

Electronic Grant Management System (eGMS)

Training Manual for Administering Institution (AI) Users

Application Module

If you have any queries or encounter difficulties relating to eGMS, please send email to egmsenquiry@healthbureau.gov.hk

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Abbreviations

AI = Administering Institution

eGMS = Electronic Grant Management System

EO = Executive Officer

DH = Department Head*

FA = Fellowship Applicant

FO = Finance Officer*

PA = Principal Applicant

RFS = Research Fund Secretariat

RO = Research Officer*

* *AI user*

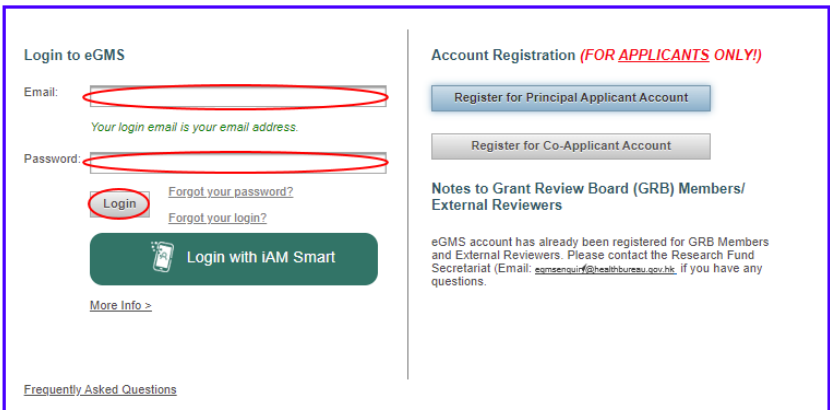
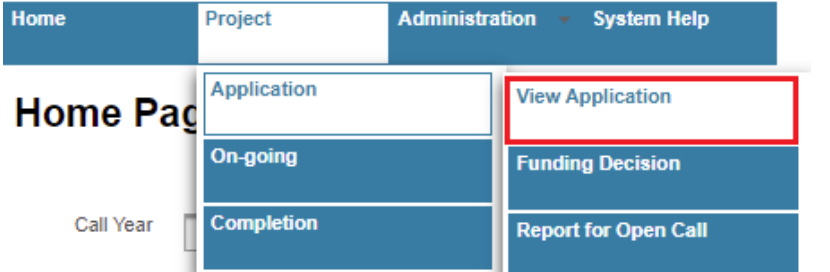
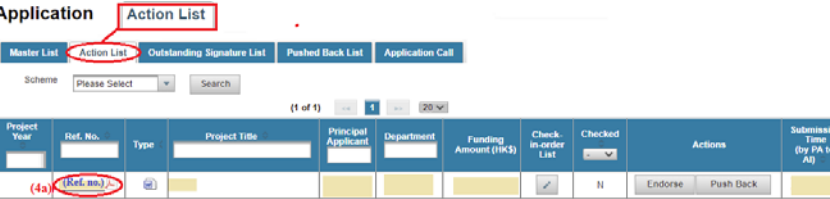
1. Endorsement of Application

Preview and Checking : Step 4

Push Back: Step 6

Endorsement: Step 7

* EO(DH), EO(FO) and EO(RO) are not able to endorse the application.

<p>Subject: eGMS : Submission of Grant Application(s) for the 20XX Open Call for Investigator-initiated Projects</p> <p>Dear (Title) (Last Name) (The contact person of RO/ FO/ DH as recorded in eGMS),</p> <p>This email is sent to inform you that grant application(s) has been submitted by Principal Applicant(s)/Fellowship Applicant(s) of your Administering Institution in the electronic Grant Management System (eGMS) of the Research Fund Secretariat, Health Bureau, HKSAR.</p> <p>Please login to the eGMS (eGMS URL) to access the application(s) for necessary action(s).</p> <p>Thank you.</p>	<p>Step 1:</p> <p>Click on the eGMS URL to login to the eGMS and review the application.</p>																						
	<p>Step 2:</p> <ul style="list-style-type: none"> - Enter login email. - Enter password and click 'Login'. 																						
	<p>Step 3:</p> <p>Go to Project > Application > View Application</p>																						
 <table border="1"> <thead> <tr> <th>Project Year</th> <th>Ref. No.</th> <th>Type</th> <th>Project Title</th> <th>Principal Applicant</th> <th>Department</th> <th>Funding Amount (HK\$)</th> <th>Check-in-order List</th> <th>Checked</th> <th>Actions</th> <th>Submission Time (By PA to AG)</th> </tr> </thead> <tbody> <tr> <td></td> <td>(4a) (Ref. no.)</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>N</td> <td>Endorse Push Back</td> <td></td> </tr> </tbody> </table>	Project Year	Ref. No.	Type	Project Title	Principal Applicant	Department	Funding Amount (HK\$)	Check-in-order List	Checked	Actions	Submission Time (By PA to AG)		(4a) (Ref. no.)							N	Endorse Push Back		<p>Step 4.</p> <p>To review the Application Form, select 'Action List'.</p> <p>Step 4a: via internet</p> <ul style="list-style-type: none"> - Click on the 'Ref. no.' to check the web-base application form . <p>OR</p>
Project Year	Ref. No.	Type	Project Title	Principal Applicant	Department	Funding Amount (HK\$)	Check-in-order List	Checked	Actions	Submission Time (By PA to AG)													
	(4a) (Ref. no.)							N	Endorse Push Back														

Application

Master List | Action List | Outstanding Signature List | Pushed Back List | Application Call

Scheme: Please Select Search

Project Year Ref. No. Type Project Title Principal Applicant Department Funding Amount (HK\$) Check-in-order List

(4b-i)

Note: Versitech (VXF) e-Form is no longer supported, you can view the application(s) through PDF version next to the Ref. No.

Step 4b: via pdf

(i) Click on the 'PDF icon'.

(ii) Set a 6-character password to protect the downloaded Application form.

(iii) Open the downloaded Application form.

Application

Master List | Action List | Outstanding Signature List | Pushed Back List | Application Call

Scheme: Please Select Search

(1 of 1) 1 20

Project Year	Ref. No.	Type	Project Title	Principal Applicant	Department	Funding Amount (HK\$)	Check-in-order List

hmf_eform_TMP...pdf **(4b-iii)**

Application

Master List | Action List | Outstanding Signature List | Pushed Back List | Application Call

Scheme: Please Select Search

(1 of 1) 1 20

Project Year	Ref. No.	Type	Project Title	Principal Applicant	Department	Funding Amount (HK\$)	Check-in-order List	Checked	Actions	Submission Time (by PA to AI)
								N	Endorse Push Back	

(5.1)

Step 5:

To confirm Application form checked. (Optional)

5.1 Click the box under 'Check-in-order List'.

5.2 Click the checkbox of the 'Checked Date'.

5.3 Fill in the details in 'Remarks' (if any).

5.4 Click 'Confirm Checked' to save the checked entry.

Check-in-order List

Ref. No. [Redacted]
 Project Title [Redacted]
 Principal Applicant [Redacted]
 Department [Redacted]
 User Name [Redacted]
 Checked Date **(5.2)**
 Remarks **(5.3)**

(5.4) **Confirm Checked** Back Push Back

Check-in-order List

Saved Successfully.

Ref. No. [Redacted]
 Project Title [Redacted]
 Principal Applicant [Redacted]
 Department [Redacted]
 User Name [Redacted]
 Checked Date
 Remarks

Confirm Checked Back Push Back

Ref. No.	Project Title	Principal Applicant	Department	Funding Amount (HK\$)	User Name	Authorised Role(s)	Checked Date	Remarks

An acknowledgment message for 'Saved Successfully' will be shown at the top.

Application

Master List | Action List | Outstanding Signature List | Pushed Back List | Application Call

