



JUNIOR INVESTIGATOR GRANT PANEL TRAVEL AWARDS (JI) APPLICATION GUIDE

Canadian Cancer Society

Travel Awards: application guide

Four easy steps

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Step 1: Create your application

1. Log in to EGrAMS to access the home screen/**Application workbench**.
2. Click the **Junior Investigator Grant Panel Travel Awards** program under the Funding opportunities section on the left:
3. The **Project ID** will default to JI-current year (the **Grant Program** code).
4. Enter the name of the grant program you wish to observe into the **Title** field, for example Innovation Grants.
 - The **Research Institute** field will be auto-populated with your Host Institution once you click in the field. Use the  button to select a different institution if necessary.



Troubleshooting tip: empty Host Institution field

The **Host Institution** field is auto-populated from information provided in your user profile. If this field is blank, you will need to go back to your profile and add your Host Institution there.

5. Click the  button.

Step 2: Add signing authority


All applications require sign-off by the Head of the Department or Institution Head. Providing the name and e-mail contact information of your signatory will allow the system to generate an automated e-mail containing a link to a page of your application where they can acknowledge their agreement. The system will send the e-mail when you click the **Notify** box (step 2).

1. From the **Application workbench**, complete the forms under the **Signatories and references** section, providing the titles, names, institutions and e-mail addresses of your Head of Department/Dean:

The screenshot shows the 'Application workbench' interface. At the top, it displays the program name 'JI-15 Junior Investigator Grant Panel Travel Award - 2015' and the deadline '12/31/2015 12:00:00 AM Eastern Time (US & Canada)'. Below this is the 'Applications' section with a table containing one entry: 'JIGMO-15'. A toolbar below the table includes buttons for Edit, Validate, Preview, Print, Submit, Participant Permissions, Program Synopsis, Program Notes, and Show Documents. The 'Signatories and references' section is visible below, with a table header including 'Sel.', 'Title', 'First Name', 'Last Name', 'Institution', 'Email', '+Info.', 'Notify', 'Save', 'Remind', 'Status', and 'Delete'. The first row is for 'Head of Department / Dean'. A red arrow points to the 'Notify' checkbox in this row, which is currently unchecked.

2. **IMPORTANT:** Ensure that the **Notify** checkbox is checked.

This is a close-up of the 'Signatories and references' table. The row for 'Research Supervisor / Mentor' is shown. The 'Notify' checkbox is now checked, and it is circled in red with a red arrow pointing to it. The other fields in the row are: Title 'Dr', First Name 'Jane', Last Name 'Doe', Institution 'University of t...', and Email 'jane.doe@egra...'. The 'Save' button is also visible to the right of the 'Notify' checkbox.

- This ensures that EGrAMS will send an automated e-mail message to your signatory as soon as you click  to save your entry.
- The e-mail will contain a unique URL that will grant access to the relevant section of your application.


3. Click the  button under the **+Info** heading and complete the **Reference Additional Info** window for **Department**, **Position/Title** and **Phone**.



STEP 2: ADD SIGNING AUTHORITY

The screenshot shows a web application interface. On the left, there is a sidebar with 'Funding opportunities (4)' and 'Your profile' for Dr. Joe Test. The main area displays a 'Reference Additional Info' dialog box for Jane Doe. The dialog box has fields for Name, Relationship to you, Department (Biochemistry), Position/Title (Head of Department), Phone ((604)555-5555), and Notify Date. A red dashed arrow points from the 'Notify' checkbox in the main application window to the 'Notify Date' field in the dialog box.



NOTE: Automated e-mail delivery to your supervisor

The e-mail notification is sent out as soon as you click the  button to save your entry into the system. If you are not ready to notify this person, make sure that the **Notify** option is unchecked. When you are ready to notify them, follow these steps:

1. Return to the **Application workbench** screen.
 2. Click the **Notify** button.
 3. Click .
4. Click  to save your entry.
- An e-mail containing a unique URL for access to the signing authority section of your application will be sent out to your contact immediately.



Best practice tip: monitoring status / sending reminders


Check to see if your supervisor has completed the Supervisor section of your application by following these steps:

1. Return to the **Application workbench** screen.
2. Check the **Status** column of the retrieved record. (It will display either "Pending", "Work In Progress" or "Complete".)

| First Name | Last Name | Institution | Email | Notify | Status | Remind | +Info |
|------------|-----------|----------------------|----------------------|-------------------------------------|---------|---|---|
| Jane | Doe | University of Ottawa | jane.doe@hotmail.com | <input checked="" type="checkbox"/> | Pending |  |  |

