

# **Electronic Grant Management System (eGMS)**

## **Training Manual for Operating eGMS Accounts**

If you have any queries or encounter difficulties relating to eGMS, please send email to [egmsenquiry@healthbureau.gov.hk](mailto:egmsenquiry@healthbureau.gov.hk)

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### **Abbreviations**

AI = Administering Institution

eGMS = Electronic Grant Management System

EO = Executive Officer

DH = Department Head\*

FO = Finance Officer\*

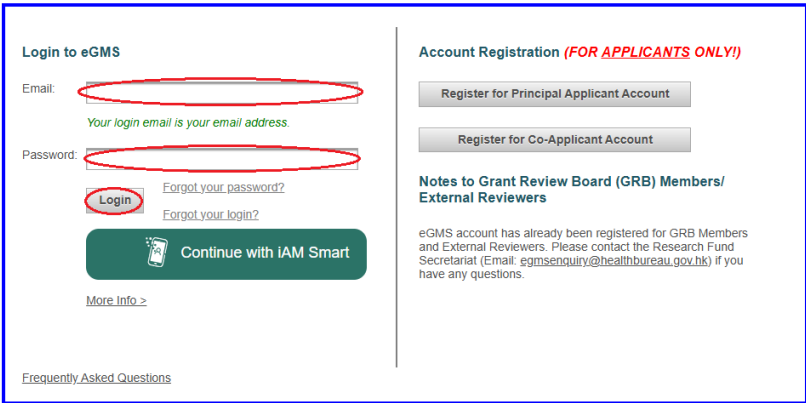
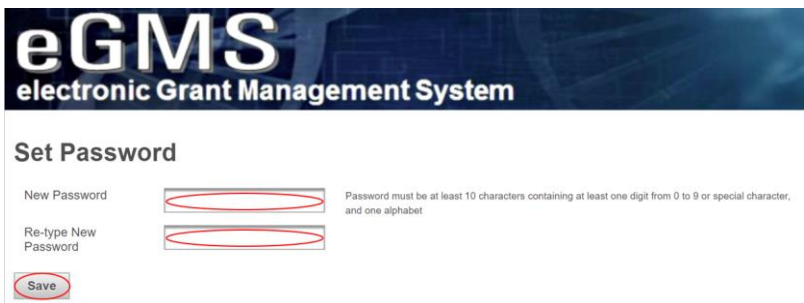
PA = Principal Applicant

RFS = Research Fund Secretariat

RO = Research Officer\*

*\* AI user*

## 1. Set Password for a First-time Login User

<p>Subject: eGMS – Successful Account Registration for (Account Type): (The Name of User)</p> <p>Dear (The Name of Principal Applicant),</p> <p>Your registration as Principal Applicant in the electronic Grant Management System (eGMS) of the Research Fund Secretariat, Health Bureau, HKSAR is <u>successful</u>.</p> <p>You can now submit your grant application via the eGMS by logging in to the <a href="#">eGMS</a> (eGMS URL).</p> <p>Please contact to the Research Fund Secretariat at <a href="mailto:egmsenquiry@healthbureau.gov.hk">egmsenquiry@healthbureau.gov.hk</a> if you have more than one login account in the eGMS.</p> <p>Thank you.</p>	<p><b>Step 1:</b></p> <p>Please click on the eGMS URL to go to the eGMS login page.</p>
	<p><b>Step 2:</b></p> <ul style="list-style-type: none"> <li>- Go to the eGMS Login page.</li> <li>- Enter login email.</li> <li>- Enter password and click ‘Login’.</li> </ul>
	<p><b>Step 3:</b></p> <ul style="list-style-type: none"> <li>- Enter new password.</li> <li>- Re-enter new password</li> <li>- Click ‘Save’.</li> </ul> <p>Note: The password should be at least 10 characters containing at least one digit 0-9 and one alphabet, e.g. abc123.</p>



### Set Password

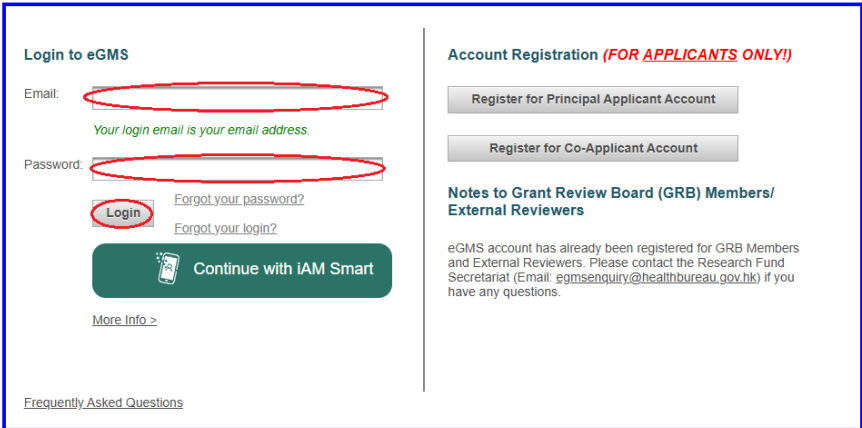

The password of your account is set successfully. You can login again for your actions.