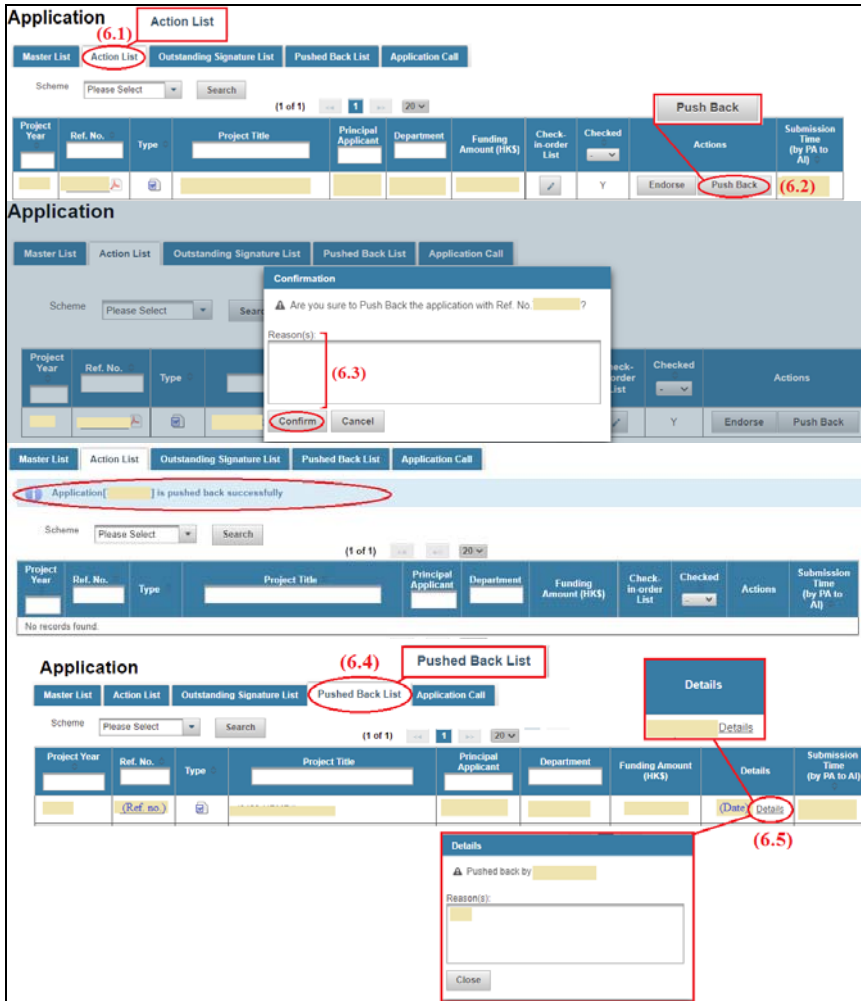
Scheme: Please Select Search

(1 of 1) 1 20

Project Year	Ref. No.	Type	Project Title	Principal Applicant	Department	Funding Amount (HK\$)	Check-in-order List	Checked	Actions	Submission Time (by PA to AI)
								Y	Endorse Push Back	

Checked

Go to the 'Action List', 'Y' will be shown under 'Checked'.



Step 6.
To Push back application.
(On a need basis)

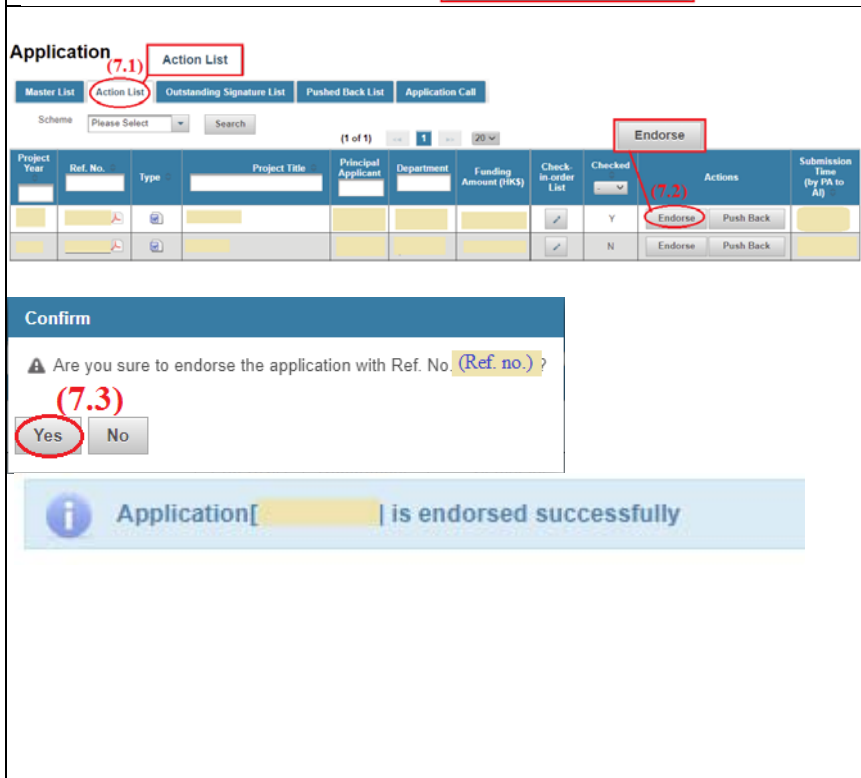
- 6.1 Select 'Action List'.
- 6.2 Click 'Push back'.
- 6.3 Fill in the 'Reason(s)' and click 'Confirm'.

An acknowledgment message for 'pushed back successfully' will be shown at the top.

(Remark: Email notification will be sent to PA after his/her application has been pushed back by AI user(s).)

6.4 Pushed back applications will appear on the 'Pushed Back List'.

6.5 Click on 'Details' to view the reason(s) of push back.



Step 7.
To Endorse application.

- 7.1 Select 'Action List'.
- 7.2 Click 'Endorse' for endorsement.
- 7.3 Click 'Yes' for confirmation.

An acknowledgment message for 'endorsed successfully' will be shown at the top.

(Note: EO(DH), EO(FO) and EO(RO) cannot endorse the application.)

8a (for DH/ FO/ RO)

Application Master List (8a)

Master List Action List Outstanding Signature List Pushed Back List Application Call

Scheme Please Select Search (1 of 1) 1 20

(N/A / Y / N)

Project Year	Ref. No.	Type	Project Title	Principal Applicant	Department	Funding Amount (HK\$)	Status	Co-Applicant(s) Signed	Head of Department Signed	Finance Officer Signed	Research Officer Signed	Submission Time (by PA to AI)

8b (for RO only)

Application (8b) Outstanding Signature List

Master List Action List Outstanding Signature List Pushed Back List Application Call

Scheme Please Select Search (1 of 1) 1 20

(Signing status) (Check-in-order) (Endorse/Push Back)

Project Year	Ref. No.	Type	Project Title	Principal Applicant	Department	Funding Amount (HK\$)	Co-Applicant(s) Signed	Head of Department Signed	Finance Officer Signed	Check-in-order List	Actions	Submission Time (by PA to AI)
							N/A	Y	N		Endorse Push Back	

Step 8.

To view the signing status of CoA(s) and AI users. (Optional)

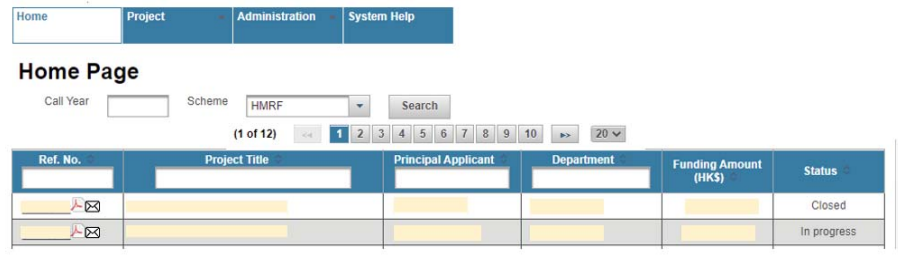
8a (for DH/ FO/ RO)

Click 'Master List' to view the signing status.

8b (for RO only)

Click 'Outstanding List' (for viewing of signing status, completing 'Check-in-order' List and 'Endorse'/'Push Back' the applications).

2. Communicate with RFS through message icon

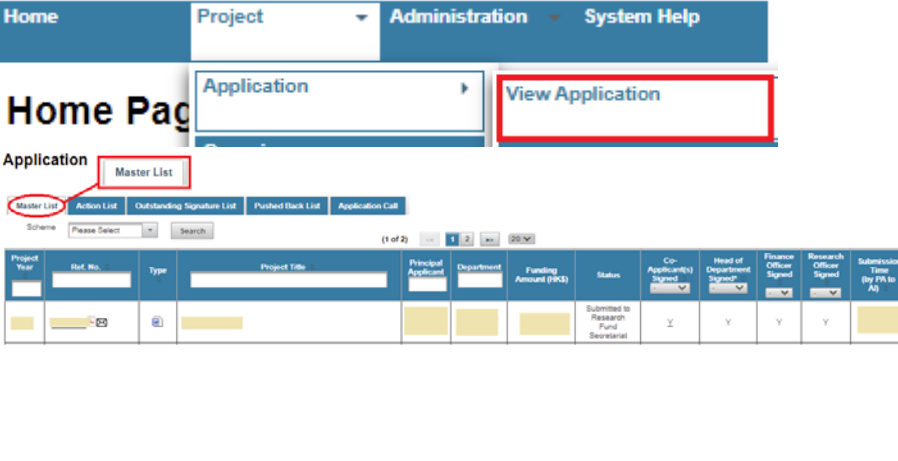


Home Page

Call Year: Scheme: HMRF Search:

(1 of 12) << 1 2 3 4 5 6 7 8 9 10 >> 20

Ref. No.	Project Title	Principal Applicant	Department	Funding Amount (HK\$)	Status
					Closed
					In progress



Application

Home Project Administration System Help

Application View Application


Master List

Master List Action List Outstanding Signature List Pushed Back List Application Call

Scheme: Please Select Search:

(1 of 2) << 1 2 >> 20

Project Year	Ref. No.	Type	Project Title	Principal Applicant	Department	Funding Amount (HK\$)	Status	Co-Applicant(s) Signed	Head of Department Signed	Finance Officer Signed	Research Officer Signed	Submission Time (By PA to AF)
							Submitted to Research Fund Secretariat	Y	Y	Y	Y	



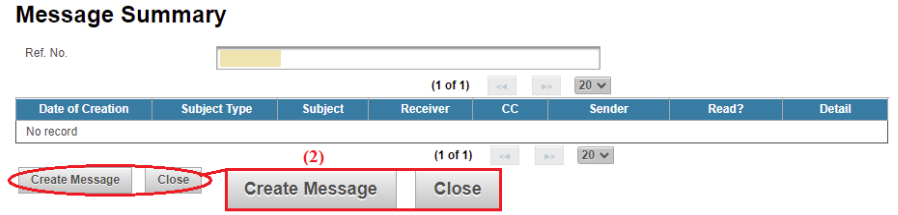
Application

Master List Application Call

Scheme: HMRF (Fellowship) Search:

(1 of 1) << 1 >> 20

Project Year	Ref. No.	Actions	Type	Project Title	Department	Funding Amount (HK\$)	Status	Co-Applicant(s) Signed	Head of Department Signed	Finance Officer Signed	Research Officer Signed	Last Edited By	Submission Time (By PA to AF)
		(1)					Submitted to Research Fund Secretariat						



Message Summary

Ref. No.

