# FUTURE ENERGY SYSTEMS
## FORUM PROJECT MANAGEMENT SYSTEM WALKTHROUGH

## CONTENTS

<table>
<thead>
<tr>
<th>Topic</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Logging in</td>
<td>2</td>
</tr>
<tr>
<td>Editing the ‘My Profile’ section</td>
<td>5</td>
</tr>
<tr>
<td>Setting up a FES project page</td>
<td>9</td>
</tr>
<tr>
<td>Adding a member</td>
<td>17</td>
</tr>
<tr>
<td>Adding Publications and Research Outputs</td>
<td>23</td>
</tr>
<tr>
<td>Adding Collaborations and Knowledge Users</td>
<td>26</td>
</tr>
<tr>
<td>Adding Leverages</td>
<td>29</td>
</tr>
<tr>
<td>Annual Reporting Process</td>
<td>32</td>
</tr>
<tr>
<td>What’s New?</td>
<td>42</td>
</tr>
</tbody>
</table>
1. LOGGING IN TO FORUM

1.1. Open a web browser and type forum.futureenergysystems.ca in the address bar (Google Chrome and Mozilla Firefox are recommended).

1.2. Your Forum username is in the form ‘Firstname.Lastname’. To log in, you may either (1) type in both your username and password, and then click on the Log in button; or (2), type in your username and click on the E-mail new password button. Please note you can request a new password only after typing your username in. Should you be unable to remember your username, please contact the FES admin team at fes@ualberta.ca

1.3. If you clicked on the E-mail new password button, you will get a confirmation message like the one shown in the picture below. You may now check your email inbox for your temporary password.
1.4. Once you have received an email like the one in the image below, please copy the temporary password embedded in the message and use it for logging in to Forum.

![Email Image](image1)

1.5. After logging in with your temporary password, you will be automatically redirected to a Forum section where you will be asked to set a new password. Please remember to click the ‘Set password and log in’ button.

![Forum Image](image2)
1.6. You are all set with your Forum username and password! Your Forum home screen should look like the image below. You should be able to see (1) your profile picture (if you do not have a photo, please contact FES admin team at fes@ualberta.ca to have it taken) on the upper right section of the screen, and (2) a series of tabs that would take you to your ‘My Profile’ and ‘My Projects’ sections.
2. EDITING THE ‘MY PROFILE’ SECTION IN FORUM

2.1. Log in to Forum. If you cannot remember your login information, please refer to steps 1.1. through 1.6. of this guide. Then, go back to your Forum home screen which should look like the image below.

![Forum Home Screen](image1)

2.2. Once you are logged in, please click on My Profile.

![My Profile Click](image2)

2.3. At this point, you should see a page similar to the image below. Please click on Edit Bio.

![Edit Bio Click](image3)
2.4. Edit your (1) contact and (4) bio information\(^1\). All faculty are required to answer two new questions found in section (2). Fill in details associated to your (3) institution(s)/faculty/position(s). Please make sure you select your Start Date (and End Date if applicable) with the Institution. If you want to delete any institution/position you’ve added by mistake, just click on the checkbox under ‘Delete?’ Finally, click on (5) Save Bio. If you wish to discard all changes, click on (5) Cancel.

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\(^1\) Uploading your own photo is not allowed due to website compatibility issues. You can schedule an appointment with the FES admin team to have your photo taken and uploaded to your Forum profile with the desired resolution and other parameters. Email fes@ualberta.ca with the subject FES Headshot.
2.5. Once you have clicked [Save Bio], the system will take you back to your profile page, and will also display a confirmation message like the image below.

2.6. To review Equity, Diversity and Inclusion (EDI) information, please go to your EDI tab and then click [Edit EDI].

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2 All EDI information is kept confidential and is not visible to other Forum users. It can be accessed only by a designated administrative staff member for the purposes of aggregation to assess the EDI performance of the Future Energy Systems program.
2.7. FES participants are encouraged to answer all questions in this section; however, this is not mandatory and we have included the option ‘I prefer not to answer’ to the four EDI-related questions. Finally, click on the [Save EDI] button to save changes and go back to your EDI main page. Otherwise, click [Cancel] to discard any new changes.

2.8. If you saved changes to your EDI info, the system will take you back to your EDI main page and show you the ‘EDI’ updated successfully message.
3. SETTING UP A FES PROJECT PAGE IN FORUM

3.1. Log in to Forum. If you cannot remember your login information, please refer to steps 1.1. through 1.6. of this guide. Then, go back to your Forum home screen which should look like the image below.

