Canadian Cancer Society

# TRAVEL AWARDS APPLICATION GUIDE TRV20-1

Canadian Cancer Society

November 25, 2019
Version 1.0

**Before starting your application, please note the following important points:**

- Applicants may receive a CCS Travel Award only once per stage of training (i.e. PhD, MD, Post-doctoral/clinical fellow).
- Applications will only be accepted for conference dates within 6 months following the funding start date.
- Acceptance is not required at the time of application, but documentation confirming acceptance from the conference organizers must be submitted in order to claim the award.

Please see the CCS Travel Awards Program Description for more information.

# Travel Awards: application guide

## Four easy steps



## Troubleshooting



## Additional information

**TRV20-1 Submission Checklist**

*We strongly encourage applicants to validate their applications at least a week prior to the submission deadline to ensure there is ample time to address any validation errors. You will not be able to submit your application until all validation errors are cleared.*

Are you ready to submit? Check the list below to find out.

- ☐ Do you meet all the eligibility requirements? See the Travel Awards program description for more information.
- ☐ Does your application have a title? The application title should be the conference title.
- ☐ Have you added your supervisor's contact information? Have they uploaded their letter of reference?
- ☐ Have you entered your institution's Financial Officer contact information in Section 3?
- ☐ Do your attachments meet the page and size requirements and follow the requested naming convention?
- ☐ Does your CV follow the required format?
- ☐ Have you uploaded your abstract? If you have received confirmation of acceptance from the conference organizer, append this to your abstract.
- ☐ Does your Project Summary meet the character count limit? If you included any special characters in your summary, ensure you use Alt codes or the special character tool in EGrAMS. Copying text from Word for Greek or French characters using Symbol font will result in these special characters being lost (usually converted to some other letter).
- ☐ Have you completed the Budget section? Ensure that the funds listed in the budget section align with the information provided in section 2) Conference Information.

If you have any questions, please contact the CCS Research Department at research@cancer.ca. For technical concerns, please contact egrams@cancer.ca.

## Step 1: Create your application

1. Log in to EGrAMS to access the home screen/**Application workbench**.

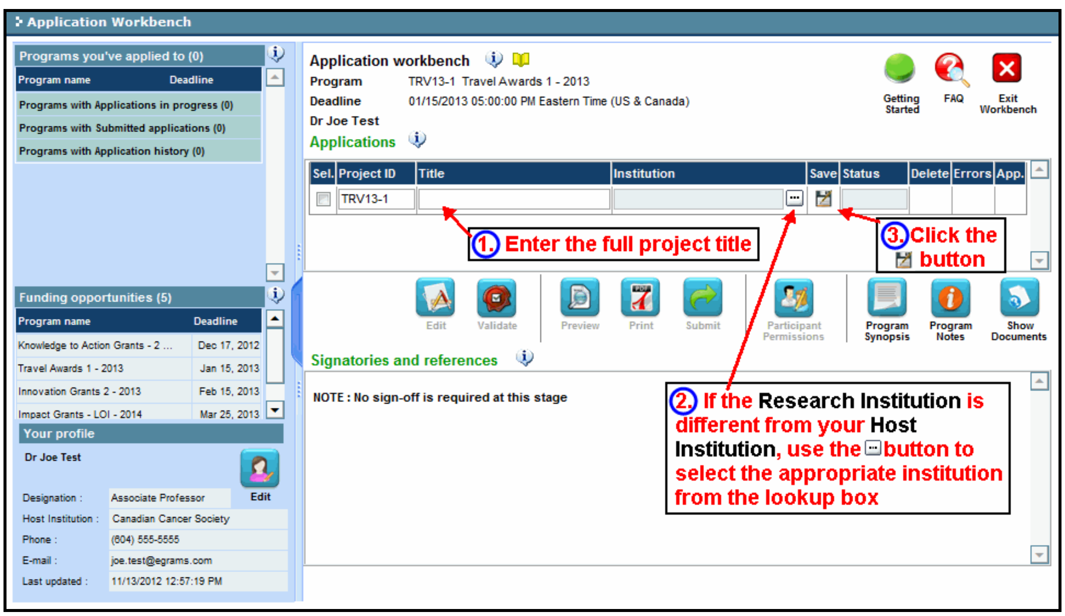
2. Click the **Travel Awards - 1 - 2020** program under the Funding opportunities section on the left

3. The **Project ID** will default to TRV20-1 (the **Grant Program** code).

4. Enter the **conference title** into the **Title** field.
    - 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 you Host Institution there.