(1 of 1) << >> 20

Date of Creation	Subject Type	Subject	Receiver	CC	Sender	Read?	Detail
No record							

(2) (1 of 1) << >> 20

Create Message Close

Create Message Close

Step 1:
Go to Home Page

Or

Go to Project>
Application>
View application

-Select 'Master List'

(Note: 'Message icon' will be available for the communication with RFS after the application has been submitted to Research Fund Secretariat.)

Step 2:
(1) Click on the 'Message icon' to pop up 'Message summary'.

(2) Click 'Create Message' to send message to RFS or 'Close' to close the pop-up browser.

Message

To: Assigned Secretariat Executive's email
CC: Assigned Scientific Reviewer's email (3)
Type: HMRF
Subject:
Message:

(4)

Please Select
Please Select
Progress Report
Interim Report
Final Report
Financial Statement
Audited Accounts
Request for change of principal applicant
Request for change of co-applicant
Request for change of administering institution

Attachment (if any, in PDF format only and all files together should not exceed 2MB):

(1 of 1) << >> 20

Filename	Remove
No record	

(1 of 1) << >> 20

(5) **Attach**

Attachment

Please attach the supporting documents

Browse
 Browse
 Browse
 Browse

Attach

Filename	Remove
...pdf	

Preview **Cancel** (6)

Preview Message

To: Assigned SE's email
CC: Assigned SR's email
Type: HMRF
Subject:
Message:

Attachment (if any, in PDF format only and all files together should not exceed 2MB):

(1 of 1) << 1 >> 20

Filename	Remove
...pdf	

(1 of 1) << 1 >> 20

Attach

(7) **Back** **Send** **Cancel**

- (3) Please select type of message.
- (4) Fill-in the Subject and Message.
- (5) Click 'Attach' to upload attachment(s), if any. (Attachment should in PDF format only and all files together should not exceed 2MB.) To remove the uploaded file, click on the 'Trash' icon.
- (6) Click 'Preview' to preview message or 'Cancel' to close the browser without any action.
- (7) Click on 'Back' for further editing, 'Send' to send the message to RFS or 'Cancel' to close the browser without any action.

Message Summary

Ref. No.

(1 of 1) << 1 >> 20

Date of Creation	Subject Type	Subject	Receiver	CC	Sender	Read?	Detail
						N	View Detail

Message Summary

Ref. No.

(1 of 1) << 1 >> 20

Date of Creation	Subject Type	Subject	Receiver	CC	Sender	Read?	Detail
						Y	View Detail

Detail of Message

Type: HMRF-

Subject:

Message:

(1 of 1) << 1 >> 20

Filename

No record

(1 of 1) << 1 >> 20

Close

The message will be recorded at message summary after sent to RFS.

(8)Click on 'View Detail' to review the message sent.

After receiver read the message 'Y' will be shown under 'Read?'.

Example email for informing new inbox message.

Subject: eGMS – New inbox message

Dear (The Name of user),

This email is sent to inform you that there is a new message in your inbox. Please login to the eGMS (eGMS URL) for your necessary action(s).

Thank you.

Email notification for informing new inbox message will be received if RFS sent you a message through message icon.

Please click on the eGMS URL to go to the eGMS login page for necessary action(s).

eGMS
electronic Grant Management System

Home Project Administration System Help

Home Page

Call Year Scheme HMRF Search

ES user ID: Logout

✉ (3)

To review the unread message, click on the 'Message icon' at 'Home Page'.

Inbox

Period From To Ref. No.

Subject Type Please Select Subject

Read N

Submit

(1 of 1) << 1 >> 20

Ref. No.	Date of Creation	Subject Type	Subject	Receiver	CC	Sender	Read?	Detail
							N	View Detail
							N	View Detail
							N	View Detail

Detail of Message

Type:

Subject:

Message:

(1 of 1) << 1 >> 20

Filename

No record

(1 of 1) << 1 >> 20

Close

Export to CSV

Click 'View Details' to review 'Detail of Message'.

Note:

(Remark: Entry of the viewed message will be removed from 'Inbox' automatically after closed the 'Detail of Message'.)

3. View Funding Decision:

(The following functions are granted to **RO** only)

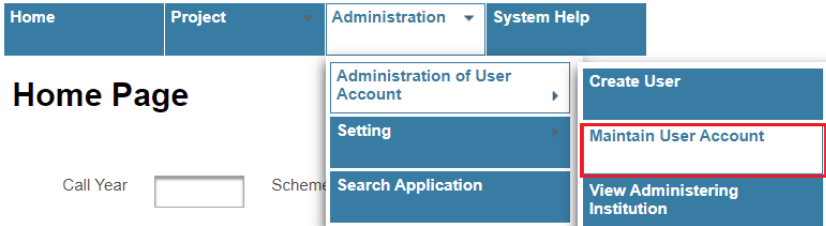
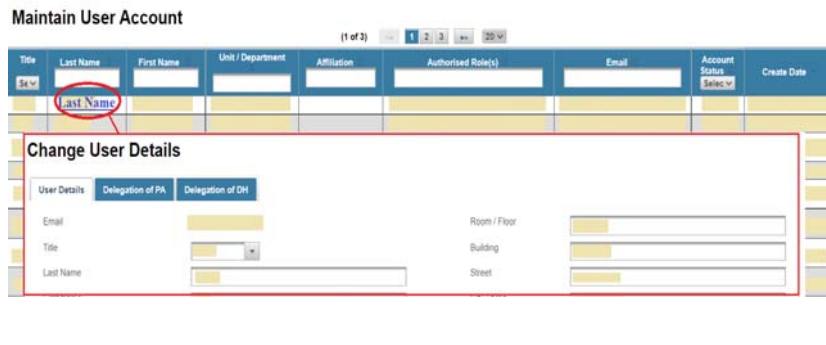
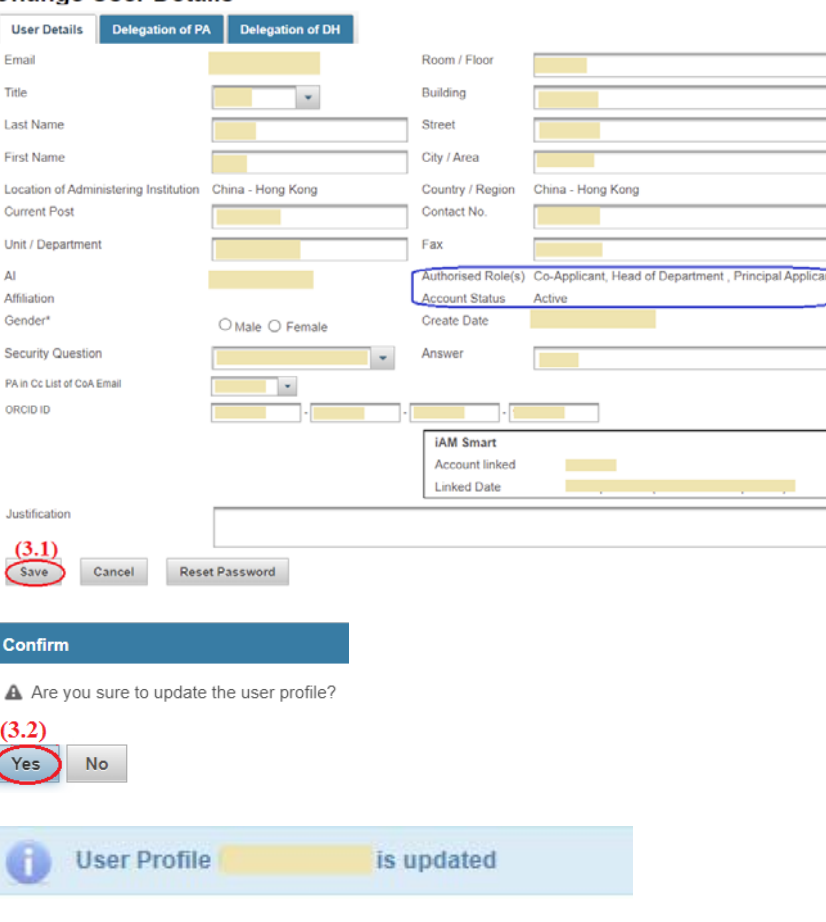
	<p>Step 1: Go to Project > Application > Funding Decision</p>
	<p>Step 2: In the Funding Decision page, click 'Master List' to view all applications. Funding decision is shown under the 'Status'.</p>
<p>3.1 (Optional) Click on the 'Report icon' to view the GRB/AP/RFAP Report.</p> <p>3.2 (Optional) Check the columns of Funding Amount, and due dates.</p>	<p>Step 3: In the Funding Decision page, click 'Fundable Application' to view fundable applications.</p>

