

Training Guide for Data Admin – Progress Reports

IGMS



## Learning Objectives

#### In this session, you will learn:

Overview of IGMS

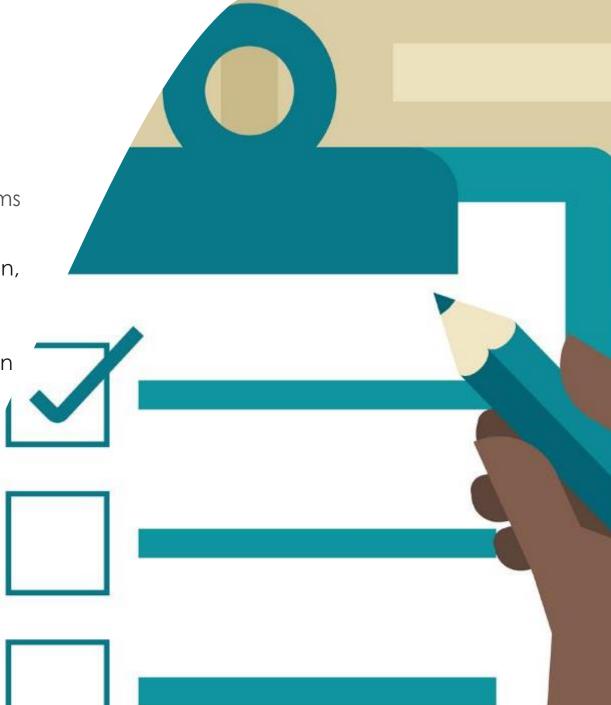
In this module you will learn what is IGMS and common terms

Registration and Login

In this module you will learn how to register as a Data Admin, how to login and what menus are available.

Progress Report Submission

In this module you will learn how to fill up progress reports on behalf of the Lead PI





#### Overview of IGMS

#### 1. Overview of IGMS

- 2. Registration & User Profile module
  - Register as a Data Admin in IGMS
  - Logging in as a Data Admin
  - Links and Menus for Data Admin
- 3. Progress Reports module
  - Pre-requisites to accessing a Progress Report
  - Accessing a Progress Report
  - Filling up the Progress Report form



#### Overview of IGMS System

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

The system allows management of grants from submission of proposal till closure of the project



## Definitions, Acronyms and Abbreviations

SI. 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	DA	Data Admin



## Integrated Grant Management System (IGMS)

https://www.researchgrant.gov.sg/



## Registration and Login

Overview of IGMS

#### 2. Registration & User Profile module

- Register as a Data Admin in IGMS
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Click on the "Host Institution Users" option on the IGMS login page

#### To Note

This Login route is for users who are applying for grant calls or performing transactions on behalf of their company.

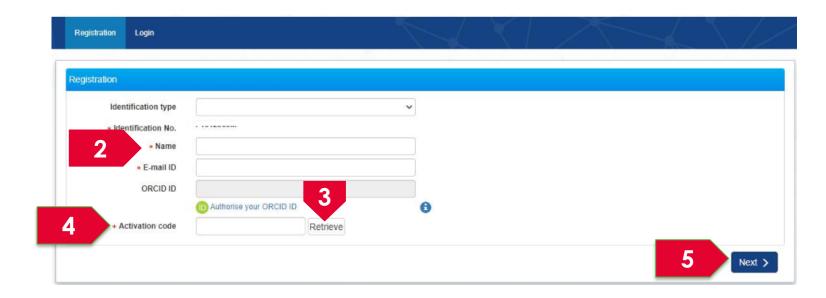
1



#### **Host Institution Users**

- Principal Investigator
- HI Administrator
- Office of Research/ Director of Research
- · HI Finance/ HI Human Resource
- · Data Administrator/ HI Audit





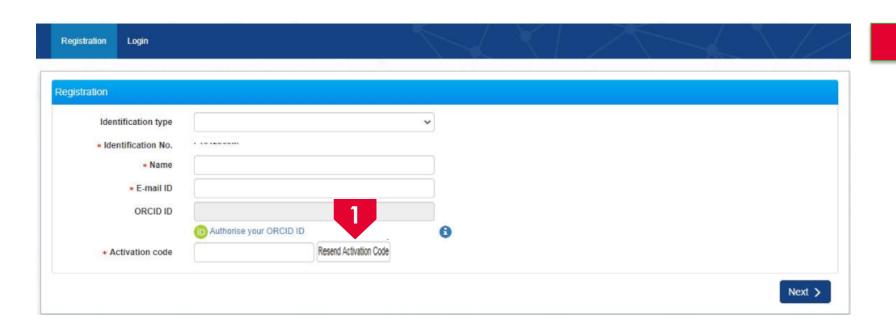
An activation code has been sent to your e-mail account. It will expire within a short period. Please check your inbox and spam/junk folder.

OK

System displays a message indicating an Activation Code has been sent to your email account. It will expire indicating an Activation Code has been sent to your email account. Input the Activation Code.

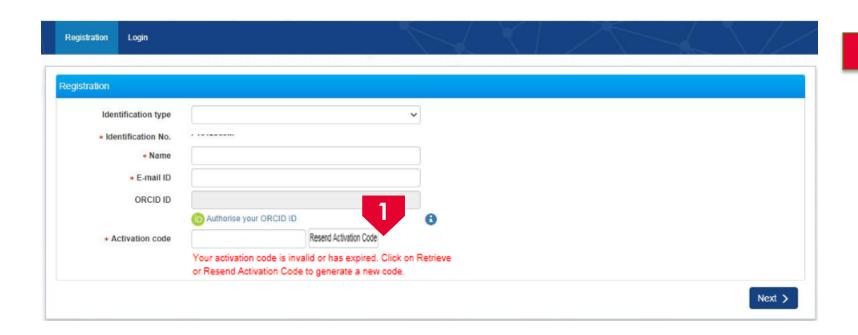
- Fill up all the mandatory fields indicated by the Asterix (\*). Identification type and Identification No will be populated by system.
- Click on **Retrieve** button to generate a new Activation Code. System sends an Activation Code which will be valid for 15 minutes to the email account mentioned at the above.
  - Click on Next button to complete the registration.





If user misses the
Activation Code, he/she
should click Resend
Activation Code button
to generate a new one.
System will send a new
code in a new email.





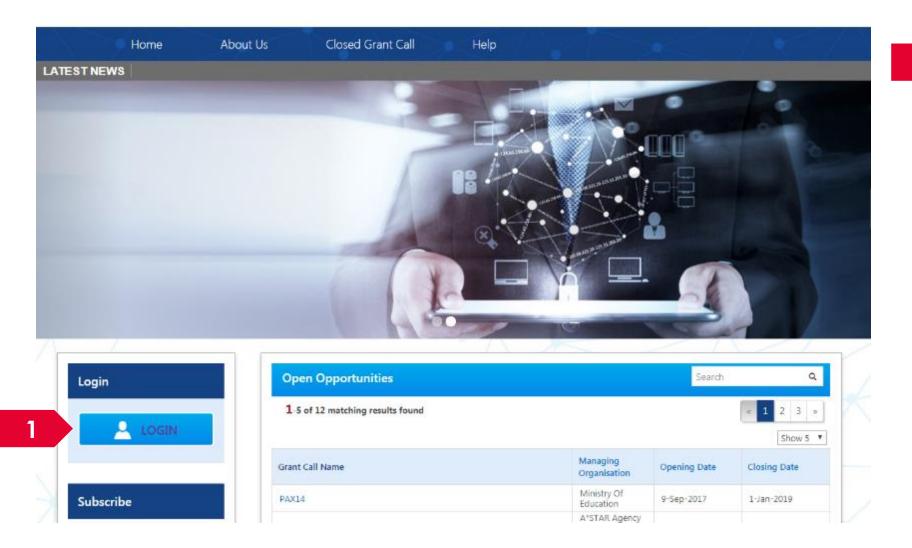
If user inputs a wrong
Activation Code, system
displays the error
message. User can click
Resend Activation Code
button to generate a
new one. System will send
a new code in a new
email.



## Logging in as a Data Admin



## Logging in as a Data Admin – 1







## Logging in as a Data Admin-2

1



#### **Host Institution Users**

- · Principal Investigator
- HI Administrator
- Office of Research/ Director of Research
- · HI Finance/ HI Human Resource
- · Data Administrator/ HI Audit

1

Click on **Host Institution Users** option on the IGMS login page



Forget & reset password for Singpass login (Host Institution and Individual users)



## Forget and Reset Password for Singpass Login

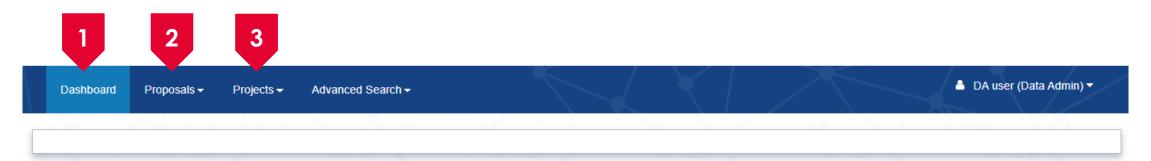
Go to www.singpass.gov.sg to reset the password or to retrieve lost password



# Links and Menus for Data Admin



#### Links and Menus for Data Admin



- 1 Dashboard: Displays the items pending user's actions (coming soon)
- Proposals: Displays the proposals assigned to the Data Admin by the Pl
- 3 Projects: Displays the projects assigned to the Data Admin by the Pl.



- Overview of IGMS
- 2. Registration & User Profile module
  - Register as a Data Admin in IGMS
  - Logging in as a Data Admin
  - Links and Menus for Data Admin

#### 3. Progress Reports module

- Pre-requisites to accessing a Progress Report
- Accessing a Progress Report
- Filling up the Progress Report form



# Pre-requisites to accessing a Progress Report



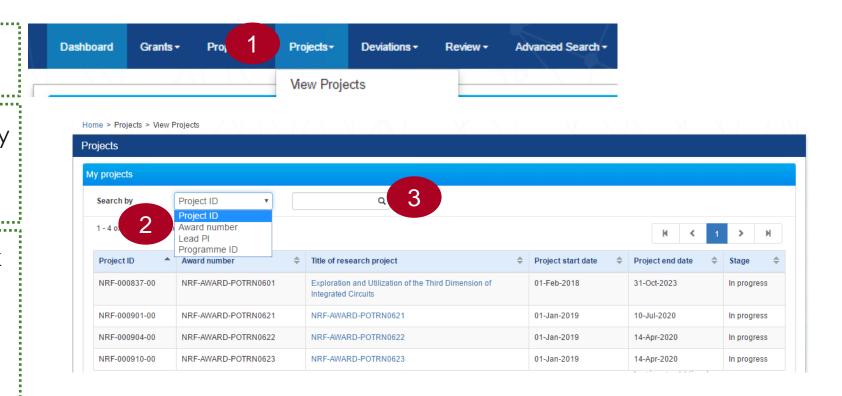
#### Pre-requisites to accessing a Progress Report

- The Data Admin must register for a user account in IGMS.
- The HI Admin must assign the Data Admin role to the user account.
- The Data Admin must be assigned by the Lead PI to the Project (refer to the training manual on Progress Report-Submission (Lead PI) for details)
- The Data Admin can only access Progress Reports with status of Pending Submission or Pending Resubmission.
- Progress Reports that are in **Pending Submission** state will only be shown on the screen, after the system sends the **first reminder** e-mail to the Lead PI.
- Once a deviation for change in Lead PI or change in HI is approved, the access of the existing Data Admin will be removed.





