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

Content

Abbreviations

AI = Administering Institution

eGMS = Electronic Grant Management System

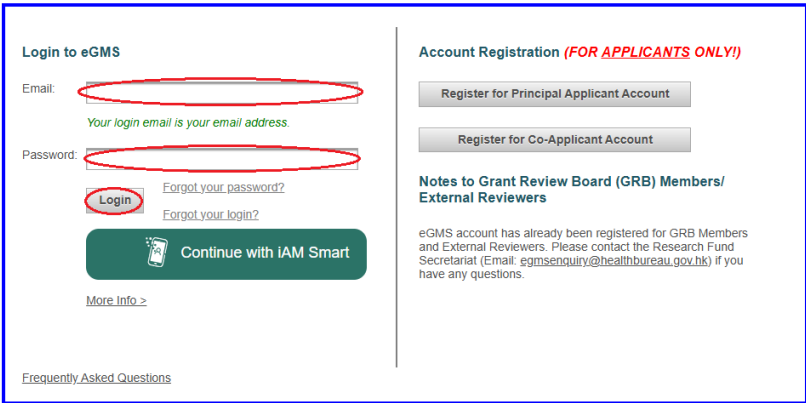EO = Executive Officer

DH = Department Head*

FO = Finance Officer*
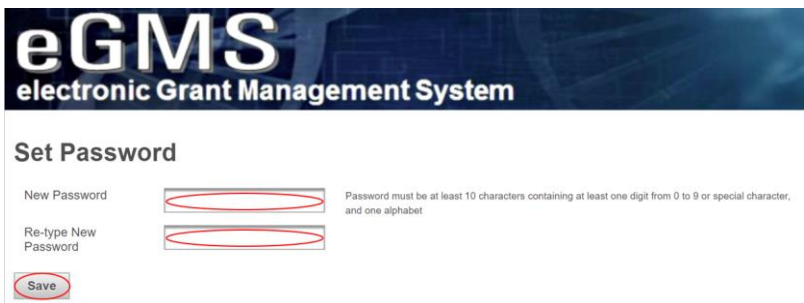
PA = Principal Applicant

RFS = Research Fund Secretariat

RO = Research Officer*

AI user

1. Set Password for a First-time Login User

Subject: eGMS – Successful Account Registration for (Account Type): (The Name of User) Dear (The Name of Principal Applicant), Your registration as Principal Applicant in the electronic Grant Management System (eGMS) of the Research Fund Secretariat, Health Bureau, HKSAR is <u>successful</u>. You can now submit your grant application via the eGMS by logging in to the <u>eGMS</u> (eGMS URL). Please contact to the Research Fund Secretariat at egmsenquiry@healthbureau.gov.hk if you have more than one login account in the eGMS. Thank you.	***Step 1:*** Please click on the eGMS URL to go to the eGMS login page.
	Step 2: - Go to the eGMS Login page. - Enter login email. - Enter password and click 'Login'.
	Step 3: - Enter new password. - Re-enter new password - Click 'Save'. Note: The password should be at least 10 characters containing at least one digit 0-9 and one alphabet, e.g. abc123.