4. Administrative Function – Create Account(s)

	<p>Step 1: Go to Administration > Administration of User Account > Create User</p>
<p>2a: (RO only) Create User Account</p> <p>2b: (DH/FO) Create Executive Officer Account</p> <p>Confirm</p> <p>Are you sure to create this user? (2a-iv) / (2b-iii)</p> <p>Yes No</p> <p>User with email [] is created</p>	<p>Step 2a: (RO only) (i) Select 'Authorised Role(s)'. (ii) Fill in all compulsory User's details. (iii) Click 'Save' to create user. (iv) Click 'Yes' for confirmation.</p> <p>Or Step 2b: (DH/FO) (i) Fill in all compulsory User's details. (ii) Click 'Save' to create user. (iii) Click 'Yes' for confirmation.</p> <p>(Remark: Email notification with login email and password will be sent to the EO(DH)/EO(FO). Each AI could create more than one EO account.)</p> <p>An acknowledgment message for the creation of user's account will be shown at the top.</p>

5. Administrative Function – Maintain User’s Profile

(The following functions are granted to RO only)

	<p>Step 1:</p> <p>Go to Administration > Administration of User Account> Maintain User Account</p>
	<p>Step 2:</p> <p>RO can preview a summary of accounts of his/her AI.</p> <p>- Click ‘Last name’ to view / edit account details for a particular account.</p>
	<p>Step 3:</p> <p>Note: The update of ‘Authorised Role(s)’ or ‘Account Status’ of a user must be completed by RFS. Please e-mail to: egmsenquiry@healthbureau.gov.hk.</p> <p>3.1 Click ‘Save’ to update user details.</p> <p>3.2 Click ‘Yes’ for confirmation.</p> <p>An acknowledgment message for ‘User Profile is updated’ will be shown at the top.</p>

Change User Details

(4.1)

User Details **Delegation of PA** Delegation of DH

Assign Delegate

Email

Start Date

End Date

Assign Delegate (4.3)

If your delegate is not an existing user in eGMS, please create a user.

Create Delegate

Delegation List (4.4)

Delegate Name	Email	Assigned Time	Delegate Period	Actions
				Edit <input type="button" value=""/>

If your delegate is not an existing user in eGMS, please create a user.

Create Delegate

Confirm

Are you sure to update delegation list?

(4.6)

Yes No

Delegation List

Delegate Name	Email	Assigned Time

(4.5)

Save

Delegation History (1 of 3)

Action Time	Action Performed	Delegate Name	Email	Delegate Period

(4.7)

Delegation list has been updated successfully.

Delegation List

Delegate Name	Email	Assigned Time	Delegate Period	Actions
			(5.4)	Edit <input type="button" value=""/>

Save

(5.5)

Edit

Start Date

End Date

Save

(5.3)

Su Mo Tu We Th Fr Sa

4 5 6 7 8 9 10

11 12 13 14 15 16 17

18 19 20 21 22 23 24

25 26 27 28

Confirm

Are you sure to update delegation list?

Yes No (5.6)

Delegation list has been updated successfully.

Step 4:

To view/update the Delegation of PA.

(For users authorised with PA Role only)

4.1 Select 'Delegation of PA'.

4.2 Fill in Assigned user's email and delegate period.

4.3 Click 'Assign Delegate'.

4.4 New record will show at 'Delegation List'.

4.5 Click 'Save' to save the 'Delegation List'.

4.6 Click 'Yes' for confirmation.

4.7 The update is recorded at 'Delegation History'.

An acknowledgment message for 'Delegation list has been updated successfully' will be shown at the top.

(Remark: If the delegate does not exist in eGMS, please go to Step 7 to create delegate (PA).)

Step 5:

To edit delegate of PA/DH.

5.1 Click 'Edit' at 'Delegation List'.

5.2 Select the 'Start Date' and 'End Date'.

5.3 Click 'Save'.


5.4 The 'Delegate Period' is updated.

5.5 Click 'Save'.

5.6 Click 'Yes' for confirmation.


An acknowledgment message for the update will be shown at the top.

Delegation List


Delegate Name	Email	Assigned Time	Delegate Period	Actions
				Edit 

(6.2) (6.1)

Confirm

 Are you sure to update delegation list?

(6.3)

 Delegation list has been updated successfully.

Step 6:

To delete delegate of PA/DH.

6.1 Click the 'Trash' icon. (*Record will be removed immediately on the screen after clicking 'Trash' icon.)

6.2 Click 'Save'.

6.3 Click 'Yes' for conformation.

An acknowledgment message for the update will be shown at the top.

Change User Details (7.1)

Assign Delegate

Email

Start Date

End Date

If your delegate is not an existing user in eGMS, please create an user.

(7.2)

Create Delegate

Authorised Role(s)

Email

Please provide institutional email account

Title

Last Name

First Name

Please enter the English name before the English translation of your Chinese name (e.g. David Tai-man).

Location of Administering Institution

Current Post

Unit / Department

AI

Room / Floor

Building

Street

Please enter number and name of street.

City / Area

Country / Region

Contact No.


Fax

Gender* Male Female


Information collected will be used for statistical purposes only.

(7.3-ii) (7.3-i)

Confirm

 Are you sure to create this user?

(7.3-iii)

 User with email [] is created

Step 7:

To create delegate (PA).

7.1 Select 'Delegation of PA'.

7.2 Click 'Create Delegate'.

7.3 Complete & save delegate's contact information:

- (i) Fill in all compulsory User's details.
- (ii) Click 'Save' to create user.
- (iii) Click 'Yes' for conformation.

(Remark: Email notification with login email and password will be sent to the delegate.)

An acknowledgment message for 'User is created' will be shown at the top.

Change User Details (8.1)

User Details Delegation of PA Delegation of DH

Assign Delegate

Email

Start Date

End Date

Assign Delegate (8.3)

If your delegate is not an existing user in eGMS, please create a user.

Create Delegate

Delegation List (8.4)

Delegate Name	Email	Assigned Time	Delegate Period	Actions
				Edit <input type="button" value=""/>

Create Delegate

Delegation List

Delegate Name	Email	Assigned Time	Delegate Period

Confirm

Are you sure to update delegation list?

Yes No

Save Export to CSV

Delegation History

(1 of 1) << 1 >> 20

Action Time	Action Performed	Delegate Name	Email	Delegate Period

Delegation list has been updated successfully.

Step 8:

To view/update the delegation of DH of a user.
(For users authorised with DH Role only)

8.1 Select 'Delegation of DH'.

8.2 Fill in Assigned user's email and delegate period.

8.3 Click 'Assign Delegate'.

8.4 The delegation details will be shown at 'Delegation List'.

8.5 Click 'Save' to save the 'Delegation List'.

8.6 Click 'Yes' for confirmation.

8.7 The update is recorded at 'Delegation History'.

An acknowledgment message for 'Delegation list has been updated successfully' will be shown at the top.

(Remark: If the delegate does not exist in eGMS, please refer to Step 9 to create delegate (DH).)

Change User Details

(9.1)

User Details Delegation of PA **Delegation of DH**

Assign Delegate

Email

Start Date

End Date

Assign Delegate

If your delegate is not an existing user in eGMS, please create an user.

Create Delegate (9.2)

Create Delegate

Authorised Role(s)	<input type="text" value="Please Select"/>	
Email	<input type="text"/>	<input type="button" value="Check email availability"/>
	Please provide institutional email account	
Title	<input type="text" value="Please Select"/>	
Last Name	<input type="text"/>	
First Name	<input type="text"/>	
Location of Administering Institution	Please enter the English name before the English translation of your Chinese name (e.g. David Tai-man).	
Current Post	China - Hong Kong	
Unit / Department	<input type="text"/>	
AI	The University A	
Room / Floor	<input type="text"/>	
Building	<input type="text"/>	
Street	<input type="text"/>	
	Please enter number and name of street.	
City / Area	<input type="text"/>	
Country / Region	China - Hong Kong	
Contact No.	<input type="text"/>	
Fax	<input type="text"/>	
Gender*	<input type="radio"/> Male <input type="radio"/> Female	

Information collected will be used for statistical purposes only.

Save (9.3-ii)

Confirm

⚠ Are you sure to create this user?

Yes (9.3-iii)

 User with email [] is created

Step 9:

To create delegate (DH).

9.1 Select 'Delegation of DH'.

9.2 Click 'Create Delegate'.

9.3 Complete & save delegate's contact information:

(i) Fill in all compulsory User's details.

(ii) Click 'Save' to create user.

(iii) Click 'Yes' for confirmation.

(Remark: Email notification with login email and password will be sent to the delegate.)

An acknowledgment message for 'User is created' will be shown at the top.

Delegation List

Delegate Name	Email	Assigned Time	Delegate Period	Actions
			(10.4)	<input type="button" value="Edit"/> <input type="button" value="Trash"/>

(10.5)

Edit

Start Date: (DD MM YYYY) (10.2)

End Date: (DD MM YYYY)

(10.3)

				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28			

Confirm

⚠ Are you sure to update delegation list?

(10.6)

i Delegation list has been updated successfully.