- 1 Click on Projects > View Projects menu.
- User can search for a project by specifying a Search by criteria from the dropdown list
  - Input the keyword on the blank field and click on the looking glass icon to proceed with the search. Use an asterisk (\*) symbol to perform a wildcard search (e.g. \*837\*).

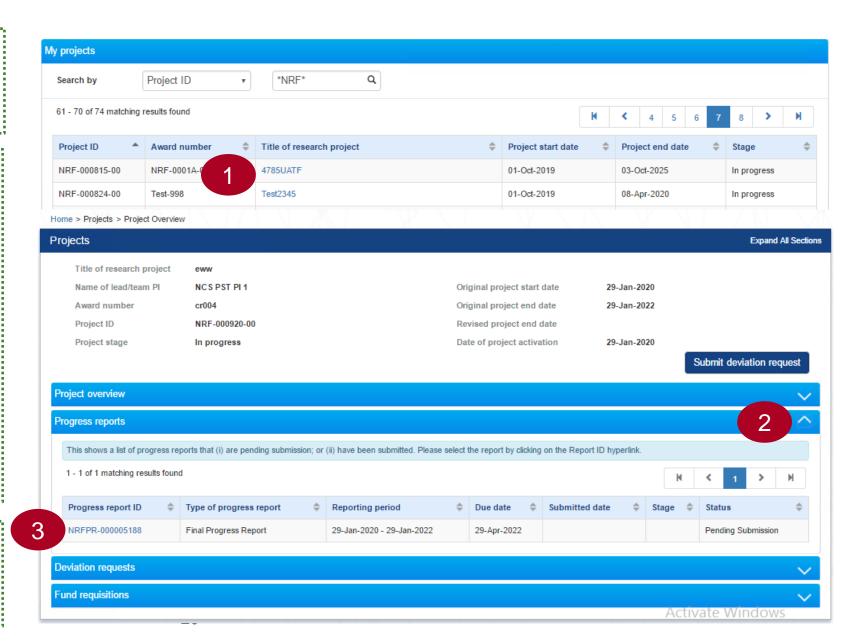


#### To Note

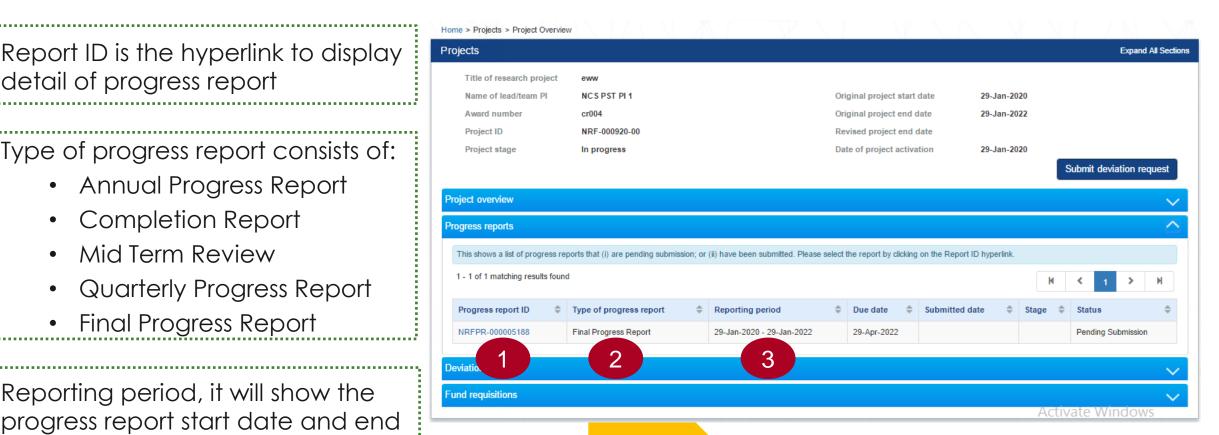
- Data Admin will be notified via email when a Progress Report is **returned** to the Lead PI for amendments. Data admin can start to directly edit the returned progress report.
- Data admin will be notified via email when PI submits or resubmits the progress report to the ORE.



- 1 Click on the hyperlink of Title of research project column for the project you want to open
- Click the arrow () to display the Progress reports of respective Project/Award. This includes:
  - a. Progress report which is due for submission and for which system reminder has been sent
  - b. Progress report which has been submittedOnly current active PI and DA can view/edit Progress Report
- Click on Progress report ID hyperlink to display detail of progress report



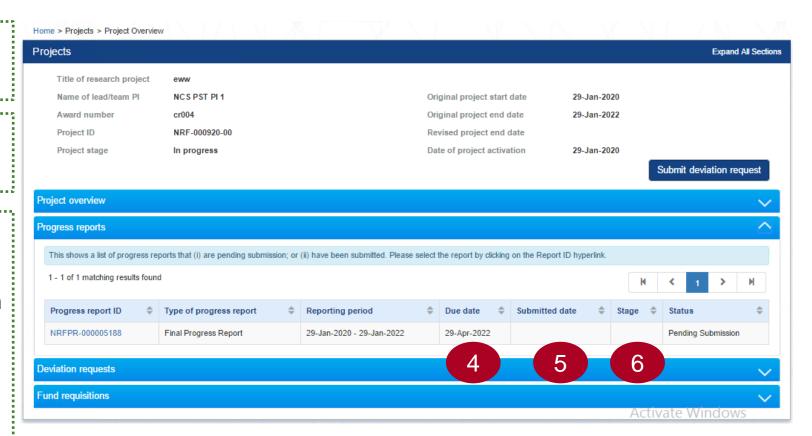
- Report ID is the hyperlink to display detail of progress report
- Type of progress report consists of:
  - Annual Progress Report
  - Completion Report
  - Mid Term Review
  - Quarterly Progress Report
  - Final Progress Report
  - Reporting period, it will show the progress report start date and end date



#### Notes

Progress Reports that are Pending Submission will only be shown on this screen, after the system sends the first reminder email to the Lead Pl

- Due date, it will show the due date of progress report
- Submitted date, it will show the date when the report is submitted.
- Stage, it will show the stage of that progress report. There are 3 stages :
  - Submission, progress report in submission stage
  - Evaluation, progress report in evaluation stage after PM approval.
  - Closed, progress report has been approved and evaluated.





- 7
- Status, it will show the status of progress report. Statuses are:
  - Pending Submission, initial status, for Lead Pl action.
  - Pending Re-submission, Progress report has been returned for Lead PI amendment.
  - Pending ORE verification, for ORE action
  - Pending DOR endorsement, for DOR Action.
  - Submitted to PM, for PM approval.
  - Pending Review, PM has approved the Progress Report and now in review process



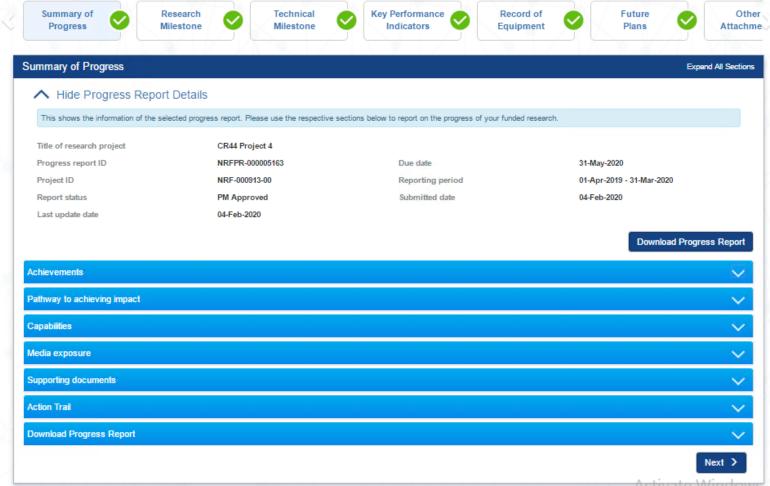


# Filling up the Progress Report form



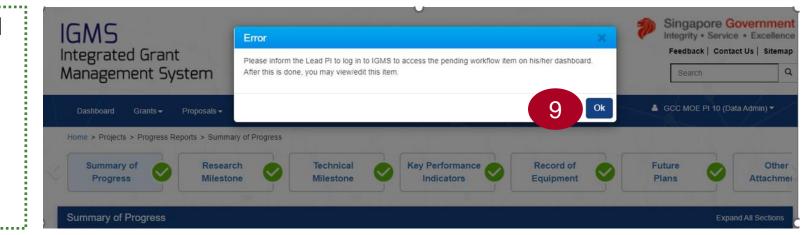
Summary of Progress Research Milestone Technical Milestone Key Performance Indicator Record of Equipment **Future Plans** Other Attachments Undertaking page

Progress Report has 8 page sections that need to be completed



9 If PI has not clicked the dashboard item, Data Admin will receive an error message to inform Lead PI to click the workflow link.

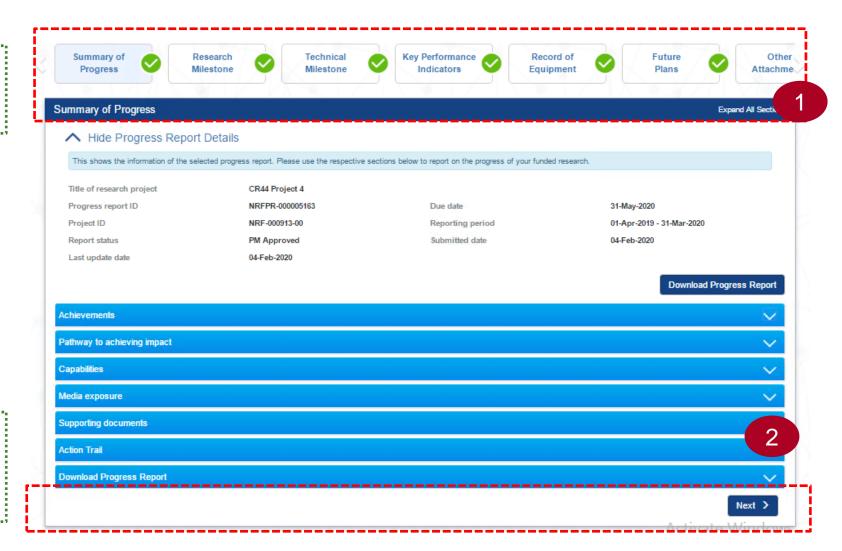
This is required before the DA can edit the progress report.