Login Page

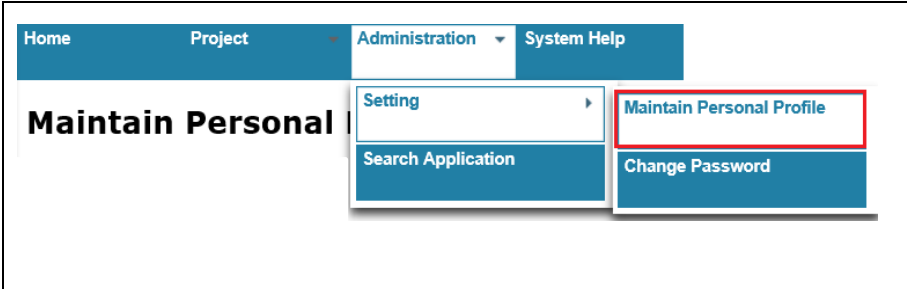
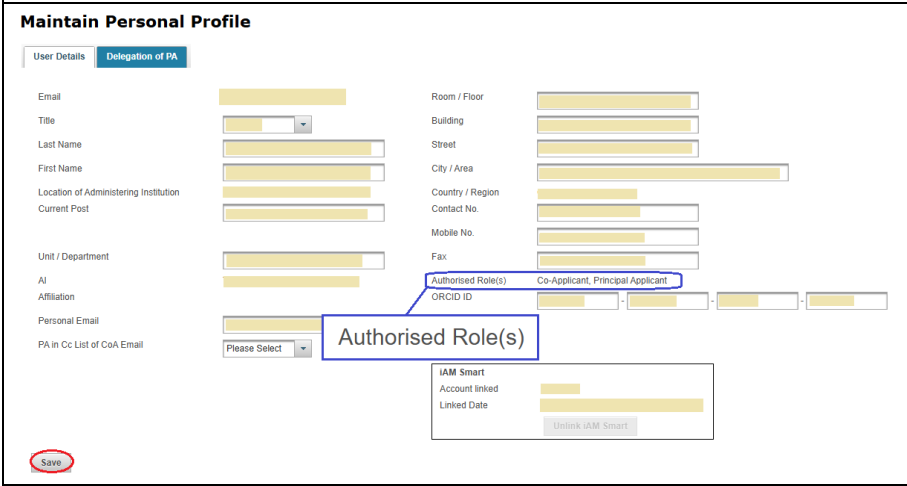
### Step 3:

Click 'Login Page'.

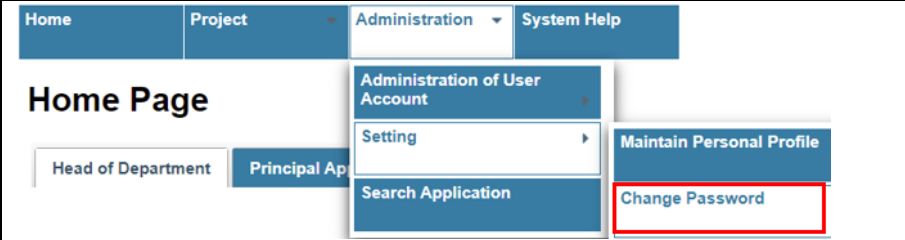
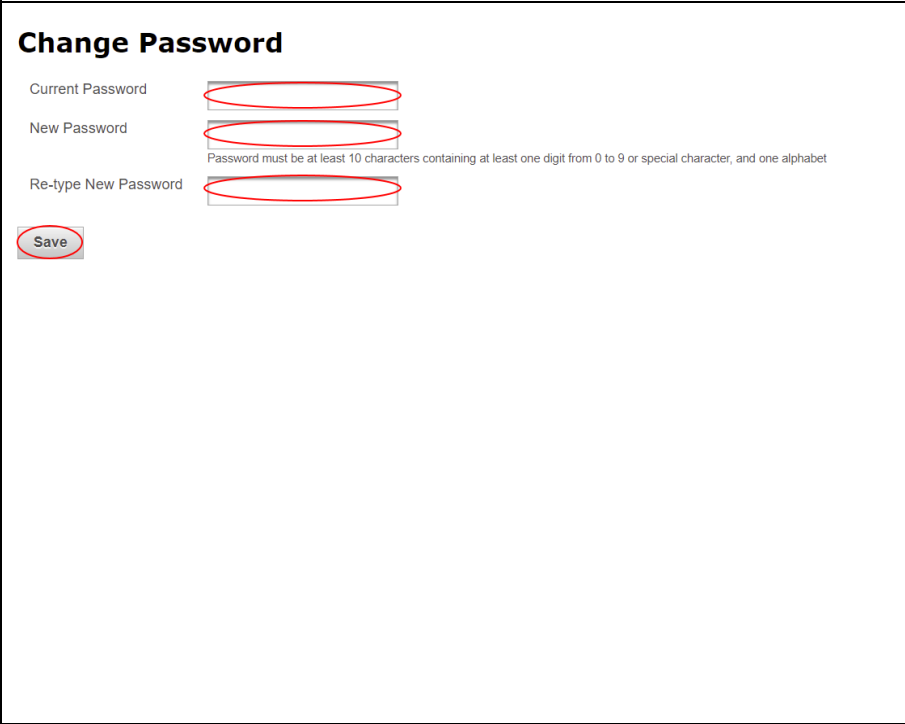
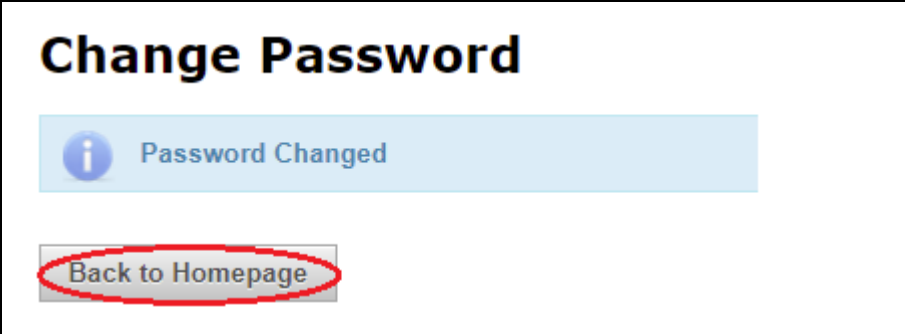
## 2. Login to / Logout eGMS