Delegation List

Delegate Name	Email	Assigned Time	Delegate Period	Actions
				<input type="button" value="Edit"/> <input type="button" value="Trash"/>

(11.2)

(11.1)

Confirm

⚠ Are you sure to update delegation list?

(11.3)

i Delegation list has been updated successfully.

Step 10:

To edit delegate of DH.

- 10.1 Click 'Edit'.
- 10.2 Select the 'start date' and 'end date'.
- 10.3 Click 'Save'.
- 10.4 The 'Delegate Period' is updated.
- 10.5 Click 'Save'.
- 10.6 Click 'Yes' for conformation.

An acknowledgment message for 'Delegation list has been updated successfully' will be shown at the top.

Step 11:

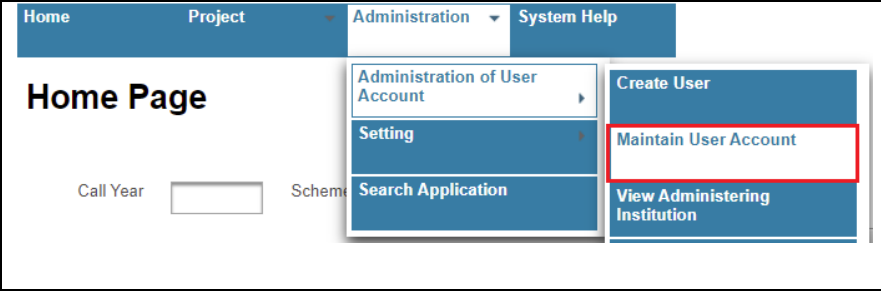
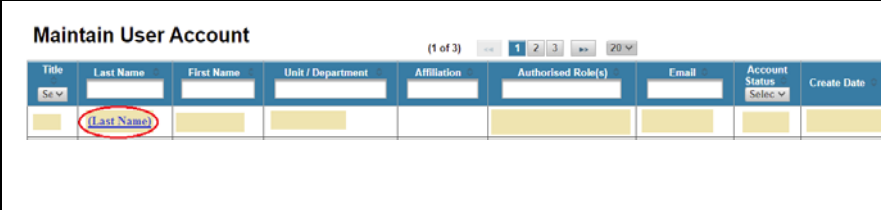
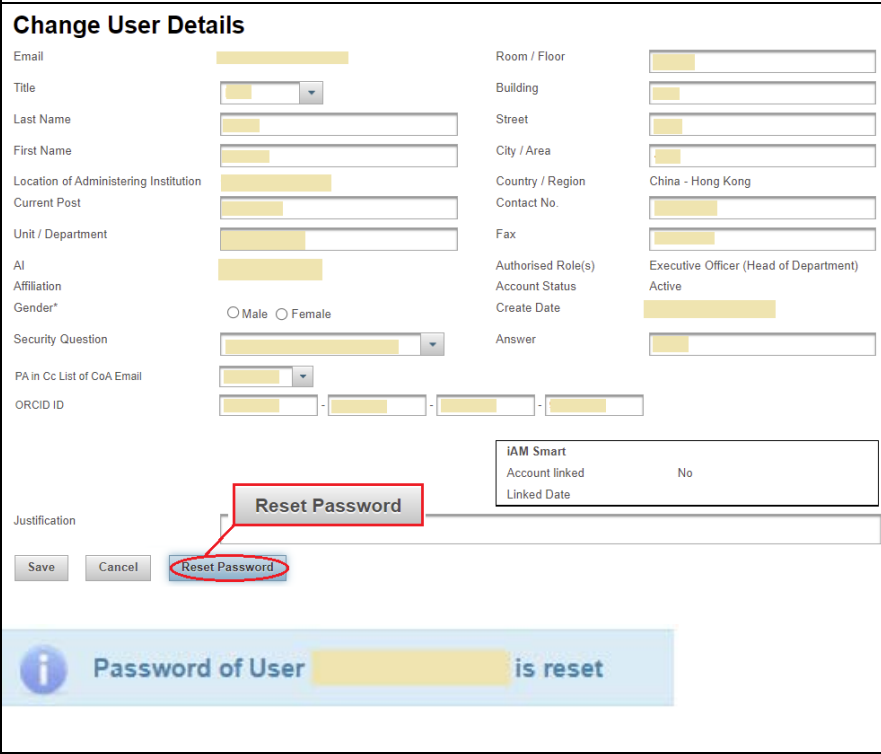
To delete delegate.

- 11.1 Click the 'Trash' icon. (*Record will be removed immediately on the screen after clicking 'Trash' icon.)
- 11.2 Click 'Save'.
- 11.3 Click 'Yes' for conformation.

An acknowledgment message for 'Delegation list has been updated successfully' will be shown at the top.

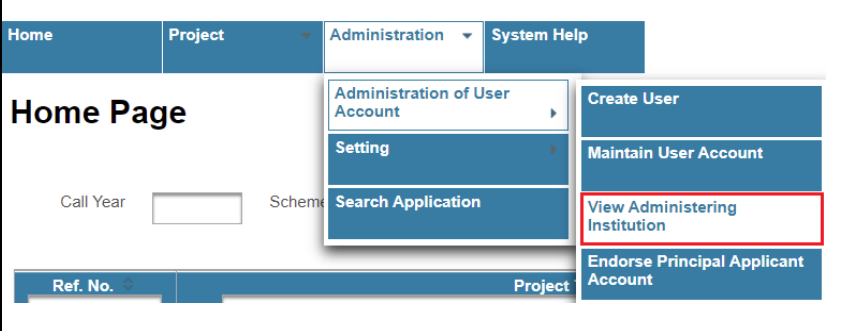
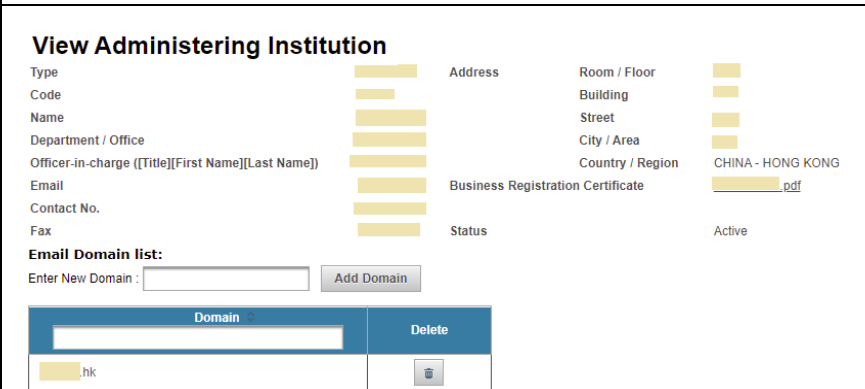
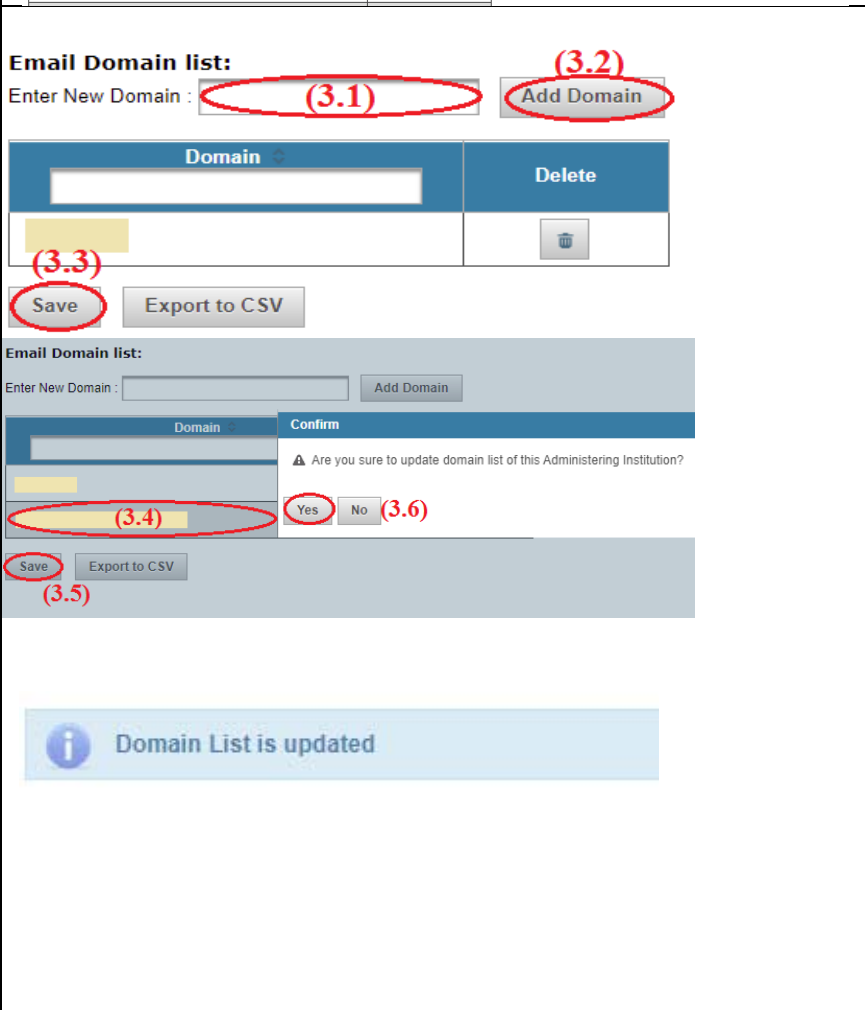
6. Administrative Function – Reset Password






