Training Guide for Dashboard

IGMS

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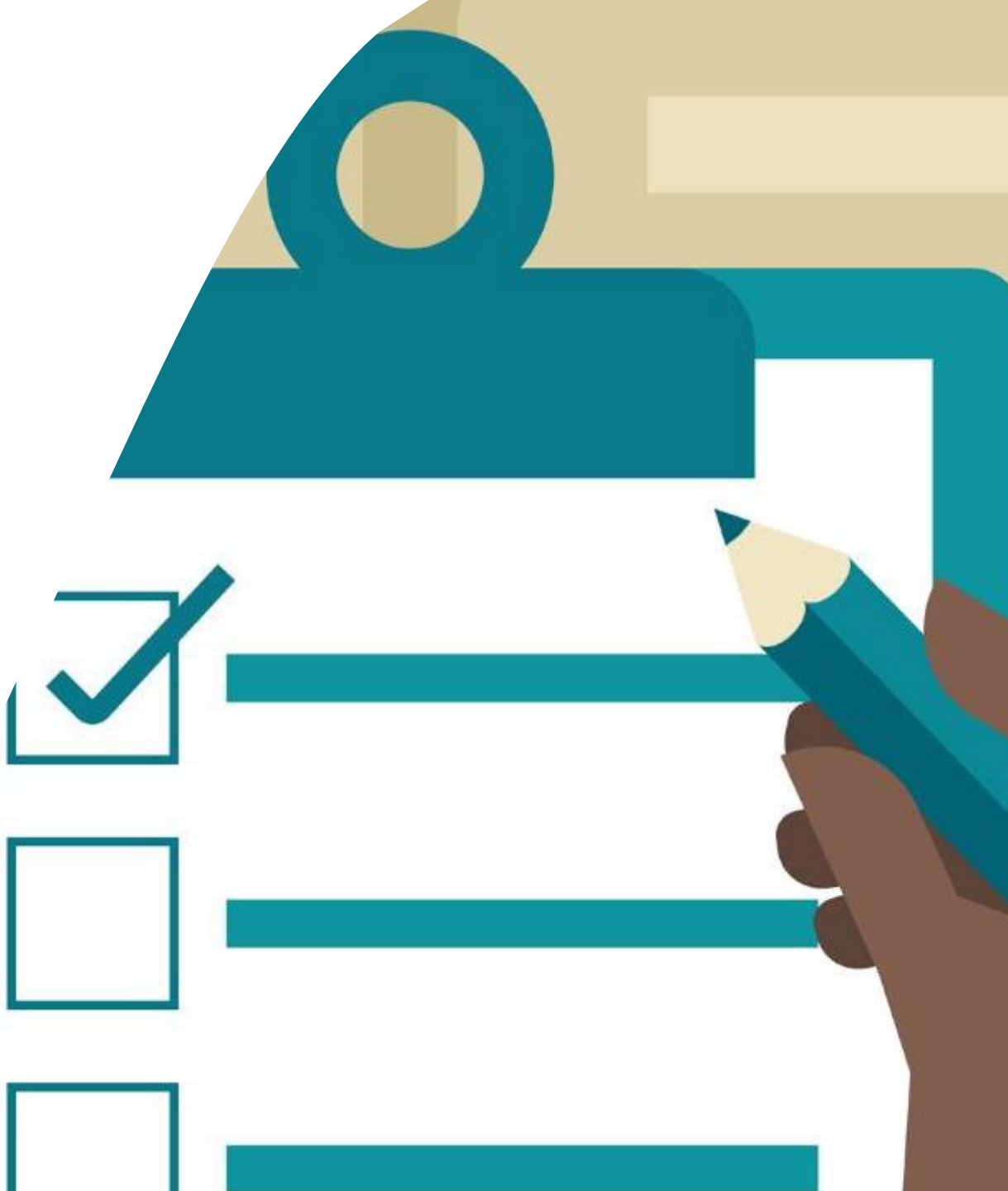
Learning Objectives

In this session, you will learn:

- Module -1: Understand IGMS dashboard components
- Module -2: How to use dashboard for portal users (IGMS website users)
- Module -3: How to use dashboard for IGMS AX (Backend)
- Module -4: How to personalize IGMS AX(Backend) dashboard components.



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Module -1: Understand IGMS dashboard components

- Overview of IGMS dashboard components
- Definitions, Acronyms and Abbreviations

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Overview of IGMS dashboard components

The IGMS dashboard is designated for researchers and grant managers who are involved in NRF, MOH, MOE and A*STAR grants.

IGMS dashboard is designed for quick access to pending action items for researchers, ORE, DOR and PMs using IGMS system

IGMS dashboard components are split into three major types

a. Activities
b. Work Items
c. Reports

For Portal users, only one dashboard component, **Work Items,** are applicable

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Definitions, Acronyms and Abbreviations

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

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Module -2: How to use dashboard for portal users (IGMS website users)

- Overview of dashboard for portal users
- Navigation and Sorting on dashboard page

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Overview of Dashboard Page for portal users

To Note

Portal users are PI, ORE, DOR, AI ORE, AI DOR, HI Admin, AI DOR, HI HR, HI Fin

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Integrated Grant Management System (IGMS)

https://researchgrant.gov.sg/

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Overview of Dashboard Page for portal users

The Dashboard lists the Work Items, which indicates pending action items for users. There are 2 sections, Proposals and Projects.

Navigation and sorting on dashboard page

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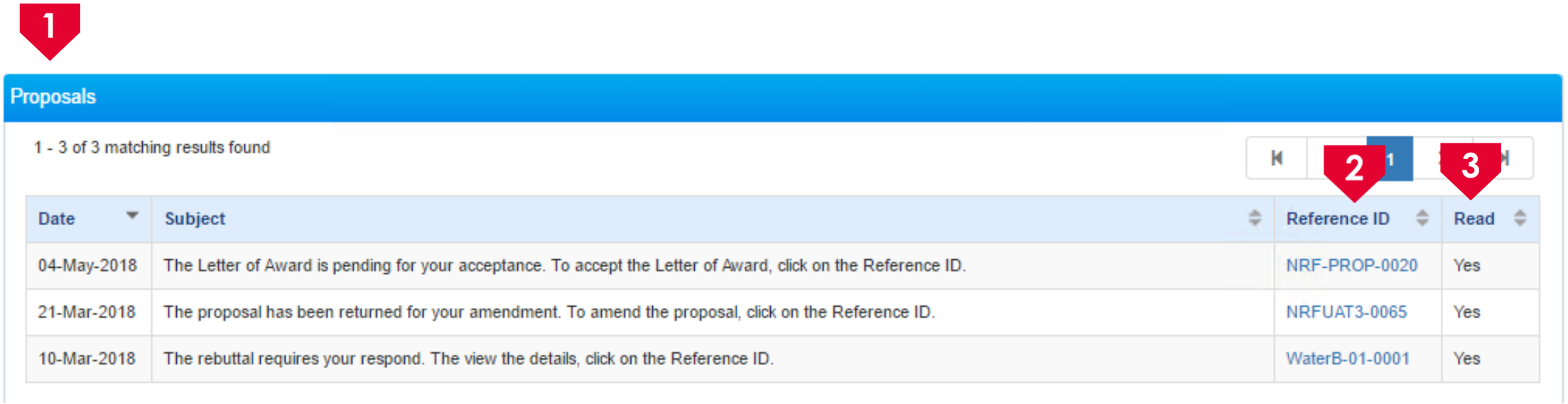
Navigation and sorting on dashboard page

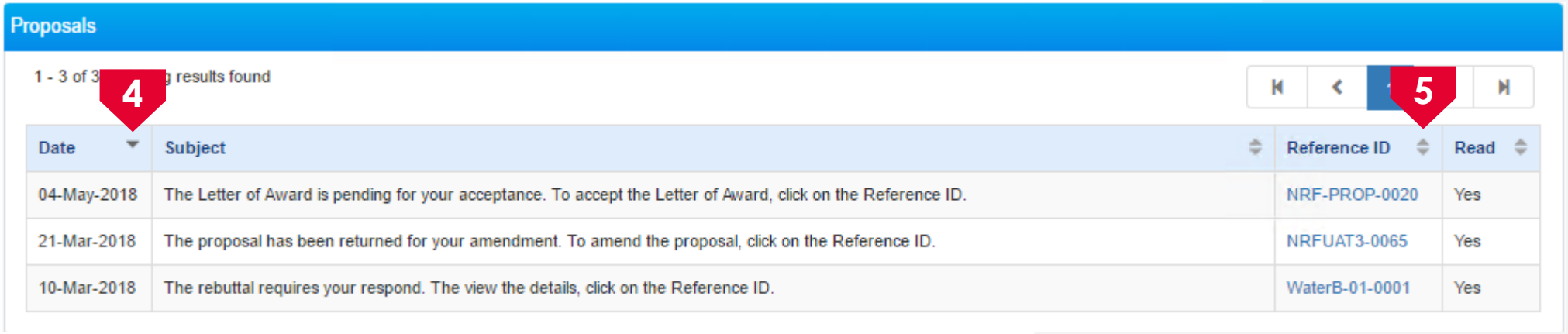


1 Navigate to Proposal/Project section.

2 Click on reference ID to navigate to pending Work Item record, where the approval or action item needs to be performed.

