



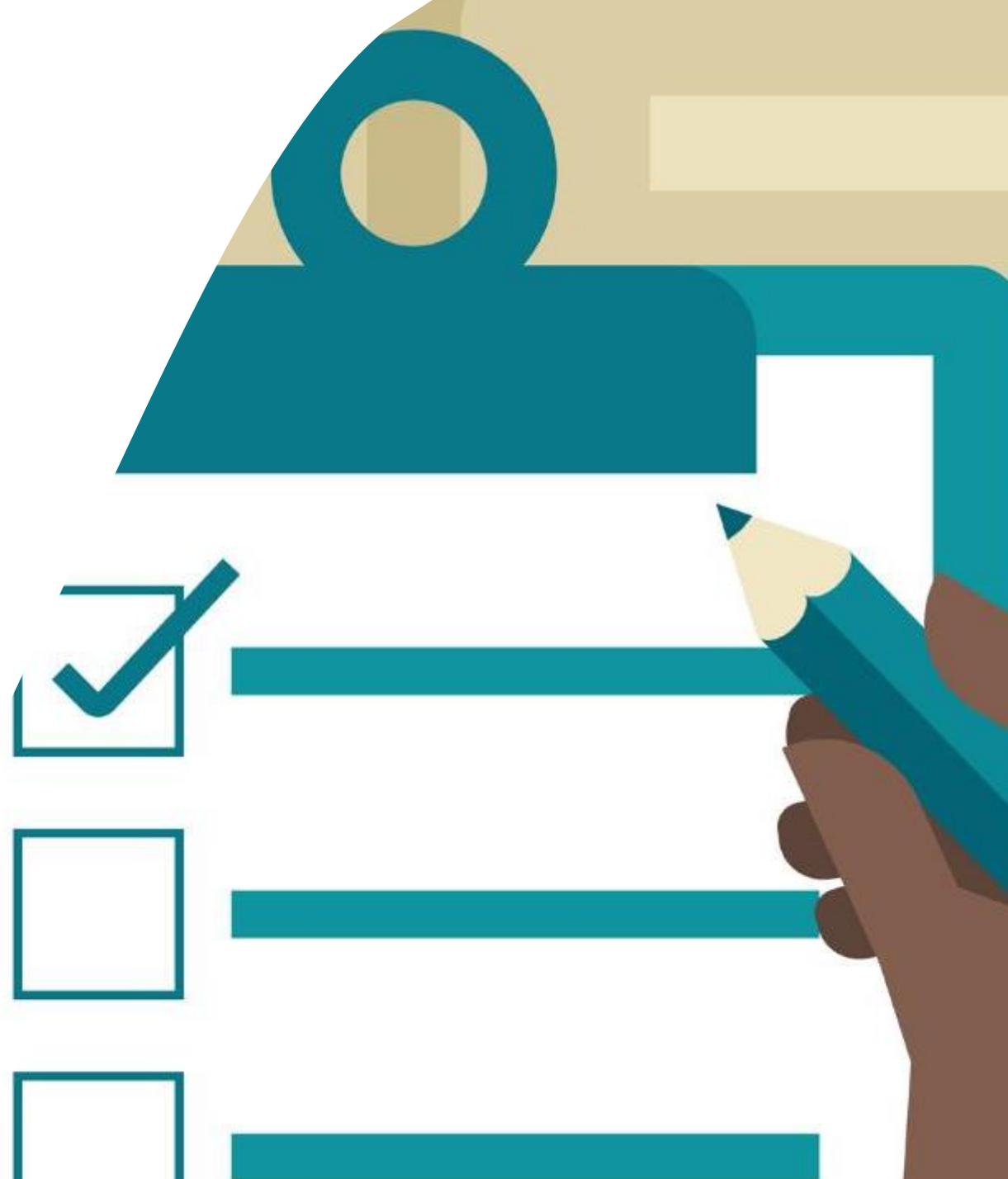
# Training Guide for Dashboard

IGMS

# 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.



# Module -1: Understand IGMS dashboard components

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

# 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

# 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

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

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

# 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

# Integrated Grant Management System (IGMS)

<https://researchgrant.gov.sg/>

# Overview of Dashboard Page for portal users

### Proposals

1 - 3 of 3 matching results found

Date ▾	Subject	Reference ID	Read
04-May-2018	The Letter of Award is pending for your acceptance. To accept the Letter of Award, click on the Reference ID.	<a href="#">NRF-PROP-0020</a>	Yes
21-Mar-2018	The proposal has been returned for your amendment. To amend the proposal, click on the Reference ID.	<a href="#">NRFUAT3-0065</a>	Yes
10-Mar-2018	The rebuttal requires your respond. The view the details, click on the Reference ID.	<a href="#">WaterB-01-0001</a>	Yes

### Projects

1 - 2 of 2 matching results found

Date ▲	Subject	Reference ID	Read
20-Dec-2017	The deviation has been returned for your amendment. To amend the deviation, click on the Reference ID.	<a href="#">NRFDV-000000129</a>	Yes