	<p><b>Step 1 (to login):</b></p> <ul style="list-style-type: none"><li>- Go to the eGMS Login page.</li><li>- Enter login email.</li><li>- Enter password and click ‘<b>Login</b>’.</li></ul> <p>Note: The login email is the email address registered with AI/RFS.</p>
	<p><b>Step 2 (to logout):</b></p> <p>Click ‘<b>Logout</b>’ (at the right-hand side upper corner).</p>


3. Maintain Personal Profile

 <p>The screenshot shows a navigation bar with 'Home', 'Project', 'Administration', and 'System Help'. A dropdown menu is open under 'Administration', showing 'Setting', 'Search Application', and 'Change Password'. The 'Setting' dropdown is further open, and 'Maintain Personal Profile' is highlighted with a red rectangular box.</p>	<p><b>Step 1:</b></p> <p>Go to Administration &gt; Setting&gt; Maintain Personal Profile</p>
 <p>The screenshot shows the 'Maintain Personal Profile' form. It has two tabs: 'User Details' and 'Delegation of PA'. The 'User Details' tab is active. The form contains various input fields for personal and contact information, including Email, Title, Last Name, First Name, Location of Administering Institution, Current Post, Unit / Department, AI, Affiliation, Personal Email, and PA in Cc List of CoA Email. There are also fields for Room / Floor, Building, Street, City / Area, Country / Region, Contact No., Mobile No., and Fax. A section for 'Authorized Role(s)' is highlighted with a blue box, showing 'Co-Applicant, Principal Applicant'. Below this is an 'ORCID ID' field. At the bottom left, a 'Save' button is circled in red.</p>	<p><b>Step 2:</b></p> <p>Click ‘Save’ after editing the contact information.</p> <p>Note: Authorised roles can only be modified by RFS.</p>

#### 4. Change Password

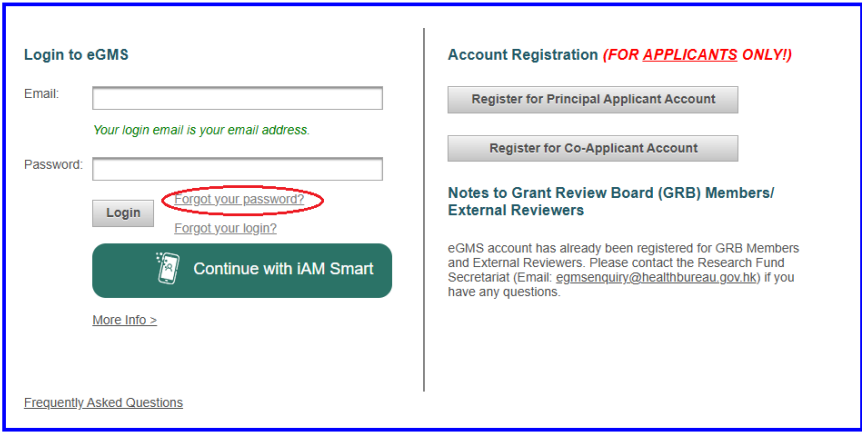
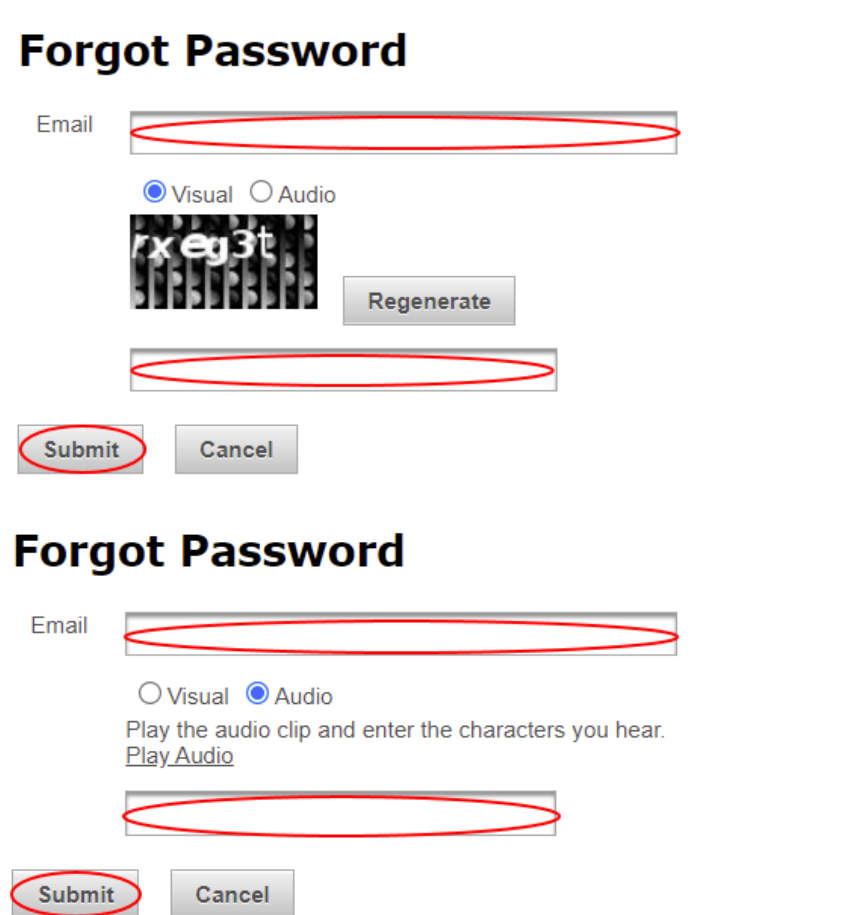
	<p><b>Step 1:</b></p> <p>Go to Administration &gt; Setting&gt; Change Password</p>
	<p><b>Step 2:</b></p> <ul style="list-style-type: none"> <li>- Enter current password.</li> <li>- Enter new password</li> <li>- Re-enter new password</li> <li>- Click 'Save'.</li> </ul> <p>Note: Password must be at least 10 characters containing at least one digit from 0 to 9 or special character, and one alphabet e.g. abc123.</p>
	<p><b>Step 3:</b></p> <p>Acknowledgment message for Password changed will be shown at the top.</p> <p>Click 'Back to Homepage'.</p>