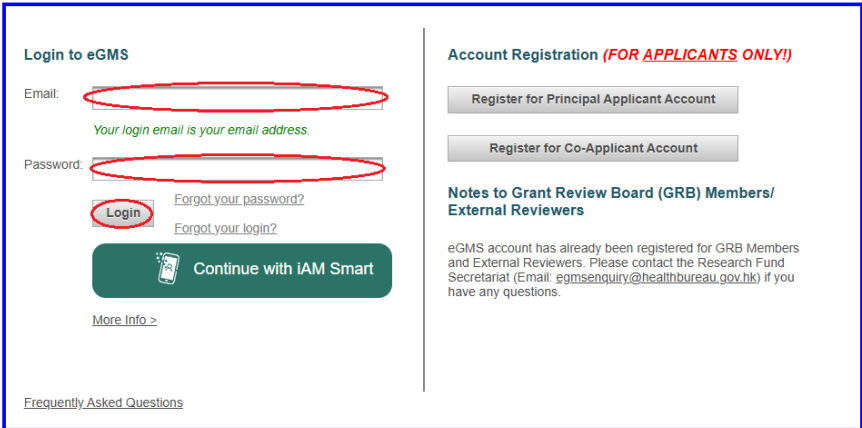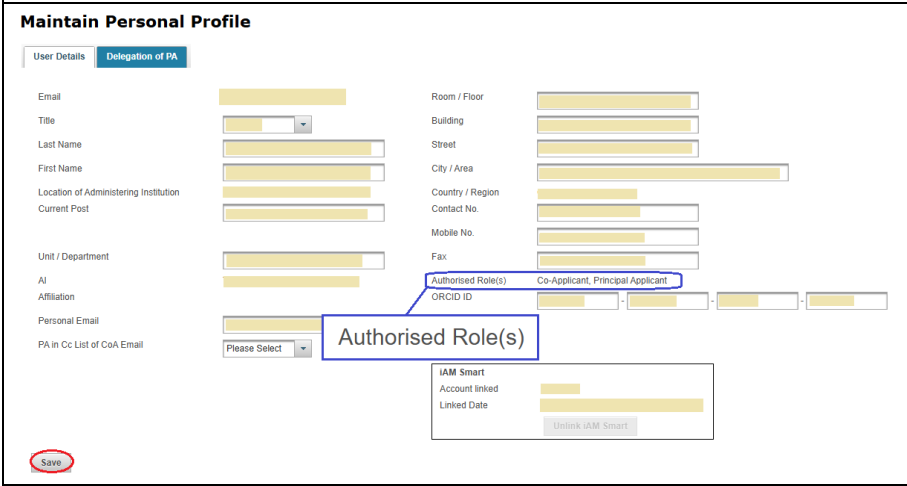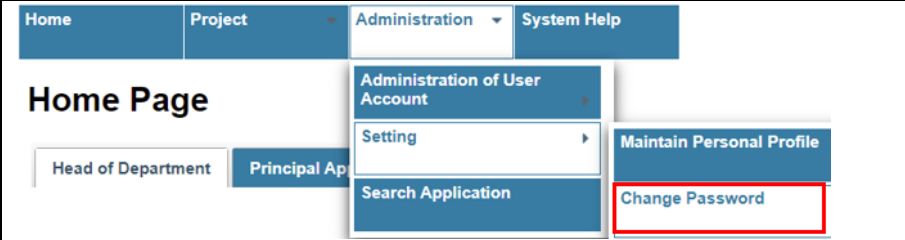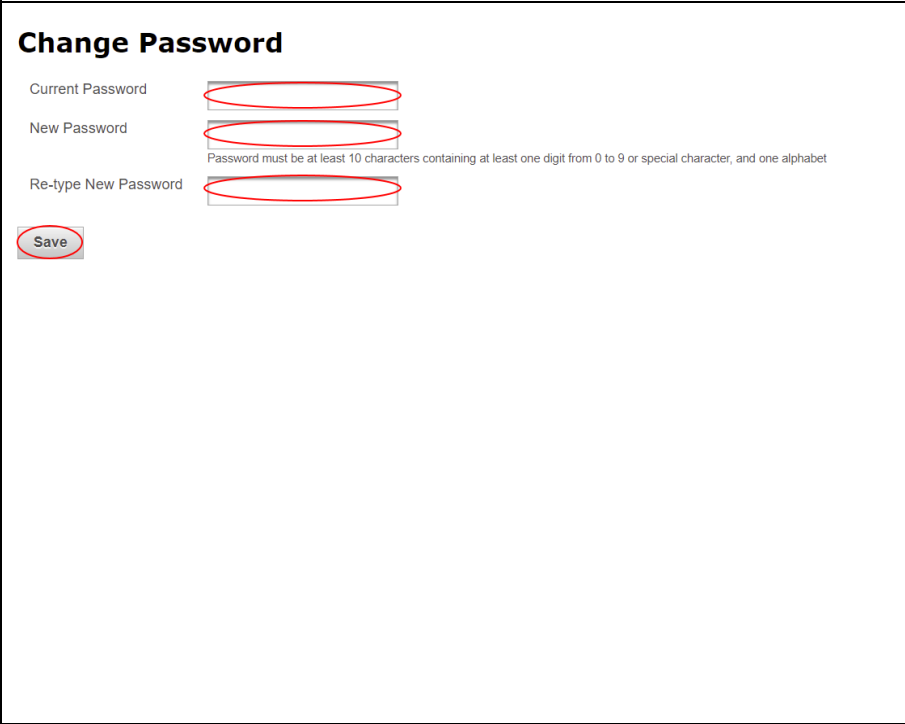|	
eGMS **electronic Grant Management System** **Set Password** The password of your account is set successfully. You can login again for your actions. [Login Page]	***Step 3:*** Click '<mark>Login Page</mark>'.
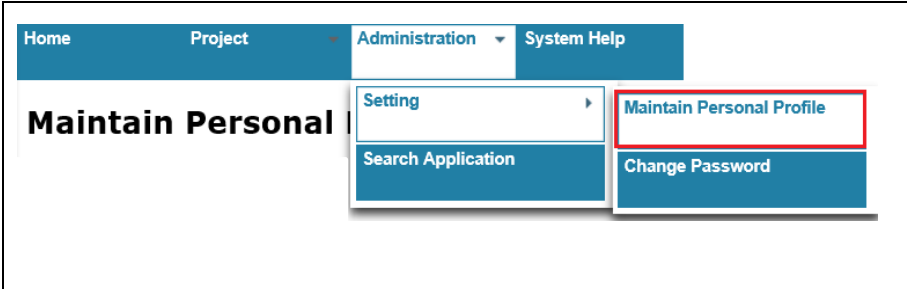
2. Login to / Logout eGMS