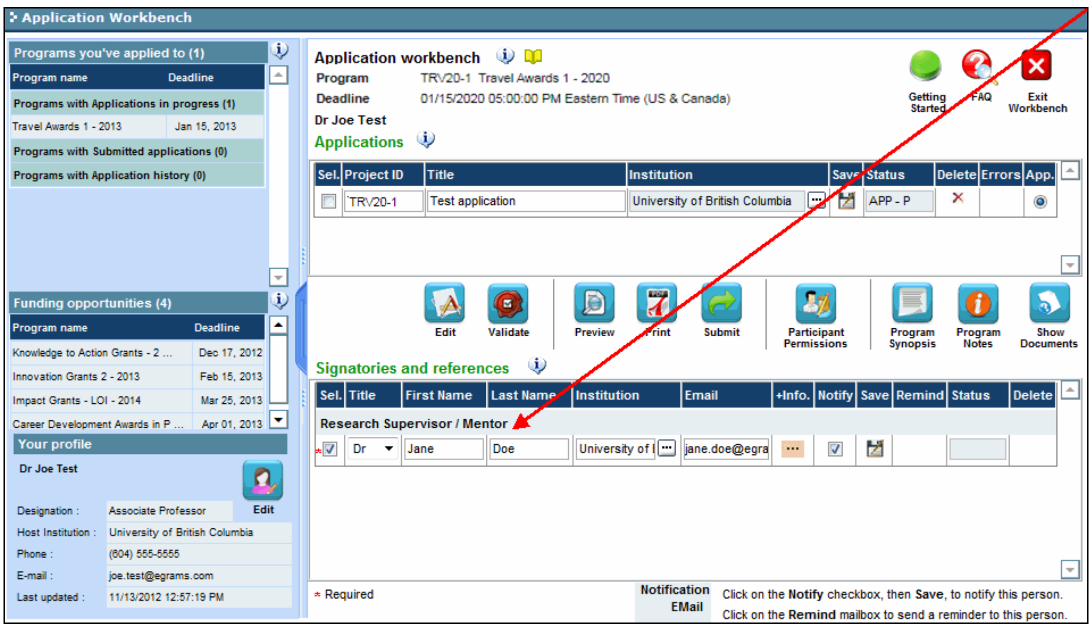

5. Click the button.

## Step 2: Add your supervisor(s)

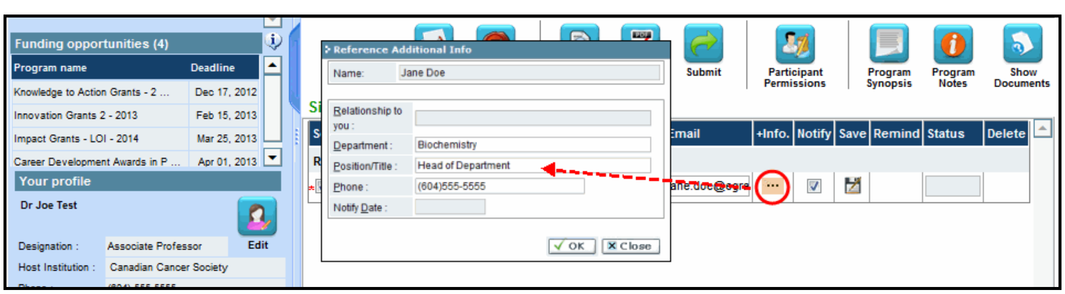
Your research supervisor must contribute a letter of reference to your application, as well as information regarding his or her area(s) of expertise and recent publications. In order to grant access to your application, you must designate your supervisor as a reference and provide contact information.

**Note for multiple supervisors:** If you have two supervisors, enter the first one according to the instructions below, they will be required to complete all fields of the supervisor section. Your second supervisor should be added as a reference, but the system will capture their name and other information only. **Do not click Notify for the second supervisor.**

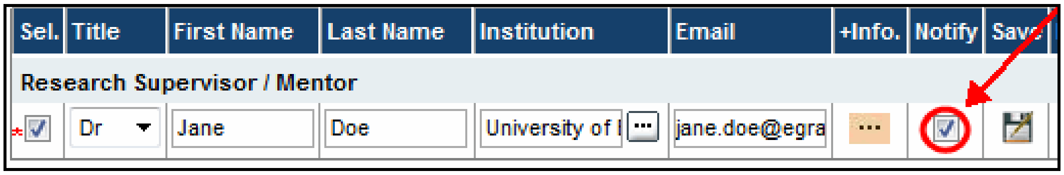
1. From the **Application workbench**, complete the form under the **Signatories and references** section, providing your supervisor's title, name, institution and email address.




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



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




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

**NOTE: Automated email delivery to your supervisor**

The email 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:

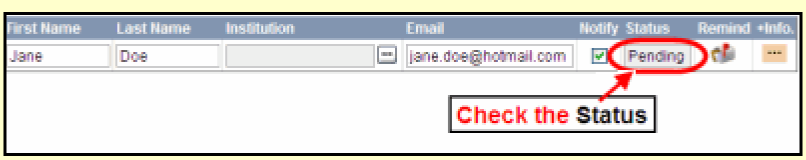
1. Return to the **Application workbench** screen.
2. Click the **Notify** button.
3. Click .

4. Click to save your entry.
   - An email containing a unique URL for access to the Supervisor section of your application will be sent out to your supervisor 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”.)

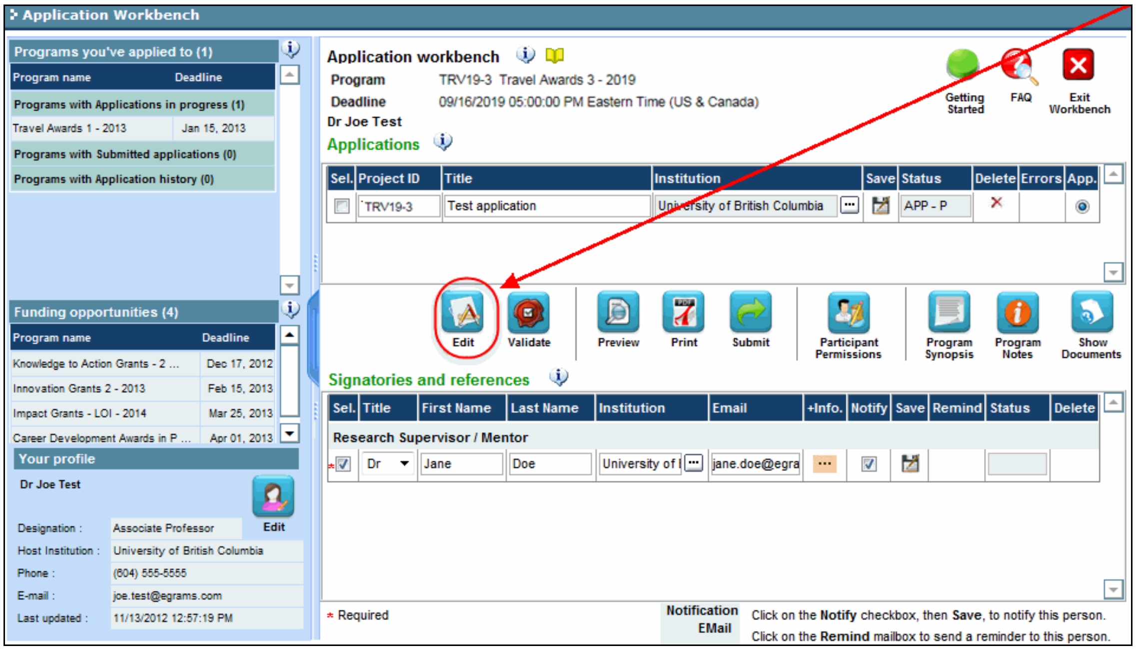



**Send a reminder email**: If you are concerned that your supervisor has not yet completed his or her portion of your application, you can re-send the email notification just by clicking on the button.

## Step 3: Complete your application

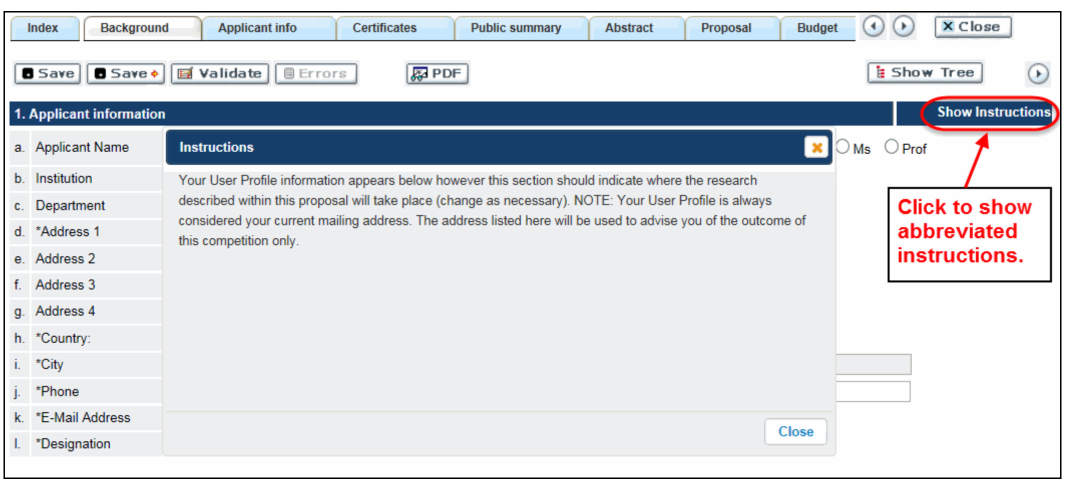
1. From the application workbench, click the 

button to access the application:




2. **Click on the Background tab to begin.**

3. Enter details of your application as instructed:



4. Save content entries before moving to the next page of the application:


## *Language*

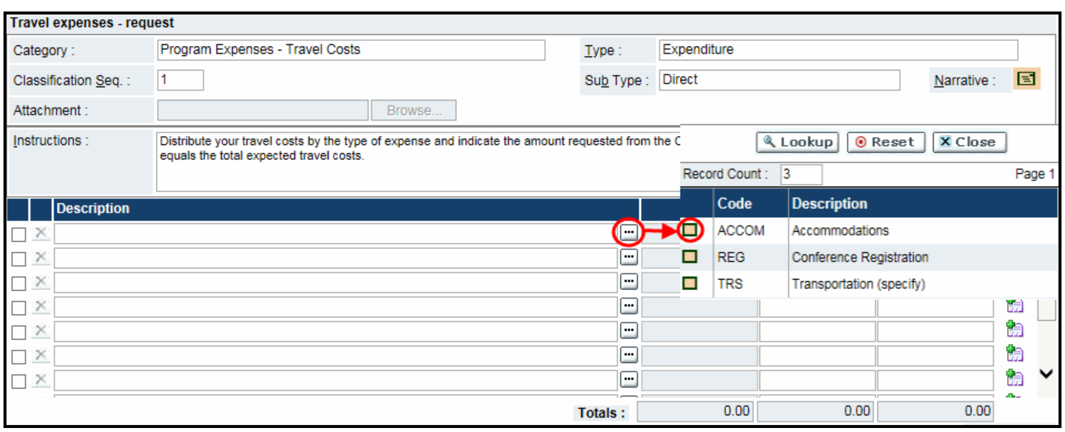
Complete the entire application in one language only. Note for applications submitted in French - all review panels are conducted in English. French language reviewers will be secured as required.

## *Budget entry*

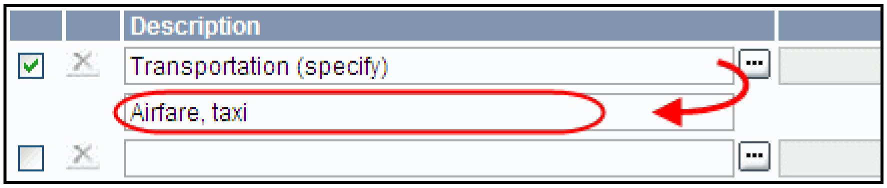
### First page: Travel Expenses – Request

Provide a breakdown of your budget according to several categories. For each line item, indicate the amount you are requesting from CCS and any funding you are receiving from other sources for the CCS eligible expense categories. CCS eligible expenses include: 1) Conference registration fees, including abstract submission; 2) Accommodations; and 3) Transportation only.

i. For each line item, use the button in the **Description** column to select the appropriate category.

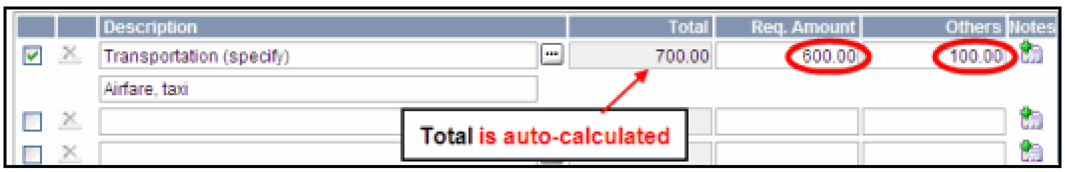


If you select **Transportation**, provide details in the space below.




ii. In the **Req.** [requested] **Amount** column, indicate the funds you are requesting from CCS towards this line item.

iii. In the **Others** column, indicate the funds (if any) requested or expected from other sources towards this line item.



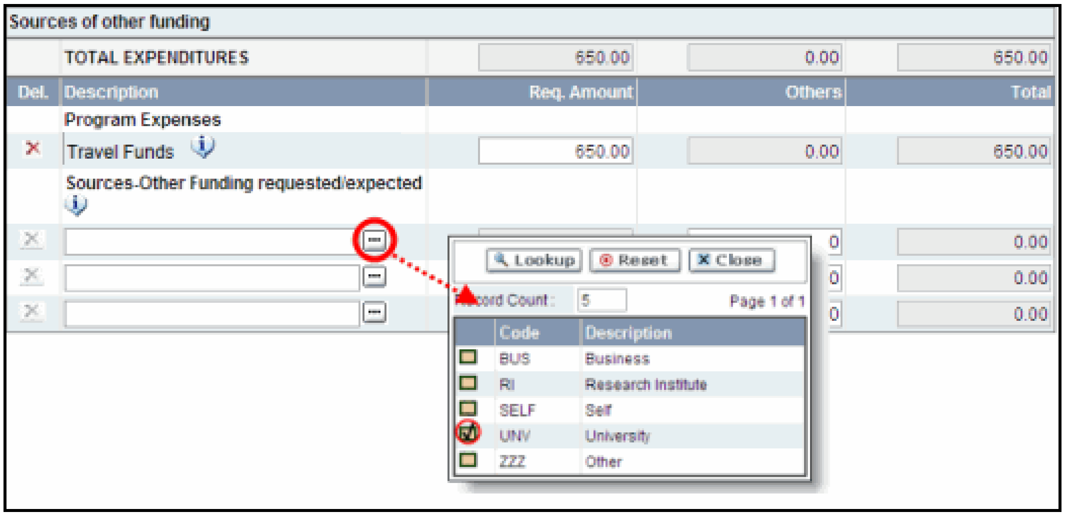

iv. Click **Save** before advancing to the **Other Funding** page.

**Other Funding**

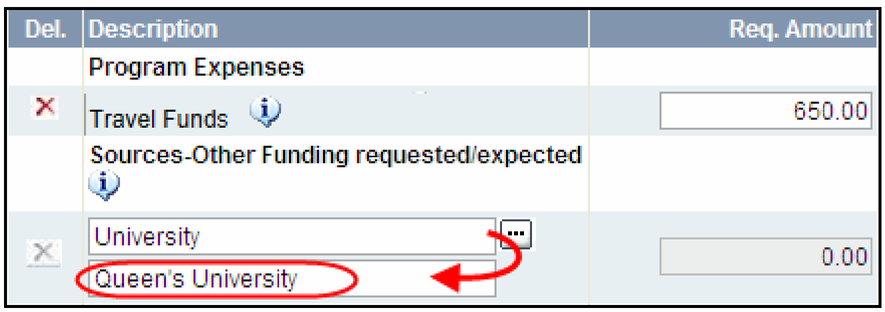
Provide a brief summary of other sources of funding you expect or have requested.