The Navigation bar shows the completeness of each section.

Click the Next button to validate the entered data and move to the next section.





Navigation on each page, will show a page status. If the page is grey, it means the page is new without any record saved or created.



2 If the page is orange, the page has some draft data saved but has not been validated by the system.



If the page is green, the page has been completed, and system has validated the data.



#### **Notes:**

You can only submit Progress Report if all pages mark as Green (Completed).

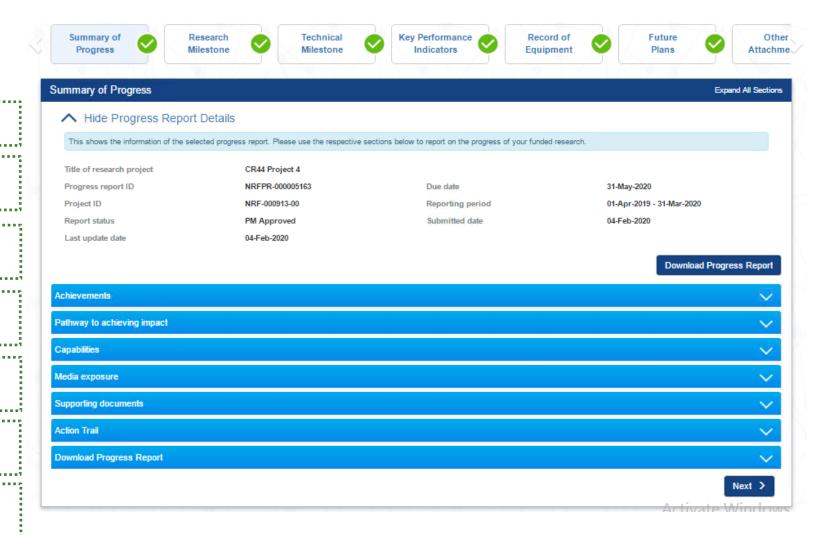
## **Summary of Progress**



#### **Summary of Progress**

The summary of progress page have sections as below:

- 1 Achievements
- Pathway to achieving impact
- 3 Capabilities
- Media exposure
- Supporting documents
- Action Trail
  - Download progress report

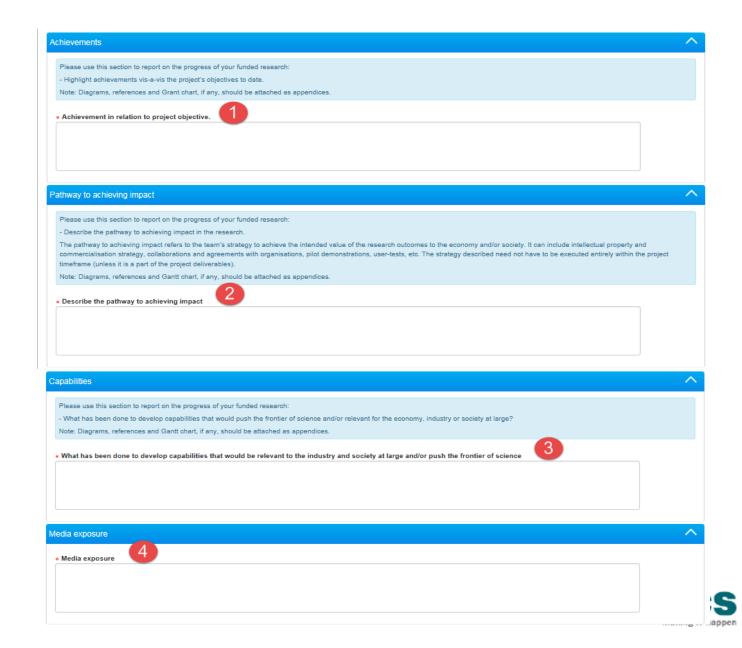




## **Summary of Progress**

There are 4 mandatory fields under Summary of Progress, as follows. Expand each section and key in the details.

- Achievements
- Pathway to Achieving Impact
- Capabilities
  - Media exposure

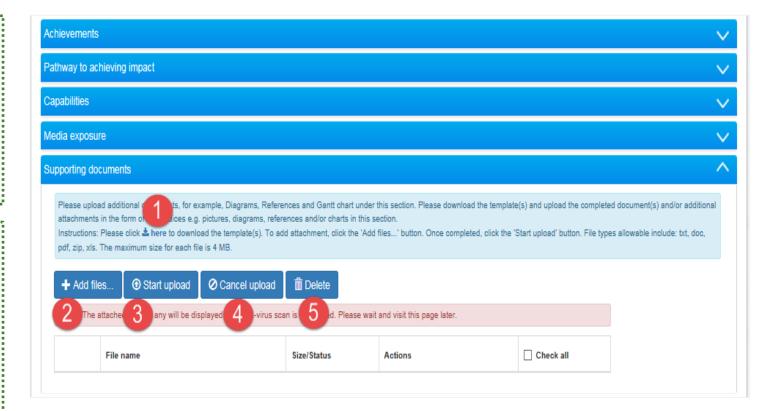


### **Summary of Progress**

- In the Supporting documents section, click here to download the template of progress report. This is applicable only if the Managing Agency has provided a specific template for progress report submission format.
  - To add an attachment, click the 'Add files...' button. Select the file(s) to be attached from the dialog box. File types allowed include: txt, doc, pdf, zip, xls. The maximum size for attachment file size in one Progress Report is 30 MB.

each file is 4 MB. Maximum combined

Click the 'Start upload' button.

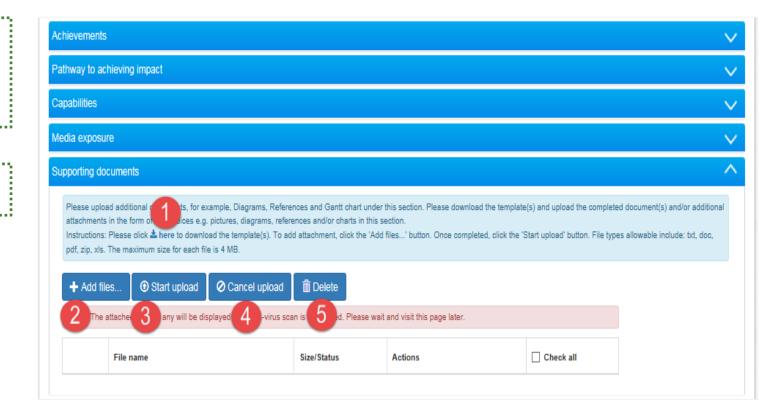




### **Summary of Progress**

4 Click 'Cancel upload' to cancel the upload. This is applicable if the file has not been attached yet.

Click 'Delete' to remove the file.

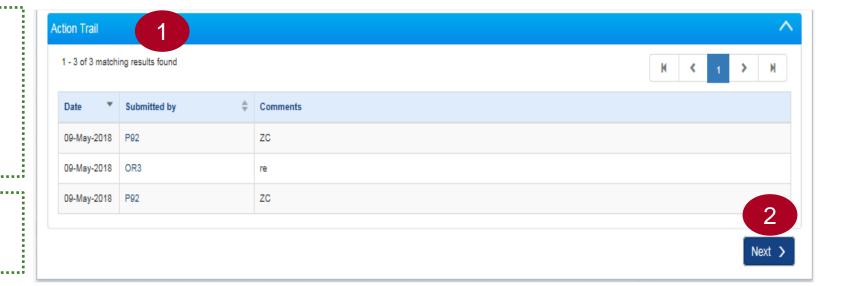




## **Summary of Progress**

1 Action Trail displays the history of workflow. The Action Trail captures the Date, submitted by (party that took any action) and Comments.

Click "Next" to move to the **Research Milestone** section.



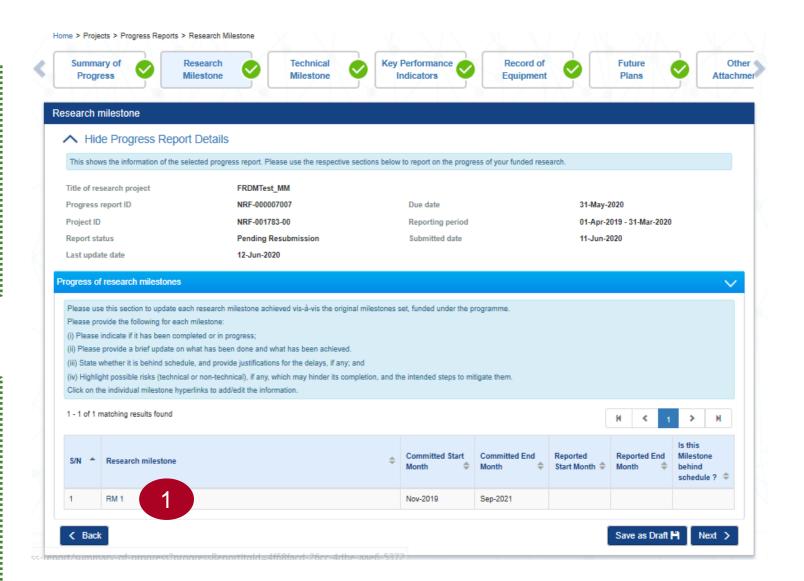




Click on the "Research milestone" hyperlink to update and report on the research milestone's progress. All Research Milestones listed are retrieved from the awarded project.

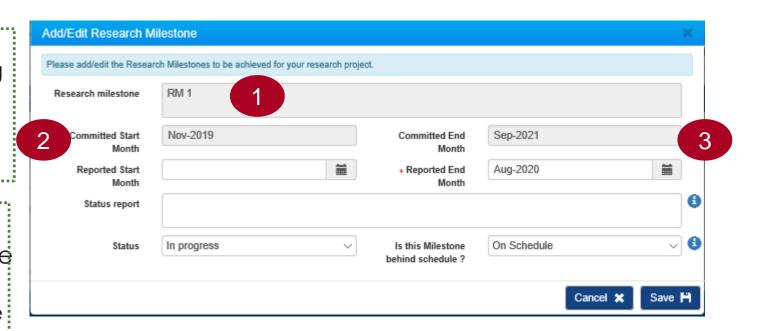
#### **Notes:**

You will not be able to add or remove any milestone in the progress report. To revise a milestone from awarded project, ask the Lead PI to submit a request through the deviation request module.