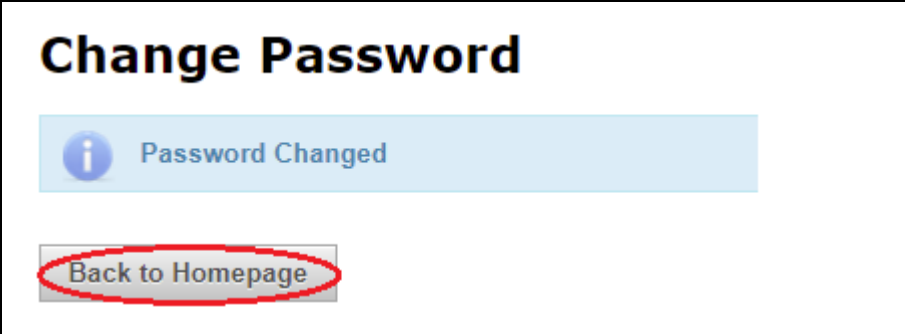|	
	Step 1 (to login): - Go to the eGMS Login page. - Enter login email. - Enter password and click '<mark>Login</mark>'. Note: The login email is the email address registered with AI/RFS.
	Step 2 (to logout): Click '<mark>Logout</mark>' (at the right-hand side upper corner).

3. Maintain Personal Profile

	Step 1: Go to Administration > Setting> Maintain Personal Profile
	Step 2: Click 'Save' after editing the contact information. Note: Authorised roles can only be modified by RFS.