26-Jan-2018	The deviation has been returned for your amendment. To amend the deviation, click on the Reference ID.	<a href="#">NRFDV-000000153</a>	Yes

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

# Navigation and sorting on dashboard page

1

Proposals

1 - 3 of 3 matching results found

Date	Subject	Reference ID	Read
04-May-2018	The Letter of Award is pending for your acceptance. To accept the Letter of Award, click on the Reference ID.	NRF-PROP-0020	Yes
21-Mar-2018	The proposal has been returned for your amendment. To amend the proposal, click on the Reference ID.	NRFUAT3-0065	Yes
10-Mar-2018	The rebuttal requires your respond. The view the details, click on the Reference ID.	WaterB-01-0001	Yes

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

Proposals

1 - 3 of 3 results found

4

5

Date	Subject	Reference ID	Read
04-May-2018	The Letter of Award is pending for your acceptance. To accept the Letter of Award, click on the Reference ID.	NRF-PROP-0020	Yes
21-Mar-2018	The proposal has been returned for your amendment. To amend the proposal, click on the Reference ID.	NRFUAT3-0065	Yes
10-Mar-2018	The rebuttal requires your respond. The view the details, click on the Reference ID.	WaterB-01-0001	Yes

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.

# Overview of IGMS AX dashboard

# 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.

© 2018 - Government of Singapore

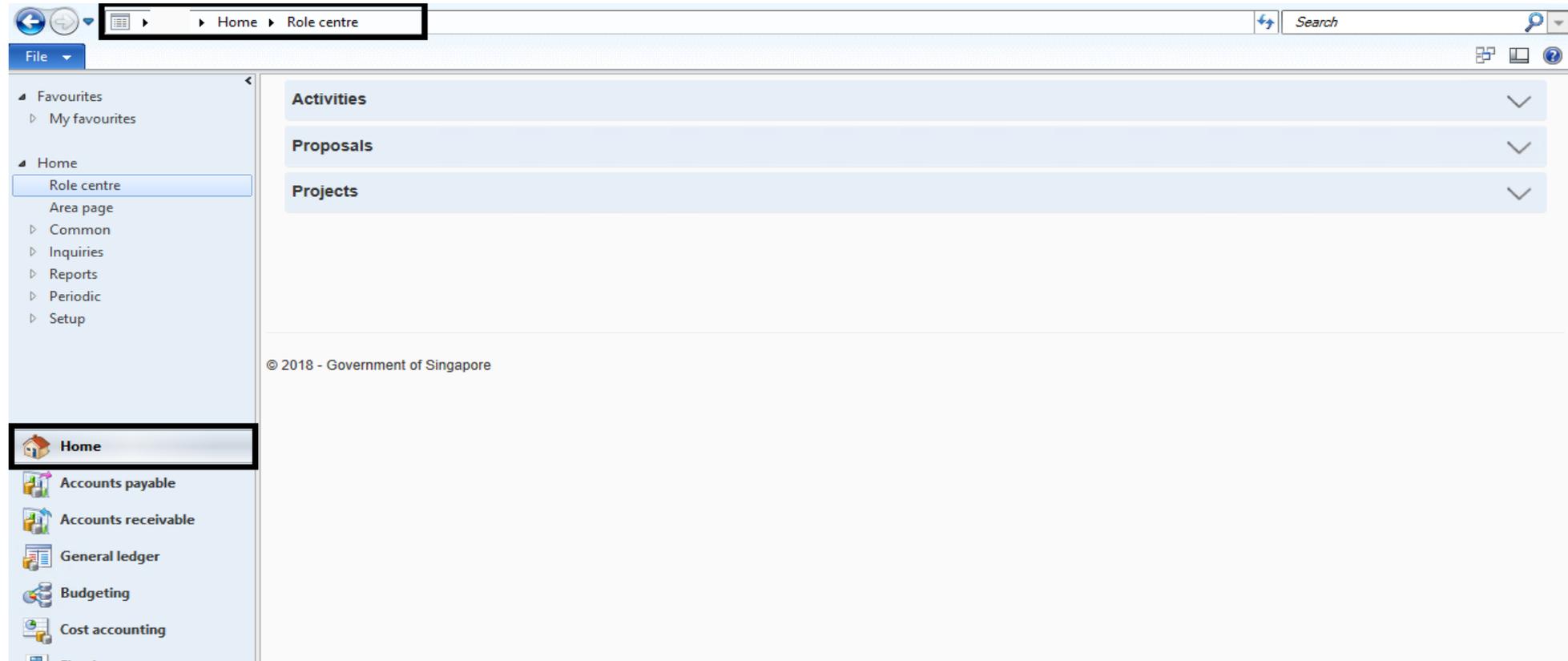
IGMS dashboard Components are split into three major types

