – Read-only Infrastructure Operating Fund – Read-only Institutional overview – Read-only Institutional privilege management Payment – Read-only Project overview – Read-only Project progress report – Data capture and submit Proposal – Data capture and submit Research security – Data capture	Financial report – Data capture Financial report – Data capture and submit Infrastructure Operating Fund – Data capture Infrastructure Operating Fund – Data capture and submit
<b>Account administrator</b>	Amendment – Read-only Award finalization – Data capture and Submit Financial report – Data capture and submit Infrastructure Operating Fund – Data capture and submit Institutional overview – Read-only Institutional privilege management Payment – Read-only Project overview – Read-only Project progress report – Read-only Proposal – Read-only	Amendment – Data capture Amendment – Data capture and submit Project progress report – Data capture Project progress report – Data capture and submit Proposal – Data capture Proposal – Data capture and submit Research security – Data capture

\* Additional privileges can be selected by the institution in the institutional agreement, or they can be managed in CAMS as needed.

# Appendix B – Privileges that can be assigned by each institutional agreement role

Institutional agreement role	Privileges that can be assigned to institutional administrators by the institutional agreement role	Privileges that cannot be assigned
<b>President</b>	The president can assign all privileges available to institutions in CAMS	N/A
<b>Authorized signatory</b>	The authorized signatory cannot assign any privilege	N/A
<b>Liaison</b>	Amendment – Data capture Amendment – Data capture and submit <sup>3</sup> Amendment – Read-only Award finalization – Read-only Financial report – Read-only Infrastructure Operating Fund – Read-only Institutional overview – Read-only Payment – Read-only Project overview – Read-only Project progress report – Data capture Project progress report – Data capture and submit Project progress report – Read-only Proposal – Data capture Proposal – Data capture and submit <sup>4</sup> Proposal – Read-only Research security – Data capture	Financial report – Data capture Financial report – Data capture and submit Infrastructure Operating Fund – Data capture Infrastructure Operating Fund – Data capture and submit
<b>Account administrator</b>	Amendment – Read-only Award finalization – Read-only Infrastructure Operating Fund – Data capture Infrastructure Operating Fund – Data capture and submit Infrastructure Operating Fund – Read-only Institutional overview – Read-only Financial report – Data capture Financial report – Data capture and submit Financial report – Read-only Payment – Read-only Project overview – Read-only Project progress report – Read-only Proposal – Read-only Research security – Data capture	Amendment – Data capture Amendment – Data capture and submit Project progress report – Data capture Project progress report – Data capture and submit Proposal – Data capture Proposal – Data capture and submit

3 The "Amendment – Data capture and submit" privilege can only be assigned to individuals with an institutional agreement role.

4 The "Proposal – Data capture and submit" privilege can only be assigned to individuals with an institutional agreement role and one additional individual (if necessary).

For any questions about CAMS,  
feel free to contact us at:

[\*\*help@innovation.ca\*\*](mailto:help@innovation.ca)

We will be happy to answer you promptly.