4. Change Password
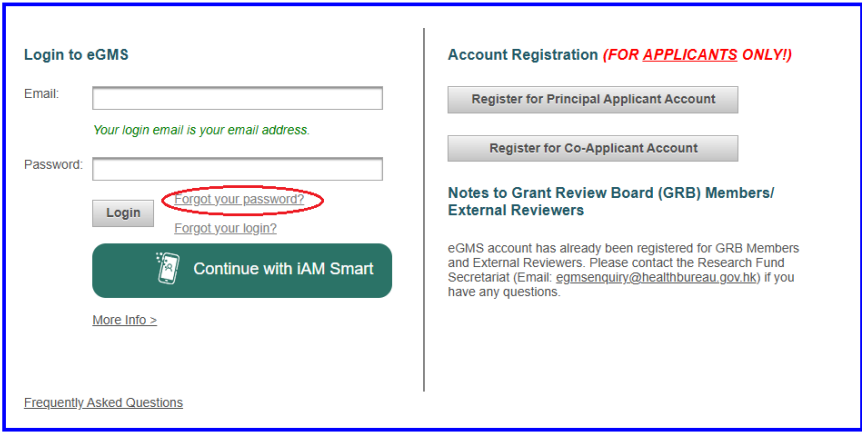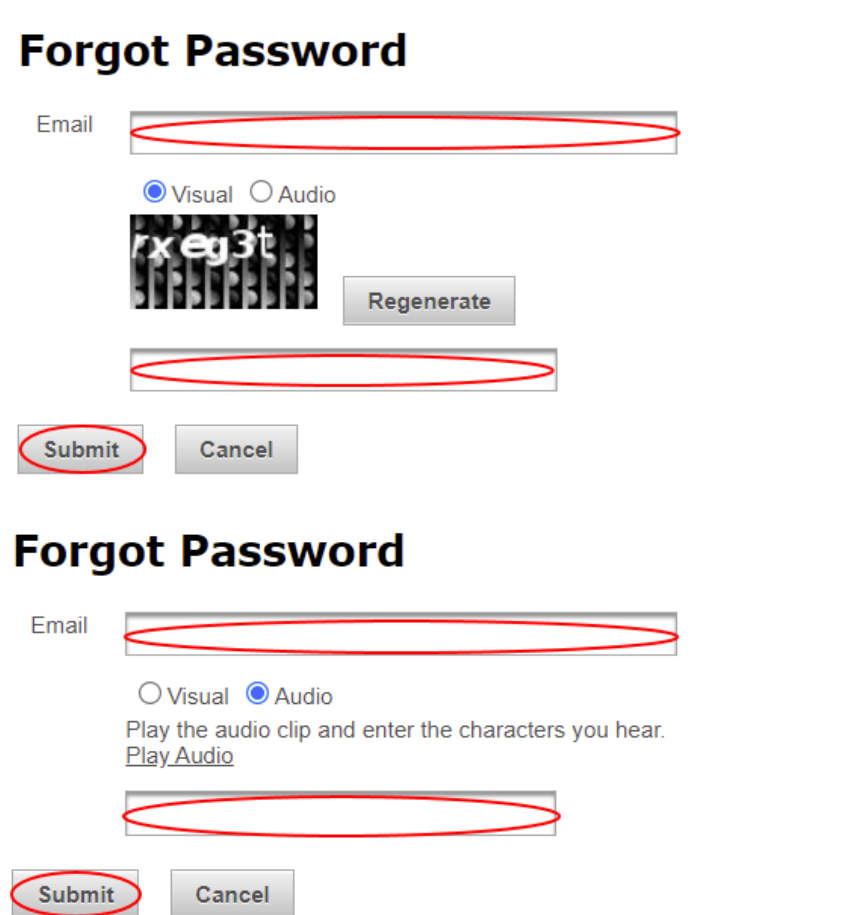
	Step 1: Go to Administration > Setting> Change Password
	Step 2: - Enter current password. - Enter new password - Re-enter new password - Click 'Save'. Note: Password must be at least 10 characters containing at least one digit from 0 to 9 or special character, and one alphabet e.g. abc123.
	Step 3: Acknowledgment message for Password changed will be shown at the top. Click 'Back to Homepage'.