- a. Activities
- b. Work Items
- c. Reports

# How to access IGMS AX dashboard

# 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

# Navigation on IGMS AX dashboard

The screenshot shows a navigation menu with the following items:

- Activities (with a downward arrow icon)
- Proposals (with a downward arrow icon)
- Projects (with a downward arrow icon)
- FR pie chart report (with a magnifying glass icon, a 100% dropdown, a print icon, a refresh icon, and a downward arrow icon)
- Bar Chart of Target vs Achieved KPI across projects (with a magnifying glass icon, a 100% dropdown, a print icon, a refresh icon, and a downward arrow icon)
- Overall Milestones across programmes and projects (with a magnifying glass icon, a 100% dropdown, a print icon, a refresh icon, and a downward arrow icon)
- Budget Utilisation across Projects and Programme (with a magnifying glass icon, a 100% dropdown, a print icon, a refresh icon, and a downward arrow icon)

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

The screenshot shows the 'Activities' dashboard. The title 'Activities' is in a light blue bar with a red arrow containing the number '3' pointing to it. Below the title, there are two cue cards. The first card is 'Pending Project Creation' with a red arrow containing the number '4' pointing to it. The second card is 'Applications Pending PM review' with a red arrow containing the number '3' pointing to it. At the bottom of the dashboard, there are two buttons: 'Add Cue' and 'Manage Cues'.

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.

Grant management system ▶ Common ▶ Proposal ▶ All proposals

File Manage

Edit Delete Maintain Proposal details Section d... Rebuttal Action Update institution Letter of award Generate Refresh Export to Microsoft Excel List Attachments Attachments Generate package Attachments Consolidated reviewers Report Full proposal Actions Workflow

All proposals

Proposal ID

Proposal ID	Programme ID	Grant call ID	Type	Proposal status	Stage	Lead PI	Institution name	Grant call close date
DB5Mar18-0002	Dashboard Test	Dashboard 5March2...	White paper	Submitted to PM	Submission	NRF PST PI 1	Nanyang Innovation and Enterprise Office ...	31-Mar-2018 12:00 pm
DB5Mar18-0003	Dashboard Test	Dashboard 5March2...	White paper	Submitted to PM	Submission	NRF PST PI 1	Nanyang Innovation and Enterprise Office ...	31-Mar-2018 12:00 pm
Grant-007-0002	Programme-006	Grant-007	Full proposal	Submitted to PM	Submission	P2	NRF TEST HI 3	01-Jan-2155 07:59 am
Grant-009-0002	Programme-008	Grant-009	Full proposal	Submitted to PM	Submission	P2	NRF TEST HI 3	01-Jan-2155 07:59 am
IGMS-02 Apr-0003	IGMS-12 Mar 2...	IGMS-02 Apr 2018	Full proposal	Submitted to PM	Submission	NRF PST PI 2	Nanyang Innovation and Enterprise Office ...	30-Apr-2018 12:00 pm