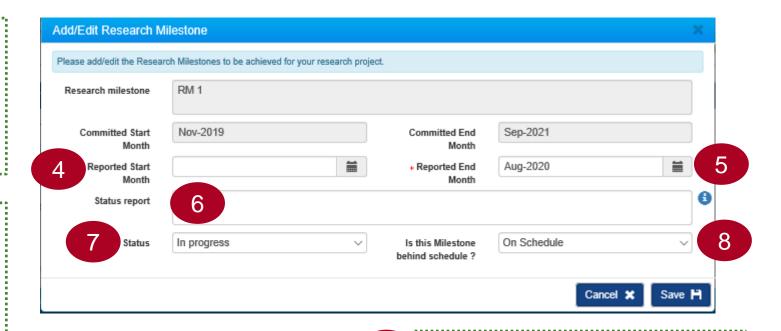


- Research milestone shows the milestone that was approved during baseline/award stage or deviation. Report the status update for the milestone in progress report.
- Committed start month refers to the intended start month and year of the milestone that was set during the award stage. To change this, please raise a deviation request (refer to Deviation training manual).
- Committed end month refers to the intended end month and year of the milestone that was set during the award stage. To change this, please raise a deviation request (refer to Deviation training manual).





- Reported start month is the actual start month and year of the milestone. It is mandatory to input this for milestone with status as "Achieved".
- Reported end month is the actual end month and year of the milestone. It is mandatory to input this for all milestones with status except "Not Started".
- Status report is to provide the updates and detailed description for the milestone. It is mandatory to input this for milestone that are marked as "Behind Schedule".



Status: Indicate "Not started", "In progress", or "Achieved". When a milestone is removed through deviation, this will be set as "Not applicable".

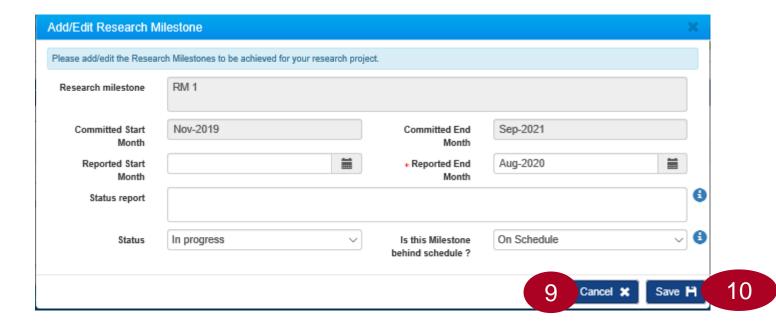
Is this milestone behind schedule?: Indicate whether milestone is "On schedule" or "Behind schedule".



9 Click "Cancel" to discard the changes to the record.

10 Click "Save" to save the changes to the record.

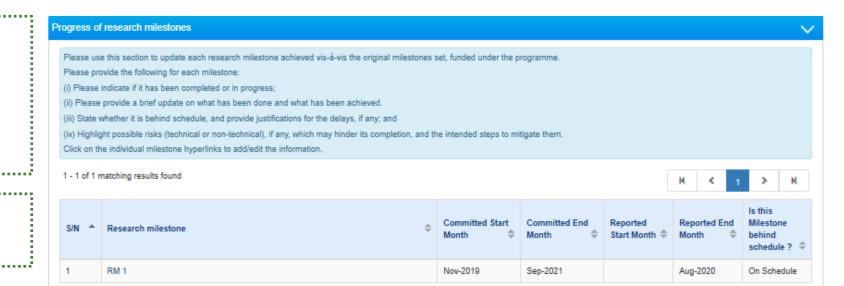
**\*------**





After saving the record, the changes will be reflected in the "Progress of research milestone" tab. Click "Next" to move to the **Technical Milestone** section.

Click "Back" to go back to the previous section.



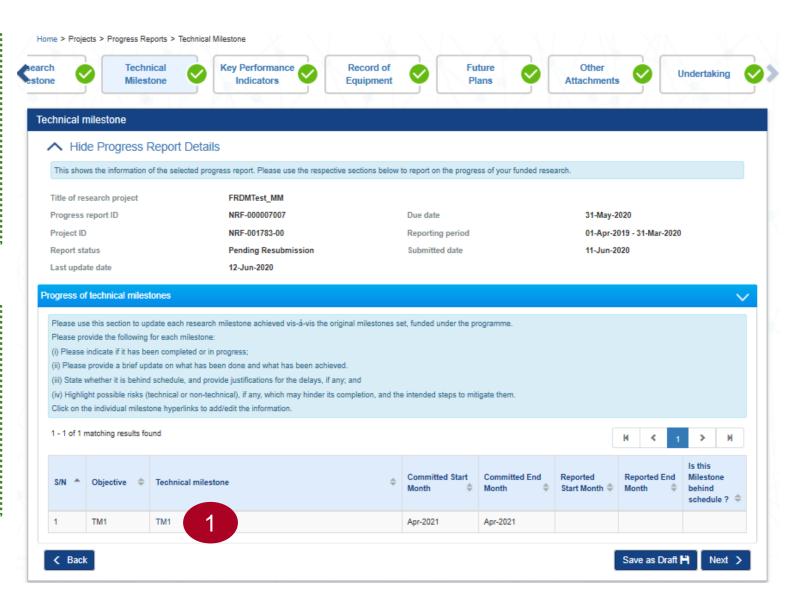




1 Click on "Technical Milestone"
hyperlink to update and report on
the technical milestone's progress.
All Technical milestone(s) listed is
retrieved from the awarded
project.

#### Notes:

You will not be able to add or remove any milestone. If you wish to revise a milestone from awarded project, ask the PI to submit a request through deviation request module.

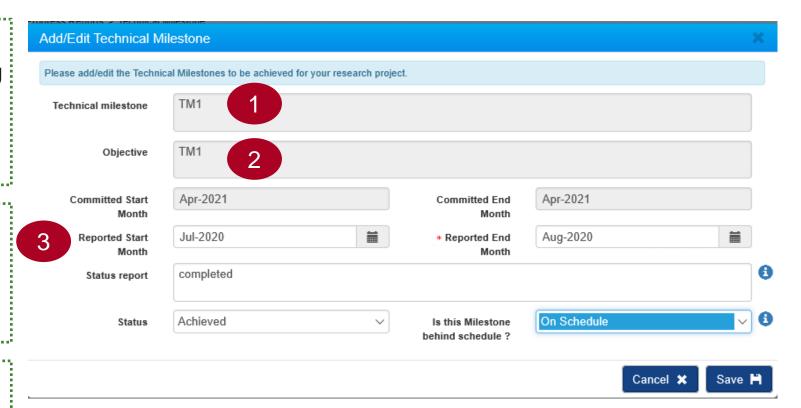




Technical milestone shows the milestone that was approved during baseline/award stage or deviation. Report the status update for the milestone in the progress report.

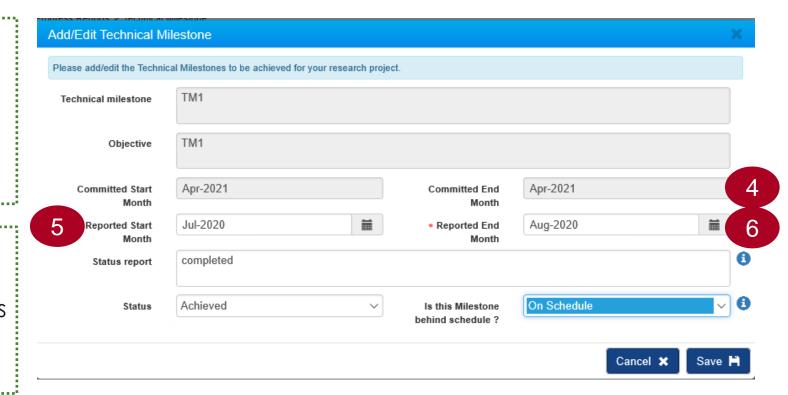
Objective displays the objective of each technical milestone that was approved during baseline/award stage or deviation.

Committed start month refers to the intended start month and year of the milestone that was set during the award stage. To change this, please raise a deviation request (refer to Deviation training manual).





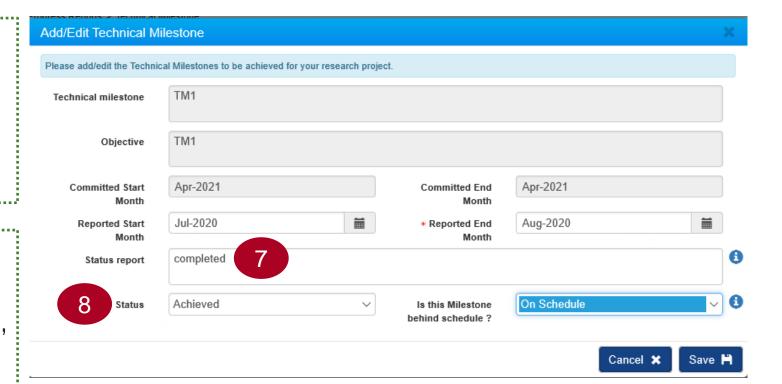
- Committed end month refers to the intended end month and year of the milestone that was set during the award stage. To change this, please raise a deviation request (refer to Deviation training manual).
- Reported start month is the actual start month and year of the milestone. It is mandatory to input this for milestone with status as "Achieved".
- Reported end month is the actual end month and year of the milestone. It is mandatory to input this for all milestone with status except "Not Started".





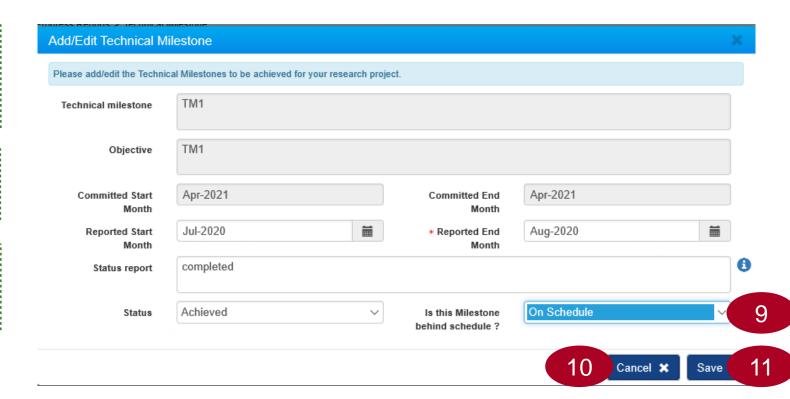
Status report is meant for the PI to provide updates and detail description for the milestone. It is mandatory to input this for milestone that are marked as "Behind Schedule".