5. Change Password when password is expired every 180 days

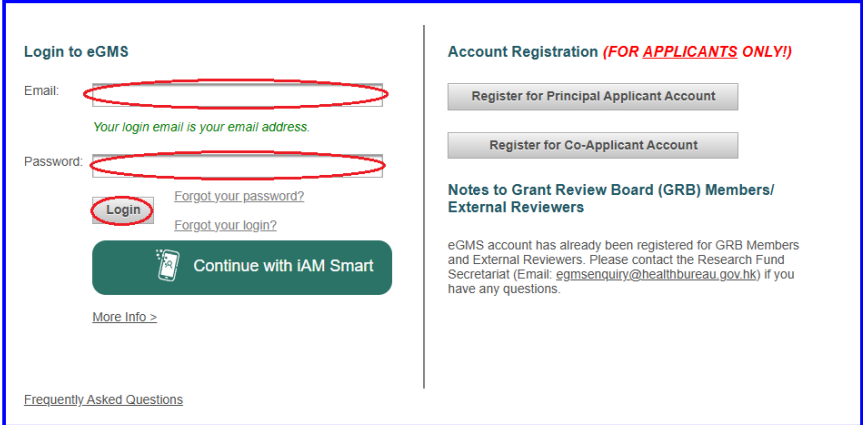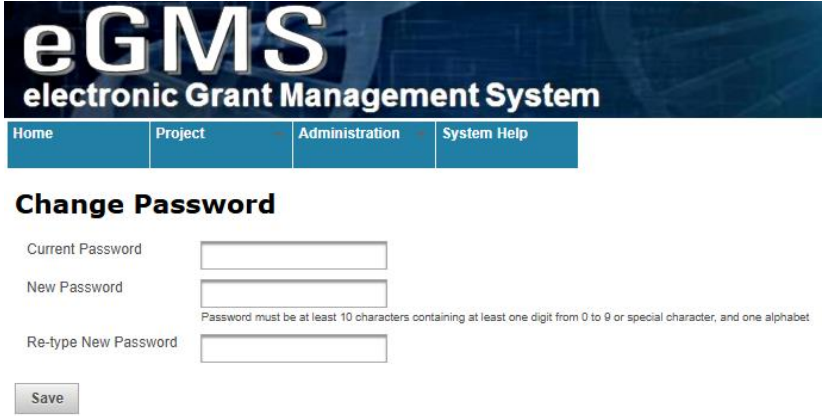|	
Change Password Current Password New Password Password must be at least 10 characters containing at least one digit from 0 to 9 or special character, and one alphabet Re-type New Password Save	***Step 1:*** - Enter current password. - Enter new password. - Re-enter new password. - Click 'Save'. Note: 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.
Change Password ⓘ Password Changed Back to Homepage	***Step 2:*** Acknowledgment message for Password changed will be shown at the top. - Click 'Back to Homepage'.

6. Forgot Password

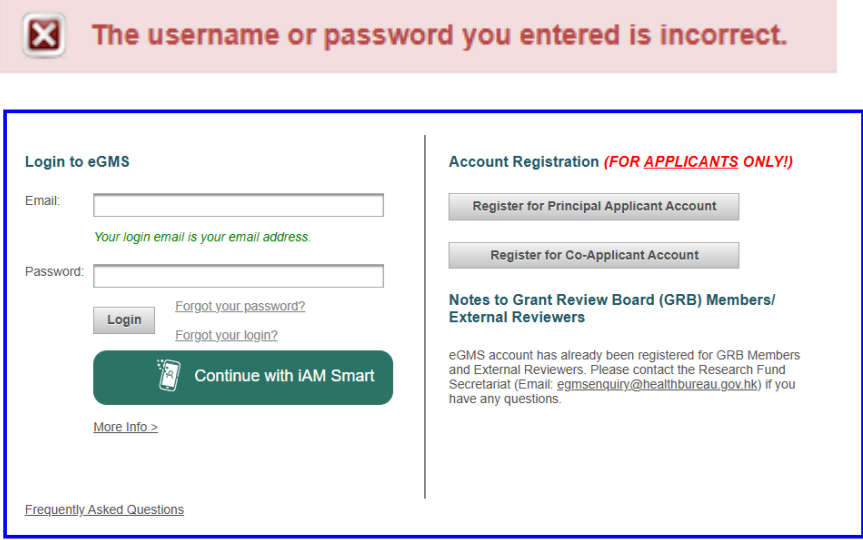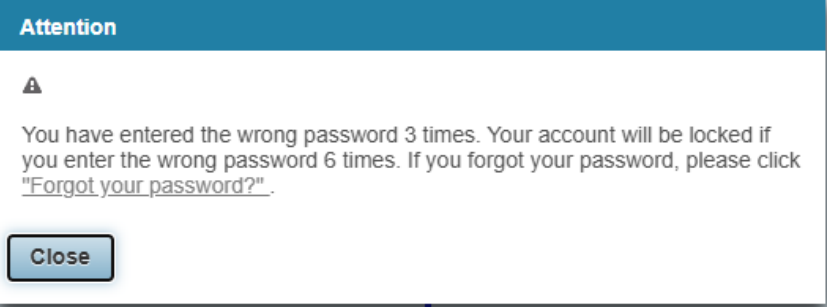|	
	Step 1: Click '==Forgot your password?==' on Login Page.
	Step 2: - Enter login email - Enter visual captcha - Click '==Submit==' *Or* - Enter login email - Enter the audio clip - Click '==Submit=='