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

The screenshot displays two sections of the IGMS AX dashboard: 'Proposals' and 'Projects'. Each section contains a table of work items with columns for Date, Subject, Reference ID, and Read/Unread status. The 'Proposals' section shows 11-15 results, and the 'Projects' section shows 1-10 results. A red arrow with the number '1' points to the top of the 'Proposals' section.

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

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

Proposals

11 - 15 of 15 matching results found

3 4

Date	Subject	Reference ID	Read/Unread
03-Mar-2021		<a href="#">HN-000000230</a>	No
04-Mar-2021	The rebuttal has been responded by PI. The view the details, click on the Reference ID.	<a href="#">GRC20210303-0001</a>	No
10-Mar-2021	The rebuttal has been responded by PI. The view the details, click on the Reference ID.	<a href="#">GRC20210303-0003</a>	No
12-May-2021	The proposal is pending your approval. To view the details, click on the Reference ID.	<a href="#">SG55-NRF-0002</a>	No
27-May-2021	The Scrubbing requires your approval. To view the details, click on the Reference ID.	<a href="#">CR27CNRF1-0009</a>	No
04-Mar-2021	Peer Review has submitted the evaluation and wait for your approval. To view the details, click on the Reference ID.	<a href="#">tstcal-0033</a>	No

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.

Proposals

5 of 15 matching results found

6

Date	Subject	Reference ID	Read/Unread
03-Mar-2021		<a href="#">HN-000000230</a>	No
04-Mar-2021	The rebuttal has been responded by PI. The view the details, click on the Reference ID.	<a href="#">GRC20210303-0001</a>	No
10-Mar-2021	The rebuttal has been responded by PI. The view the details, click on the Reference ID.	<a href="#">GRC20210303-0003</a>	No
12-May-2021	The proposal is pending your approval. To view the details, click on the Reference ID.	<a href="#">SG55-NRF-0002</a>	No
27-May-2021	The Scrubbing requires your approval. To view the details, click on the Reference ID.	<a href="#">CR27CNRF1-0009</a>	No
04-Mar-2021	Peer Review has submitted the evaluation and wait for your approval. To view the details, click on the Reference ID.	<a href="#">tstcal-0033</a>	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

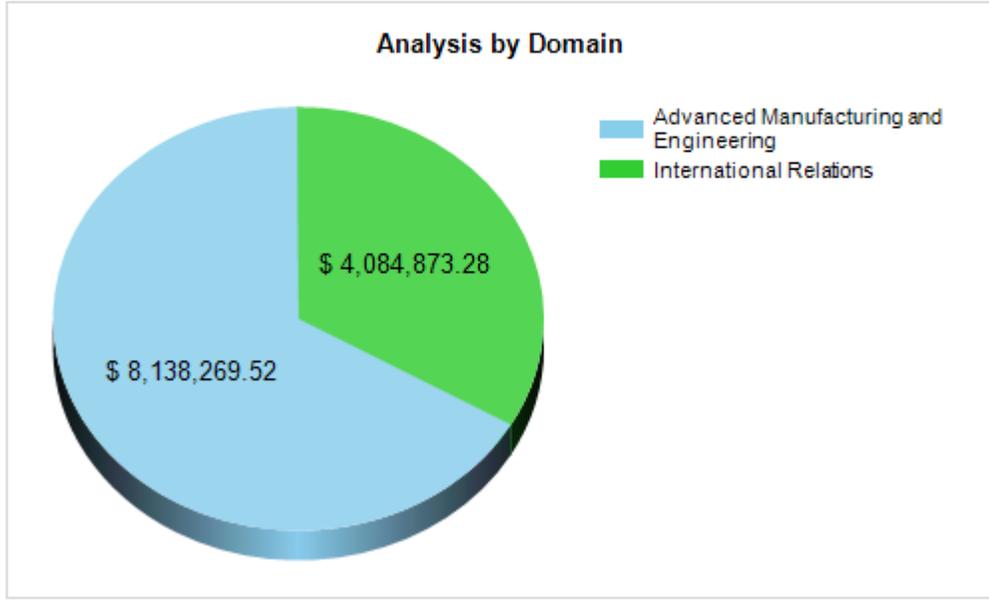
## FR Pie Chart Report

Search 1 [Download] [Refresh] [Home]

2

1

Quarter  Criteria  FY  [Refresh]



1

Select the desired criteria.