3.2. Once you have logged in to your Forum account, click on the ‘My Projects’ tab, below the search bar. All the projects you are currently working on should be horizontally listed (in the form of FES project identifiers) below the ‘My Projects’ tab. A FES project page is considered to be fully set up only if the sections ‘Main’, ‘Description’, ‘Schedule’ and ‘Budget’ are duly filled out with your project information. Begin with the ‘Main’ tab, and click on (see image below).

3.3. Check that your project title is correct; select the main theme to which your project is related; add your project website (if applicable); and provide a brief overview of the project, this overview will

3 Note: FES project pages in Forum are created by the FES office only. It is the responsibility of the project Principal Investigator to complete the project page set up in Forum within the timeline indicated by the FES office. Failing to complete the project page set up in Forum may result in delays on your project set up process.
be displayed in our www.futureenergysystems.ca website. Click on ‘Save Main’ to register the changes made, otherwise click on ‘Cancel’.
3.4. Continue to the ‘Description’ section and click on ‘Edit Description’. Fill all seven text boxes with your project information (all sections are required). Save the changes made by clicking on Save Description. Otherwise, click Cancel.

3.5. Next, go to the ‘Schedule’ section and click Edit Schedule to enter your project activities and milestones. We recommend you to edit this section in the following sequence: (a) Activities, (b) Tasks, and (c) Milestones.
3.6. To add activities, click on [Add Activity], type your activity title in the dialog box, click on [Add Activity] (within the same dialog box), and click ‘Save Schedule’ to record your input. Otherwise, click [Cancel]. Repeat this step until you have entered all your project activities.
3.7. To add tasks, click **Add Task**, select the parent activity under which the task falls. Type in your task title and click **Add Task** within the dialog box. Your task will be added, and you will be taken back to the ‘Edit Schedule’ section.

3.8. Once your task is added to your project schedule, assign a timeline by checking the relevant boxes in the schedule. Please make sure you assign a Leader, Personnel, Comments (by using the icon), and Status to all your tasks. Click on ‘Save Schedule’ to record your input. Otherwise, click **Cancel**.
3.9. To add milestones, click on Add Milestone, type in a description of the milestone, define a timeline by checking the relevant box in the schedule, and define other parameters such as Leader, Personnel and Status. You may provide additional information under Comments (by clicking on the icon). Click on ‘Save Schedule’ to record your input. Otherwise, click Cancel.
3.10. The image below shows how the ‘Schedule’ section would look like after successfully adding activities, tasks and milestones to your project page.

3.11. Moving forward, please go to the ‘Budget’ section and click on **Edit Budget**.
3.12. A FES budget template is available for download by clicking on ‘Budget Template’. Please download the FES budget template and fill in your project budget information without altering the template’s form. Upload your completed project budget file (non-protected excel version), provide details about your budget using the ‘Budget Justification’ box, and click on to have your file uploaded and other changes registered. Otherwise, click .

Please note that the FES office will periodically monitor the progress of your project page setup. If you face any difficulties during the setup process, please contact the FES team at fes@ualberta.ca.

5 Altering the template’s form may result in the Forum platform being unable to correctly display your project budget.
4. ADDING A MEMBER IN FORUM

4.1. Log in to Forum. If you cannot remember your login information, please refer to steps 1.1. through 1.6. of this guide. Then, go back to your Forum home screen which should look like the image below.

![Forum Home Screen](image)

4.2. Click on ‘Add Member’ in the side menu located in the left side of your screen.

![Add Member Menu](image)
4.3. Complete all four sections shown in the image below. Please make sure the ‘Send Registration Email?’ box is checked, so that the new member is notified about the creation of their profile.
4.4. If the member you are adding is an HQP, an additional ‘HQP Academic Status’ field will appear, please avoid selecting the default academic status ‘Other’. Then, click on the 'Submit Request' button.

4.5. Once you have submitted the request, a confirmation message will be displayed. Please allow 24 hours for the FES team to assess your request.
4.6. Once your request is approved by the FES team, you may continue assigning attributes to the new member, such as roles, projects and recruitment/alumni (if applicable). Click on the ‘Manage People’ tab (1) in the left side menu, underneath the ‘Add Member’ tab. Use the search bar (2) embedded in the People Management page to locate the member you have previously added. You can add or edit attributes by clicking on the different icons (3).

![People Management](image)

4.7. When you are first assigning a role to a member, the pop-up window should look like the image below. Please click on **Add Role** to begin assigning roles to the new member.