3 The Read flag will change to Yes once the user has clicked on the notification item. Default value for this read column is No.

Navigation and sorting on dashboard page



4 To sort the items by Date, click **the arrow**.

5 To sort the items by Reference ID click **the arrow**.

Module -3: How to use dashboard for IGMS AX (Backend)

- Overview of IGMS AX dashboard.
- How to access IGMS AX dashboard.
- Navigation and Sorting on dashboard page.
- How to apply filter or select parameters on dashboard reports.

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Overview of IGMS AX dashboard

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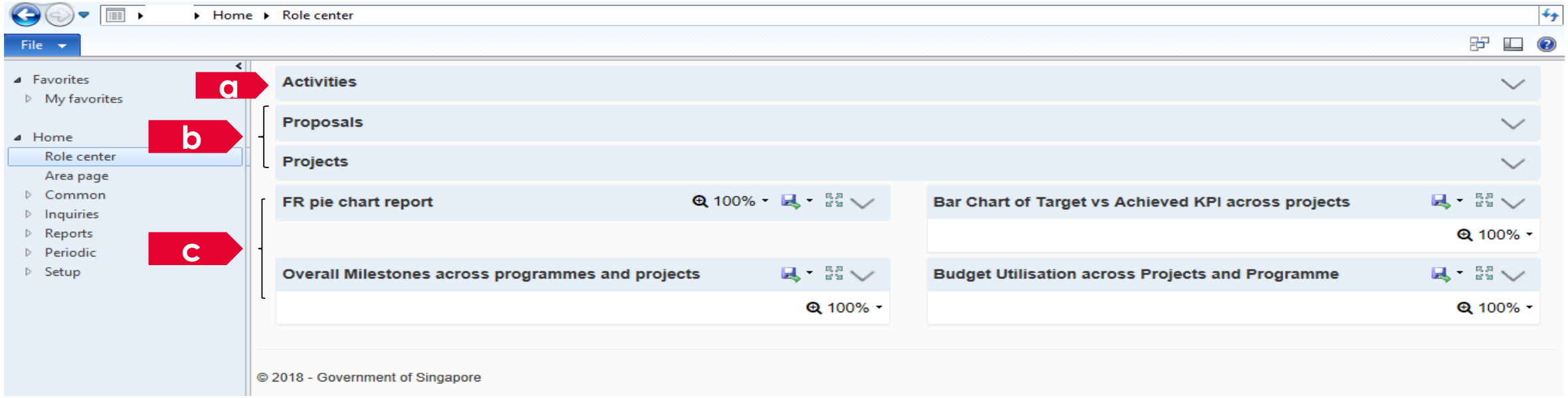
Overview of IGMS AX dashboard

The IGMS AX dashboard is designed for grant managers who are involved in NRF, MOH, MOE and A*STAR grants.



IGMS dashboard Components are split into three major types

a. Activities
b. Work Items
c. Reports

How to access IGMS AX dashboard

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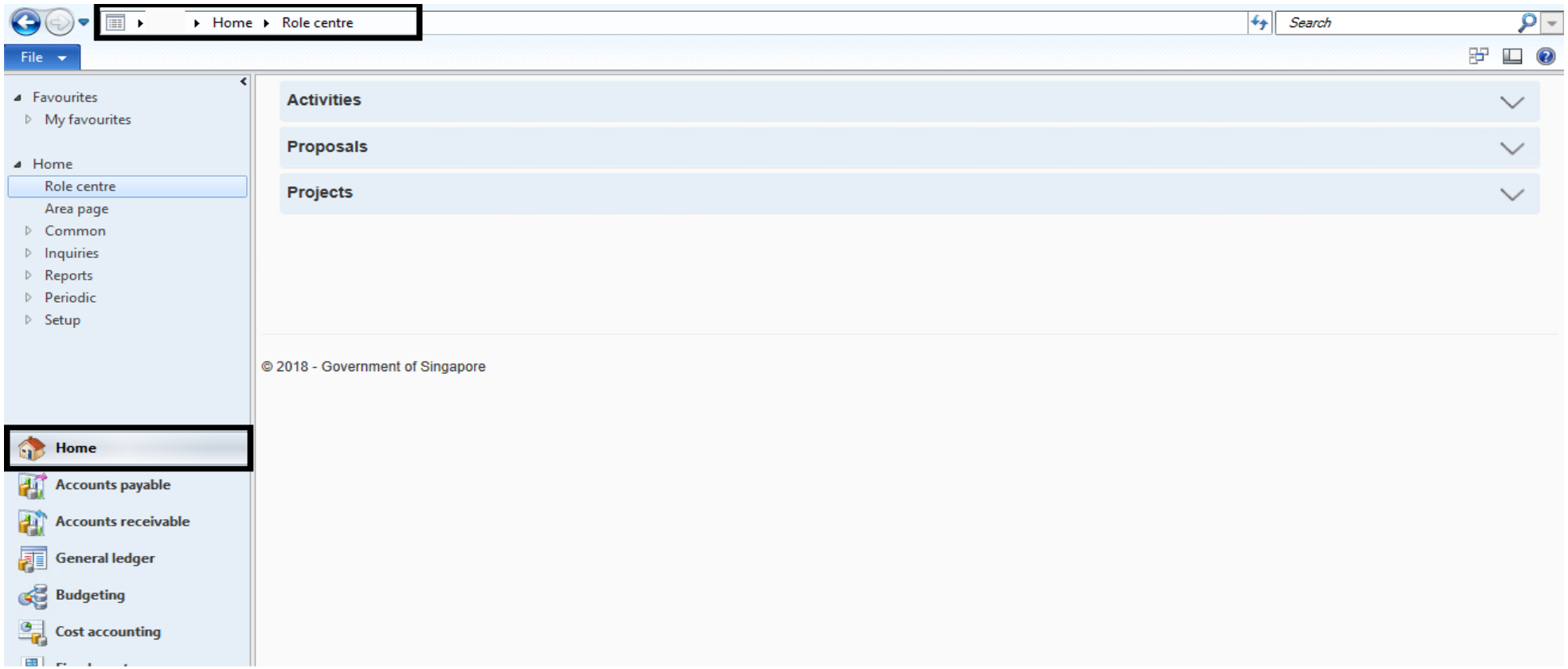
How to access IGMS AX dashboard

1



1

1 Navigate:- <Agency Name> -> Home -> Role centre or click on the navigation pane Home icon.

Navigation and sorting on IGMS AX dashboard page

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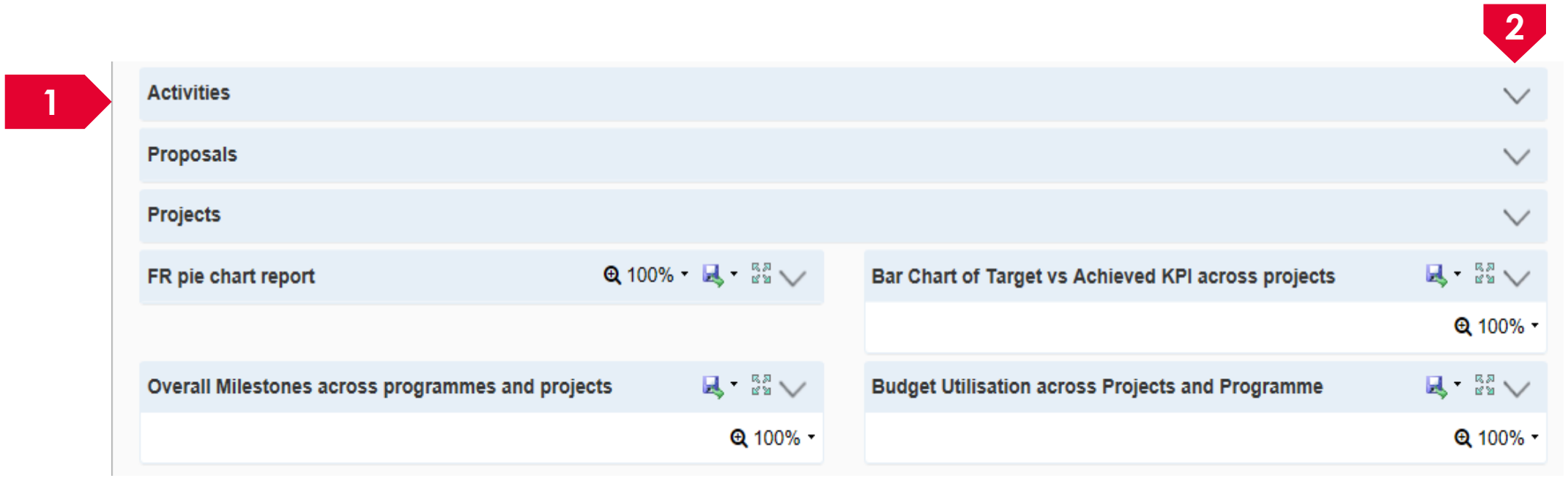
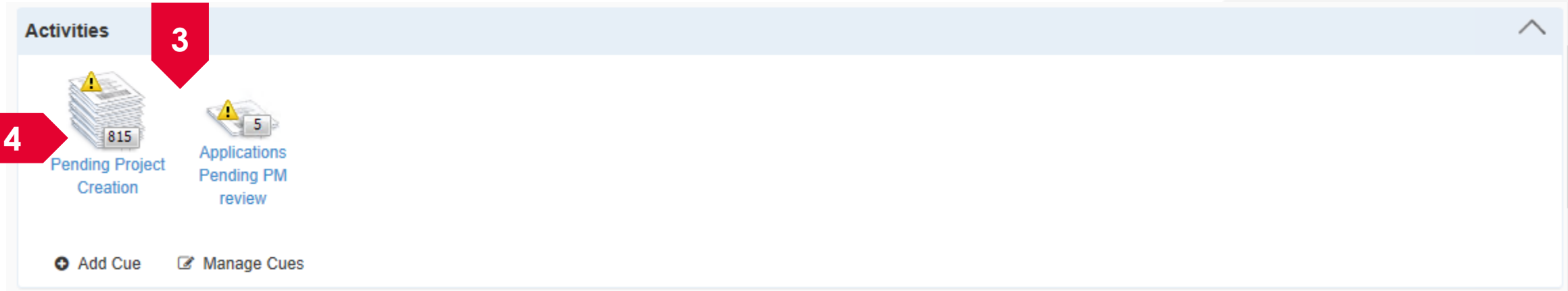
Navigation on IGMS AX dashboard