Check the Status


Send a reminder e-mail

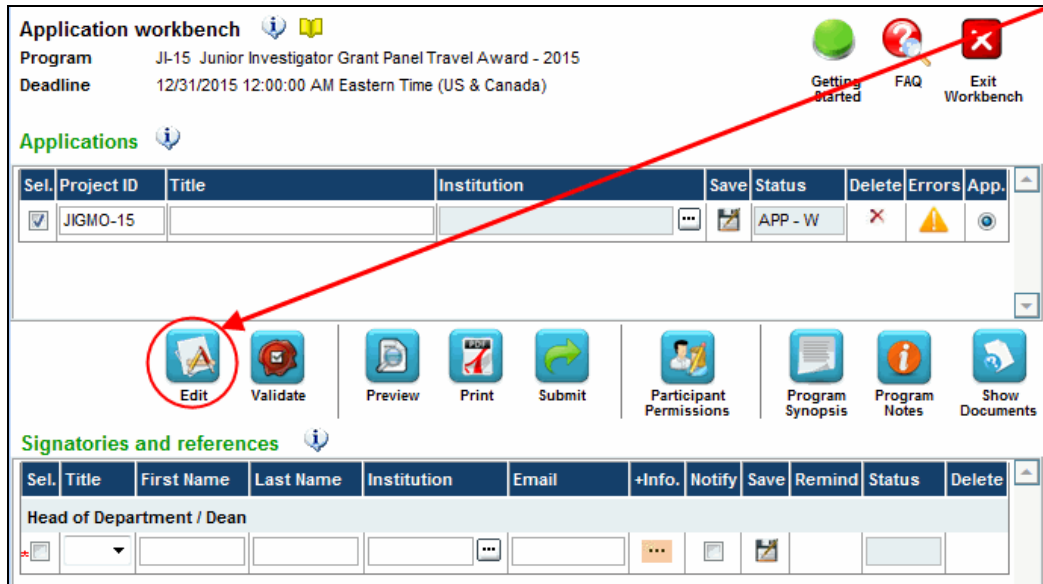
If you are concerned that your signatory has not yet completed his or her portion of your application, you can re-send the e-mail notification just by clicking on the  button.

| First Name | Last Name | Institution | Email | Notify | Status | Remind | +Info |
|------------|-----------|----------------------|----------------------|-------------------------------------|---------|---|---|
| Jane | Doe | University of Ottawa | jane.doe@hotmail.com | <input checked="" type="checkbox"/> | Pending |  |  |

Click to re-send e-mail notification

Step 3: Complete your application

1. From the application workbench, click the  button to access the application:



Application workbench

Program: JI-15 Junior Investigator Grant Panel Travel Award - 2015
Deadline: 12/31/2015 12:00:00 AM Eastern Time (US & Canada)

Getting Started | FAQ | Exit Workbench

Applications

| Sel. | Project ID | Title | Institution | Save | Status | Delete | Errors | App. |
|-------------------------------------|------------|-------|-------------|------|---------|--------|--------|------|
| <input checked="" type="checkbox"/> | JIGMO-15 | | | | APP - W | | | |

Edit | Validate | Preview | Print | Submit | Participant Permissions | Program Synopsis | Program Notes | Show Documents

Signatories and references

| Sel. | Title | First Name | Last Name | Institution | Email | +Info. | Notify | Save | Remind | Status | Delete |
|------|---------------------------|------------|-----------|-------------|-------|--------|--------|------|--------|--------|--------|
| | Head of Department / Dean | | | | | | | | | | |

2. Click on the Application tab to begin.
3. Enter details of your application as instructed.
4. Save content entries before moving to the next page of the application:



Applicant: Joe Test
Application: Joe Test's Pre
Prevention Initiative - 2010

Index | Project Inform

Save indicates save and move forward to the next page

Save | Save | Validate | Errors | PDF

2. Project Information

f. Is this application being submitted in French?

Language

Complete the entire application in one language only.



Click the button to watch a video tutorial

Step 4: Validate and submit your application

I. Validation

Before you can submit your application, you must go through a validation process in order to identify any items left incomplete or filled out incorrectly. You can choose to either a) validate the full application or b) validate one section at a time.

a) Validate the full application

1. Click on the Index tab

2. Click Validate

3. You can choose to either:
a. view the errors for the full application, or
b. view the errors per section

| Description | Status | Del | Errors | Comments |
|---|-------------------------------------|-----|-------------------------------------|----------|
| 11. Tables, graphs, charts and associated legends | <input type="checkbox"/> | | | |
| 12. Appendices | <input checked="" type="checkbox"/> | | | |
| 13. Budget request | <input checked="" type="checkbox"/> | x | <input checked="" type="checkbox"/> | |
| Review panel | | | | |
| 14. Panel recommendation | <input checked="" type="checkbox"/> | x | | |
| 15. Reviewer recommendation | <input checked="" type="checkbox"/> | x | | |
| 16. Reviewer exclusions | <input checked="" type="checkbox"/> | x | | |
| Tracking | | | | |
| 17. Research tracking information | <input checked="" type="checkbox"/> | x | | |
| 17.a. Research focus | <input checked="" type="checkbox"/> | x | | |
| 17.b. Research subject | <input checked="" type="checkbox"/> | x | | |
| 17.c. Cancer site relevance | <input checked="" type="checkbox"/> | x | | |
| 17.d. Common Scientific Outline (CSO) | <input checked="" type="checkbox"/> | x | | |

3a View Errors 2 Validate

b) Validate one section at a time

Must be conducted once for every section (e.g. Background, Applicant Info, Budget, etc.) of the application. Sections are identified as tabs in the banner across the top of the application.