Status: Indicate "Not started", "In progress", or "Achieved". When a milestone is removed through deviation, it is set as "Not applicable" by default.





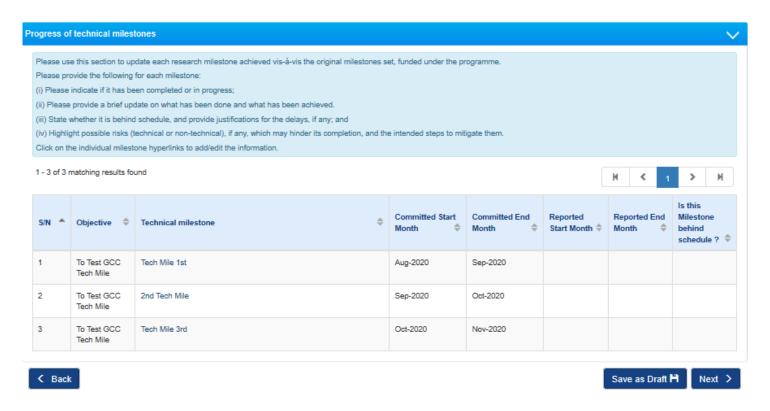
- 9 Is this milestone behind schedule?: Indicate whether the milestone is "On schedule" or "Behind schedule".
- Click "Cancel" to discard the changes to the record.
- Click "Save" to save the changes to the record.





After saving the record, the changes will be reflected in the "Progress of technical milestone" tab. Click on "Next" button to move to **Key Performance Indicators** section.

Click on "Back" button to go to previous section.



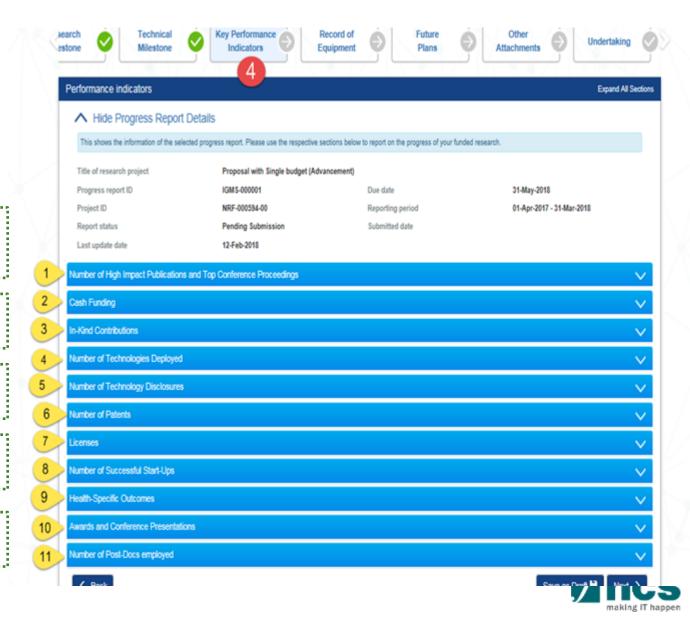


# **Key Performance Indicators**

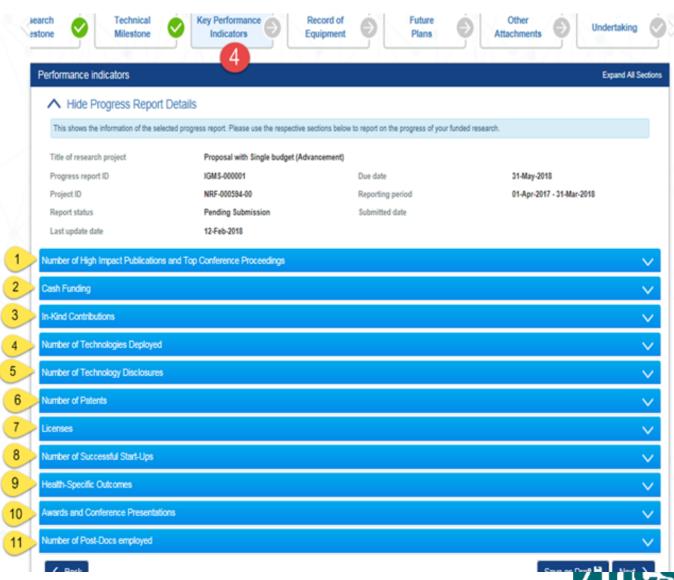


The KPI page have different sections. The listed sections are called KPI category. The values vary according to the awarded project contract. These are the complete list of KPI Category that may applicable for each project:

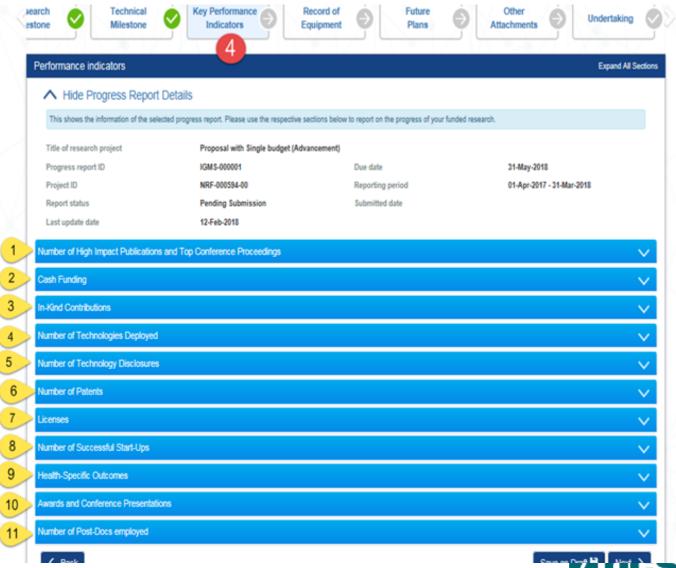
- Number of High Impact Publications and Top Conference Proceedings
- Number of Collaboration Projects
- 3 Cash Funding
- 4 In-Kind Contributions
- Number of Technologies Deployed



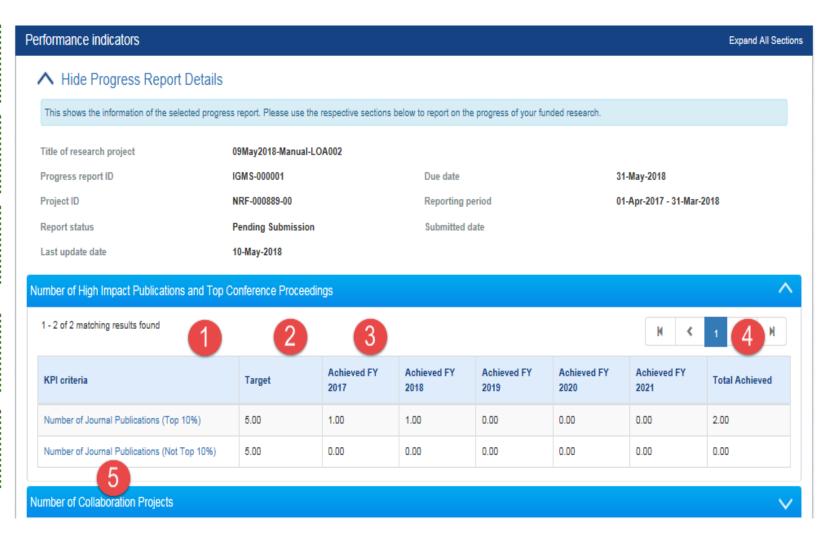








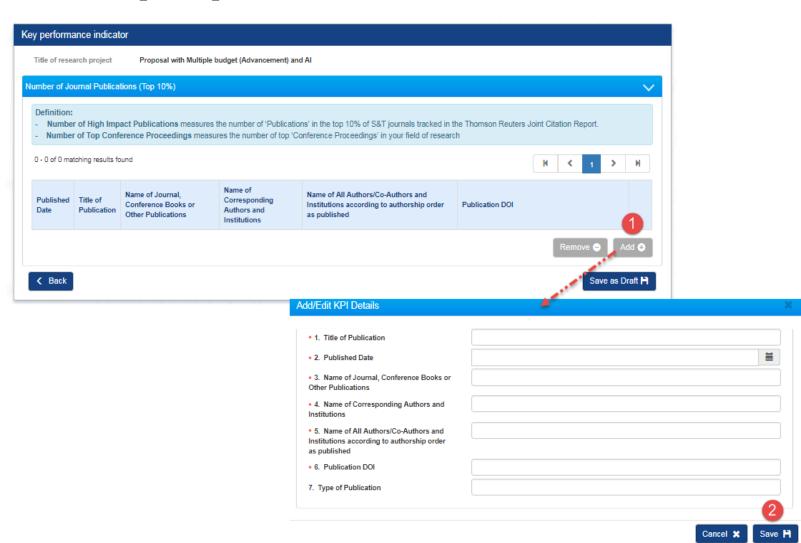
- 1 In each KPI category ID, listed applicable KPI criteria.
- Target is the total KPI target for the entire project duration.
- 3 Achieved FY, is the achieved KPI per Financial Year.
- Total achieved, is total achieved KPI for the entire project duration
- To add a KPI, click on the hyperlink of the criteria name.





On KPI criteria details form, click "Add" to add the achieved KPI.

In the pop up form, key in related information. Click Cancel to discard the record or click Save to save the achieved KPI.





For the "Number of Patents" KPI, user can leave the "Date Granted" field blank.

A KPI record entered without the "Date Granted" field will not contribute to the number of KPIs achieved for the "Number of Patents" KPI.