![Edit Roles](image)
4.8. Select both the role (1) and its associated project (2) from the dropdown lists, and then **click on the + sign for the system to register the entry (3)**. Enter the Start Date (and End Date, if known) (4) and then click on **Save** if you are done adding roles for this member. Otherwise, you may continue adding as many roles as needed by clicking on **Add Role**.

4.9. Make sure the project identifier you have selected is copied above the dropdown list, replacing the ‘No Projects’ phrase shown before.

4.10. Should you need to delete a role added, you can simply check the ‘Delete?’ box and click on **Save** to have changes registered.
4.11. Please make sure you complete the (new) ‘Recruitment/Alumni’ section by answering those questions (from the image below) that apply to the member’s profile you are adding/editing.
5. ADDING PUBLICATIONS AND RESEARCH OUTPUTS IN FORUM

5.1. Log in to Forum. If you cannot remember your login information, please refer to steps 1.1. through 1.6. of this guide. Then, go back to your Forum home screen which should look like the image below.

[Forum home screen image]

5.2. Go to ‘Manage Publications and Research Outputs’ on the left sidebar menu, where you will see all your research outputs listed in your summary table. This table (please see image below) should display the FES project identifiers (as column headings) for all projects you are working on as Principal Investigator. In the example below, only one FES project identifier (T0x-P0x) is displayed, since Mock Professor is a Principal Investigator on T0x-P0x only. Click on ‘Add Publication and Research Output’ right above the summary table.

[Summary table image]
5.3. Forum will display a pop-up window where you can provide all the details associated to the research output you want to add. Please note that you can scroll up and down within this page to see all input fields (refer to the images below). Provide information in the following sections:

a) Title

b) Authors. Use the search bar to look up an author name within the Forum database, and click to add a person to your list. Also, use the arrows to reorganize the authors list. To remove a person from your list, just click on the person’s name, and then click .

c) Description

d) Tags. You may either browse from the tag list by clicking , or manually enter tags.

e) Category, Type and Visibility. You can select the category from within a list of four options (Publication, Activity, IP Management Award), and specify the ‘Type’ depending on each category.

f) Status, Date, Lead Author, etc. Provide as much information as you are able to. If you provide a publication URL, that link will appear on www.futureenergysystems.ca in relation to your publication, making it easier for visitors to access.

Note: the four checkboxes below ‘Lead Author’ are of special interest to us, as they build on our performance measuring plan. Please check all those boxes that are applicable to your item.

g) Click on .
5.4. Once all changes are registered, Forum will take you back to the main ‘Publication and Research Output Management’ page, where you will see your item listed in the summary table, as shown in the image below.
6. ADDING COLLABORATIONS AND KNOWLEDGE USERS IN FORUM

6.1. Log in to Forum. If you cannot remember your login information, please refer to steps 1.1. through 1.6. of this guide. Then, go back to your Forum home screen which should look like the image below.

6.2. Click on ‘Manage Collaborations and Knowledge users’ from the left sidebar menu. You will be directed to the ‘Collaborations’ section, where you will find a summary table with all your collaborators and knowledge users, should you have added any before. Otherwise, your screen should look like the image below. Please mind CFREF’s definitions of Collaborator and Knowledge User displayed right above the summary table.
6.3. The process of adding a collaborator is very similar to that of adding a knowledge user. In this guide, you will learn how to add a new collaborator. Start by clicking ‘Add Collaboration’, and then complete all fields available in the ‘New Collaboration’ page. Please make sure to associate this new collaboration with (at least) one FES project by clicking on the appropriate checkboxes under ‘Related Projects’. When you have filled out all the relevant information, save changes by clicking Create Collaboration. Otherwise, click Cancel to discard any changes made.
6.4. If you completed all mandatory fields and successfully created a collaboration (or knowledge user), you will see a summary of the entry like the image below. From this page, you may Edit/Delete this entry, or simply return to the summary table by clicking ‘Back to Collaborations’.

6.5. The image below shows how your summary table should look after you have added a new collaboration or knowledge user. At this point, you can continue adding new entries or move to another section.
7. ADDING LEVERAGES⁶ IN FORUM

7.1. Log in to Forum. If you cannot remember your login information, please refer to steps 1.1. through 1.6. of this guide. Then, go back to your Forum home screen which should look like the image below.