(The following functions are granted to **RO** only)

	<p>Step 1: Go to Administration > Administration of User Account > Maintain User Account</p>
	<p>Step 2: Click ‘Last name’ to view/ edit account details.</p>
	<p>Step 3: Click ‘Reset Password’ for the user.</p> <p>An acknowledgment message for ‘Password of User is reset’ will be shown at the top.</p>
<p>Sample email for password reset: Subject: eGMS - Password Reset: (User’s Name) Please find the temporary password for accessing the electronic Grant Management System (eGMS): Password: (Insert temporary password) Login page: (eGMS URL) Please be reminded to set up a new password after logging in to the eGMS (eGMS URL). Thank you.</p>	<p>Step 4: Email notification for the new login password will be sent to user. Please click on the eGMS URL to go to the eGMS login page.</p>

7. Administrative Function – Maintain AI Profile - (email domains)

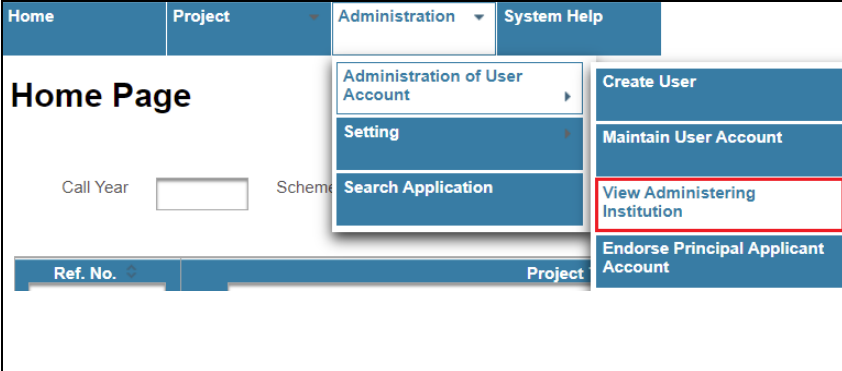
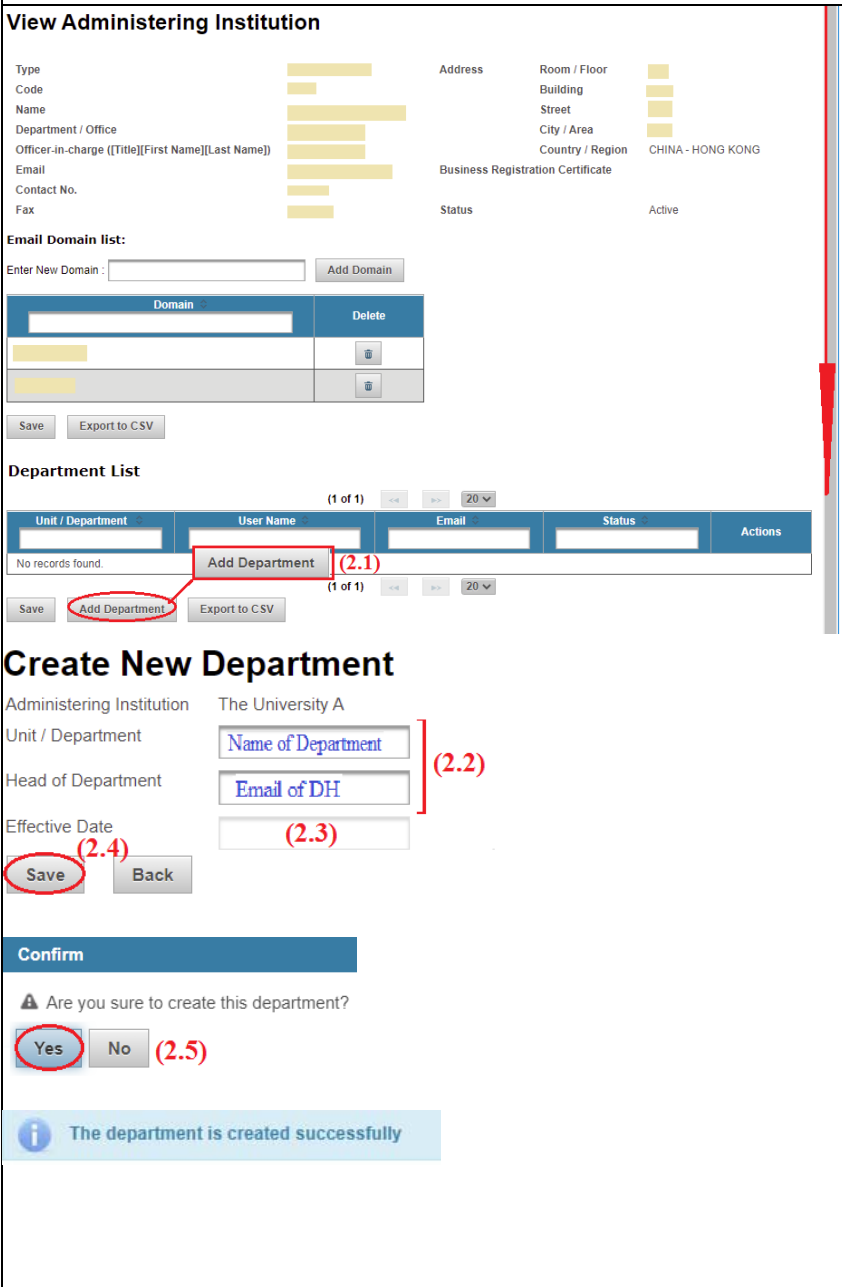
(The following functions are granted to **RO** only)

	<p>Step 1: Go to Administration > Administration of User Account > View Administering Institution</p>
	<p>Step 2: RO can preview information of his/her own AI.</p>
	<p>Step 3: (Optional) To Add email domains.</p> <p>3.1 Enter the new domain.</p> <p>3.2 Click ‘Add Domain’.</p> <p>3.3 Click ‘Save’.</p> <p>3.4 The new domain is shown at the ‘Email Domain list’.</p> <p>3.5 Click ‘Save’.</p> <p>3.6 Click ‘Yes’ for confirmation.</p> <p>An acknowledgment message for ‘Domain List is updated’ will be shown at the top.</p>

<p>Email Domain list:</p> <p>Enter New Domain : <input type="text"/> <input type="button" value="Add Domain"/></p> <table border="1"> <thead> <tr> <th data-bbox="209 293 715 360">Domain</th> <th data-bbox="715 293 903 360">Delete</th> </tr> </thead> <tbody> <tr> <td data-bbox="209 360 715 421"><input type="text"/></td> <td data-bbox="715 360 903 421"></td> </tr> </tbody> </table> <p>(4.2) <input type="button" value="Save"/> <input type="button" value="Export to CSV"/> (4.1)</p> <p>Confirm</p> <p> Are you sure to update domain list of this Administering Institution?</p> <p><input type="button" value="Yes"/> <input type="button" value="No"/> (4.3)</p> <p> Domain List is updated</p>	Domain	Delete	<input type="text"/>		<p>Step 4: To delete email domain.</p> <p>4.1 Click the 'Trash' icon. (*Record will be removed immediately on the screen after clicking 'Trash' icon.)</p> <p>4.2 Click 'Save'.</p> <p>4.3 Click 'Yes' for confirmation.</p> <p>An acknowledgment message for 'Domain List is updated' will be shown at the top.</p>
Domain	Delete				
<input type="text"/>					

8. Administrative Function – Maintain AI Profile - (Department List)

(The following functions are granted to **RO** only)

	<p>Step 1: To maintain the list of departments and department heads. Go to Administration > Administration of User Account > View Administering Institution</p>
	<p>Step 2: To add department.</p> <p>2.1 Click 'Add Department' under 'Department List'.</p> <p>2.2 Fill in the name of department, email of DH, and effective date (if necessary).</p> <p>2.3 If 'Effective Date' is not entered, the role of 'Head of Department' will be assigned immediately.</p> <p>2.4 Click 'Save'.</p> <p>2.5 Click 'Yes' for confirmation.</p> <p>An acknowledgment message for 'The department is created successfully' will be shown at the top.</p>

Department List (1 of 1) << 1 >> 20

Unit / Department	User Name	Email	Status	Actions
				<input type="button" value="Edit"/> <input type="button" value="Trash"/>

(1 of 1) << 1 >> 20

Edit Department

Administering Institution

Unit / Department

Status

Head of Department

New Head of Department (3.2)

Email

Effective Date

Change current Head of Department immediately

(3.3)

Confirm

⚠ Are you sure to save this department?

(3.4)

i The department is updated successfully

Step 3:
To edit Department List.

3.1 Click 'Edit'.

3.2 Update the Department details and enter email of new DH and effective date (if necessary).
If 'Effective Date' is not entered, the role of 'Head of Department' will be assigned immediately.

3.3 Click 'Save'.

3.4 Click 'Yes' for confirmation.

An acknowledgment message for 'The department is updated successfully' will be shown at the top.