Upon completion of all pages within a tab/section of the application, click the **Save** button. Next click the **Validate** button:

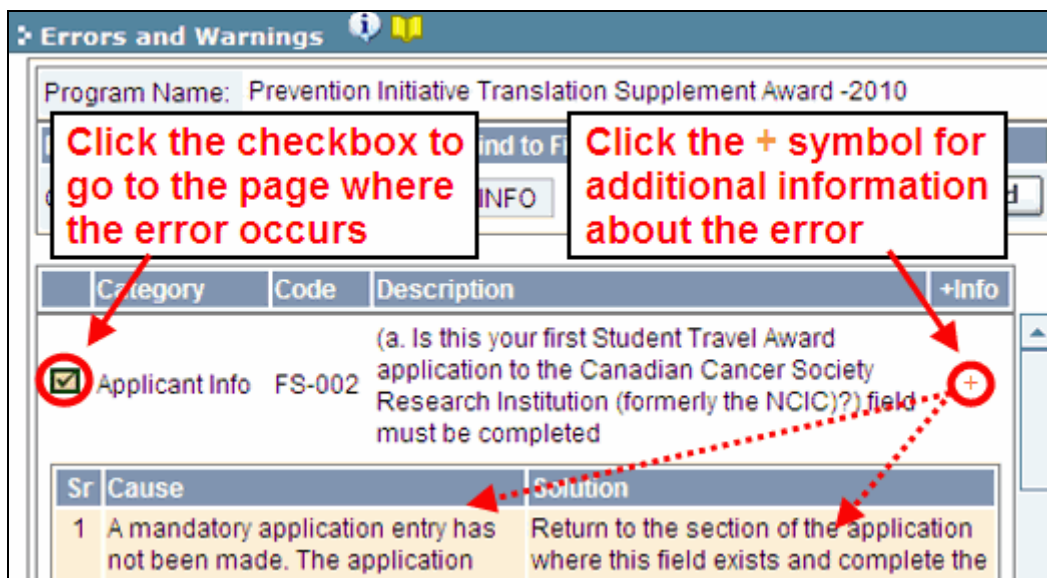
1. Save your entries

2. Click the Validate button

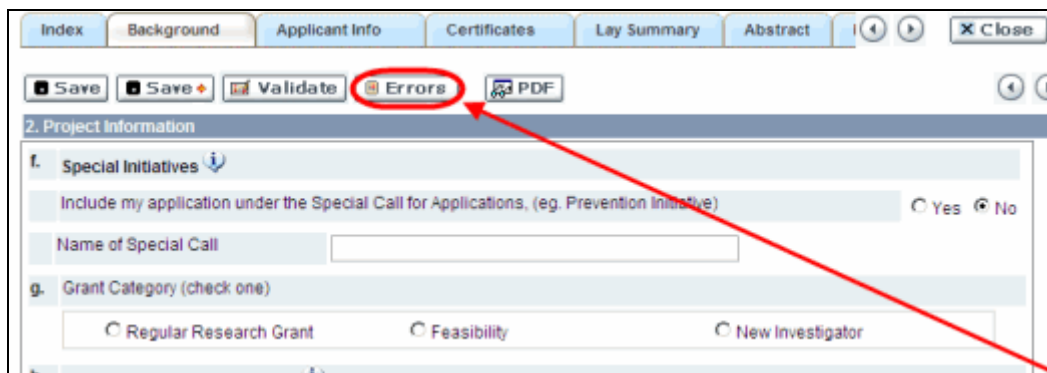
For both type a) and b) validation, follow the below instructions:

- If errors are found, a dialogue box will open with details.
 - Click the + symbol under the **+Info** heading for information about the cause and solution of the error.
 - Click the checkbox to the left of the error listing to be taken to the page where the error has occurred.

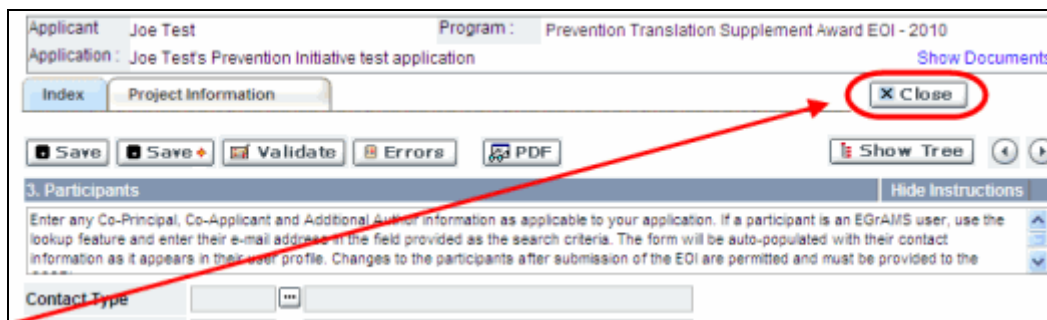
STEP 4: SUBMIT YOUR APPLICATION



- To view the dialogue box with the list of errors again, click the **Errors** button:
 - Note:** The list of errors will not be updated to reflect any corrections you've made until you click **Save** and then **Validate** again.