2

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

### To Note

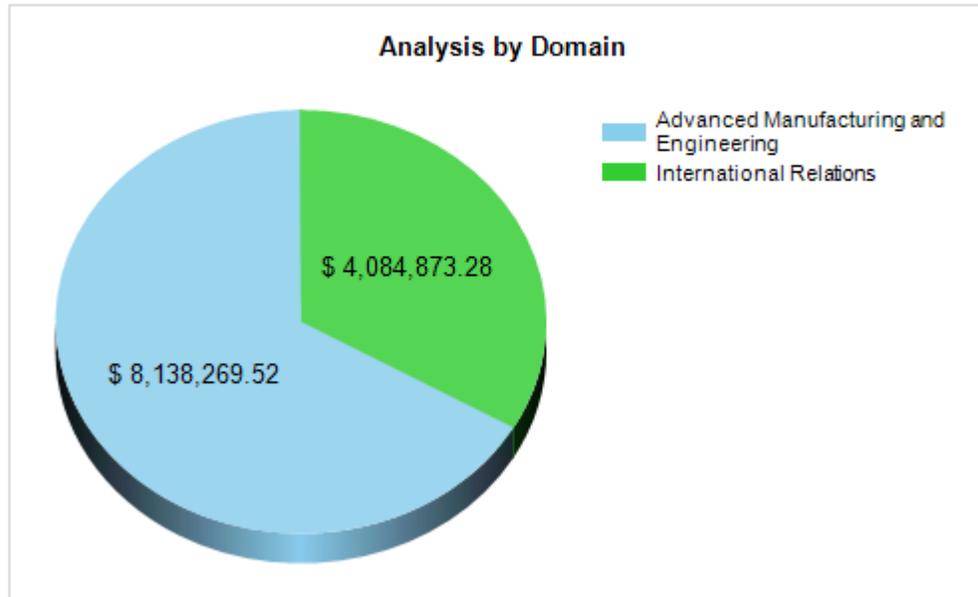
Each report on dashboard has different set of criteria selection