> **NOTE: Auto-populated values on Sources of other funding page**
>
> The values for **Total Expenditures**, **CCS Requested Funding** (**Req. Amount** and **Total**) are auto-populated using values provided on the Travel Expenses – Request page

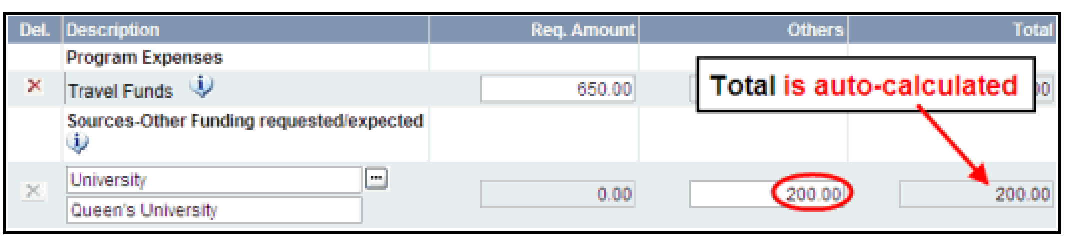
i. For any other sources of funding, use the button in the **Sources of other funding requested/expected** column to select the appropriate category or select other and indicate the type in the new field below to define something other than the items listed.




ii. A blank line will open up below funding source. Specify the name of the business, institution or otherwise.




iii. In the **Others** column, indicate the amount of funding requested or expected from the funding source indicated.



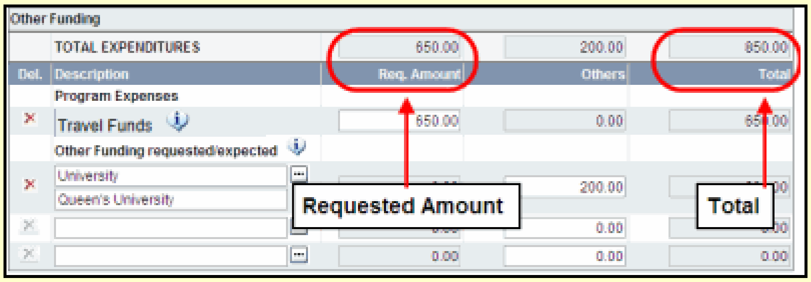

iv. Click **Save**.

**Best practice tip: enter Project Cost in Background section**

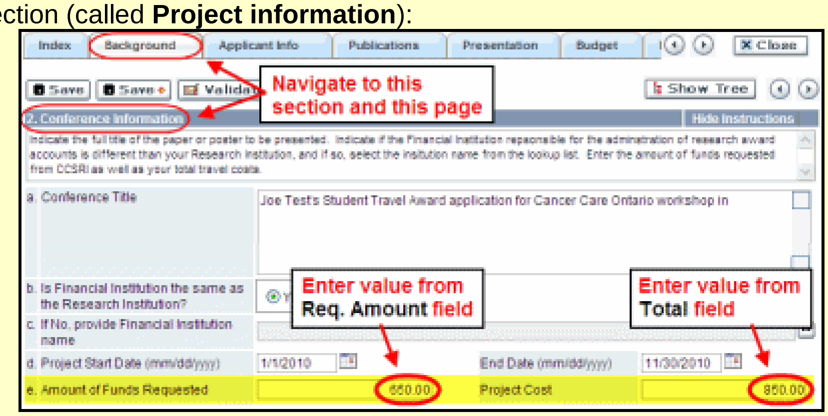
During the validation process, the system validates the amount you are requesting from CCS and the total expenses of your project against the values identified on the second page of the Background tab (as Amount of Funds Requested and Project Cost).

To avoid this error, check now to ensure that the values on both pages match:

On the **Budget – Other Funding** page, locate the **Requested Amount** and the **Total** values listed in the **Total Expenditures** row:




These values must match the values entered in item e) **Amount of Funds Requested** and **Project Cost** on the second page of the Background section (called **Project information**):




## Biographical Information

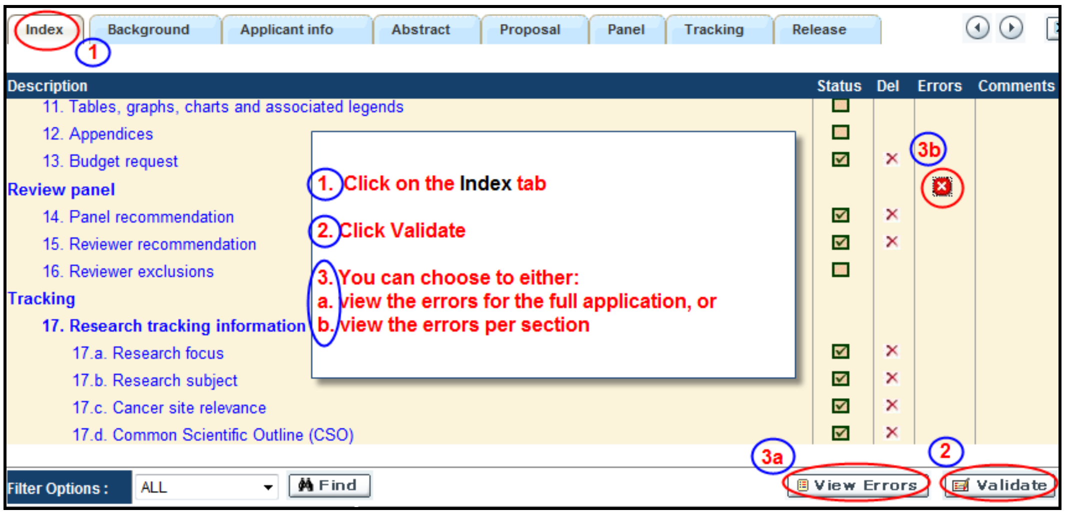
While completion of this section is mandatory, responses will be strictly confidential and will not be shared with the review panel. Aggregated and anonymized data will be used for program administration, statistical reporting and communications purposes only.