1 To view the section details, select the section.

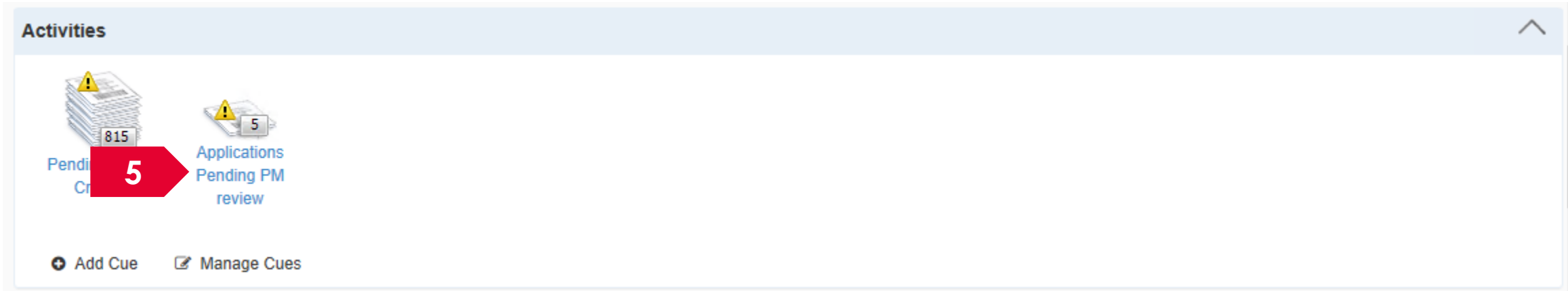
2 Click on the arrow to expand the section to view activities created on dashboard page.

Activities on IGMS AX dashboard



3 The Activities dashboard contains cues which have been created by the user. For first time usage, this section will be empty for the user to create their own cues.

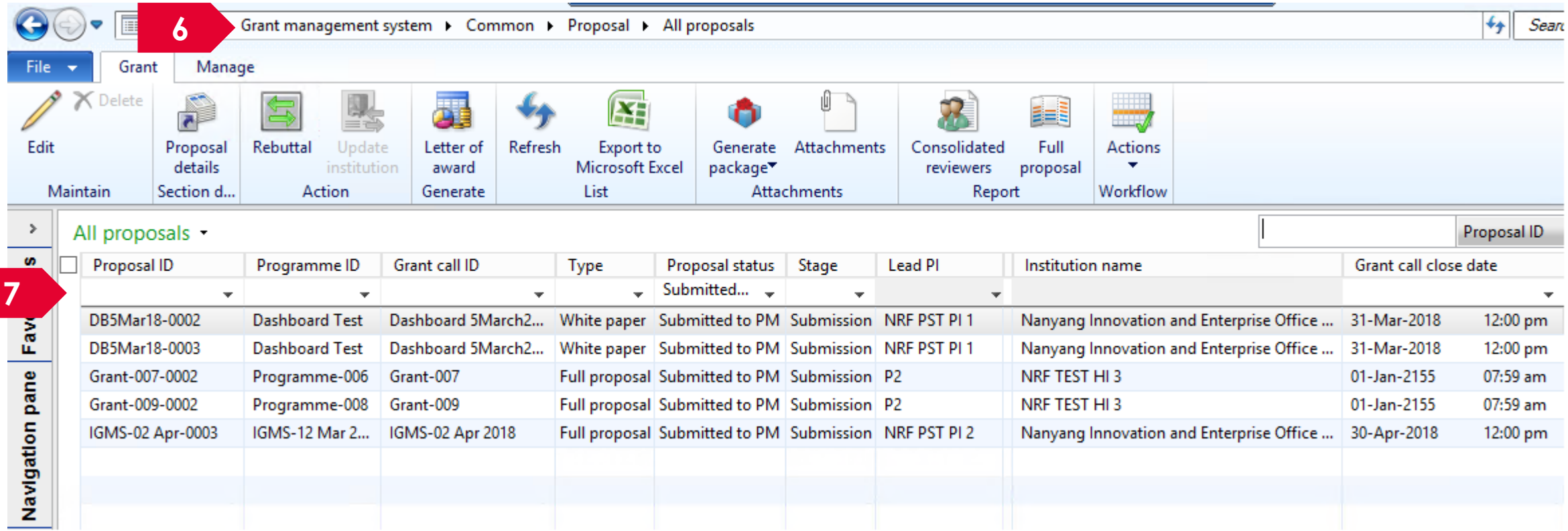
4 The number indicates pending items for user's review and necessary action.



5 Click on the cue name to view the details of the items and actions available. The system will route the user to the respective transaction/form.

To Note

Refer to Module 4 for the steps on managing the Activity cues.

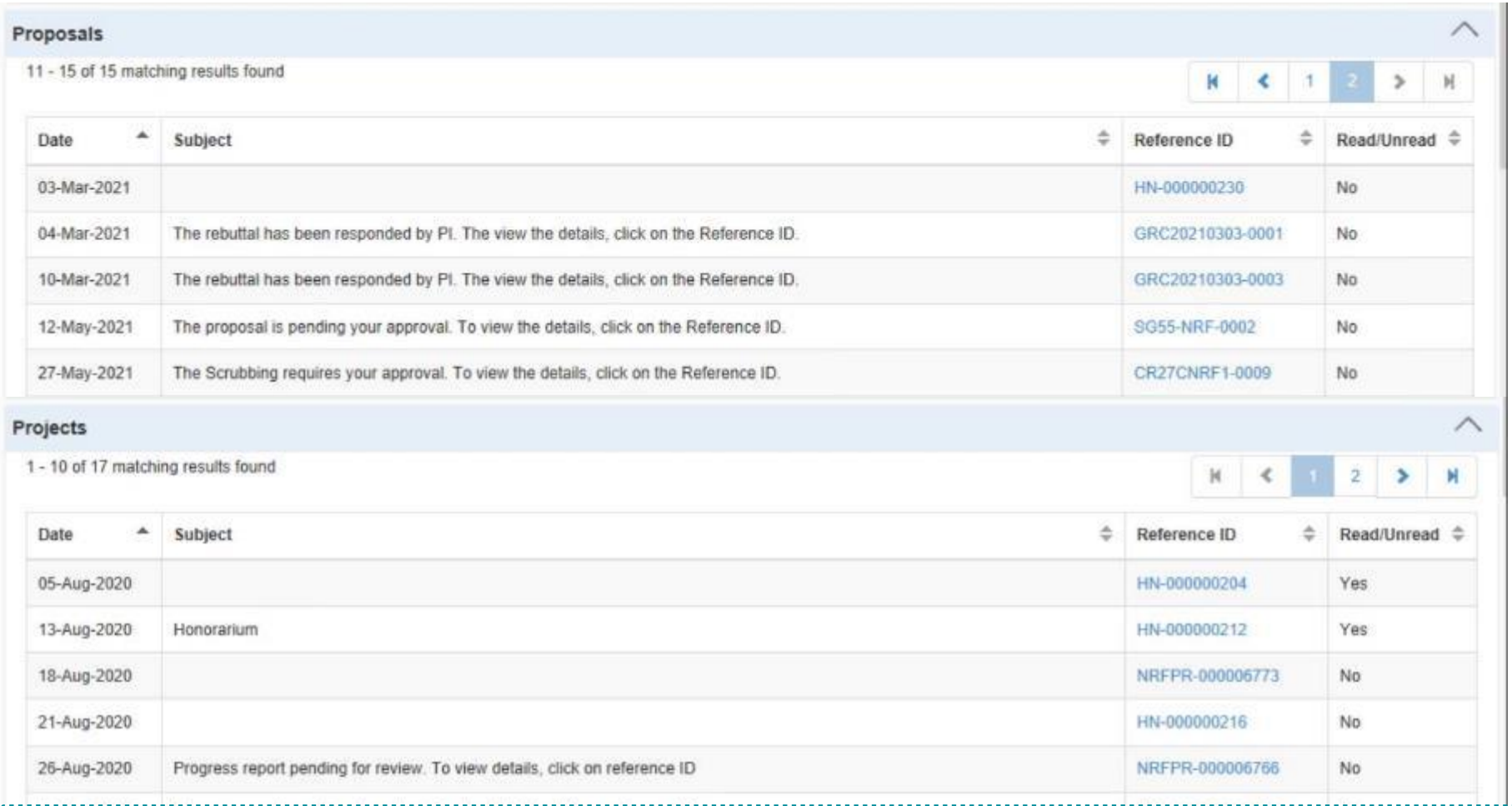


6 Upon clicking on the Activity Name, system will direct user to the relevant page in AX. For example, when user clicks "Applications Pending PM review", system will open the "All proposals" form.