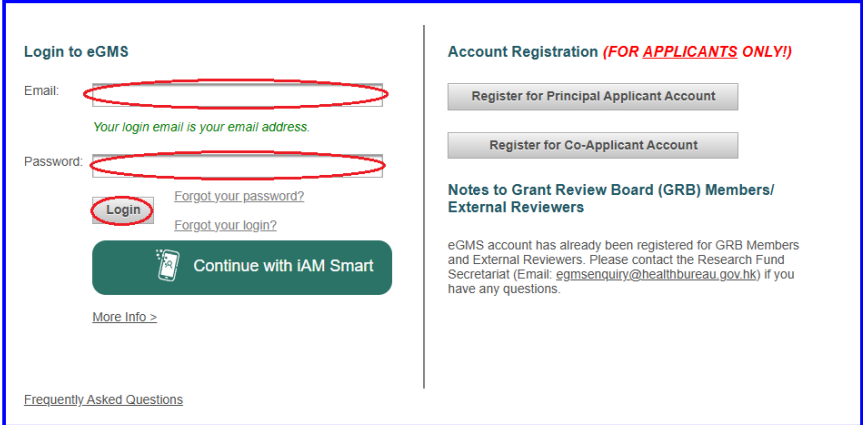
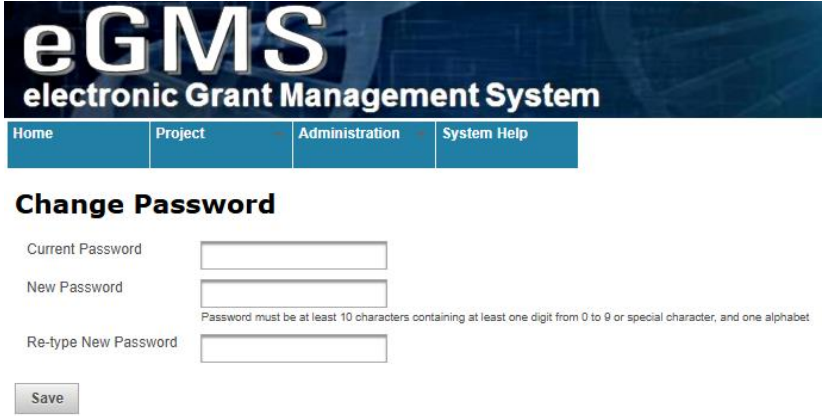
## 5. Change Password when password is expired every 180 days

<p><b>Change Password</b></p> <p>Current Password <input type="password"/></p> <p>New Password <input type="password"/></p> <p>Re-type New Password <input type="password"/></p> <p><small>Password must be at least 10 characters containing at least one digit from 0 to 9 or special character, and one alphabet</small></p> <p><input type="button" value="Save"/></p>	<p><b>Step 1:</b></p> <ul style="list-style-type: none"><li>- Enter current password.</li><li>- Enter new password.</li><li>- Re-enter new password.</li><li>- Click 'Save'.</li></ul> <p>Note:</p> <p>Password must be at least 10 characters containing at least one digit from 0 to 9 or special character, and one alphabet e.g. abc123.</p>
<p><b>Change Password</b></p> <p> Password Changed</p> <p><input type="button" value="Back to Homepage"/></p>	<p><b>Step 2:</b></p> <p>Acknowledgment message for Password changed will be shown at the top.</p> <ul style="list-style-type: none"><li>- Click 'Back to Homepage'.</li></ul>