Number of Patents

1 - 1 of 1 matching results found

Number of Patents

KPI criteria

Number of Patents

1 - 1 of 1 matching results found

Date Granted

Title

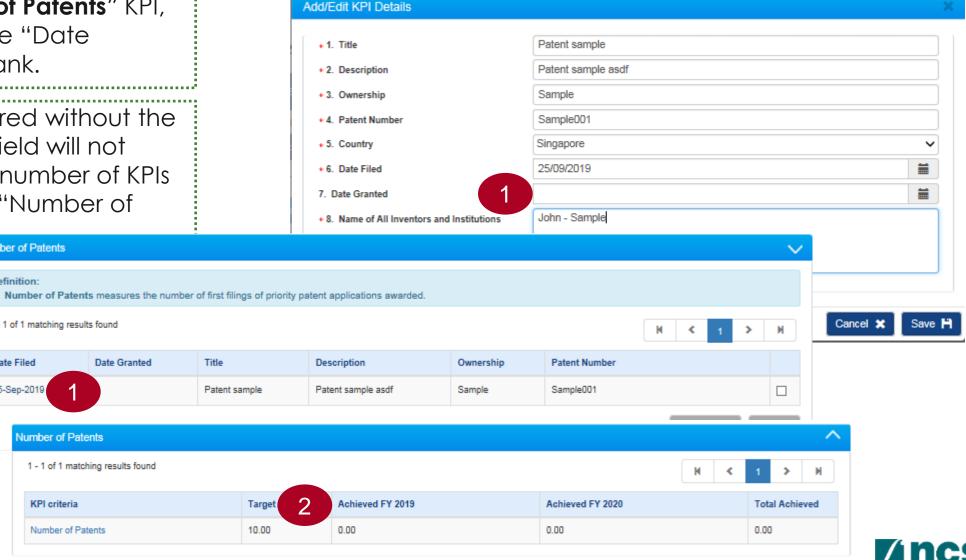
Patent sample

Target

10.00

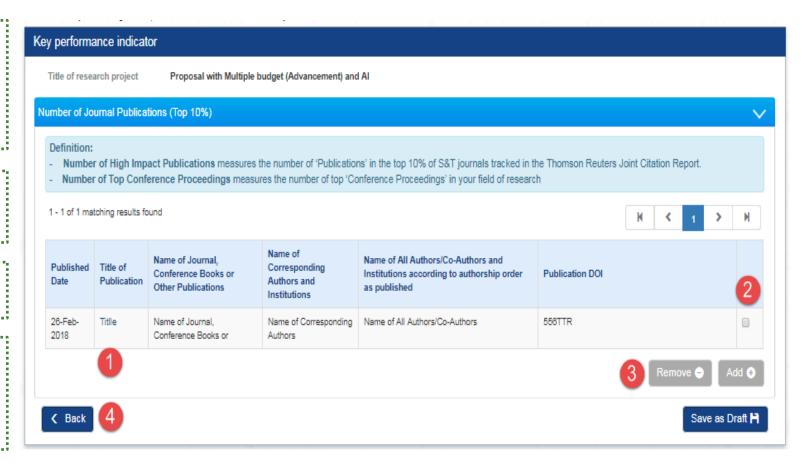
Date Filed

25-Sep-2019

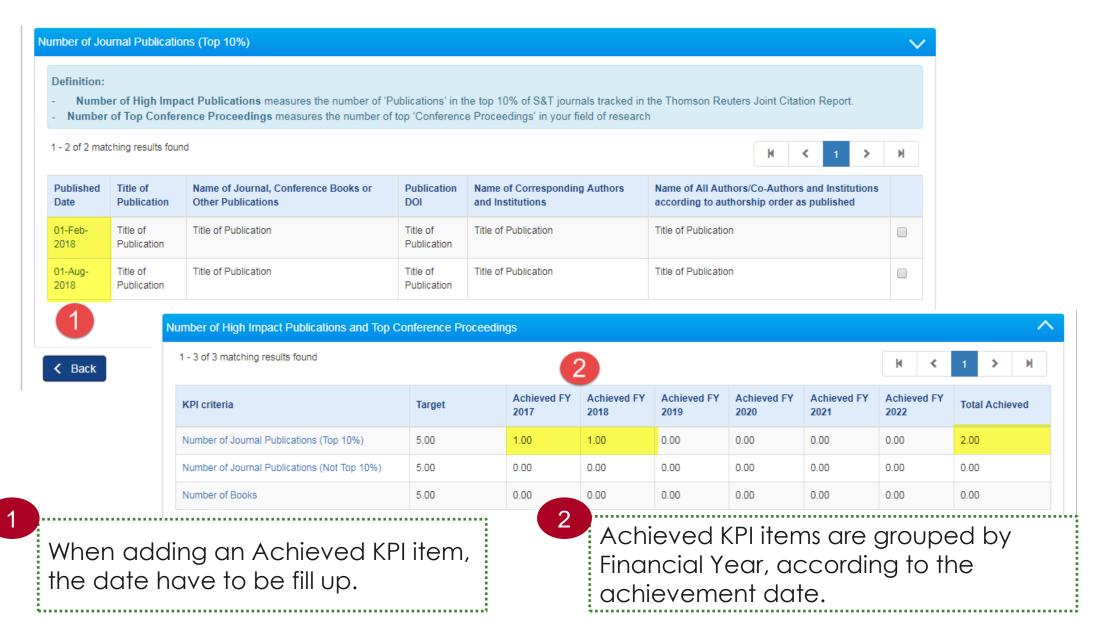




- Details created / saved record will show on the grid view. To revise a KPI, click the hyperlink on each record.
- To remove created record, check the checkbox on last column.
- Select remove button.
- 4 Select back to switch back on KPI category list page and view the achieved KPI.









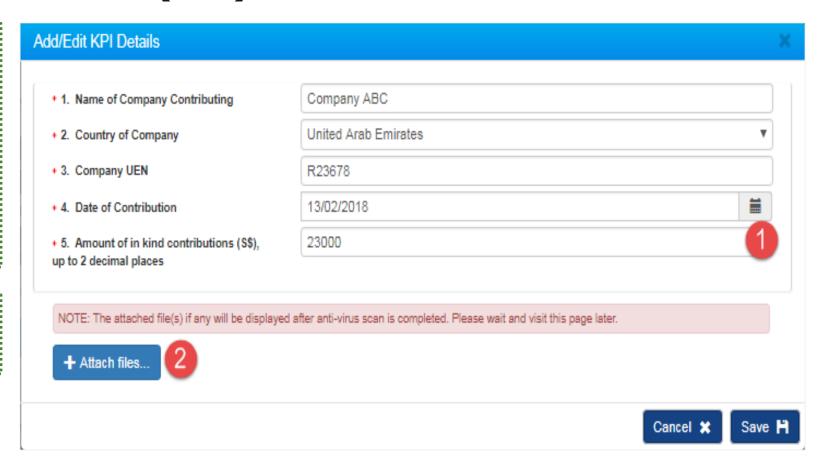


Total Achieved: is the total of the achieved FY items on KPI criteria details form.

.



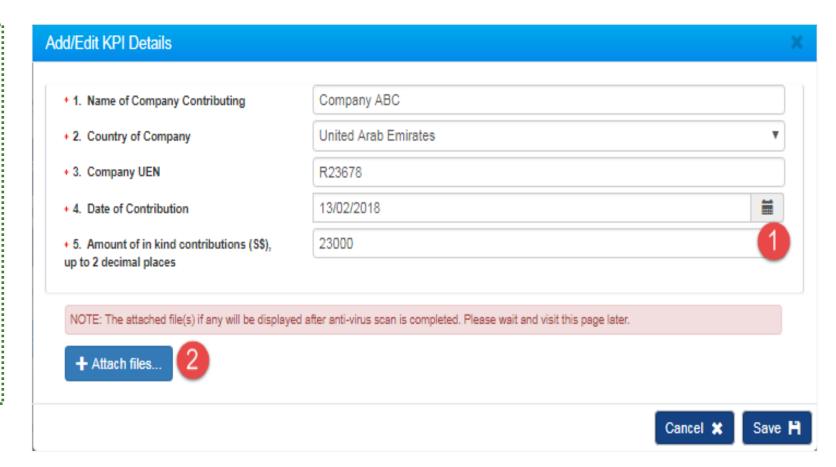
- 1 Some of the achievement KPI are measured by the S\$ (dollar) value or nominal amount. On the KPI category list page, the amount will be summed up as achieved KPI. (E.g: Cash Funding Category, In-Kind Contribution Category)
- 2 Click "Attach files" to upload the supporting documents.



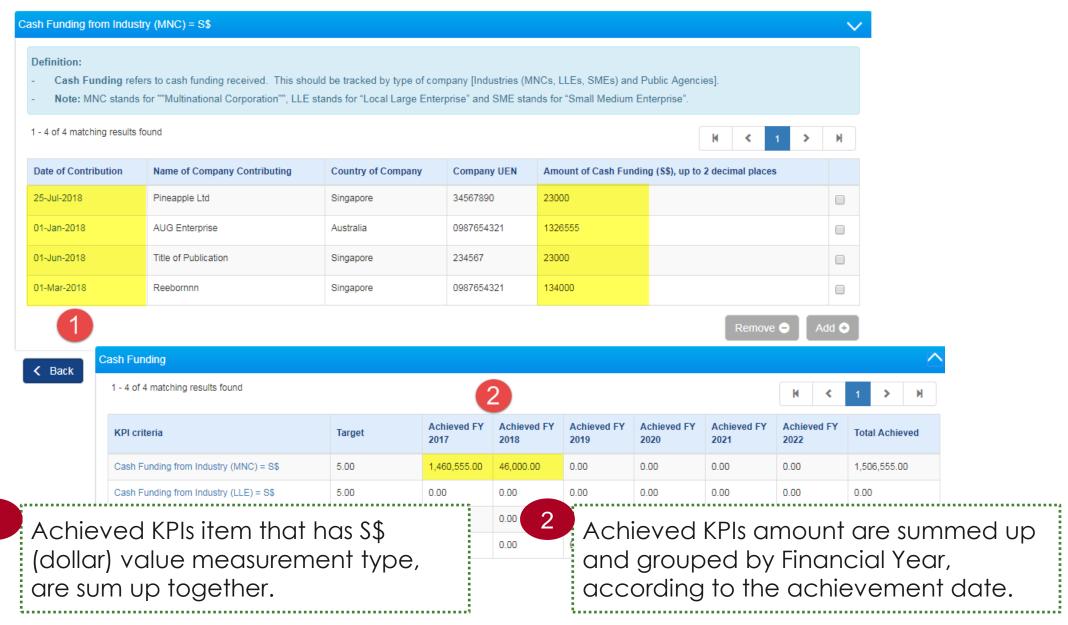


#### **Notes**

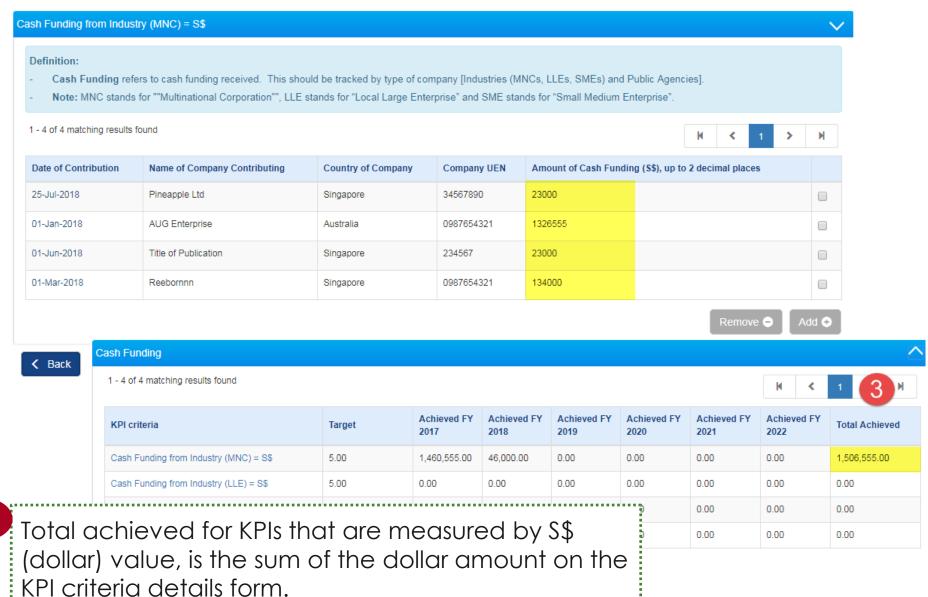
- MNC stands for Multinational Corporation
- LLE stands for Local Large Enterprise
- SME stands for Small Medium Enterprise
- Public Agency is Public sector agency governance in Singapore