Department List (1 of 1) << 1 >> 20

Unit / Department	User Name	Email	Status	Actions
				<input type="button" value="Edit"/> <input type="button" value="Trash"/>

(4.2) (1 of 1) << 1 >> 20 (4.1)

Confirm

⚠ Are you sure to update department list?

(4.3)

i The department list is updated

Step 4:
To delete department.

4.1 Click the 'Trash' icon.
(*Record will be removed immediately on the screen after clicking 'Trash' icon.)

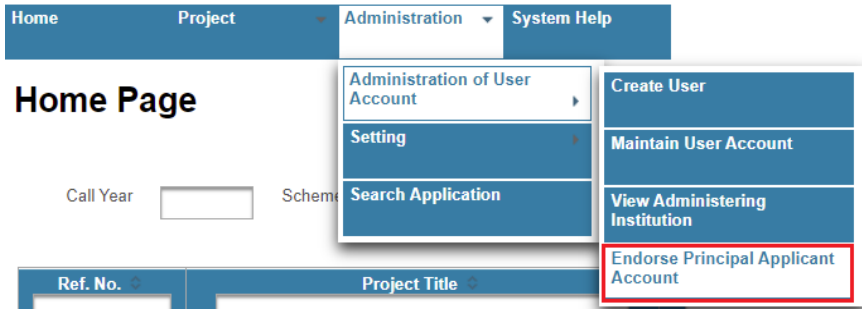
4.2 Click 'Save'.

4.3 Click 'Yes' for confirmation.

An acknowledgment message for 'The department list is updated' will be shown at the top.

9. Administrative Function - Endorsement of Principal Applicant (PA) Account

(The following functions are granted to RO only)

<p>Subject: eGMS - Account Endorsement for Principal Applicant</p> <p>Dear (Title) (Last Name) (The contact person of RO as recorded in eGMS),</p> <p>Principal Applicant (PA) of your Administering Institution has registered to open a PA account in the electronic Grant Management System (eGMS) of the Research Fund Secretariat, Health Bureau, HKSAR. Please login to the eGMS (eGMS URL) to endorse it.</p> <p>Thank you.</p>	<p>Step 1: Email notification will be sent to RO for endorsement of a PA account.</p> <p>Please click on the eGMS URL to go to the eGMS login page.</p>										
	<p>Step 2: Go to Administration > Administration of User Account > Endorse Principal Applicant Account</p>										
<p>Endorse Principal Applicant Account</p> <p>(1 of 1) 1 20</p> <table border="1"> <thead> <tr> <th>Title</th> <th>Last Name</th> <th>First Name</th> <th>Email</th> <th>Unit / Department</th> </tr> </thead> <tbody> <tr> <td>Select</td> <td>(Last Name) (3.1)</td> <td></td> <td></td> <td></td> </tr> </tbody> </table> <p>Endorse Principal Applicant Account</p> <p>Email: [Redacted] Title: [Redacted] Last Name: [Redacted] First Name: [Redacted] Current Post: [Redacted] Unit / Department: [Redacted] AI: [Redacted] Room / Floor: [Redacted] Building: [Redacted] Street: [Redacted] City / Area: [Redacted] Country / Region: CHINA - HONG KONG Contact No.: [Redacted] Fax: [Redacted] ORCID ID: [Redacted] Gender*: <input type="radio"/> Male <input checked="" type="radio"/> Female</p> <p>(3.2-i) Endorse (3.2-ii) Reject</p> <p>Confirm ⚠ Endorse this user account ? (3.2-i) Yes No</p> <p>or</p> <p>Confirm ⚠ Reject this user account ? (3.2-ii) Yes No</p>	Title	Last Name	First Name	Email	Unit / Department	Select	(Last Name) (3.1)				<p>Step 3:</p> <p>3.1 Click 'Last name' to review PA's details.</p> <p>3.2 To endorse. (Optional) (i) Click 'Endorse' and 'Yes' for confirmation.</p> <p>Or</p> <p>To reject. (Optional) (ii) Click 'Reject' and 'Yes' for confirmation.</p>
Title	Last Name	First Name	Email	Unit / Department							
Select	(Last Name) (3.1)										

Endorse Principal Applicant Account

 Endorsement is completed. Email notification will be sent to 

[Endorse Principal Applicant List](#)

or

Endorse Principal Applicant Account

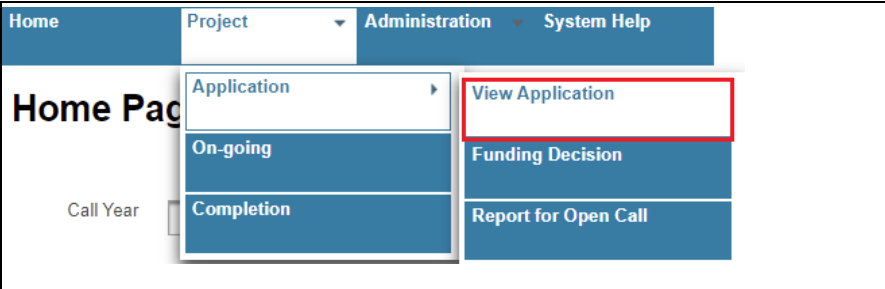
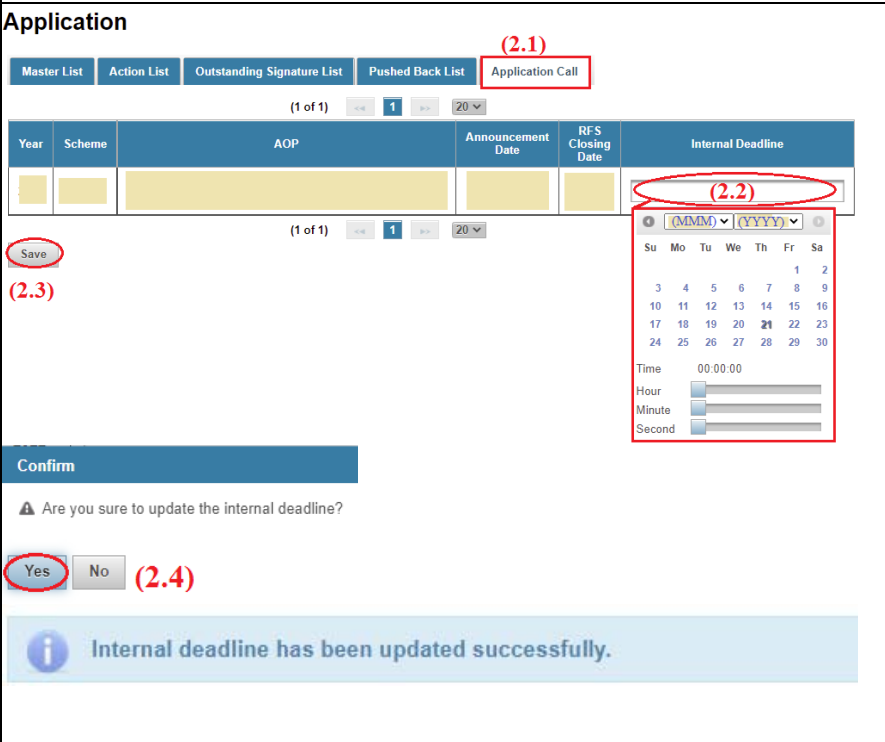
 Registration for PA role was rejected. Email notification will be sent to 

[Endorse Principal Applicant List](#)

An acknowledgment message for the endorsement/reject will be shown at the top.