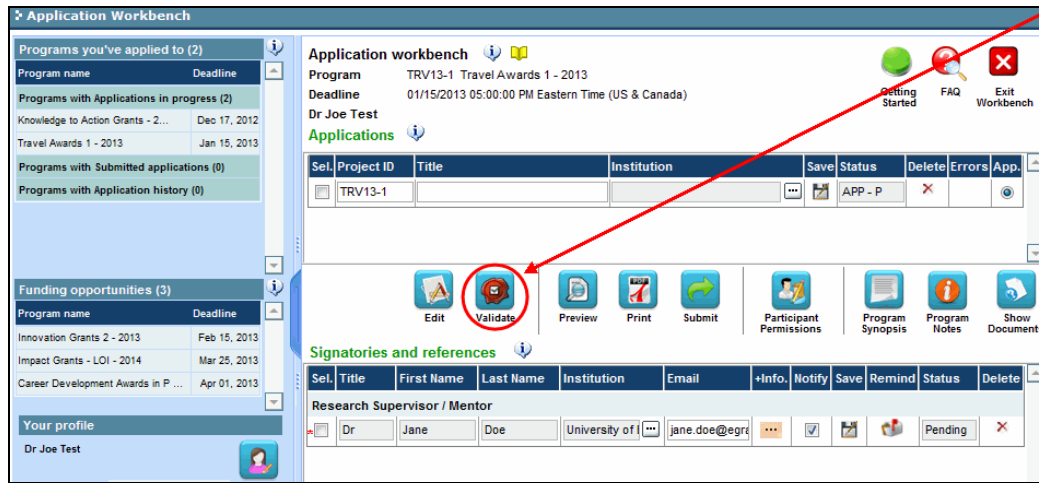
- When all errors are resolved for every section, click the **Close** button to exit the application:



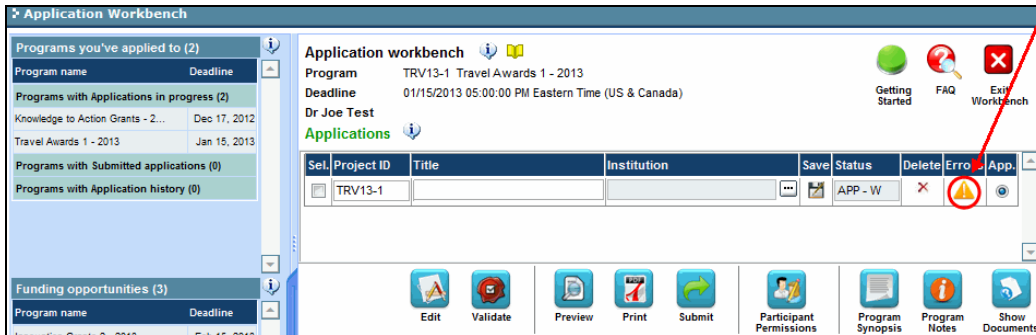
STEP 4: SUBMIT YOUR APPLICATION

II. Preview and submission

1. From the **Application workbench**, click the  button to do a final validation of your application:




2. If Errors are found, click the  button for information about the errors:




3. Errors can be corrected through the  menu.

4. To generate a PDF of your application, click the  button:

5. To preview your application in EGrAMS, click the  button:

- Use the left side menu links to navigate to specific pages, or use the forward/backward arrows to view page by page.
- Click the **Close** button to exit the preview screen.

6. Once you've validated all errors, click the  button.


III. Confirmation

Once your application is submitted, a confirmation e-mail will be sent to you by the EGrAMS system.



Troubleshooting

Host Institution field is empty or incorrect, and lookup button does not work

Problem: I am creating my application. The  button in the Host Institution field does not open a lookup box.

Solution: The Host Institution field is auto-populated from information provided in your profile. You will need to update this information in your profile first, then log out of EGrAMS and log back in and create your application.

To update your profile: From the **Application workbench**, click the  button.

Application Workbench

Programs you've applied to (2)

| Program name | Deadline |
|-----------------------------------|--------------|
| Knowledge to Action Grants - 2... | Dec 17, 2012 |
| Travel Awards 1 - 2013 | Jan 15, 2013 |

Programs with Applications in progress (2)

Programs with Submitted applications (0)

Programs with Application history (0)

Funding opportunities (3)

| Program name | Deadline |
|-----------------------------------|--------------|
| Innovation Grants 2 - 2013 | Feb 15, 2013 |
| Impact Grants - LOI - 2014 | Mar 25, 2013 |
| Career Development Awards in P... | Apr 01, 2013 |

Your profile

Dr Joe Test

Designation : Associate Professor

Host Institution : Canadian Cancer Society

Phone : (804) 555-5555

E-mail : joe.test@egrms.com

Last updated : 11/13/2012 12:57:19 PM

Application workbench

Program TRV13-1 Travel Awards 1 - 2013

Deadline 01/15/2013 05:00:00 PM Eastern Time (US & Canada)