## FR Pie Chart Report

3

4

Quarter  Criteria  FY



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

Personalize activities

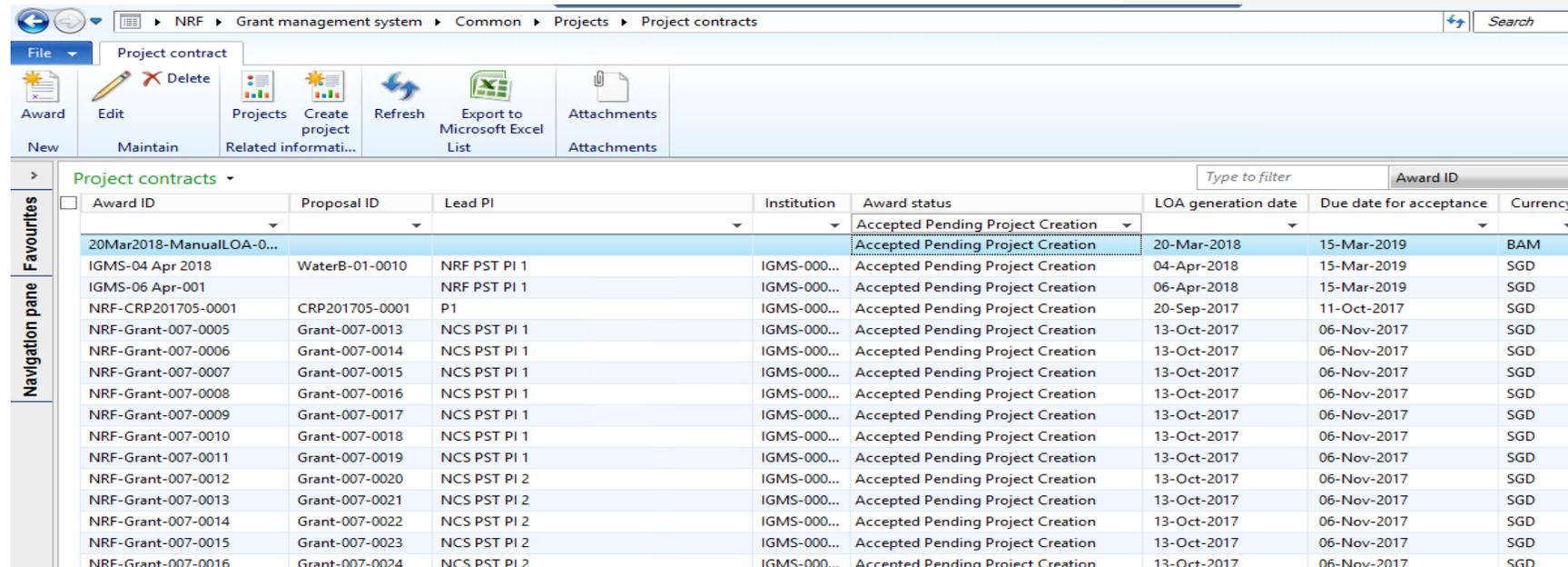
# Personalize activities

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
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

3

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

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

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

5

Project contracts

Type to filter

Award ID



Save Filter

Save As Filter...

Save As Cue...

Remove Filter/Sort Ctrl+Shift+F3

Filter

Sort

Delete Filter

6

	Lead PI	Institution	Award status	LOA generation date	Due date for acceptance	Currency
			Accepted Pending Project Creation			
			Accepted Pending Project Creation	20-Mar-2018	15-Mar-2019	BAM
10	NRF PST PI 1	IGMS-000...	Accepted Pending Project Creation	04-Apr-2018	15-Mar-2019	SGD
	NRF PST PI 1	IGMS-000...	Accepted Pending Project Creation	06-Apr-2018	15-Mar-2019	SGD
001	P1	IGMS-000...	Accepted Pending Project Creation	20-Sep-2017	11-Oct-2017	SGD
3	NCS PST PI 1	IGMS-000...	Accepted Pending Project Creation	13-Oct-2017	06-Nov-2017	SGD
4	NCS PST PI 1	IGMS-000...	Accepted Pending Project Creation	13-Oct-2017	06-Nov-2017	SGD

5

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

6

Click **Here**. Save as Cue

Save cue (1)

Name: Pending Project creation

Options:

Show sum of field

Show alert when count is

Greater than  
Less than  
Equals

0

OK Cancel

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

Save cue (1)

Name: Pending Project creation

Options:

Show sum of field

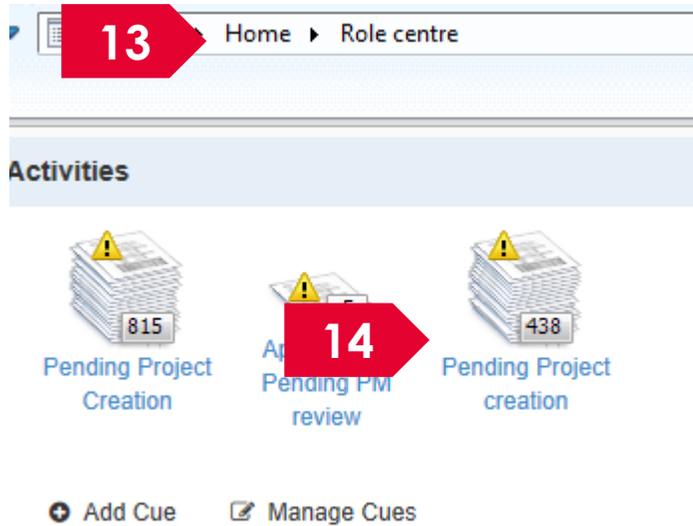
Show alert when count is

Greater than 1

12 OK Cancel

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

The screenshot shows the 'Manage Cue' dialog box. On the left, under 'Activities', there are three items: 'Pending Project Creation' (815), 'Applications Pending PM review' (5), and 'Pending Project creation' (438). A red arrow labeled '1' points to the 'Manage Cues' button. The dialog box has a title bar 'Manage Cue' with a red arrow labeled '2' pointing to the 'pen' icon. Below the title bar are four icons: a pen, an up arrow, a down arrow, and a close icon. The 'Cues' list contains three items: 'Pending Project Creation' (highlighted), 'Applications Pending PM review', and 'Pending Project creation'. At the bottom right of the dialog are 'Cancel' and 'Save' buttons.

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.

**Add Cue** [X]

**3** Name:

Options:  Show sum of field

[v]  [v]

Show alert when count is

[v]  [x]

**4**  [H]

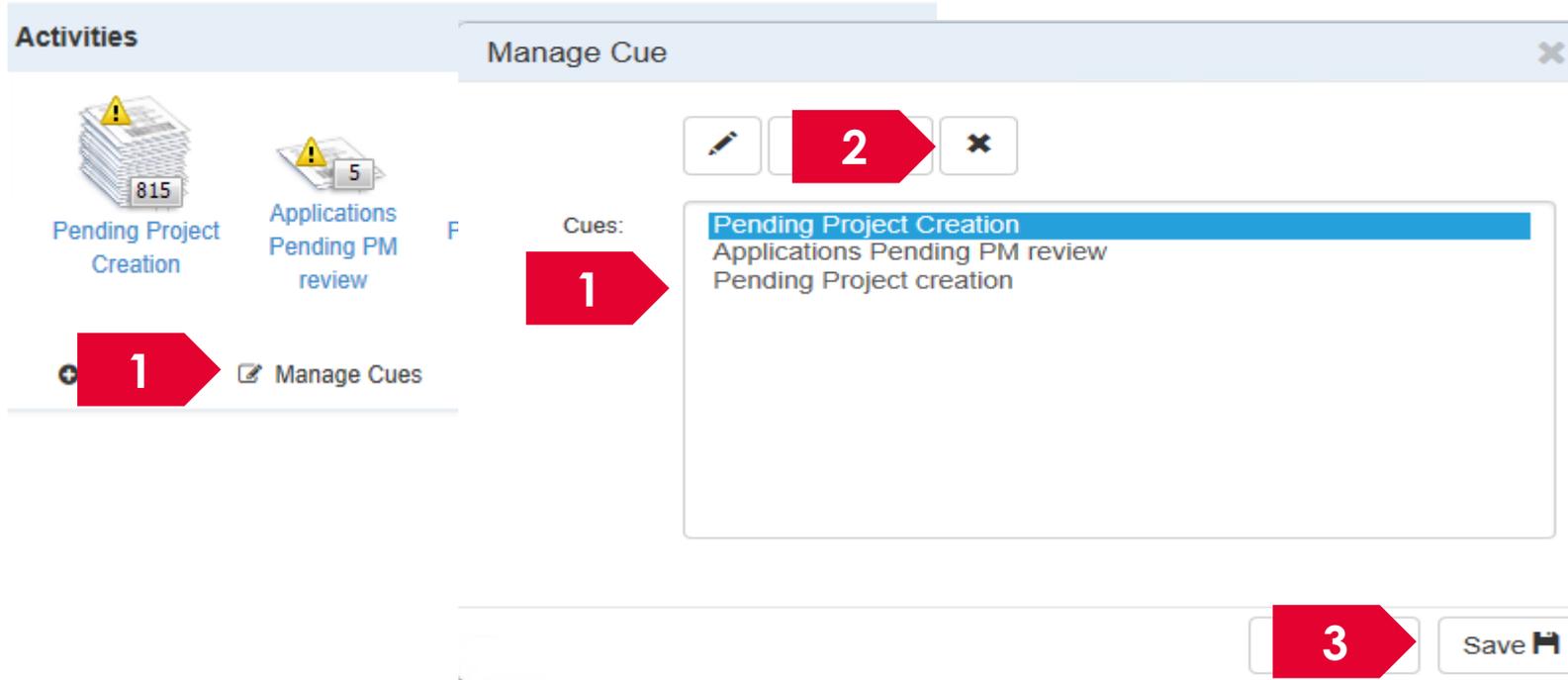
**To Note**

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.