## 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.

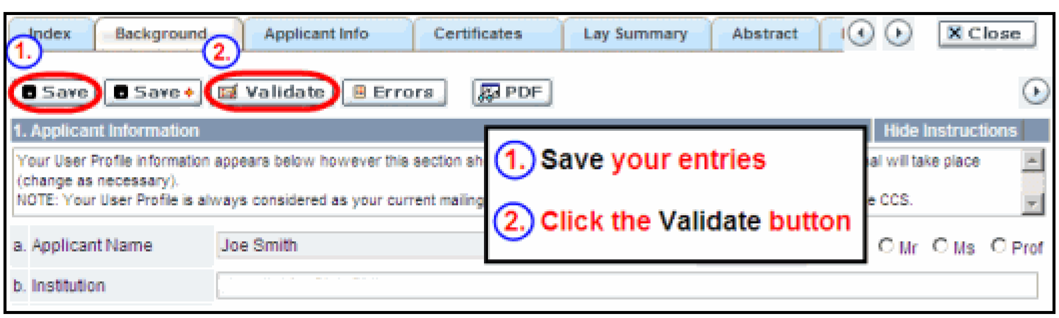
#### a) Validate the full application




#### b) Validate one section at a time

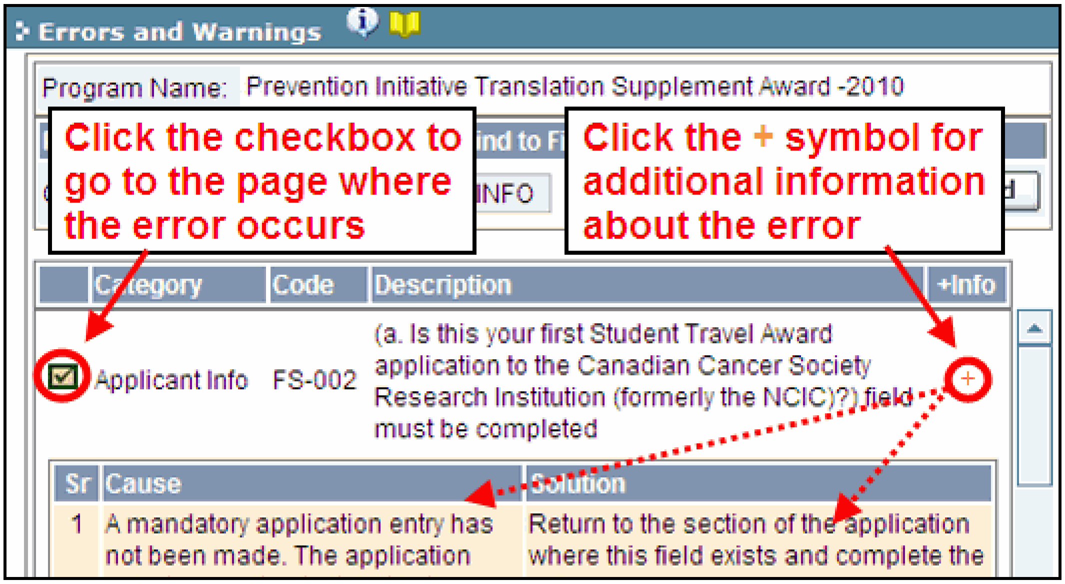
Must be conducted once for every section (e.g. Background, Applicant Info, Budget, etc.) of the application. Sections are identified as tabs in the banner across the top of the application.

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

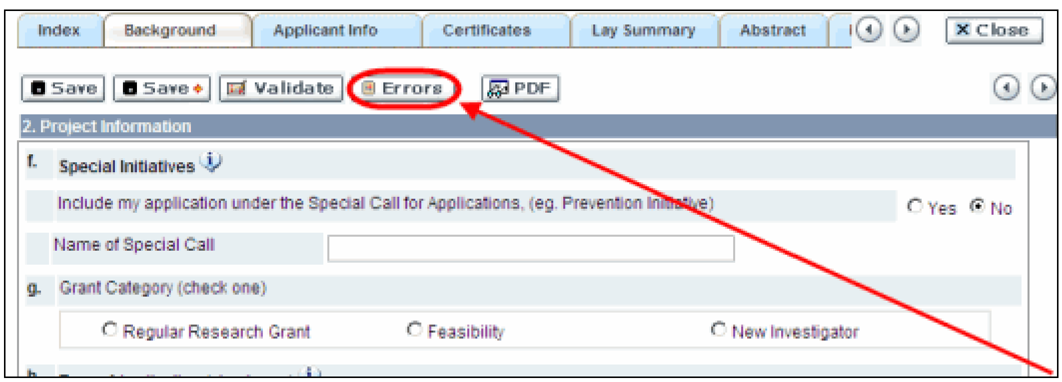



**For both type a) and b) validation, follow the below instructions:**

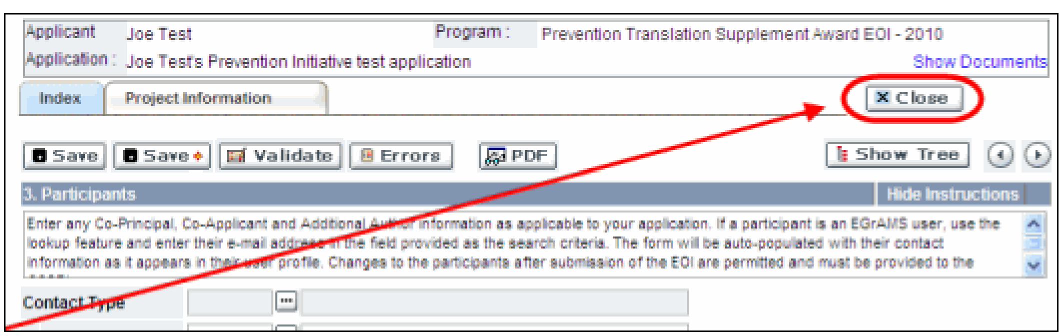
1. If errors are found, a dialogue box will open with details.
   - Click the + symbol under the **+Info** heading for information about the cause and solution of the error.
   - Click the checkbox to the left of the error listing to be taken to the page where the error has occurred.




2. 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.