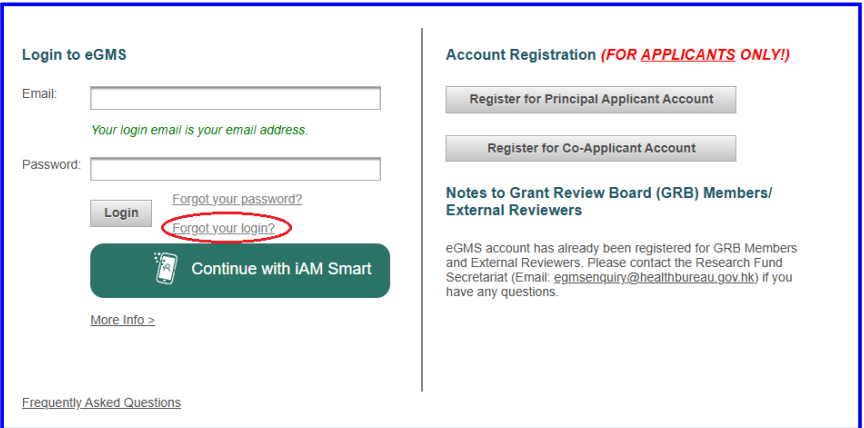
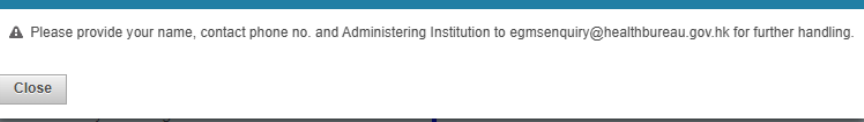


## 6. Forgot Password

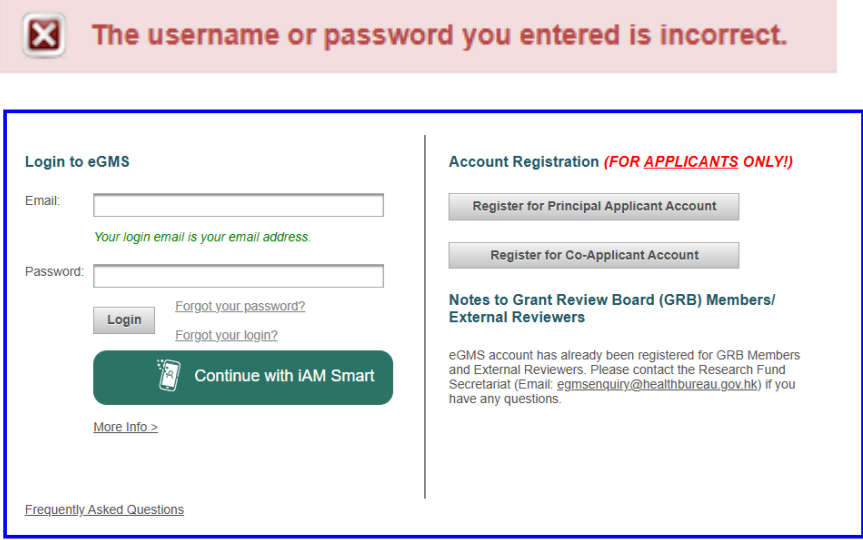
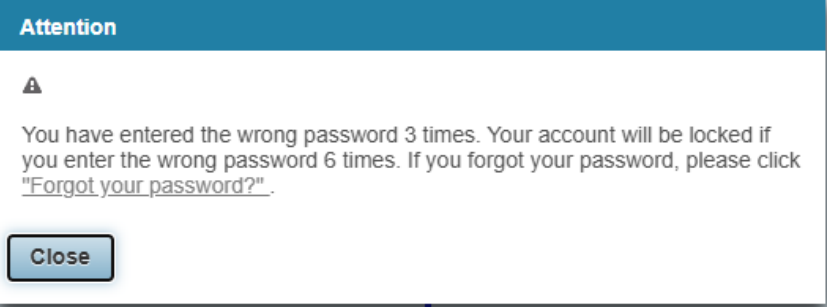

 <p>The screenshot shows the 'Login to eGMS' section on the left and 'Account Registration (FOR APPLICANTS ONLY)' on the right. In the login section, the 'Forgot your password?' link is circled in red. Below it is a 'Continue with iAM Smart' button. The registration section has two buttons: 'Register for Principal Applicant Account' and 'Register for Co-Applicant Account'. There is also a 'Notes to Grant Review Board (GRB) Members/ External Reviewers' section with contact information.</p>	<p><b>Step 1:</b></p> <p>Click 'Forgot your password?' on Login Page.</p>
 <p>The first screenshot is titled 'Forgot Password' and shows the 'Visual' captcha step. The email field is circled in red. Below it are radio buttons for 'Visual' (selected) and 'Audio'. A captcha image shows the characters 'rxeg3t'. A 'Regenerate' button is next to it. Below the captcha is an input field for the characters, also circled in red. At the bottom are 'Submit' and 'Cancel' buttons, with 'Submit' circled in red.</p> <p>The second screenshot is also titled 'Forgot Password' and shows the 'Audio' captcha step. The email field is circled in red. Below it are radio buttons for 'Visual' and 'Audio' (selected). Text says 'Play the audio clip and enter the characters you hear.' with a 'Play Audio' link. Below is an input field for the audio characters, circled in red. At the bottom are 'Submit' and 'Cancel' buttons, with 'Submit' circled in red.</p>	<p><b>Step 2:</b></p> <ul style="list-style-type: none"><li>- Enter login email</li><li>- Enter visual captcha</li><li>- Click 'Submit'</li></ul> <p>Or</p> <ul style="list-style-type: none"><li>- Enter login email</li><li>- Enter the audio clip</li><li>- Click 'Submit'</li></ul>