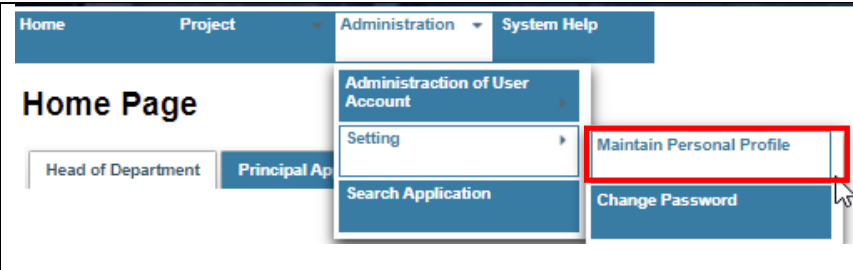
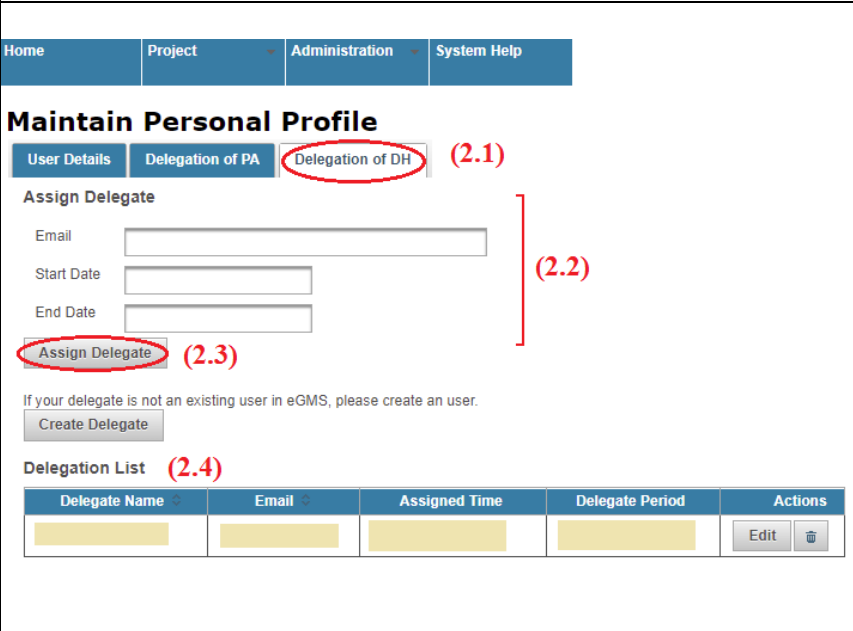
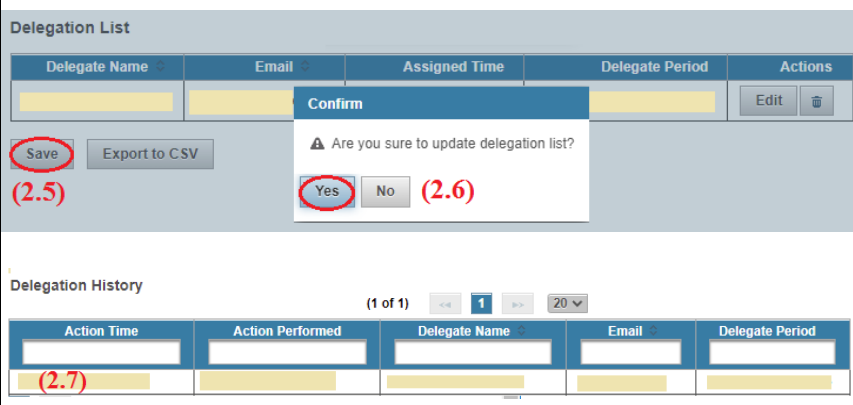
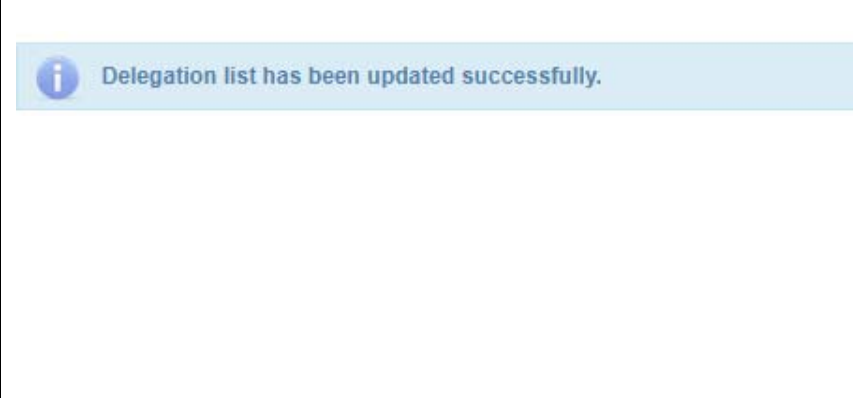
10. Administrative Function – Maintain Internal Deadline for Open Call

(The following functions are granted to **RO** only)


	<p>Step 1: Go to Project > Application > View Application</p>
	<p>Step 2: To update Internal Deadline.</p> <p>2.1 Click ‘Application Call’ to view current open call.</p> <p>2.2 Fill in the internal deadline.</p> <p>2.3 Click ‘Save’.</p> <p>2.4 Click ‘Yes’ for confirmation.</p> <p>An acknowledgment message for ‘Internal deadline has been updated successfully’ will be shown at the top.</p>

11. Administrative Function – Delegation of DH

(The following function is granted to **DH** only)

 <p>Home Project Administration System Help</p> <p>Administration of User Account</p> <ul style="list-style-type: none"> Setting Maintain Personal Profile Search Application Change Password 	<p>Step 1: Go to Administration > Setting > Maintain Personal Profile</p>																				
 <p>Home Project Administration System Help</p> <h3>Maintain Personal Profile</h3> <p>User Details Delegation of PA Delegation of DH (2.1)</p> <p>Assign Delegate</p> <p>Email: <input type="text"/></p> <p>Start Date: <input type="text"/></p> <p>End Date: <input type="text"/></p> <p>Assign Delegate (2.3)</p> <p>If your delegate is not an existing user in eGMS, please create an user. Create Delegate</p> <p>Delegation List (2.4)</p> <table border="1"> <thead> <tr> <th>Delegate Name</th> <th>Email</th> <th>Assigned Time</th> <th>Delegate Period</th> <th>Actions</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td></td> <td></td> <td>Edit <input type="button" value=""/></td> </tr> </tbody> </table>	Delegate Name	Email	Assigned Time	Delegate Period	Actions					Edit <input type="button" value=""/>	<p>Step 2: To view/update the delegation of DH of a user. (For users authorised with DH Role only)</p> <p>2.1 Click 'Delegation of DH'.</p> <p>2.2 Fill in Assigned user's email and delegate period.</p> <p>2.3 Click 'Assign Delegate'.</p> <p>2.4 The delegation details will be shown at 'Delegation List'. (DH can assign more than one delegate.)</p>										
Delegate Name	Email	Assigned Time	Delegate Period	Actions																	
				Edit <input type="button" value=""/>																	
 <p>Delegation List</p> <table border="1"> <thead> <tr> <th>Delegate Name</th> <th>Email</th> <th>Assigned Time</th> <th>Delegate Period</th> <th>Actions</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td></td> <td></td> <td>Edit <input type="button" value=""/></td> </tr> </tbody> </table> <p>Save (2.5) Export to CSV</p> <p>Confirm: Are you sure to update delegation list? Yes (2.6) No</p> <p>Delegation History (1 of 1)</p> <table border="1"> <thead> <tr> <th>Action Time</th> <th>Action Performed</th> <th>Delegate Name</th> <th>Email</th> <th>Delegate Period</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table> <p>(2.7)</p>	Delegate Name	Email	Assigned Time	Delegate Period	Actions					Edit <input type="button" value=""/>	Action Time	Action Performed	Delegate Name	Email	Delegate Period						<p>2.5 Click 'Save' to save the 'Delegation List'.</p> <p>2.6 Click 'Yes' for confirmation.</p> <p>2.7 The update is recorded at 'Delegation History'.</p>
Delegate Name	Email	Assigned Time	Delegate Period	Actions																	
				Edit <input type="button" value=""/>																	
Action Time	Action Performed	Delegate Name	Email	Delegate Period																	
 <p>Delegation list has been updated successfully.</p>	<p>An acknowledgment message for 'Delegation list has been updated successfully' will be shown at the top. (Remark: If the delegate does not exist in eGMS, please go to Step 5 to create delegate (DH).)</p>																				

Delegation List

Delegate Name	Email	Assigned Time	Delegate Period	Actions
			(3.4)	<input type="button" value="Edit"/> 

Edit

Start Date: (DD MM YYYY) (3.2)

End Date: (DD MM YYYY) (3.2)

(3.3)


				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28			

(3.5)

Confirm

⚠ Are you sure to update delegation list?

(3.6)

 Delegation list has been updated successfully.

Step 3:
To edit delegate of DH.

3.1 Click 'Edit'.

3.2 Select the 'start date' and 'end date'.

3.3 Click 'Save'.

3.4 The 'Delegate Period' is updated.

3.5 Click 'Save'.

3.6 Click 'Yes' for conformation.

An acknowledgment message for 'Delegation list has been updated successfully' will be shown at the top.

Delegation List


Delegate Name	Email	Assigned Time	Delegate Period	Actions
				<input type="button" value="Edit"/> <input type="button" value="Trash"/>

(4.2)

Confirm

⚠ Are you sure to update delegation list?

(4.3)

 Delegation list has been updated successfully.

Step 4:
To delete delegate.

4.1 Click the 'Trash' icon.
(*Record will be removed immediately on the screen after clicking 'Trash' icon.)

4.2 Click 'Save'.

4.3 Click 'Yes' for conformation.

An acknowledgment message for 'Delegation list has been updated successfully' will be shown at the top. will be shown at the top.

Maintain Personal Profile

User Details

Delegation of PA

Delegation of DH

Assign Delegate

(5.1)

Email

Start Date

End Date

Assign Delegate

If your delegate is not an existing user in eGMS, please create an user.

Create Delegate (5.2)

Create Delegate

Authorised Role(s)

Email

Please provide institutional email account

Title

Last Name

First Name

Location of Administering Institution

Current Post

Unit / Department

AI

Room / Floor

Building

Street

Please enter the English name before the English translation of your Chinese name (e.g. David Tai-man).

City / Area

Please enter number and name of street.

Country / Region

Contact No.

Fax

Gender* Male Female

Information collected will be used for statistical purposes only.

(5.3-i)

Save Back (5.3-ii)

Confirm

⚠ Are you sure to create this user?

Yes No (5.3-iii)

 User with email [] is created

Step 5:
To create delegate (DH).

5.1 Select 'Delegation of DH'.

5.2 Click 'Create Delegate'.

5.3 Complete & Save delegate's contact information:

(i) Fill in all compulsory User's details.

(ii) Click 'Save' to create user.

(iii) Click 'Yes' for confirmation.

(Remark: Email notification with login email and password will be sent to the delegate.)

An acknowledgment message for 'User is created' will be shown at the top.