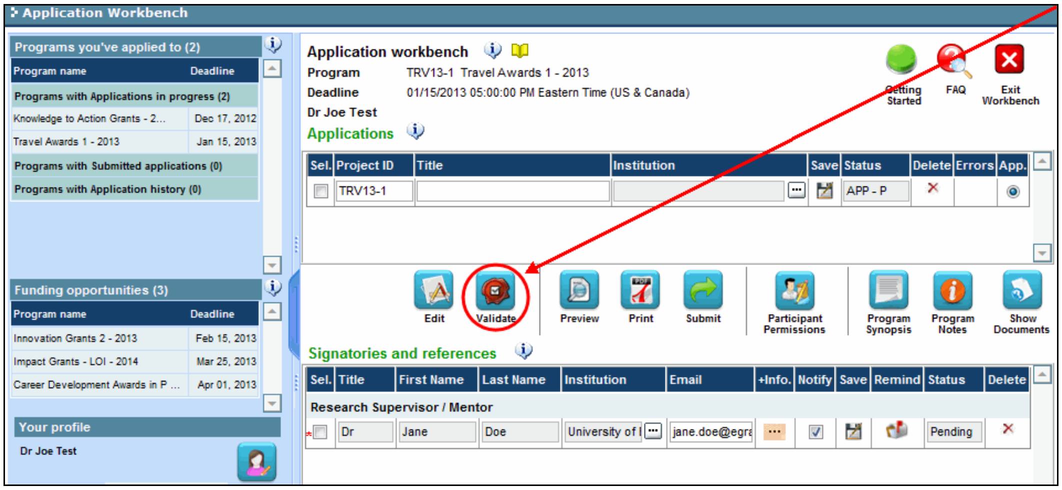



3. When all errors are resolved for every section, click the **Close** button to exit the application:

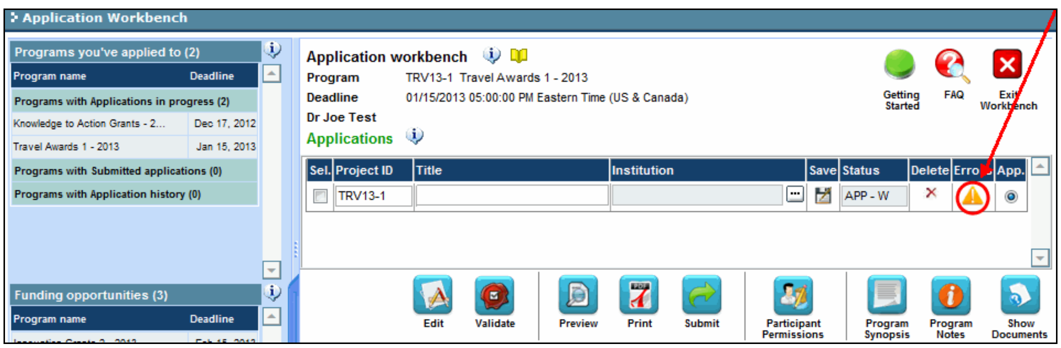


## II. Preview and submission

1. From the **Application workbench**, click the Validate 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 Edit menu.

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

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

## III. Confirmation

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

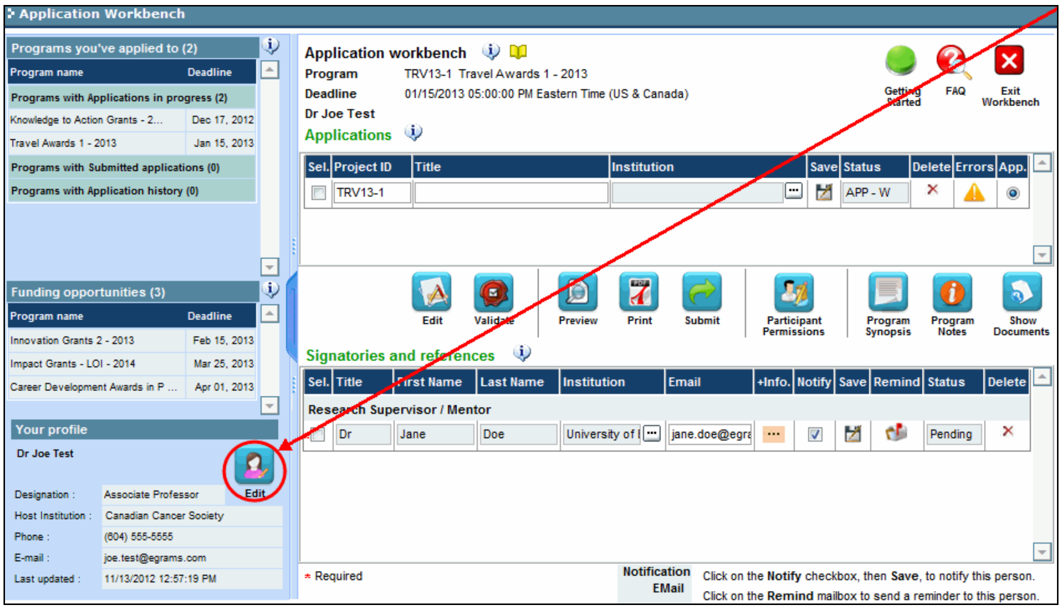
# Troubleshooting

### *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.

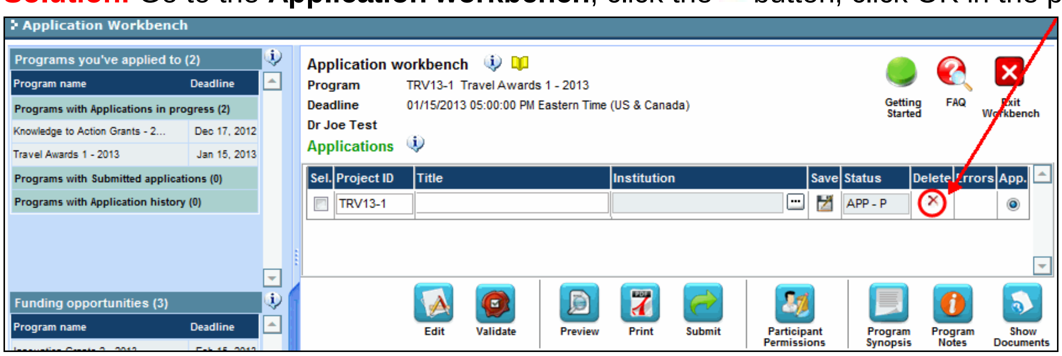
***To update your profile:*** From the **Application workbench**, click the button.




### *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.



### *Budget error during validation*

**Problem:** When I validate my Budget section, I get an error that reads "Funds requested [or Project cost] does not equal budget amount". What does it mean and how do I fix it?

**Solution:** The second page of the application (i.e. **2. Conference Information**) contains two fields under item (e) – Amount of Funds Requested and Project Cost. The values entered in these fields must match the values in your budget summary.

For more information, including illustrations, consult the best practice tip outlined in the Budget Entry details.

# APPENDIX A: The application interface

## I. Navigation

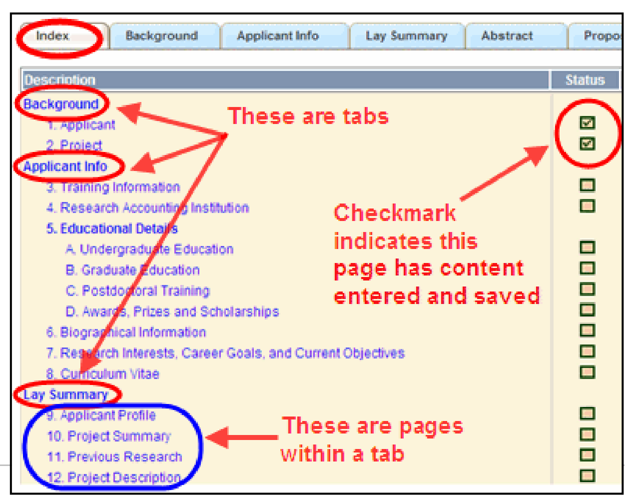
Use the tab banner and arrow buttons to navigate through your application:


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.