Dr Joe Test

Applications

| Sel. | Project ID | Title | Institution | Save | Status | Delete | Errors | App. |
|--------------------------|------------|-------|-------------|------|---------|--------|--------|------|
| <input type="checkbox"/> | TRV13-1 | | | | APP - W | | | |

Signatories and references

| Sel. | Title | First Name | Last Name | Institution | Email | +Info | Notify | Save | Remind | Status | Delete |
|------------------------------|-------|------------|-----------|---------------|--------------------|-------|--------------------------|------|--------|---------|--------|
| Research Supervisor / Mentor | | | | | | | | | | | |
| <input type="checkbox"/> | Dr | Jane | Doe | University of | jane.doe@egrms.com | | <input type="checkbox"/> | | | Pending | |

Notification Email: Click on the Notify checkbox, then Save, to notify this person. Click on the Remind mailbox to send a reminder to this person.

Delete an application

Problem: I need to delete my application.

Solution: Go to the **Application workbench**, click the  button, click OK in the pop-up.

Application Workbench

Programs you've applied to (2)

| Program name | Deadline |
|-----------------------------------|--------------|
| Knowledge to Action Grants - 2... | Dec 17, 2012 |
| Travel Awards 1 - 2013 | Jan 15, 2013 |

Programs with Applications in progress (2)

Programs with Submitted applications (0)

Programs with Application history (0)

Funding opportunities (3)

| Program name | Deadline |
|-----------------------------------|--------------|
| Innovation Grants 2 - 2013 | Feb 15, 2013 |
| Impact Grants - LOI - 2014 | Mar 25, 2013 |
| Career Development Awards in P... | Apr 01, 2013 |

Your profile

Dr Joe Test

Designation : Associate Professor

Host Institution : Canadian Cancer Society

Phone : (804) 555-5555

E-mail : joe.test@egrms.com

Last updated : 11/13/2012 12:57:19 PM

Application workbench

Program TRV13-1 Travel Awards 1 - 2013

Deadline 01/15/2013 05:00:00 PM Eastern Time (US & Canada)

Dr Joe Test

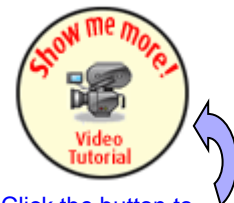
Applications

| Sel. | Project ID | Title | Institution | Save | Status | Delete | Errors | App. |
|--------------------------|------------|-------|-------------|------|---------|--------|--------|------|
| <input type="checkbox"/> | TRV13-1 | | | | APP - P | | | |

Signatories and references

| Sel. | Title | First Name | Last Name | Institution | Email | +Info | Notify | Save | Remind | Status | Delete |
|------------------------------|-------|------------|-----------|---------------|--------------------|-------|--------------------------|------|--------|---------|--------|
| Research Supervisor / Mentor | | | | | | | | | | | |
| <input type="checkbox"/> | Dr | Jane | Doe | University of | jane.doe@egrms.com | | <input type="checkbox"/> | | | Pending | |

Notification Email: Click on the Notify checkbox, then Save, to notify this person. Click on the Remind mailbox to send a reminder to this person.



Click the button to watch a video tutorial on navigating the application interface

APPENDIX A: The application interface

I. Navigation

Use the tab banner and arrow buttons to navigate through your application:

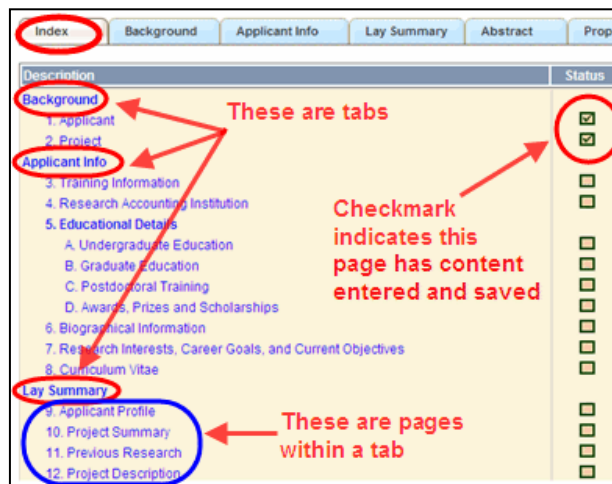


1. **Tab banner** – The application is divided into several sections (e.g. Background, Applicant Info, Certificates, Public Summary, etc.). The section names are displayed as tabs in a banner at the top of every page on the application.
2. **Current tab** – The current tab you are viewing is always highlighted in white.
3. **Show more tabs** – You can manipulate the tab banner to show hidden tabs by clicking the left and right arrows that sit to the right of the banner.
4. **Advance page by page through application** – Many sections (tabs) will consist of several pages of content. You can navigate within a section by clicking on the arrow buttons that sit just above the **Hide Instructions** label. When you come to the last page of a section, clicking the advance arrow will take you to the first page of the next section.
5. **Index** – Clicking the Index tab will produce a map of the entire application, including check boxes to indicate where content has been entered and saved on a page.