Set Password The temporary password of your account is set successfully. Please check your mail. You can login again for your actions. (Login Page)	***Step 3a:*** - Click '==Login Page==' to login to eGMS using the temporary password.
Subject: eGMS – Forget Password: (The Name of User) Dear (The Name of User), Please find the temporary password for accessing the electronic Grant Management System (eGMS): Password: [Insert temporary password] Login page: (eGMS URL) The temporary password will expire in (Temporary password validity when forget password) hours. You <u>MUST</u> set up a new password after logging in the eGMS. If you have not made this request, please email to egmsenquiry@healthbureau.gov.hk immediately. Thank you.	***Step 3b:*** Email notification for the temporary password. Note: Temporary password is valid for 24 hours, the valid period is configurable in eGMS
Login to eGMS Email: *Your login email is your email address.* Password: (Login) Forgot your password? Forgot your login? Continue with iAM Smart More Info > Frequently Asked Questions **Account Registration** *(FOR APPLICANTS ONLY!)* Register for Principal Applicant Account Register for Co-Applicant Account **Notes to Grant Review Board (GRB) Members/ External Reviewers** eGMS account has already been registered for GRB Members and External Reviewers. Please contact the Research Fund Secretariat (Email: egmsenquiry@healthbureau.gov.hk) if you have any questions.	***Step 4:*** Go to the eGMS Login page. - Enter the temporary password and click '==Login=='.
eGMS **electronic Grant Management System** Home Project Administration System Help **Change Password** Current Password New Password *Password must be at least 10 characters containing at least one digit from 0 to 9 or special character, and one alphabet* Re-type New Password (Save)	***Step 5:*** - Setup a new password after logging in the eGMS.

7. Forgot Login Email

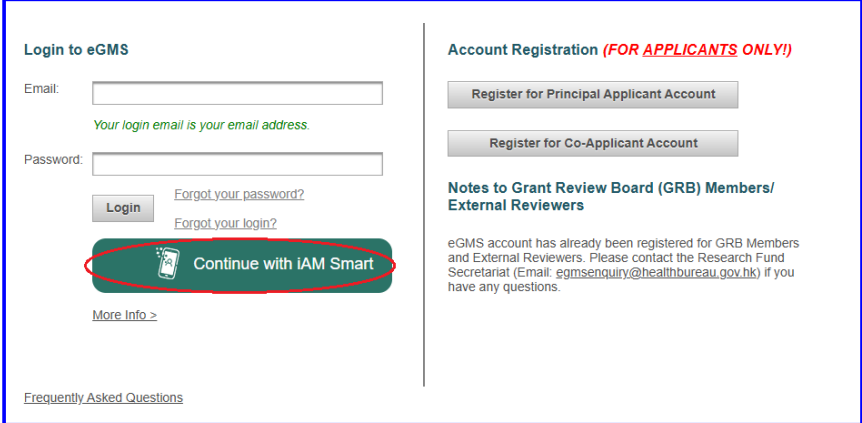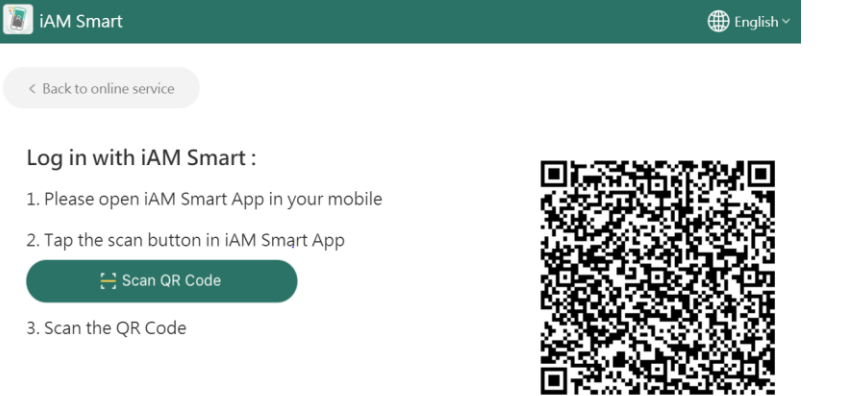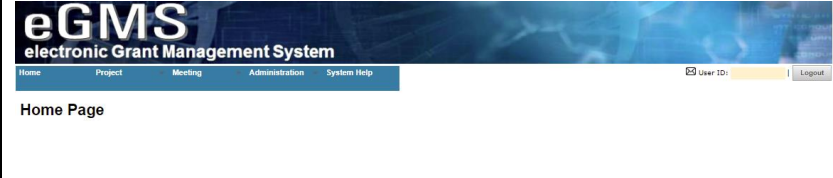|	
	Step 1: Click 'Forgot your login ?' on Login Page.
	Step 2: Provide your name, contact phone no. and Administering Institution to egmsenquiry@healthbureau.gov.hk for further handling.