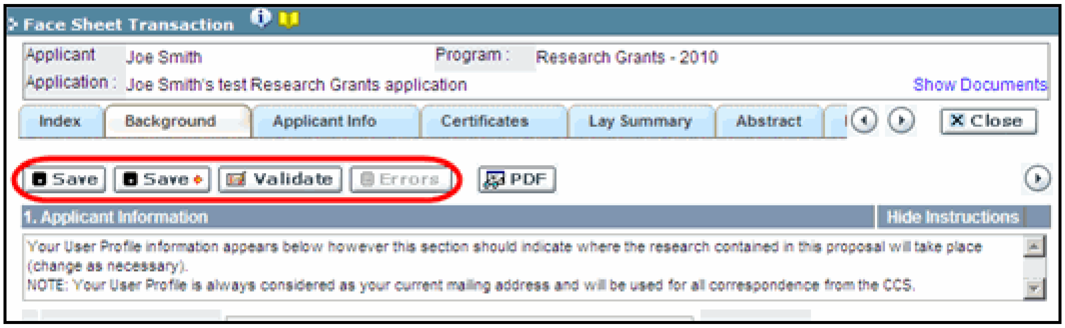
Each line of the index is clickable, and will take you straight to that page of the application.

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.

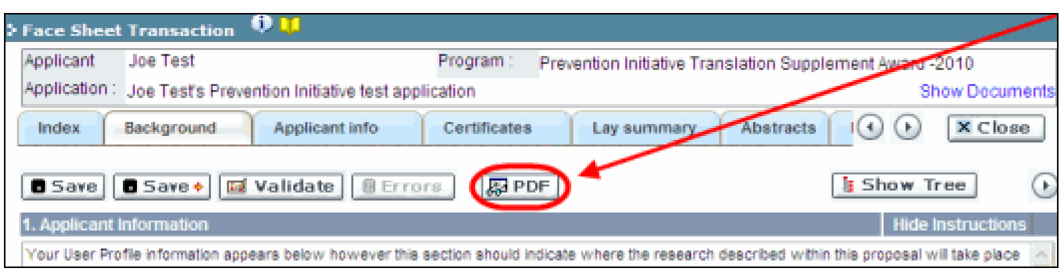
If you try to advance to the next page without saving your work, the system will prompt you to do so.

### 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.

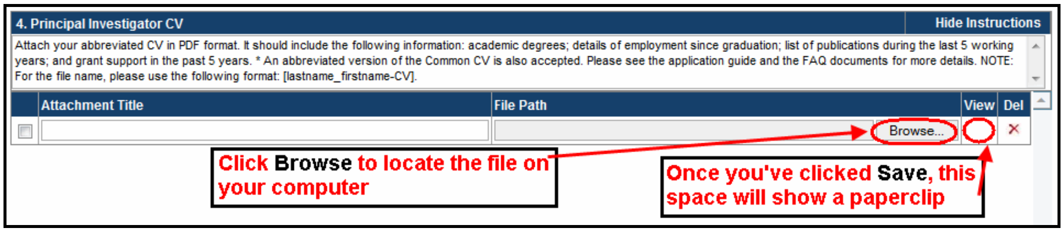



If you wish to create a PDF of your entire application, click the  button on the **Application workbench**.

## 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.

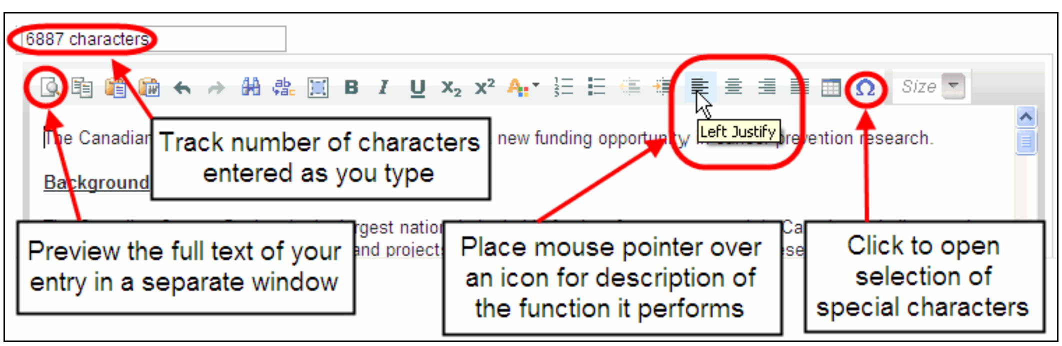



3. Click **Save** to upload the document as an attachment to your application.
   - The **File Name** path will be cleared and the paperclip icon will appear in the **View** column. You can click the paperclip to view the attachment:

## 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.



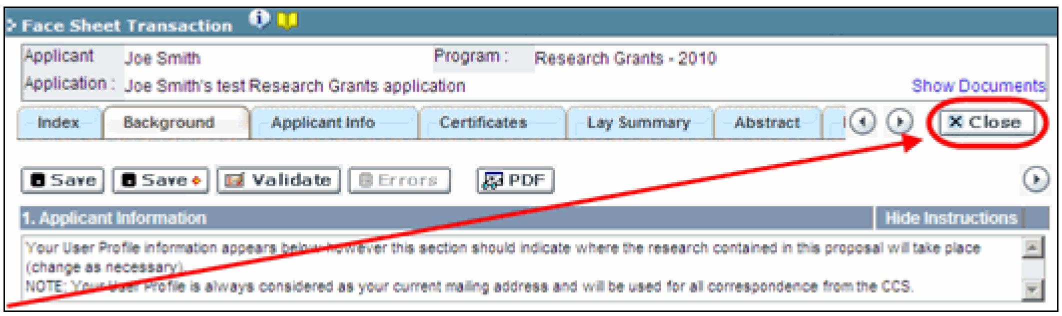

Use the rich text editor to:

- 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.

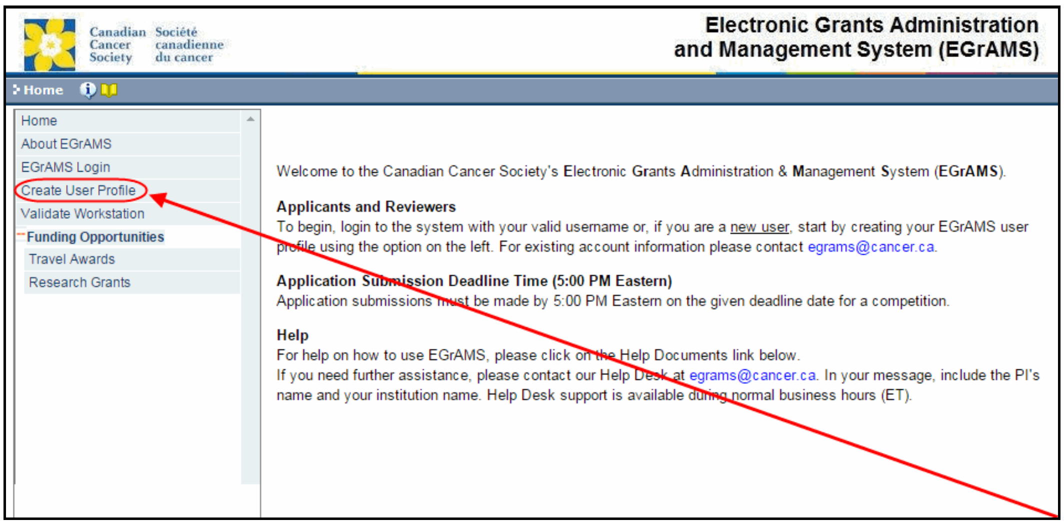


# APPENDIX B: Create your profile

**Warning: Do you already have a profile?**

Before you create a new profile, ensure that one has not already been created for you (contact egrams@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