If a file has been uploaded to a page, a paperclip icon will appear to the right of the checkbox. You can view the document by clicking the paperclip.

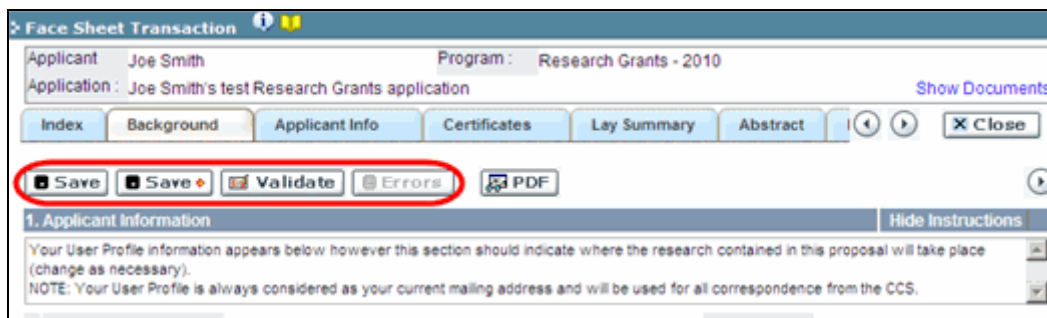
Each line of the index is clickable, and will take you straight to that page of the application.

Note that errors will show up in the index until you re-validate the application.



II. Save, Validate, Errors

The **Save**, **Save** ➔ (save and move forward to next page), **Validate** and **Errors** buttons enable users to save their work and then check to make sure they have completed the questions properly.



Save

While some sections of the application will be pre-populated with information derived from your user profile and elsewhere, the system will still expect you to save the information that has been pre-populated, the first time you view that page of the application.

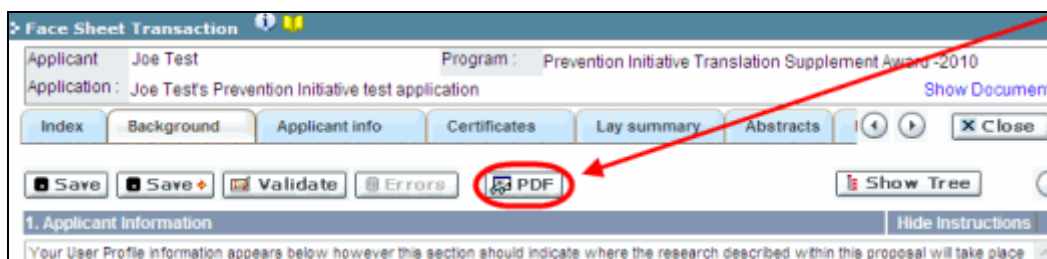
If you try to advance to the next page without saving your work, the system will prompt you to do so.


Validate and check for errors

The validation process is a crucial step in completing your application successfully. For detailed instructions, consult [Step 4: Validate and submit your application](#).

III. PDFs

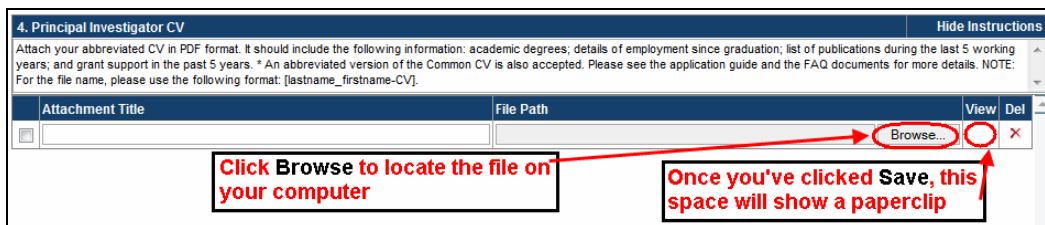
Create a PDF of **the page you are currently visiting**, including any data you have entered into the form, by clicking the PDF button.



If you wish to create a PDF of your entire application, click the  button on the **Application workbench**.

IV. Uploading document attachments

1. The system will automatically take the name of the document in the **Attachment Title** field.
 - Follow the document naming conventions provided in the instructions space.
2. Click **Browse** and locate the document on your computer.



3. Click **Save** to upload the document as an attachment to your application.
 - The **File Name** path will be cleared and the paperclip icon will appear in the **View** column. You can click the paperclip to view the attachment:

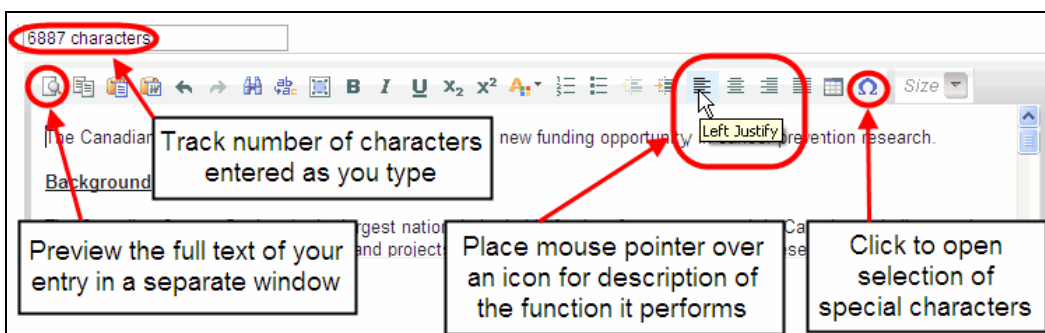
V. The rich text editor



NOTE: copying and pasting formatted text

Text that has been formatted in a word processor can be copied and pasted into the form, and formatting will be preserved, including special characters inserted using Alt codes. The use of the Symbol font in your application text is not supported in EGrAMS. Copying text from Word for Greek or French characters using this font will result in these special characters being lost (usually converted to some other letter). For more information refer to the document [Using the EGrAMS rich text editor](#).

On pages of the application where you are required to enter text blocks, you can format your text with the rich text editor, in the same way you would format text in a word processing program such as Microsoft Word.



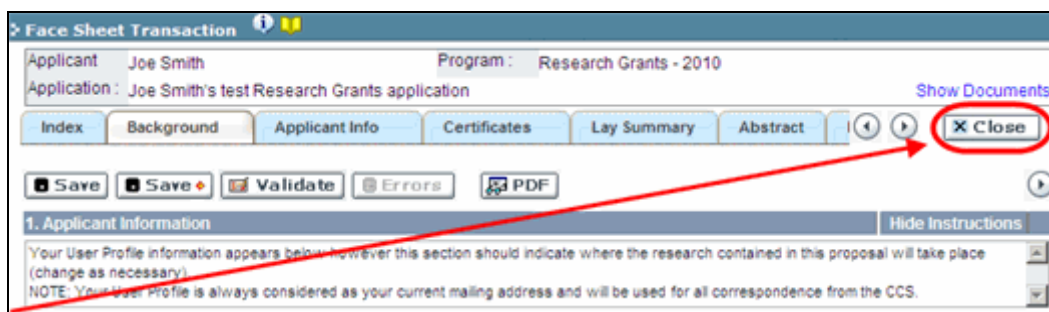
Use the rich text editor to:

- bold, italicize or underline your text
- format footnote markers with superscript

- track the number of characters used in an entry
 - character limitations for each entry are stated in the instructions posted on each page of the application, and/or in this guide
- enter special characters such as French or Greek letters
- include bulleted and/or numbered lists
- preview your text in a full screen window

VI. Exit

In order to exit the application and access the **Application workbench** again, you must click the **Close** button on the application. If you've forgotten to save your work before clicking the Close button, the system will prompt you to do so.



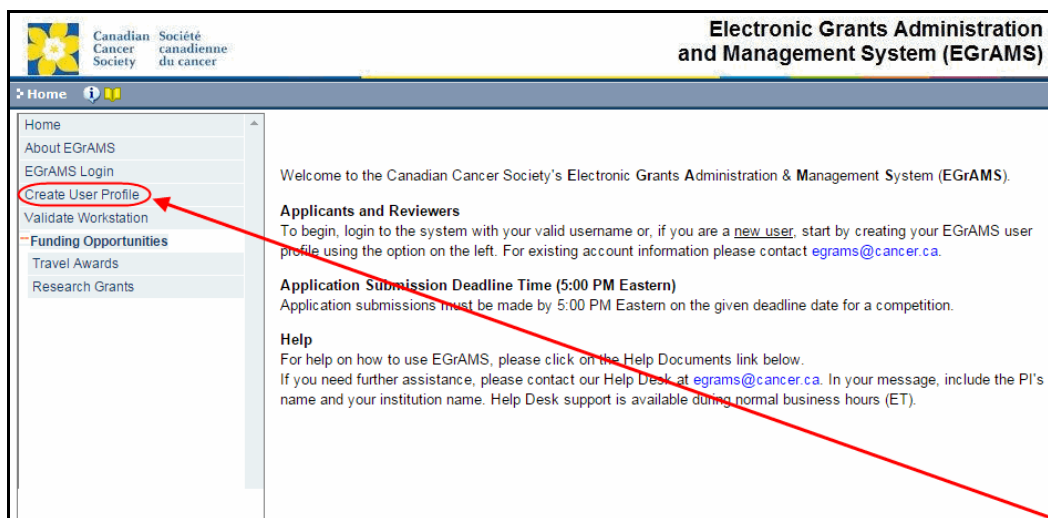
APPENDIX B: Create your profile



Warning: Do you already have a profile?

Before you create a new profile, ensure that one has not already been created for you (contact egramps@cancer.ca). If you have applied to the CCS (previously NCIC) or served as a reviewer in the past, a user profile was created for you automatically. That profile will have your previous history attached to it, including applications and/or information about review panels you may have participated on.

1. Go to the [EGrAMS home page](#) and click **Create User Profile** in the left navigation menu:



2. Provide information for all mandatory fields (marked with an asterisk *). Provide information in additional fields at your discretion.