7 Activities can also be set with multiple filter criteria on each form. Type in the filter box to filter the contents of the grid.

Work items on IGMS AX dashboard

1



Proposals

11 - 15 of 15 matching results found

Date	Subject	Reference ID	Read/Unread
03-Mar-2021		HN-000000230	No
04-Mar-2021	The rebuttal has been responded by PI. The view the details, click on the Reference ID.	GRC20210303-0001	No
10-Mar-2021	The rebuttal has been responded by PI. The view the details, click on the Reference ID.	GRC20210303-0003	No
12-May-2021	The proposal is pending your approval. To view the details, click on the Reference ID.	SG55-NRF-0002	No
27-May-2021	The Scrubbing requires your approval. To view the details, click on the Reference ID.	CR27CNRF1-0009	No

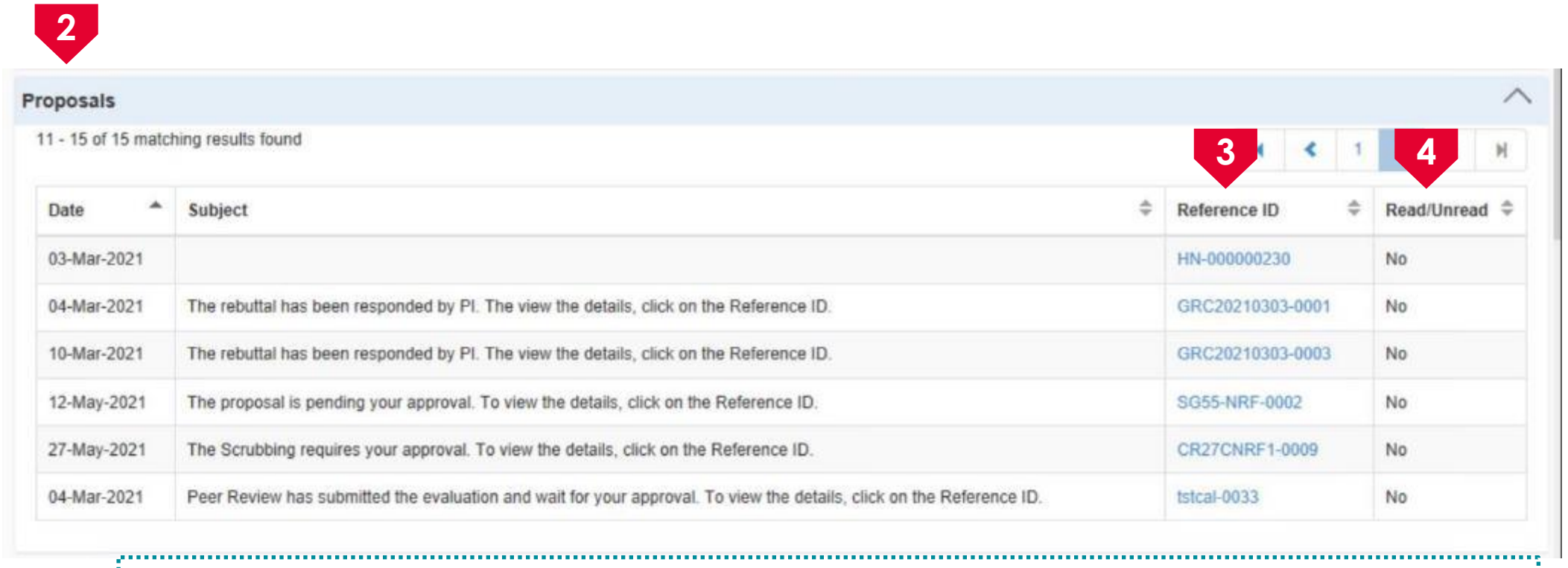
Projects

1 - 10 of 17 matching results found

Date	Subject	Reference ID	Read/Unread
05-Aug-2020		HN-000000204	Yes
13-Aug-2020	Honorarium	HN-000000212	Yes
18-Aug-2020		NRFPR-000006773	No
21-Aug-2020		HN-000000216	No
26-Aug-2020	Progress report pending for review. To view details, click on reference ID	NRFPR-000006766	No

1

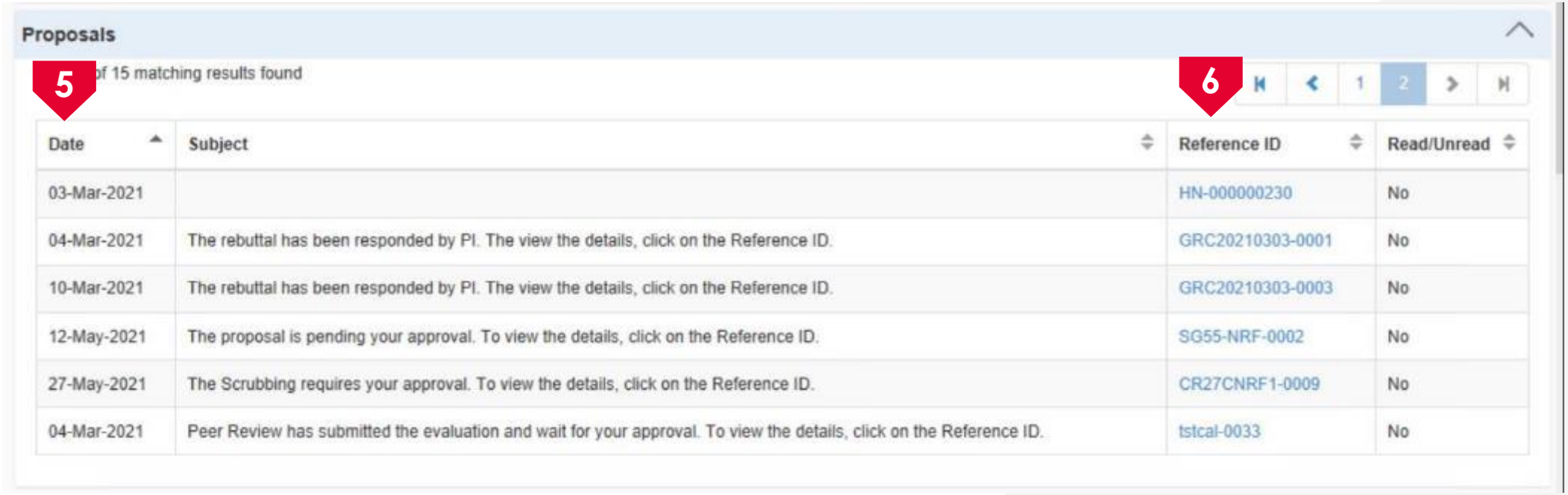
The Dashboard lists the Work Items and notifications which indicate the pending action items for the user.
There are 2 sections, Proposals and Projects.



2 Navigate to project/proposal section.

3 Click on reference ID to navigate to the pending Work Item record, where the approval or action item needs to be performed.

4 The Read flag will change to Yes once the user has clicked on the notification item. Default value for this read column is No.



5 To sort by Date click **the arrow**.

6 To sort by Reference ID click **the arrow**.

Dashboard reports on IGMS AX dashboard

There are different Dashboard reports available for each role.

Below are the reports by roles.