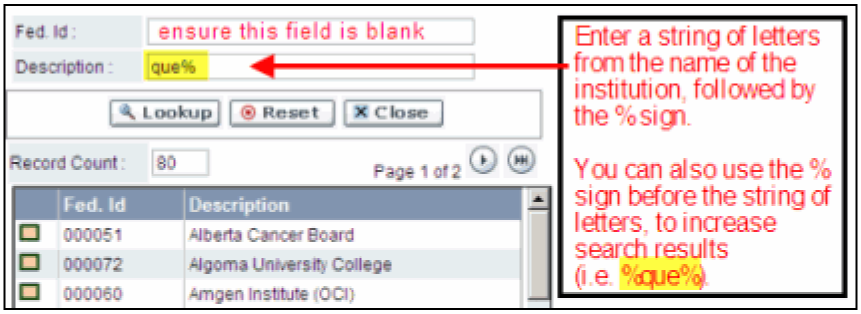
**Login Name:** Use your first initial and last name. If the system indicates this username already exists, try adding your middle initial or a number, i.e. JASmith or JSmith2

**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 egrams@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.

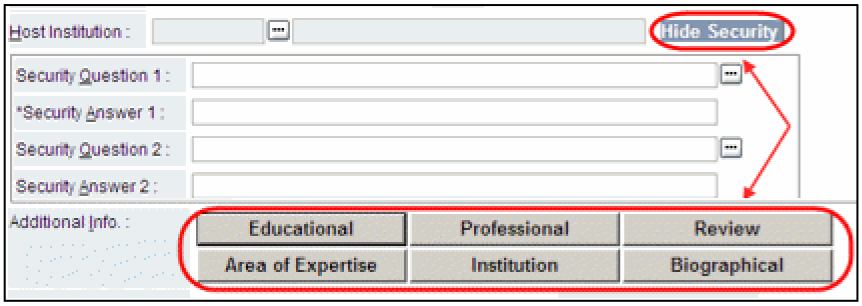
**Role:** Click on the [...] button, and select your role within the EGrAMS system:

- **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.



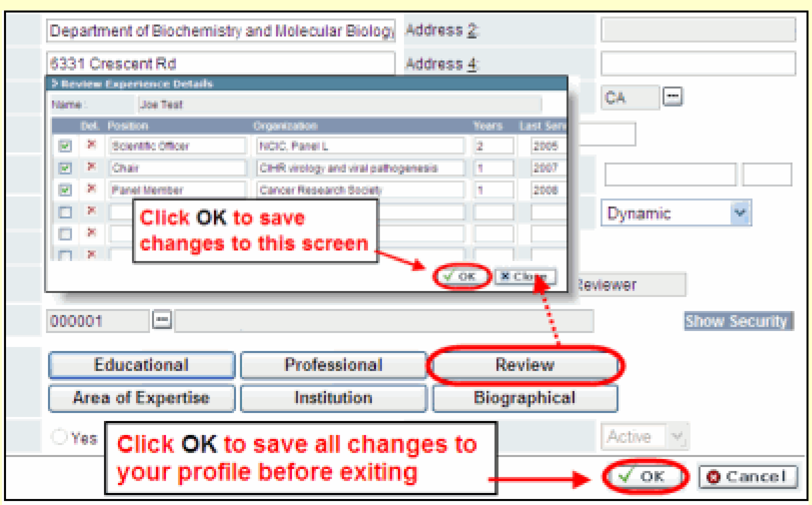

### Best practice tip: Additional Info screens

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

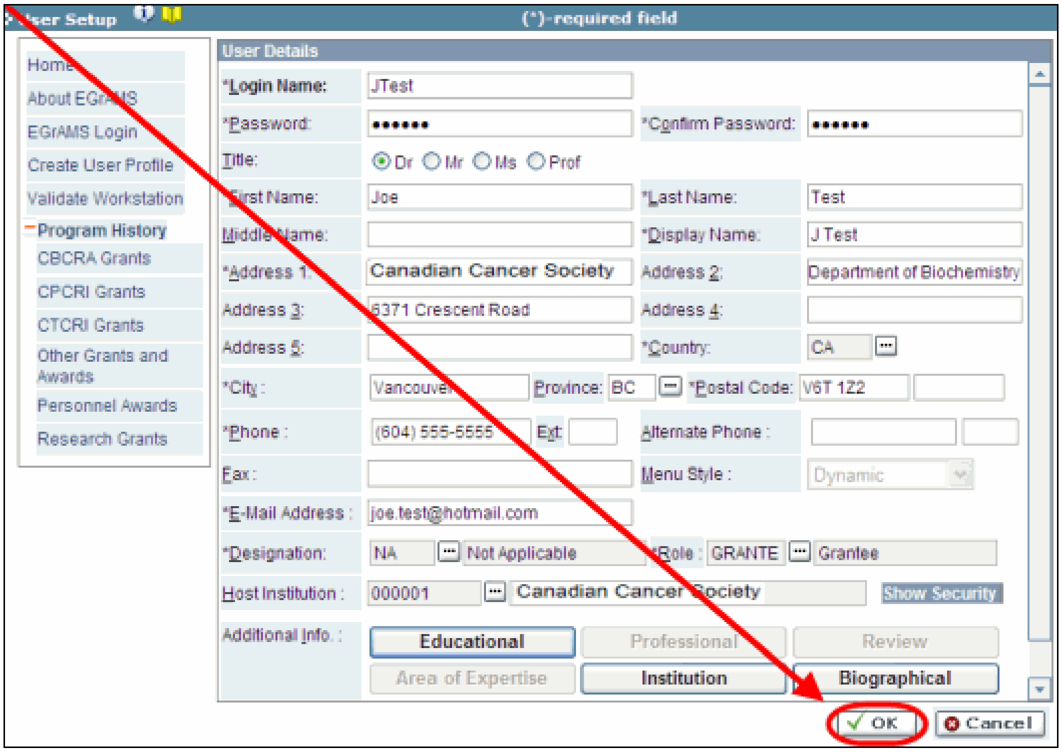
However, depending on the competition, some applications will request information about your education or biographical details. If you have completed these screens in your user profile, your application(s) will be pre-populated with information provided here.

### 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.



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




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