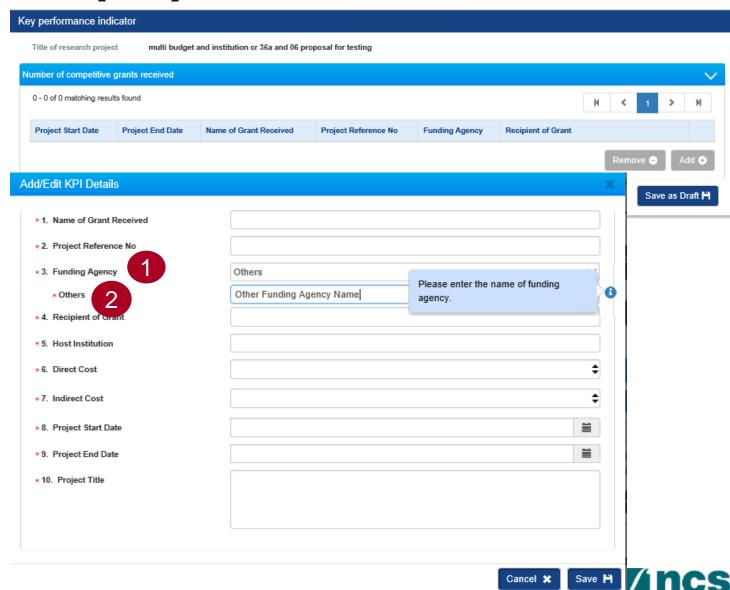
For the KPI category/criteria

"Number of competitive grants
received", the user has to select
the Funding Agency on the
dropdown. Selection is as
follows:

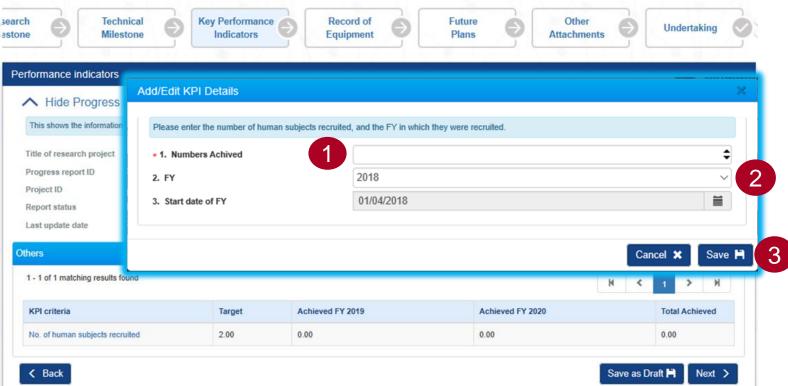
- ASTAR
- MOE
- MOH
- NRF
- Others

If the selected funding agency is

Others – the Others field will
appear and the user has to input
the Funding agency name on
the text field provided.



- For the KPI criteria "Others" "No of human subject recruited", select "FY" (Financial Year) from the dropdown list. Start date of FY is populated by system based on the selected "FY".
- Enter the number of human subject recruited in "Number Achieved"
- 3 Click on "Save" button





# **Record of Equipment**

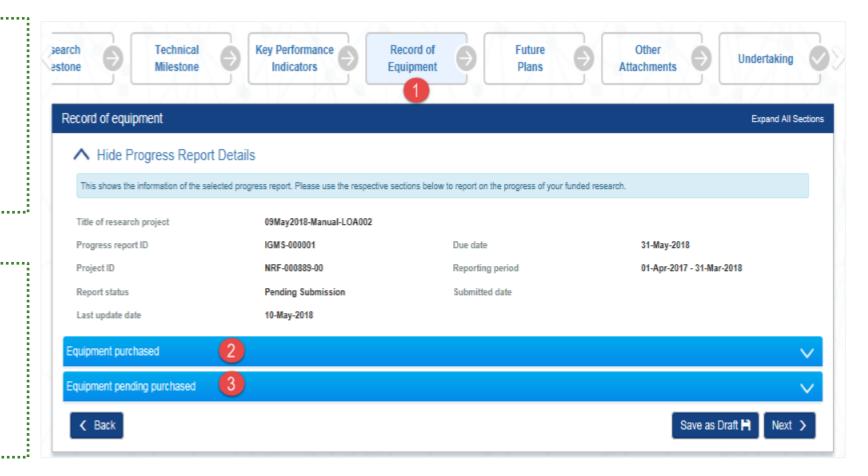


## **Record Of Equipment**

1 In Record Of Equipment page, two section are as follows,

Equipment Purchased (This shows a list of equipment purchased under the grant since last update)

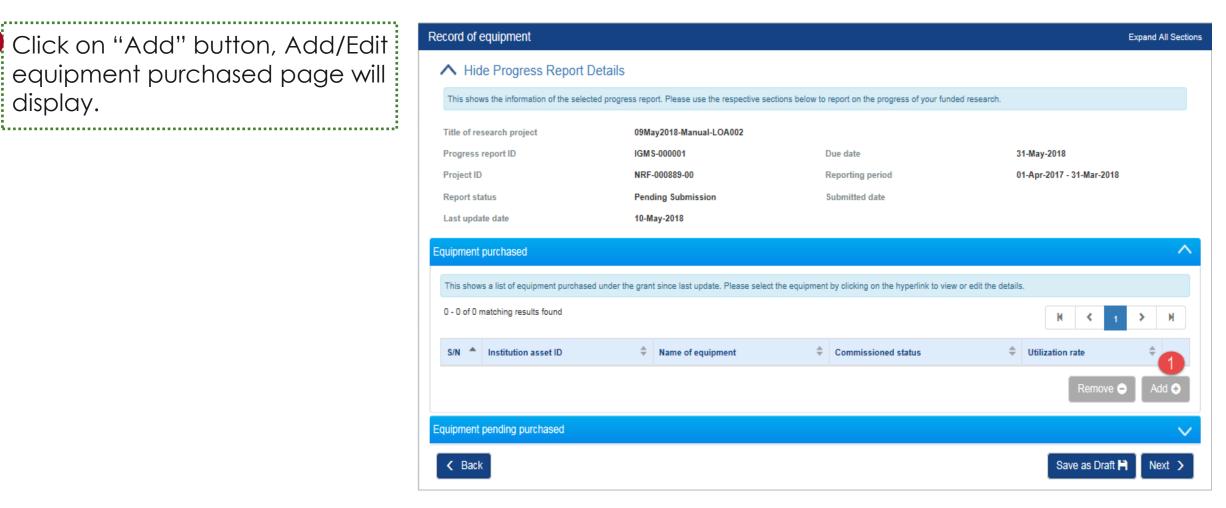
Purchased (This shows a list of equipment pending purchase under the grant since last update.)





#### Record Of Equipment

Click on "Add" button, Add/Edit equipment purchased page will display.





#### Record Of Equipment

Please use this section to list all equipment that had been purchased using the grant for full reporting period (i.e. from 'Start Date of Project' to 'End Date of Reporting'). This should include all equipment indicated in the original approved budget and any new equipment from variation request approved by the funding agency.

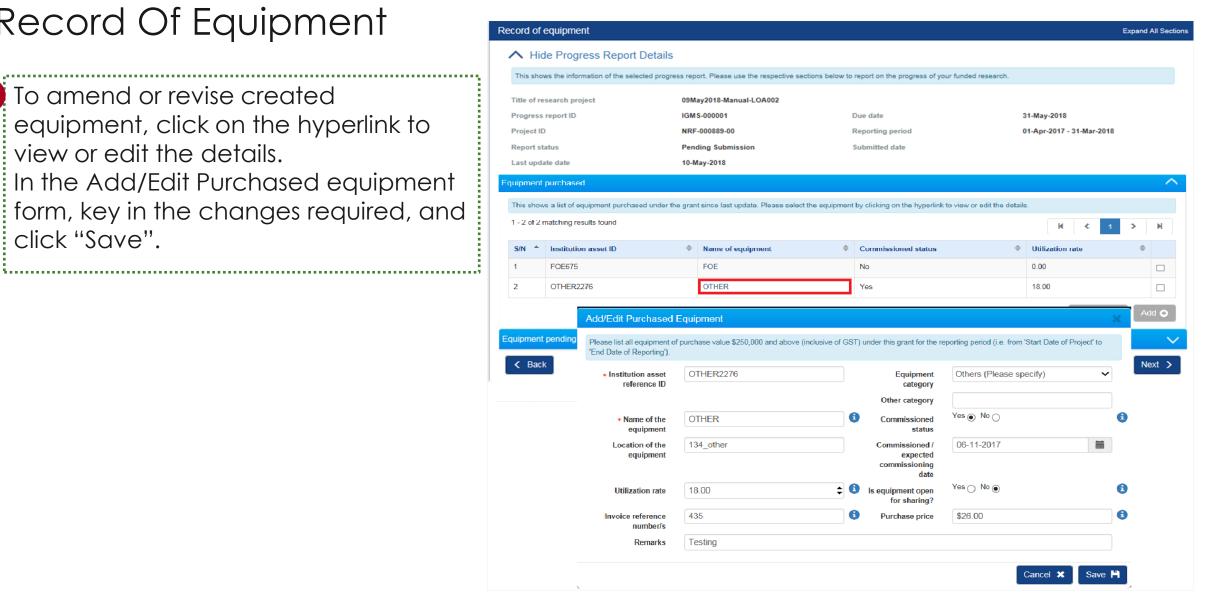
Diagonalist all assistances of	in the first of th	OT) .			
'End Date of Reporting').	purchase value \$250,000 and above (inclusive of G	51)(	under this grant for the re	eporting period (i.e. from Start Date of Project to	
<ul> <li>Institution asset reference ID</li> </ul>			Equipment category	<u> </u>	•
* Name of the equipment		0	Commissioned status	Yes ○ No ●	•
Location of the equipment			Commissioned / expected commissioning date		
Utilization rate	<b>\$</b>	0	Is equipment open for sharing?	Yes ○ No ●	•
Invoice reference number/s		0	Purchase price	\$0.00	8
Remarks					

Fill the mandatory fields and click on "save" button



## Record Of Equipment

To amend or revise created equipment, click on the hyperlink to view or edit the details. In the Add/Edit Purchased equipment form, key in the changes required, and click "Save".