PM Reports
Pie chart of outstanding fund requests across cost centre/ domain
Overall milestones across programmes and projects
Bar chart of target vs Achieved KPI across Projects
Budget utilisation across programmes and projects

Agency Finance Reports
Pie chart of outstanding fund requests across cost centre/ domain
Pie chart of outstanding fund requests across HI
Budget utilisation across programmes and projects
Overall budget utilisation across domains and programmes

Directorate Reports
Budget utilisation across programmes and projects
Bar chart of target vs Achieved KPI across Projects
Overall milestones across programmes and projects
Overall KPI across programmes
Overall budget utilisation across domains and programmes
Pie chart of outstanding fund requests across cost centre/ domain
Pie chart of outstanding fund requests across HI

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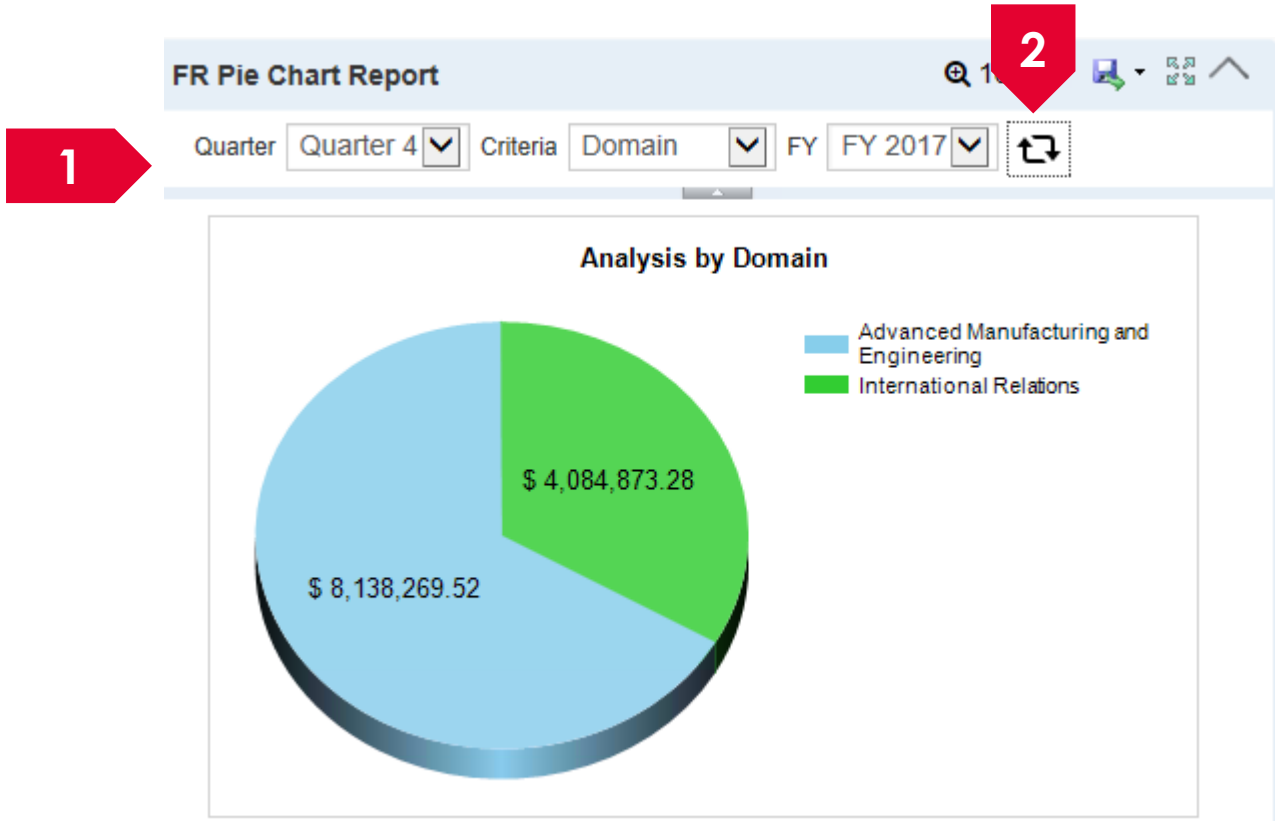
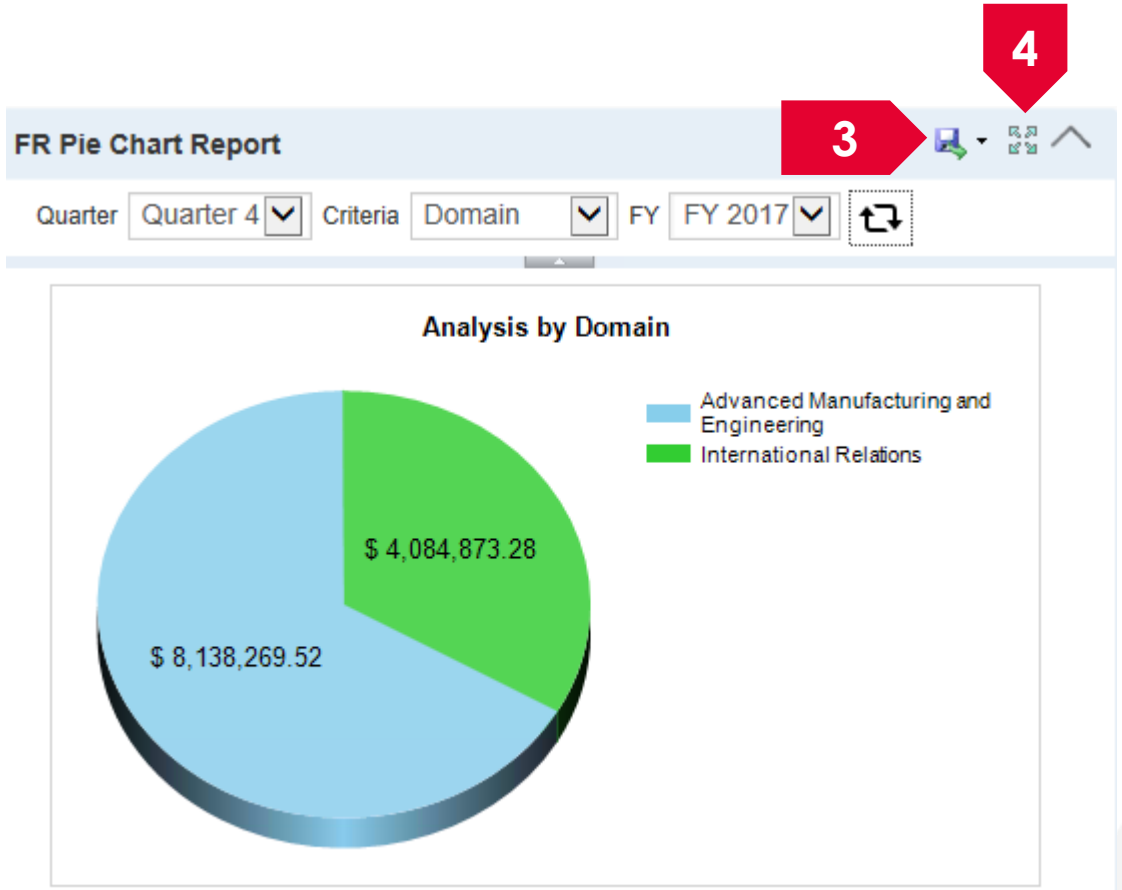


1 Select the desired criteria.

2 Click **here**. System will generate chart on dashboard

To Note

Each report on dashboard has different set of criteria selection



3 Click **here** to save to other format supported

4 Click **here**. Report section will be expanded to bigger view.

Module -4: How to personalize IGMS AX dashboard

- Personalize activities

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Personalize activities

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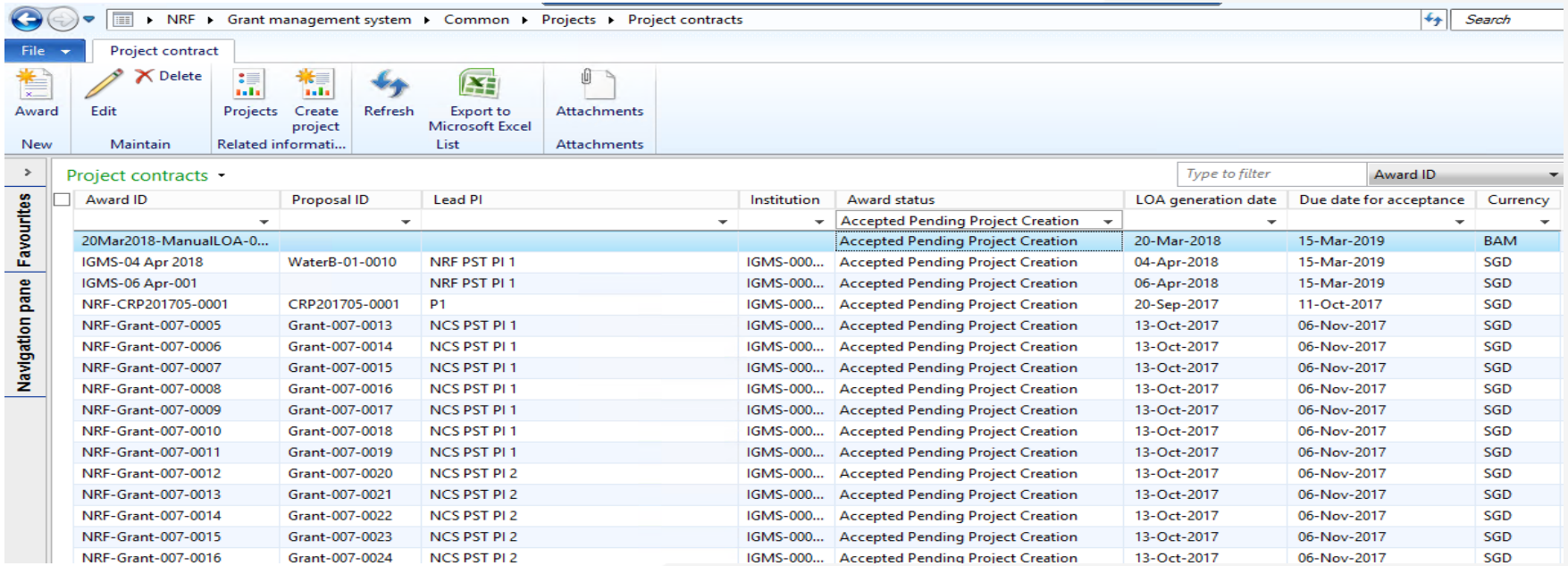
Personalize activities