<p><b>Set Password</b></p> <p>The temporary password of your account is set successfully. Please check your mail. You can login again for your actions.</p> <p><a href="#">Login Page</a></p>	<p><b>Step 3a:</b></p> <ul style="list-style-type: none"> <li>- Click ‘<b>Login Page</b>’ to login to eGMS using the temporary password.</li> </ul>
<p><b>Subject:</b> eGMS – Forget Password: (The Name of User)</p> <p>Dear (The Name of User),</p> <p>Please find the temporary password for accessing the electronic Grant Management System (eGMS):</p> <p>Password: [Insert temporary password] Login page: (eGMS URL)</p> <p>The temporary password will expire in (Temporary password validity when forget password) hours.</p> <p>You <b>MUST</b> set up a new password after logging in the <a href="#">eGMS</a>.</p> <p>If you have not made this request, please email to <a href="mailto:egmsenquiry@healthbureau.gov.hk">egmsenquiry@healthbureau.gov.hk</a> immediately.</p> <p>Thank you.</p>	<p><b>Step 3b:</b></p> <p>Email notification for the temporary password.</p> <p>Note: Temporary password is valid for 24 hours, the valid period is configurable in eGMS</p>
	<p><b>Step 4:</b></p> <p>Go to the eGMS Login page.</p> <ul style="list-style-type: none"> <li>- Enter the temporary password and click ‘<b>Login</b>’.</li> </ul>
	<p><b>Step 5:</b></p> <ul style="list-style-type: none"> <li>- Setup a new password after logging in the eGMS.</li> </ul>

## 7. Forgot Login Email

	<p><b>Step 1:</b> Click ‘Forgot your login ?’ on Login Page.</p>
	<p><b>Step 2:</b> Provide your name, contact phone no. and Administering Institution to <a href="mailto:egmsenquiry@healthbureau.gov.hk">egmsenquiry@healthbureau.gov.hk</a> for further handling.</p>

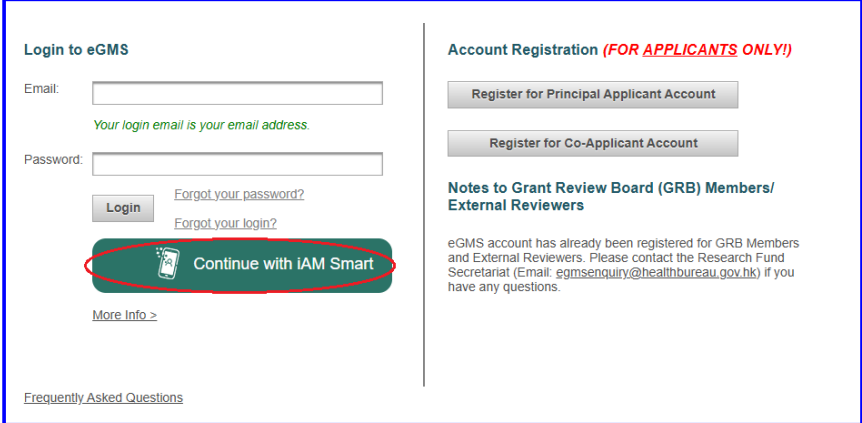
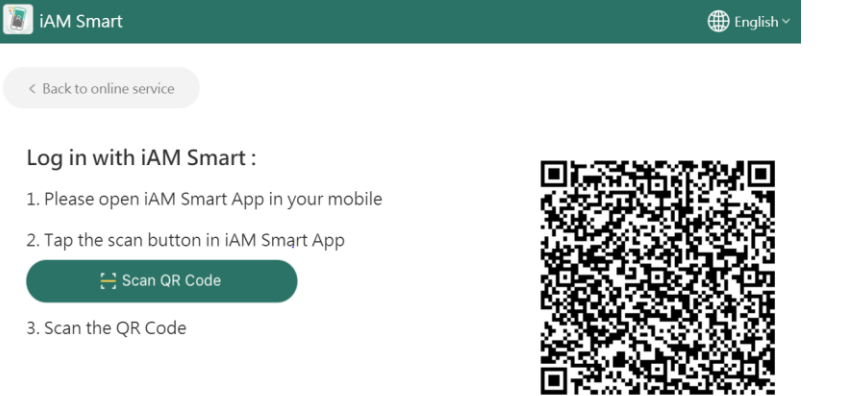
## 8. Unlock Account