7.2. Click on ‘Manage Leverages’ on the left sidebar menu, and then click on Add Leverage.

⁶ Leveraged funds are from other sources that directly support your FES project, and those funds that support a project where methods and/or outcomes can be used to enhance your FES project. CFREF wishes to know how much cash and in-kind support other entities are contributing to your research, and what sectors those entities are from, to better understand the impact their research funding is having in your field. If you have questions about whether another funding source qualifies as leveraged funds, please contact fes@ualberta.ca.
7.3. Select the End Year of your leveraged funds (only if you are entering leveraged funds that already ended, otherwise just select ‘Active’), type the name of the granting organization, and select whether this partnership existed prior to your FES grant. Next, please enter the amount you have received from this organization (1) from the beginning of your FES grant to date, and (2) how much you will receive between now and the end date of your FES grant. Please do not use any thousand separators, and round up or down to the nearest integer. Finally, select the organization’s country and sector, provide a brief description of the activities undertaken as part of this partnership, and select the FES projects that are directly benefitting from these leveraged funds. Click on to record this entry, otherwise click .
7.4. If you clicked **Create Leverage** in the previous step, you will be shown a **preview** of your recent input. Check that all the information you have entered is correct and then click **Edit Leverage** to modify, **Delete Leverage** to remove, or **Back to Leverages** to complete entry.

7.5. If you clicked **Back to Leverages** in the previous step, you will see your recent input listed in the summary table (as shown in the image below). If you wish to delete the entry, click the ‘X’.
8. **ANNUAL REPORTING PROCESS** (to be completed by Principal Investigators and Project Assistants/Admins only, during the annual reporting period; there may be some overlap with the midterm reporting process)

8.1. Log in to Forum. If you cannot remember your login information, please refer to steps 1.1. through 1.6. of this guide. Then, go back to your Forum home screen which should look like the image below.

8.2. Go to your ‘My Projects’ tab. Below the ‘My Projects’ tab, you should see project identifiers for each of the FES projects in which you have a role. Select the project you wish to begin the annual reporting process for and click on Edit Main.

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7 Reporting periods may vary between fiscal years. Please contact fes@ualberta.ca for more detailed information about the current/upcoming reporting period.

8 You may have addressed some of these sections in FORUM already during the midterm reporting process.
8.3. Edit your project’s website (1) (if applicable), overview (2) and click on 'Save Main' (3) to save recent changes. Otherwise, click Cancel.

8.4. Skip the ‘Description’ tab, and click on Schedule, followed by Edit Schedule to update your project’s milestones (only).

8.5. Milestones for the current Fiscal Year (FY4: March 31st 2019 - April 1st 2020) must be marked as either Completed, Pending or Abandoned. If you mark a milestone as ‘Pending’, you must select the appropriate modification (Revised or Postponed) that applies. **You may not delete milestones**, but instead must mark them as ‘Abandoned’. Additional information about any Pending/Abandoned milestones must be provided by clicking on the icon (in between the ‘Personnel’ and ‘Status’ columns).
8.6. Milestones for the upcoming Fiscal Year (FY5: March 31\textsuperscript{st} 2020 - April 1\textsuperscript{st} 2021) can be amended. Also, new milestones may be added for FY5.

8.7. Milestones for Fiscal Year 6 (FY6: March 31\textsuperscript{st} 2021 - April 1\textsuperscript{st} 2022) should be added (if applicable and if not done already). In most cases, expect to add two milestones per HQP per year. To save your changes, click on **Save Schedule**, otherwise click on **Cancel**.
8.8. After you finish adjusting your project schedule, you may move forward to the ‘Dashboard’ section. This section has two main components, ‘Top Research Outcomes’ and ‘Technology Evaluation’. To edit the content on this page, you may click on either \( \text{Edit Top Research Outcomes} \) or \( \text{Edit Technology} \), as per the image below.\(^9\)

For Fiscal Year 2019-2020 only, if you have addressed the Technology Evaluation/Adoption section during midterm reporting, you may skip and continue to section 8.10.
8.9. In the ‘Top Research Outcomes’ component, select (up to) two research outcomes that best showcase the work done in your project. The dropdown lists (please see image below) should be automatically populated with all your project publications and research outputs. For more information on how to add a publication and/or research outcome in Forum, please refer to steps 4.1 through 4.4 from this guide. In the Technology Evaluation/Adoption component, indicate whether any technology produced by your research group has been adopted and/or evaluated since the beginning of your research grant. Detailed information from Innovation Canada regarding the Technology Readiness Level scale can be found in this link (also provided in Forum).