User can Add, Edit, Remove and Rename cues under Activities

Add an Activity cue

1. Navigate to any form on AX (backend) system.

2. Example:- Navigate to Agency Name->Grant Management System ->Common->Projects->Project contracts



Award ID	Proposal ID	Lead PI	Institution	Award status	LOA generation date	Due date for acceptance	Currency
				Accepted Pending Project Creation			
20Mar2018-ManualLOA-0...				Accepted Pending Project Creation	20-Mar-2018	15-Mar-2019	BAM
IGMS-04 Apr 2018	WaterB-01-0010	NRF PST PI 1	IGMS-000...	Accepted Pending Project Creation	04-Apr-2018	15-Mar-2019	SGD
IGMS-06 Apr-001		NRF PST PI 1	IGMS-000...	Accepted Pending Project Creation	06-Apr-2018	15-Mar-2019	SGD
NRF-CRP201705-0001	CRP201705-0001	P1	IGMS-000...	Accepted Pending Project Creation	20-Sep-2017	11-Oct-2017	SGD
NRF-Grant-007-0005	Grant-007-0013	NCS PST PI 1	IGMS-000...	Accepted Pending Project Creation	13-Oct-2017	06-Nov-2017	SGD
NRF-Grant-007-0006	Grant-007-0014	NCS PST PI 1	IGMS-000...	Accepted Pending Project Creation	13-Oct-2017	06-Nov-2017	SGD
NRF-Grant-007-0007	Grant-007-0015	NCS PST PI 1	IGMS-000...	Accepted Pending Project Creation	13-Oct-2017	06-Nov-2017	SGD
NRF-Grant-007-0008	Grant-007-0016	NCS PST PI 1	IGMS-000...	Accepted Pending Project Creation	13-Oct-2017	06-Nov-2017	SGD
NRF-Grant-007-0009	Grant-007-0017	NCS PST PI 1	IGMS-000...	Accepted Pending Project Creation	13-Oct-2017	06-Nov-2017	SGD
NRF-Grant-007-0010	Grant-007-0018	NCS PST PI 1	IGMS-000...	Accepted Pending Project Creation	13-Oct-2017	06-Nov-2017	SGD
NRF-Grant-007-0011	Grant-007-0019	NCS PST PI 1	IGMS-000...	Accepted Pending Project Creation	13-Oct-2017	06-Nov-2017	SGD
NRF-Grant-007-0012	Grant-007-0020	NCS PST PI 2	IGMS-000...	Accepted Pending Project Creation	13-Oct-2017	06-Nov-2017	SGD
NRF-Grant-007-0013	Grant-007-0021	NCS PST PI 2	IGMS-000...	Accepted Pending Project Creation	13-Oct-2017	06-Nov-2017	SGD
NRF-Grant-007-0014	Grant-007-0022	NCS PST PI 2	IGMS-000...	Accepted Pending Project Creation	13-Oct-2017	06-Nov-2017	SGD
NRF-Grant-007-0015	Grant-007-0023	NCS PST PI 2	IGMS-000...	Accepted Pending Project Creation	13-Oct-2017	06-Nov-2017	SGD
NRF-Grant-007-0016	Grant-007-0024	NCS PST PI 2	IGMS-000...	Accepted Pending Project Creation	13-Oct-2017	06-Nov-2017	SGD

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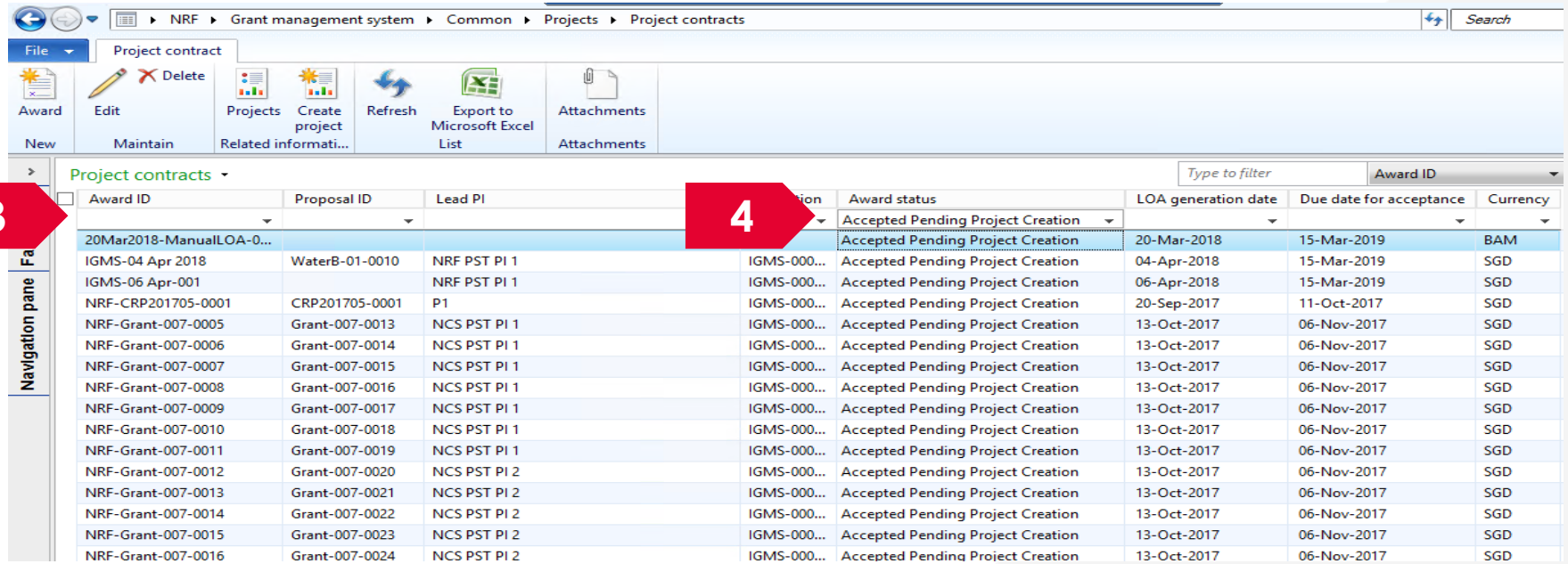
3 Apply filter on the grid level, Click shortcut CTRL + G.



4 Select the value to be filtered. Any number of filters can be applied on the same grid selection before creating a cue.

To Note

In this example, the filter applied on status field and the status selected is Accepted pending project creation

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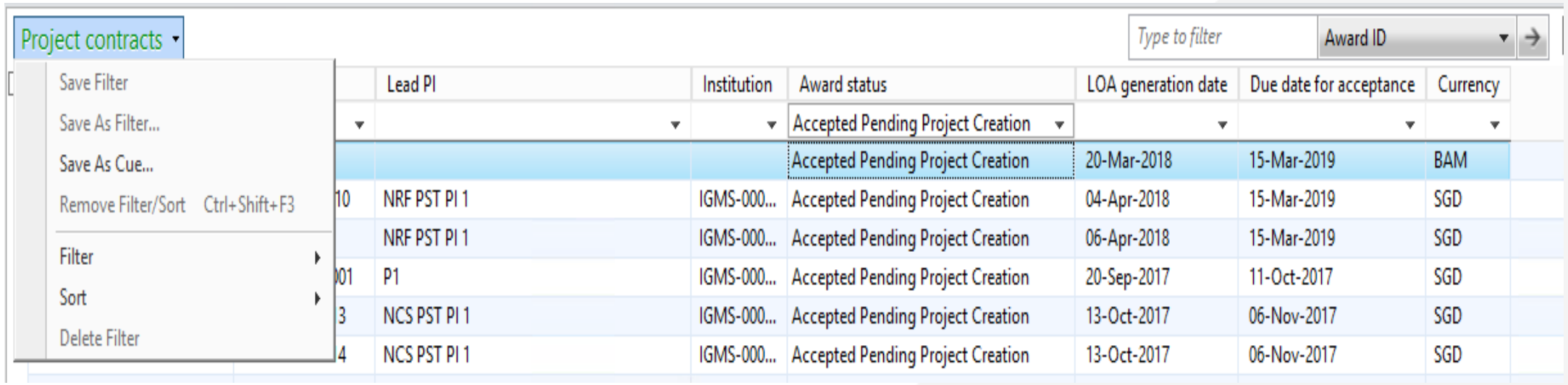
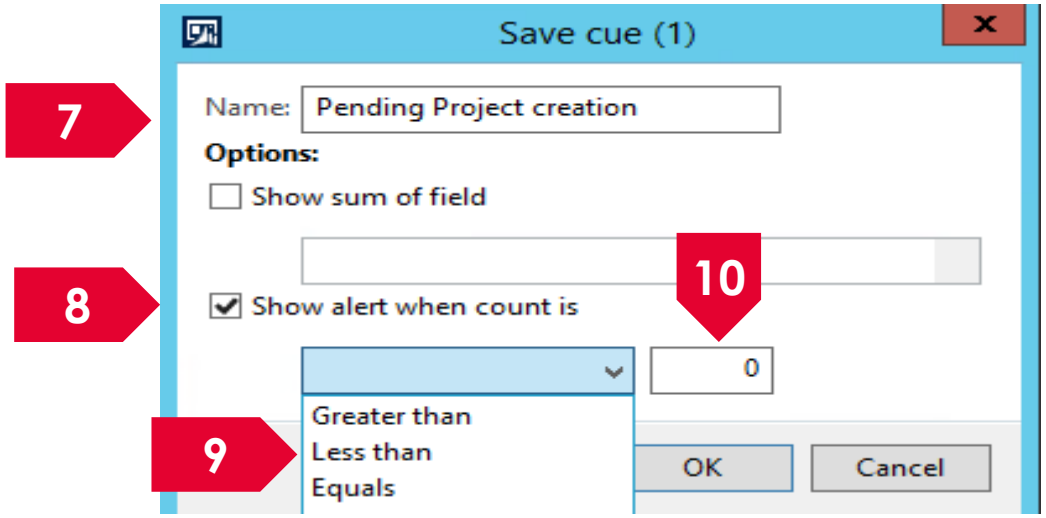