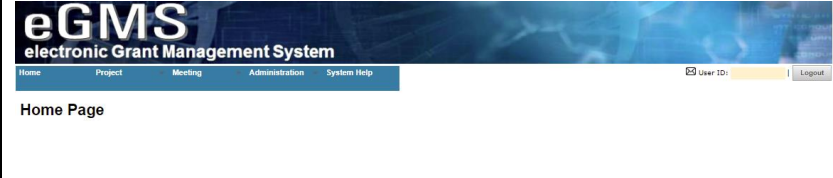
  	<p>Notes:</p> <ul style="list-style-type: none"> <li>- eGMS account will be <b>locked</b> if user fails to enter the login email/password for 6 times.</li> <li>- User can click ‘<b>Forgot your password</b>’ to avoid account locked by eGMS after the two failed attempts</li> </ul> <p>Error message for the 3<sup>rd</sup> to 5<sup>th</sup> failed attempt</p> <p>“Account locked” notice for the 6<sup>th</sup> failed attempt. User should contact RFS to unlock the account.</p>
<p>Subject: eGMS – Account Locked: (The Name of User)</p> <p>Dear (The Name of User),</p> <p>Your account (Account name) in the electronic Grant Management System (eGMS) was locked as you failed to provide the correct password for 6 times. Please contact to the Research Fund Secretariat at egmsenquiry@healthbureau.gov.hk if you would like to re-activate your account.</p> <p>Thank you.</p>	<p><b>Step 1:</b></p> <p>Contact RFS at <a href="mailto:egmsenquiry@healthbureau.gov.hk">egmsenquiry@healthbureau.gov.hk</a>.</p>

<p>Subject: eGMS – Account Unlocked: (The Name of User)</p> <p>Dear (The Name of User),</p> <p>Your account (Account name) in the electronic Grant Management System (eGMS) has been unlocked.</p> <p>Please find the temporary password for accessing the electronic Grant Management System (eGMS):</p> <p>Password: (Temporary password) Login page: (eGMS URL)</p> <p>Please be reminded to set up a new password after logging in to the <a href="#">eGMS</a> (eGMS URL).</p> <p>Thank you.</p>	<p><b>Step 2:</b></p> <p>Use the temporary password to login and reset password.</p>
<p><b>Change Password</b></p> <p>Current Password <input type="password"/></p> <p>New Password <input type="password"/></p> <p>Re-type New Password <input type="password"/></p> <p><small>Password must be at least 10 characters containing at least one digit from 0 to 9 or special character, and one alphabet</small></p> <p><input type="button" value="Save"/></p>	<p><b>Step 3:</b></p> <ul style="list-style-type: none"> <li>- Enter current temporary password</li> <li>- Enter new password</li> <li>- Re-enter the new password</li> </ul> <p>Note:</p> <p>The password must be at least 10 characters containing at least one digit from 0 to 9 or special character, and one alphabet, e.g. abcde12345.</p>
<p><b>Change Password</b></p> <p> Password Changed</p> <p><input type="button" value="Back to Homepage"/></p>	<p><b>Step 4:</b></p> <p>Click 'Back to Homepage' for necessary action(s).</p>

## 9. iAM Smart Function

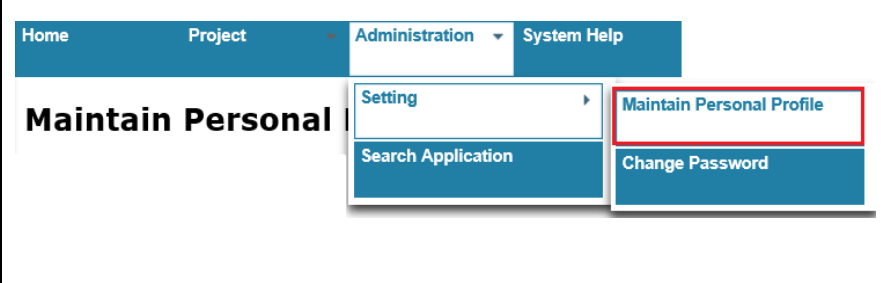
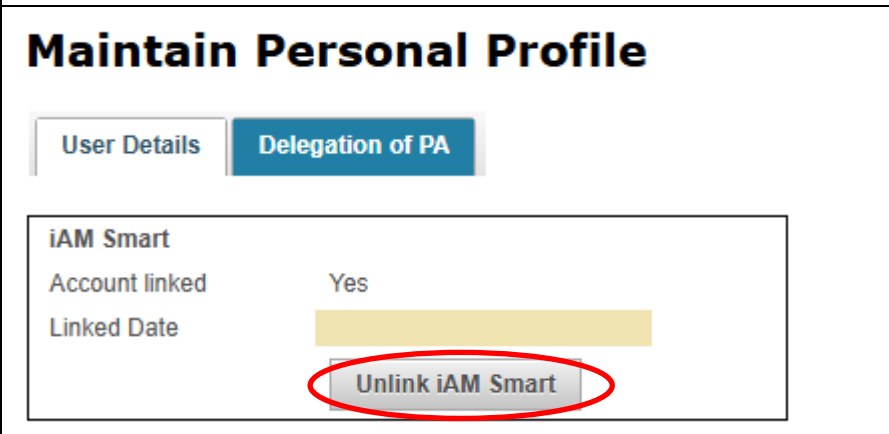
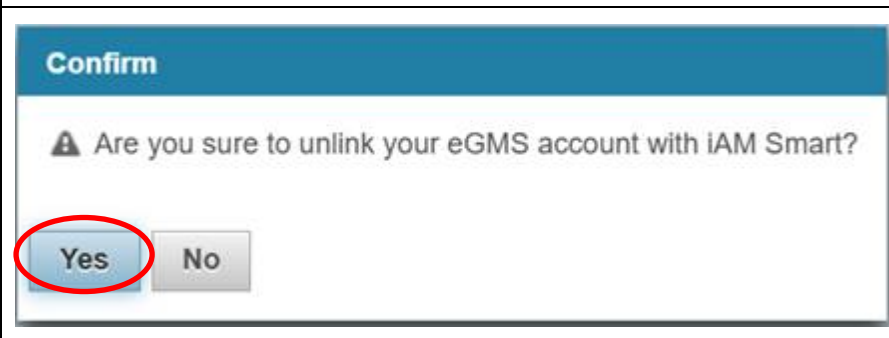
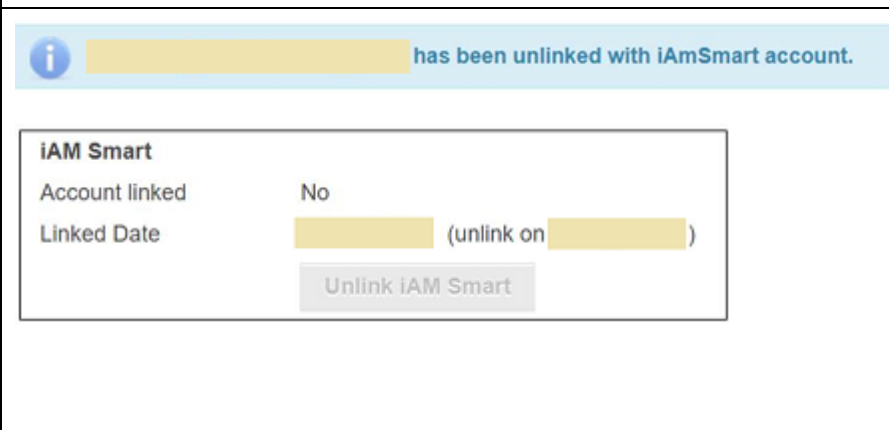
(Note: this function is available for current iAM Smart users, who are Hong Kong Identity Card (HKID Card) holders aged 11 or above. Please find more details at <https://www.iamsmart.gov.hk/>)