8. Unlock Account

Notes:
- eGMS account will be **locked** if user fails to enter the login email/password for 6 times.
- User can click '<mark>Forgot your password</mark>' to avoid account locked by eGMS after the two failed attempts

Error message for the 3ʳᵈ to 5ᵗʰ failed attempt

"Account locked" notice for the 6ᵗʰ failed attempt. User should contact RFS to unlock the account.

Subject: eGMS – Account Locked: (The Name of User)

Dear (The Name of User),

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.

Thank you.

Step 1:
Contact RFS at egmsenquiry@healthbureau.gov.hk.

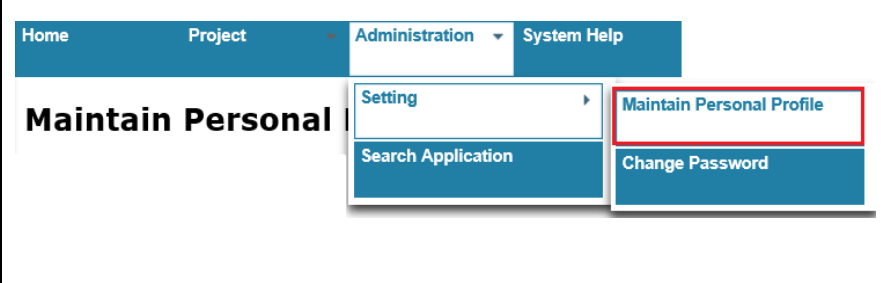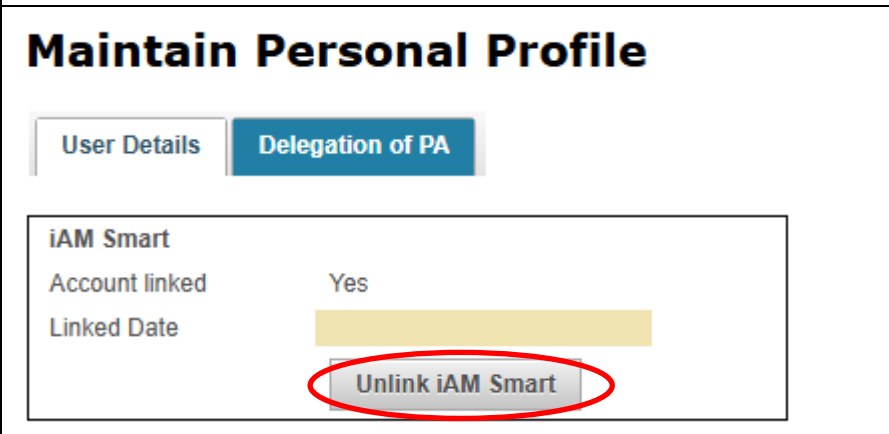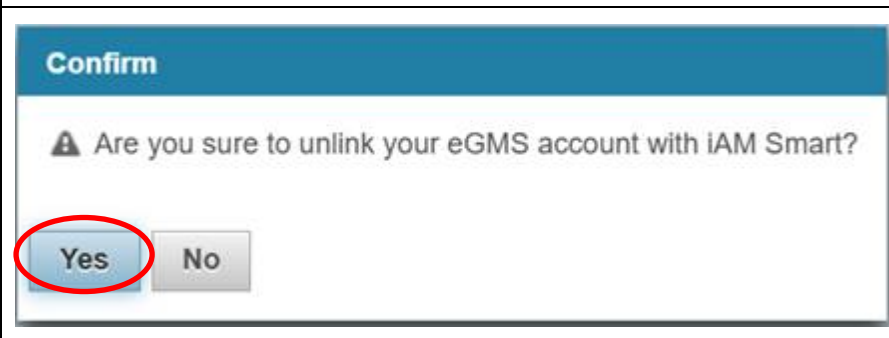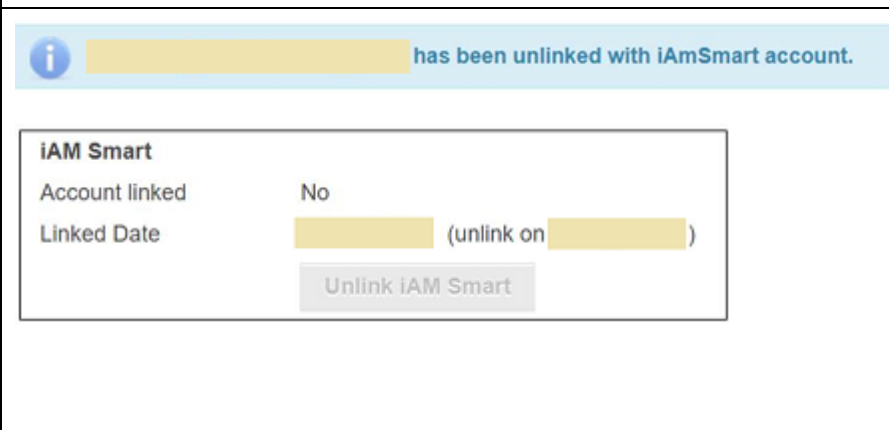|	
Subject: eGMS – Account Unlocked: (The Name of User) Dear (The Name of User), Your account (Account name) in the electronic Grant Management System (eGMS) has been unlocked. Please find the temporary password for accessing the electronic Grant Management System (eGMS): Password: (Temporary password) Login page: (eGMS URL) Please be reminded to set up a new password after logging in to the eGMS (eGMS URL). Thank you.	*Step 2:* Use the temporary password to login and reset password.
Change Password Current Password New Password Password must be at least 10 characters containing at least one digit from 0 to 9 or special character, and one alphabet Re-type New Password Save	*Step 3:* - Enter current temporary password - Enter new password - Re-enter the new password Note: 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.
Change Password Password Changed Back to Homepage	*Step 4:* Click '<mark>Back to Homepage</mark>' for necessary action(s).

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/)

	Step 1: Click 'Login with iAM Smart'.
	Step 2: Use iAM Smart App to perform the authentication - Use iAM Smart APP to scan QR Code

	Step 3a: *(for 1st time login with iAM Smart)* – Fill in the eGMS login email and password - Click "Continue" to proceed - Login to eGMS successfully
	Step 3b: Login to eGMS successfully

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/)

	Step 1: Go to Administration > Setting> Maintain Personal Profile
	Step 2: Under User Details, go to "iAM Smart" - Click "Unlink iAM Smart"
	Step 3: - Click "Yes" to confirm
	Step 3: Confirmation message will show for successful unlinking of iAMSmart account. The record for "Account linked" and "Linked Date" will be updated.

11. System Help

	Go to System Help>
System Help Guide to Users Please contact the Research Fund Secretariat (Email: egmsenquiry@healthbureau.gov.hk) if you have any questions. You can download the following file(s): File Size Latest Version Training Manual for Operating eGMS Accounts 903KB ver. 2	- Training Manuals and other user guides can be downloaded from 'System Help'.