5 Click **Here.** In this example, project contracts

6 Click **Here.** Save as Cue

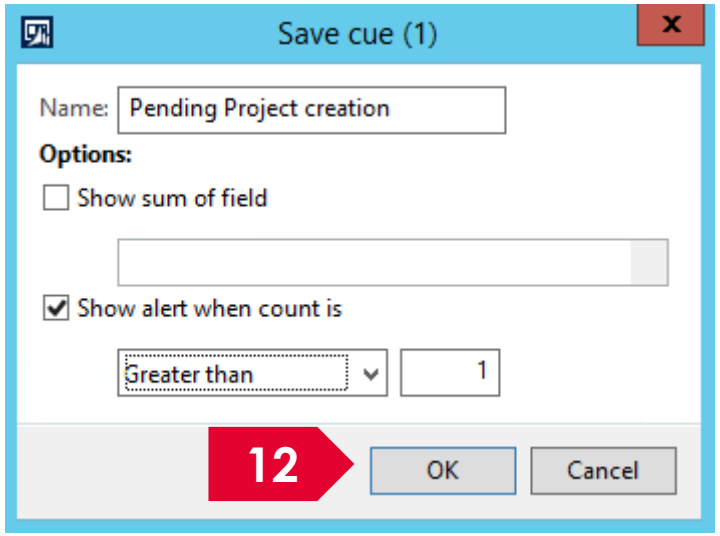


7 Enter the preferred name to be displayed on the dashboard for this cue

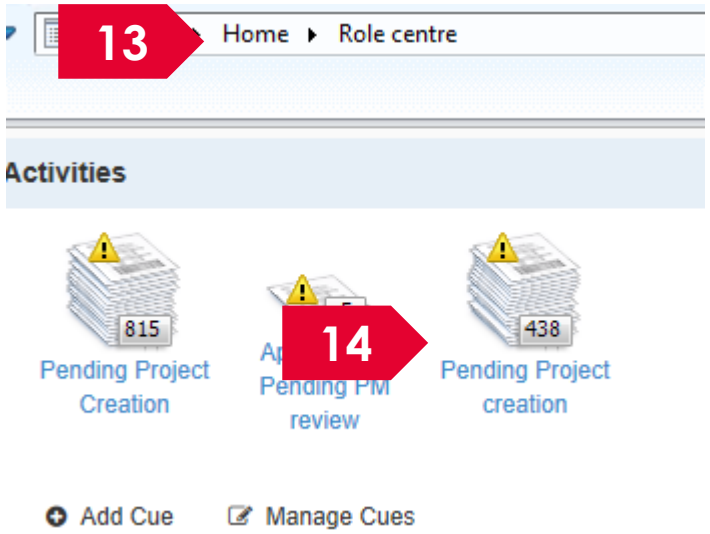
8 Select the option Show alert when count is

9 Select the preferred criteria

10 Enter the number of record count to be set as alert count



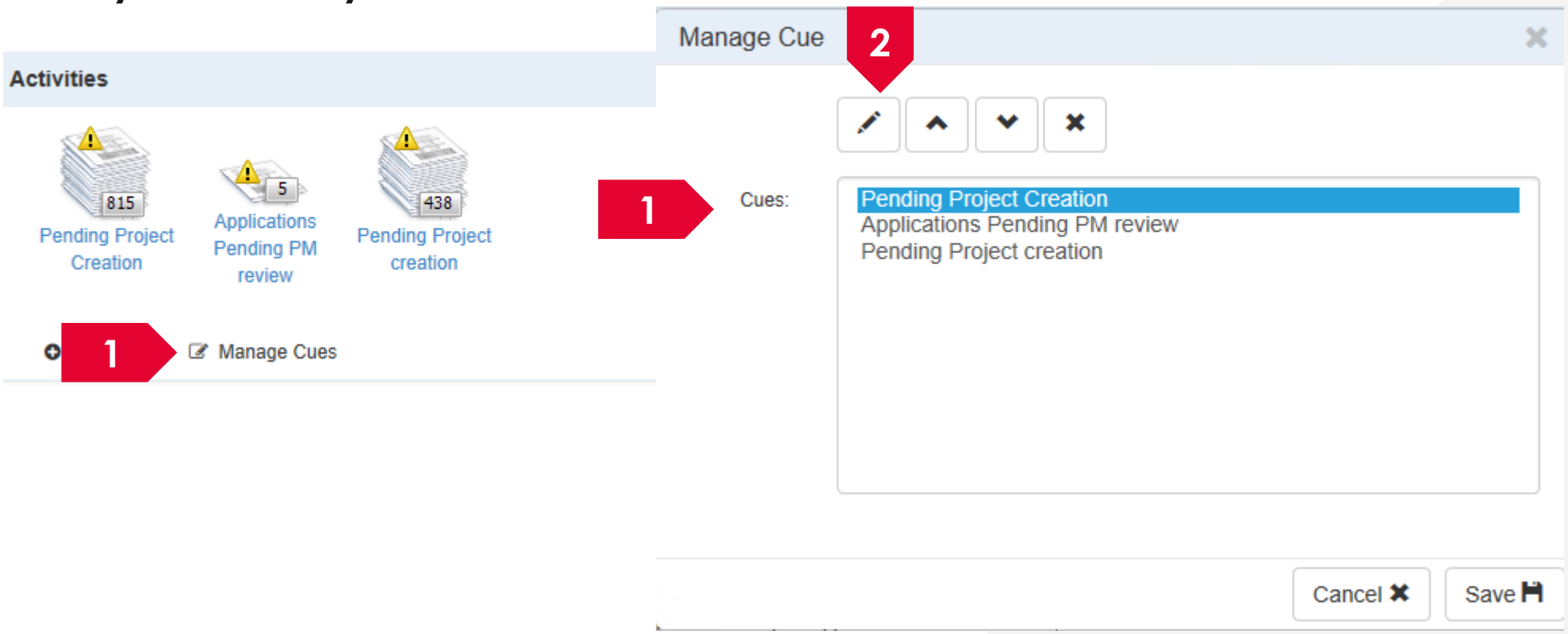
12 Click OK to save the cue.