Best practice tip: note format for entering address information

When entering your host institution address information, please follow the format outlined below, as any applications you create in EGrAMS will pull this information dynamically into the electronic form.

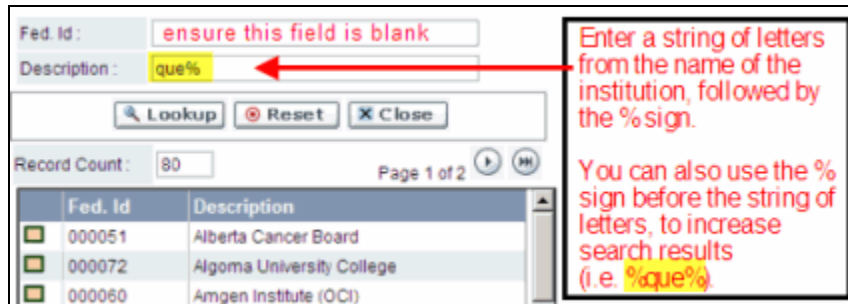
Interpreting the data fields

- Login Name:** Use your first initial and last name. If the system indicates this username already exists, try adding your middle initial or a number, i.e. JASmith or JSmith2
- Display Name:** This field will be auto-populated using the first initial from the **First Name** field and whatever you have entered in the **Last Name** field. However, you can change it if you wish.

Institution: Click on the button, and select the name of your current research institution.

**** If you do not see your institution listed** in the dialogue box, contact egrms@cancer.ca. Include “**EGrAMS institution set-up**” in the subject line.

To search for your institution: use the % sign as a wildcard in the **Description** field:



Department: Use this line to indicate your department or faculty/division (e.g. “Dept. of Immunology” or “Faculty of Nursing” where there is no department).

Address Line 1-4: Use these lines to indicate your street address. Indicate your campus, building, floor/room number, centre or laboratory as appropriate.

Country: Click on the button for a list of country codes.

City: Enter your city.

Province: Click on the button for a list of province codes.

Postal Code: Enter your entire postal code **in the first box**.

Menu Style: This category defaults to the “Dynamic” style. If you wish to change how EGrAMS displays menus along the top of your screen, you can change this field to “Drop Down List”.

Designation: This field is mandatory.

Role: Click on the button, and select your role within the EGrAMS system:

- **Grantee** is a person applying for funding.
- **Reviewer** is a panel member who evaluates applications and awards funding.
- **Grantee/Reviewer** is a person who occupies both descriptions.

Show Security: Click on this button to expand the form, and add at least one **security question** in the event you forget your password.

To add a security question, click on the button and choose from a list of questions, then enter your answer in the corresponding **security answer** field below.

Once completed, you can click the **Hide Security** button to display the Additional Info buttons below.



Best practice tip: Additional Info screens

The **Additional Info** screens (e.g. Educational, Professional, Biographical, etc.) are optional – you are not required to complete them.

However, depending on the competition, some applications will request information about your education or biographical details. If you have completed these screens in your user profile, your application(s) will be pre-populated with information provided here.



Troubleshooting tip: saving changes to Additional Info screens

If you are updating the information contained in the Additional Details screens (e.g. Educational, Professional, Review, etc.), you must save the changes by clicking **OK** on both the Additional Details screen and then again on the main user profile page. If you click OK on the former but not the latter, your changes will be lost.

| Det. | Position | Organization | Years | Last Set |
|-------------------------------------|--------------------|--------------------------------------|-------|----------|
| <input checked="" type="checkbox"/> | Scientific Officer | NIHC, Panel L | 2 | 2005 |
| <input checked="" type="checkbox"/> | Chair | CIHR virology and viral pathogenesis | 1 | 2007 |
| <input checked="" type="checkbox"/> | Panel Member | Cancer Research Society | 1 | 2008 |
| <input type="checkbox"/> | | | | |
| <input type="checkbox"/> | | | | |
| <input type="checkbox"/> | | | | |

- When you have completed your profile, save your changes by clicking the **OK** button.

APPENDIX B: CREATE YOUR PROFILE

The screenshot shows the 'User Setup' application window with the following details:

- Title:** Dr Mr Ms Prof
- *First Name:** Joe
- *Last Name:** Test
- *Address 1:** Canadian Cancer Society
- Address 2:** Department of Biochemistry
- Address 3:** 6371 Crescent Road
- *City:** Vancouver
- Province:** BC
- *Postal Code:** V6T 1Z2
- *Phone:** (604) 555-5555
- *E-Mail Address:** joe.test@hotmail.com
- *Designation:** NA (Not Applicable)
- *Role:** GRANTE (Grantee)
- Host Institution:** 000001 Canadian Cancer Society

At the bottom, the 'Additional Info.' section includes buttons for 'Educational', 'Professional', 'Review', 'Institution', and 'Biographical'. The 'OK' button is circled in red, and a red arrow points to it from the top left of the window.

4. Your profile will be created and marked as "Inactive". Your profile will be automatically activated.