 <p>The screenshot shows the 'Login to eGMS' section with fields for Email and Password, a 'Login' button, and links for 'Forgot your password?' and 'Forgot your login?'. A green button labeled 'Continue with iAM Smart' with a smartphone icon is circled in red. To the right, the 'Account Registration (FOR APPLICANTS ONLY!)' section has buttons for 'Register for Principal Applicant Account' and 'Register for Co-Applicant Account'. Below that, a section for 'Notes to Grant Review Board (GRB) Members/ External Reviewers' provides contact information for the Research Fund Secretariat.</p>	<p><b>Step 1:</b> Click 'Login with iAM Smart'.</p>
 <p>The screenshot shows the iAM Smart app interface. At the top, there's a header with the iAM Smart logo and a language selector set to 'English'. Below the header, a button says '&lt; Back to online service'. The main section is titled 'Log in with iAM Smart :' and lists three steps: 1. Please open iAM Smart App in your mobile, 2. Tap the scan button in iAM Smart App, and 3. Scan the QR Code. A green button labeled 'Scan QR Code' with a scanner icon is shown. To the right of the steps is a large QR code.</p>	<p><b>Step 2:</b> Use iAM Smart App to perform the authentication</p> <ul style="list-style-type: none"><li>- Use iAM Smart APP to scan QR Code</li></ul>

  	<p><b>Step 3a:</b> <i>(for 1st time login with iAM Smart)</i></p> <ul style="list-style-type: none"> <li>– Fill in the eGMS login email and password</li> <li>- Click “Continue” to proceed</li> <li>- Login to eGMS successfully</li> </ul>
	<p><b>Step 3b:</b> Login to eGMS successfully</p>

## 10. Unlink iAM Smart from eGMS Account

(Note: this function is available for current iAM Smart users, who are Hong Kong Identity Card (HKID Card) holders aged 11 or above. Please find more details at <https://www.iamsmart.gov.hk/>)

	<p><b>Step 1:</b></p> <p>Go to Administration &gt; Setting&gt; Maintain Personal Profile</p>
	<p><b>Step 2:</b></p> <p>Under User Details, go to “iAM Smart”</p> <ul style="list-style-type: none"> <li>- Click “Unlink iAM Smart”</li> </ul>
	<p><b>Step 3:</b></p> <ul style="list-style-type: none"> <li>- Click “Yes” to confirm</li> </ul>
	<p><b>Step 3:</b></p> <p>Confirmation message will show for successful unlinking of iAMSmart account. The record for “Account linked” and “Linked Date” will be updated.</p>



11. System Help

<div><div>HomeProjectAdministrationSystem Help</div><div><div>System Help Guide to Users</div><div>Please contact the Research Fund Secretariat (Email: <a href="mailto:egmsenquiry@healthbureau.gov.hk">egmsenquiry@healthbureau.gov.hk</a>) if you have any questions.</div><div>You can download the following file(s):</div><div><div><div>Training Manual for Operating eGMS Accounts</div><div>File Size903KB</div><div>Latest Versionver. 2</div></div></div></div></div>	<div>Go to System Help&gt;</div> <div>- Training Manuals and other user guides can be downloaded from ‘System Help’.</div>
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