13 Navigate to Home page and click on F5 to refresh the page.

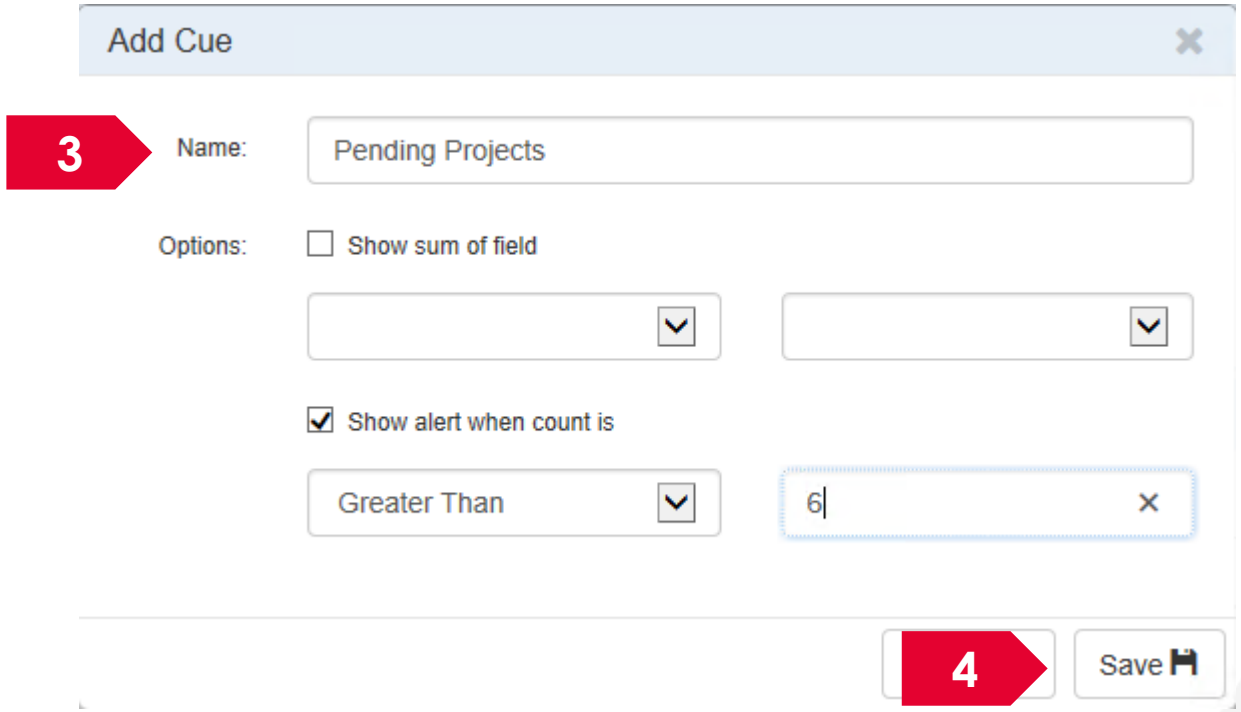
14 Upon refresh, the new cue will be displayed with the relevant count of transactions.

Modify an Activity Cue



1. Click Manage Cues. Select the activity that requires update

2. Click the "pen" icon to edit the cue name or to change the count to be displayed.



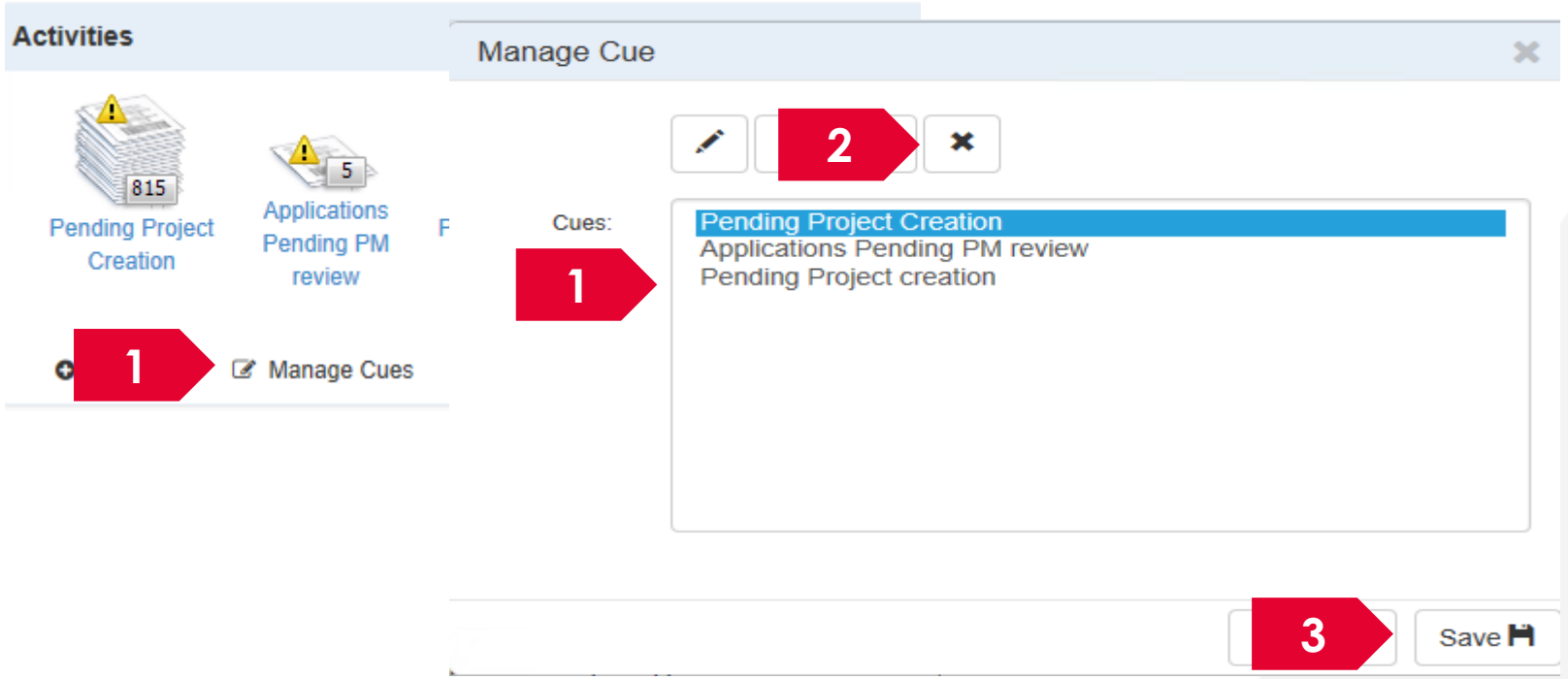
To Note

For any changes on the dashboard, click F5 or refresh icon to reflect recent changes saved.

3 Make the required edits on the form. For example, change the name to "Pending Projects".

4 Click **Save,** to save the changes

Remove an Activity Cue

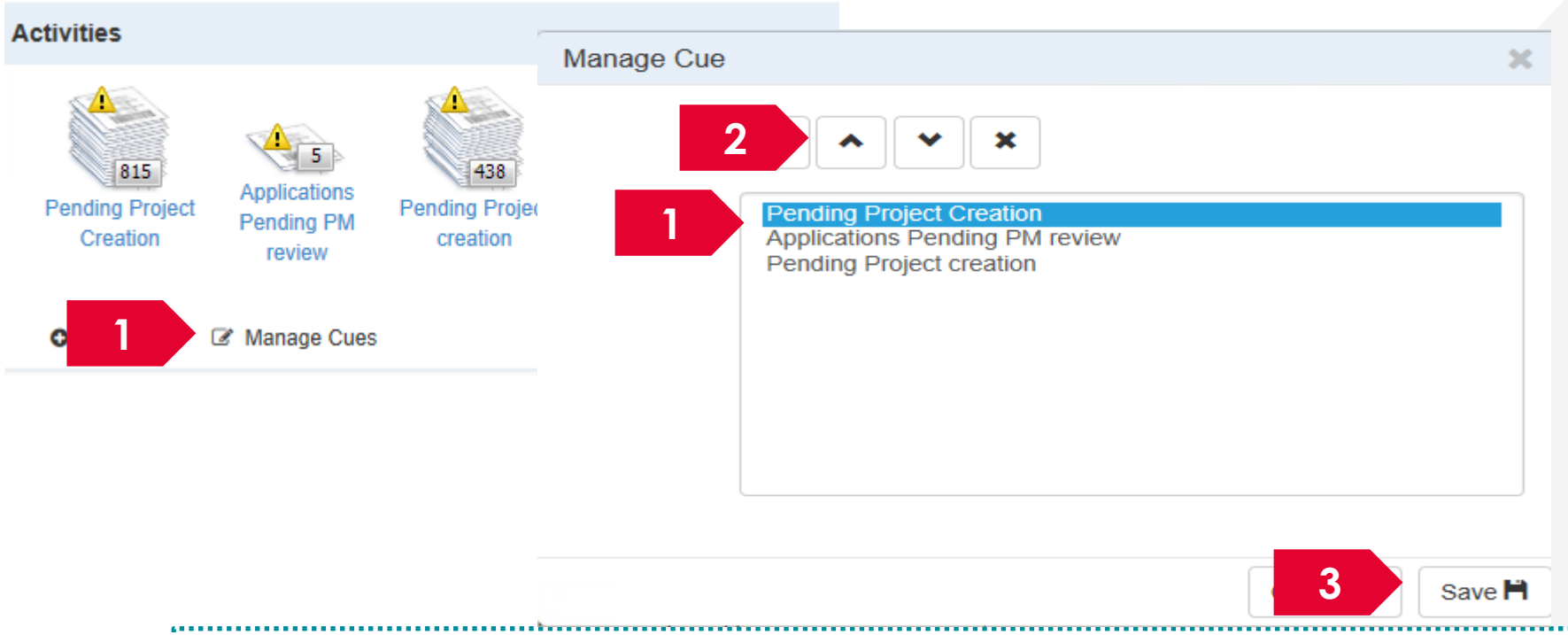


To Note

For any changes on the dashboard, click F5 or refresh icon to reflect recent changes saved.

1. Click on Manage Cues. Select the cue from the list.
2. Click the cross icon.
3. Click **Save**, to save the changes.

Change the order of Activity cues



To Note

For any changes on the dashboard, click F5 or refresh icon to reflect recent changes saved.

1. Click on Manage Cues. Select the cue from the list.
2. Click the up arrow or down arrow to change the order of cues on the Activity dashboard
3. Click **Save**, to save the changes.

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