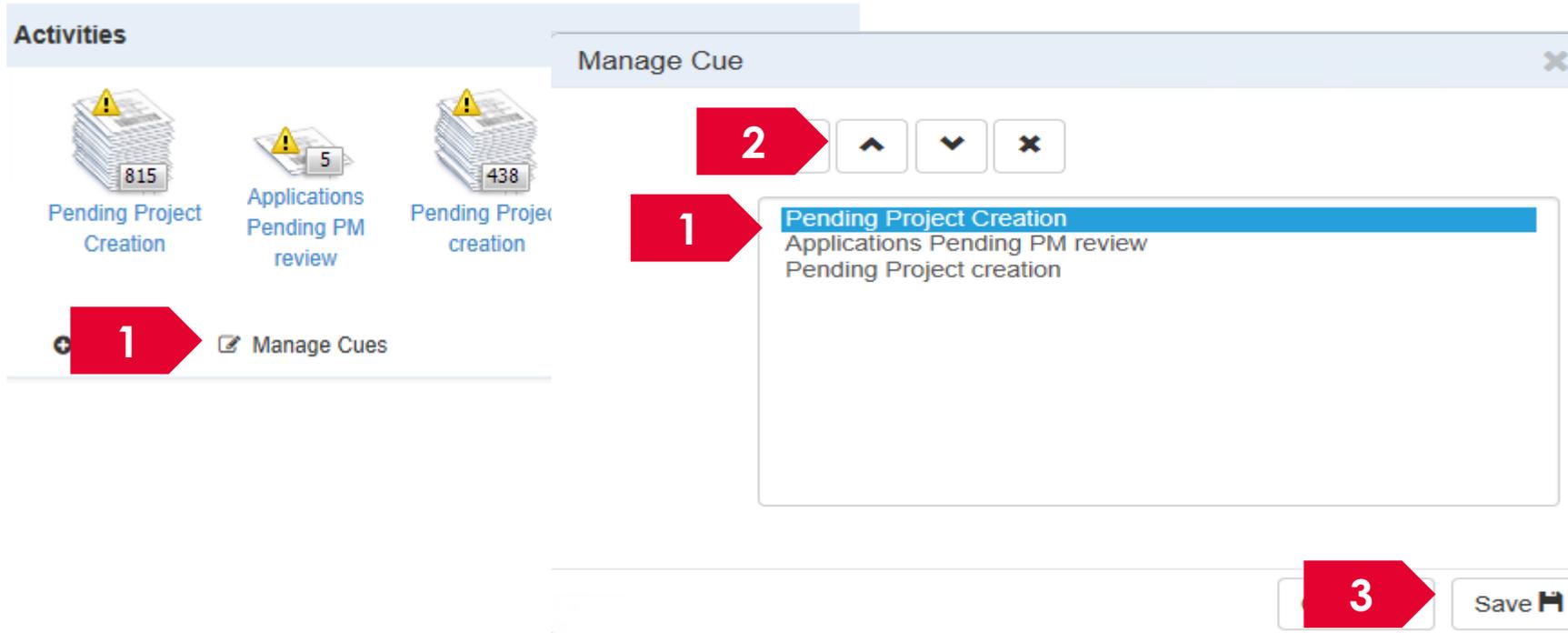
2

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.

SINGTEL GROUP ENTERPRISE   OPTUS

**Disclaimer:** This material that follows is a presentation of general background information about NCS activities current at the date of the presentation. The information contained in this document is intended only for use during the presentation and should not be disseminated or distributed to parties outside the presentation. It is information given in summary form and does not purport to be complete. It is not to be relied upon as advice to investors or potential investors and does not take into account the investment objectives, financial situation or needs of any particular investor. This material should be considered with professional advice when deciding if an investment is appropriate.