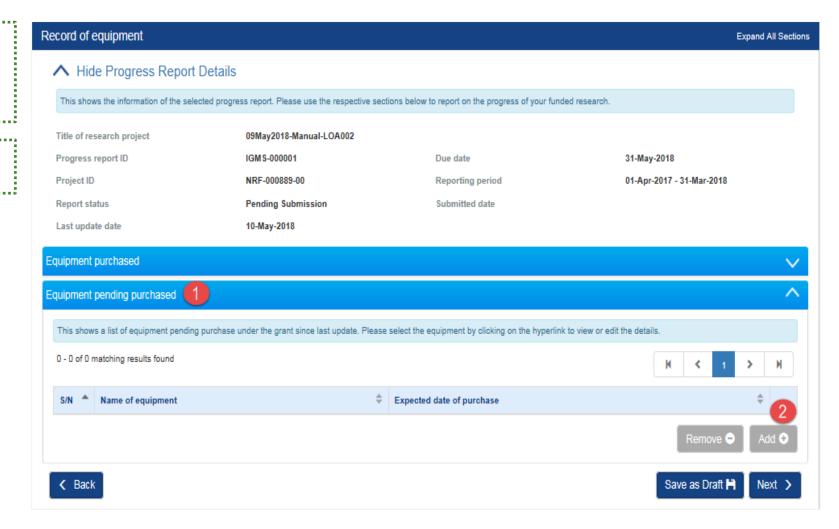




# Record Of Equipment - Equipment Pending Purchased

To add equipment for future to be purchased, open Equipment pending purchase section.

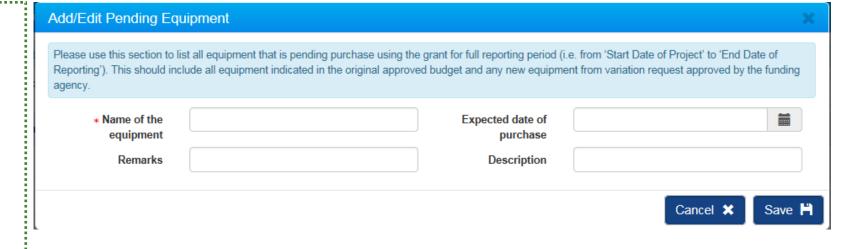
Click the "Add" button





# Record Of Equipment - Equipment Pending Purchased

Please use this section to list all equipment that is pending purchase using the grant for full reporting period (i.e. from 'Start Date of Project' to 'End Date of Reporting'). This should include all equipment indicated in the original approved budget and any new equipment from any variation request approved by the funding agency.

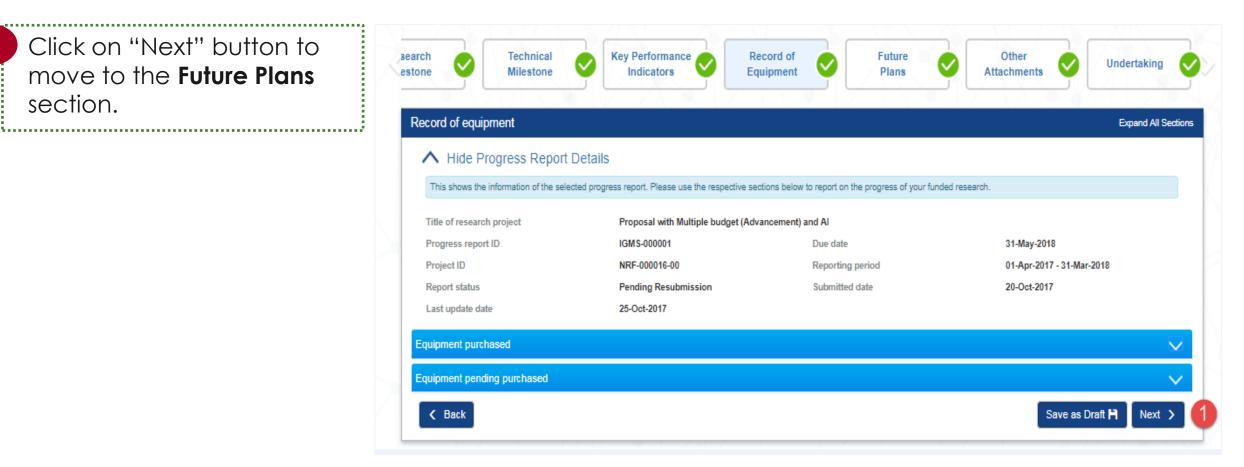


Fill the mandatory fields and click on the "Save" button



# Record Of Equipment -Equipment Pending Purchased

Click on "Next" button to move to the **Future Plans** section.



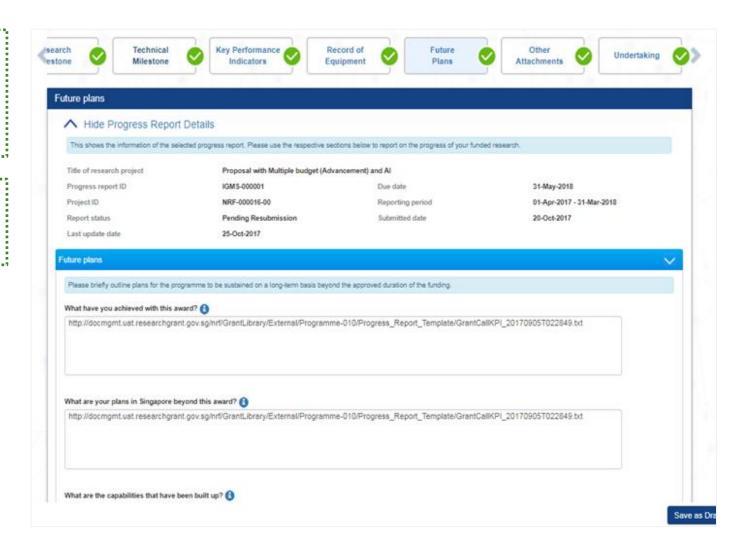


# **Future Plans**



### **Future Plans**

- 1 Use this page to describe outline plans for the programme to be sustained on a long-term basis beyond the approved duration of the funding.
- Click on "Next" button to move to the Other attachments section





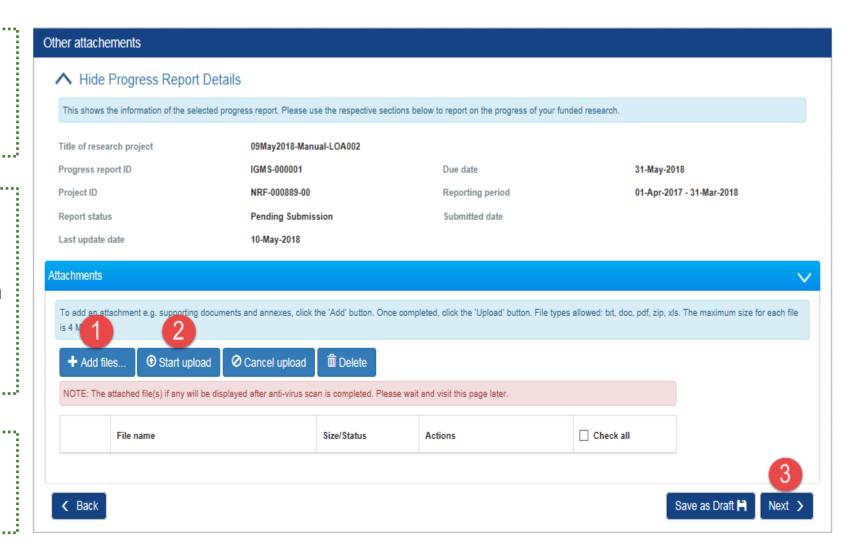
# Other Attachments



### Other Attachments

- To add an attachment e.g. supporting documents and annexes, click the 'Add' button.
- Click Start Upload. Once completed, click the 'Upload' button. File types allowed: txt, doc, pdf, zip, xls. The maximum size for each file is 4 MB.

  Maximum total file in one progress report is 30 MB.
- Click on "Next" to move to the Undertaking section.





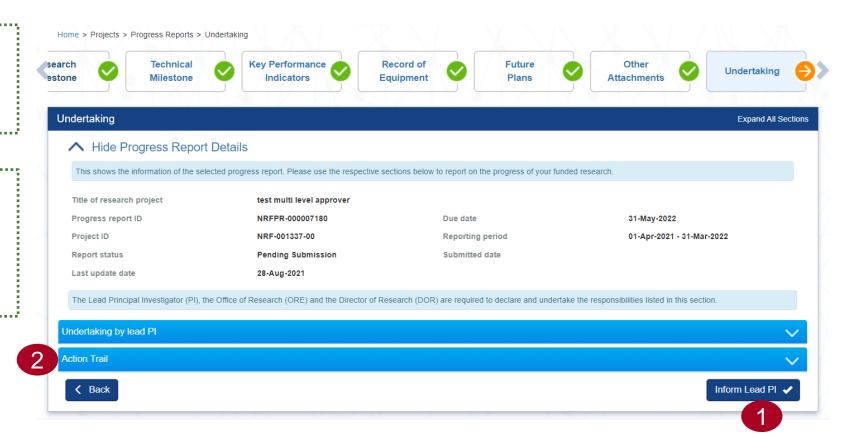
# Undertaking



### Undertaking

1 Click on "Inform Lead PI" when the progress report updates are complete.

Action Trail, This section maintains the actions and comments from all parties that acted on the progress report.





# Undertaking

Click "Yes" to proceed, or "No" to cancel..

#### Confirmation

Click Yes to inform Lead PI that the progress report updates are complete



Click "OK" to close the dialog box.

#### Message

Progress Report has been sent to Lead PI successfully



#### To Note

- 1. An email will be sent to Lead PI to inform him/her that the progress report has been filled up by the Data Admin.
- 2. The progress report is not considered submitted/resubmitted until the Lead PI submits/resubmits the progress report.



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