10 If more than one technology has been evaluated and/or adopted since the beginning of your research grant, please contact FES via email (using the subject ‘More than one Technology Evaluated/Adopted’) at fes@ualberta.ca.
8.10. Once you have completed and saved your progress in this section, you will be directed back to the 'Dashboard' main page, and shown a message indicating the section was successfully updated.
8.11. Moving forward, please click on [Budget] and click on ‘Edit Budget’ to revise and upload your project budget, as per the image below.
8.12. Use the budget template provided on Forum for your revised budget for FY5 and future years. **Do not modify the template** -- Forum will not allow you to upload the budget if the format has been altered. Click **Save Budget** to complete entry; otherwise click **Cancel**.

**Note:** Any significant changes to the budget (FY5 and onward) must be duly justified and must be pre-approved by FES. Review your project’s carry forward or over-expenditure provided on your last budget monitoring report, or check current eTRAC reports (i.e. for FY4, refer to eTRAC reports showing budget status as of March 31, 2020). Adjustments should be kept to a minimum. Do not adjust budgets by small dollar amount such as $500-1000/year. Starting on FY5 (2020/2021) FES will only allow 5% variance roll-forwards into future years. This will ensure funds are effectively used in a given period, and to streamline financial reporting at the final years of the program.

8.13. You may skip the ‘Visualizations’, ‘Wiki’ and ‘Summary’ sections, as these are not required for the annual reporting process.
8.14. Move forward by clicking on the ‘Projections’ tab. In this section, you will be asked to provide projected recruitment and research from now until the end of your FES research grant. This is new information specifically requested by CFREF as part of the Midterm Review process.\textsuperscript{11}

\textsuperscript{11}For Fiscal Year 2019-2020 only, if you have addressed the Projections section during midterm reporting, you may skip and continue to section 8.15.
8.15. Next, click on the Reporting tab, followed by Edit Reporting to address the last three questions of the current annual reporting period as per the image below. When you finish, click on Save Reporting to complete entry. Otherwise, click on Cancel.

8.16. Lastly, please inform the FES team (at fes@ualberta.ca) when you have completed your annual reporting process. The FES office will review your progress and would let you know if further information is required.
9. WHAT’S NEW?

9.1. Bio (My Profile)

a. **New question:** Are you currently a CRC or CERC (or equivalent)?

**Required action:** Go to your ‘My Profile’ section, click on **Edit Bio** and then choose the answer from the list that best describes your situation.

b. **New question:** Was your first appointment as a professor within 5 years of the beginning of your FES research?

**Required action:** Go to your ‘My Profile’ section, click on **Edit Bio** and then check the box only if your first appointment as a professor was within 5 years of the beginning of your FES research.
9.2. Dashboard (My Projects)

a. **New component**: Technology Evaluation/Adoption

**Required action**: Go to your project page, followed by . Below the ‘Top Research Outcomes’, you will find the new ‘Technology Evaluation/Adoption’ component. Answer all questions applicable to your project, and then click on to record your recent changes. Otherwise click on .
9.3. My Projects

a. New subsection: Projections

As part of the FES midterm report, CFREF has requested projections of the number of HQP expected to join each project by the end of its current funding, as well as expected outcomes.

Required action: Go to your project’s Projections tab, click on Edit Projections and enter your data in the tab for the most recent available Fiscal Year.
9.4. Manage People

   a. New subsection: Recruitment/Alumni

To meet CFREF midterm reporting needs, we have expanded the ‘Manage People’ section to collect additional information about the recruitment of your research group members, and their subsequent positions (if applicable).

Required action: Please go to your ‘Manage People’ section, and edit the ‘Recruitment/Alumni’ subsection as shown in the image below. Please complete this action for all your team members. Please also ensure that all HQP have accurate start and end dates.

9.5. Manage Collaborations and Knowledge Users

   a. New question: Collaboration existed prior to FES grant?

CFREF is interested in understanding the impact your research grant has had on the establishment of new collaborations and knowledge users since the beginning of your project.

Required action: Go to your ‘Manage Collaborations and Knowledge Users’ section and edit all the collaboration entries on your summary table to answer this question for each one. To edit a Collaboration/Knowledge User, click on the organization name, followed by .

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12 To add a member, please refer to Section 4. Adding a Member in Forum
13 Not applicable to Knowledge Users.
b. **Modified question:** ‘To date, have you received in-kind and/or cash support from this organization?’

This question now differentiates between cash and in-kind support. In order to accommodate this change, the platform was set to assume all contributions inputted into Forum before December 2019 were cash contributions.

**Required action:** Go to your ‘Manage Collaborations and Knowledge Users’ section and edit all entries on your summary table to answer this question for each one of them. To edit a Collaboration/Knowledge User, click on the organization name, followed by [Edit Collaboration]. Please do not use any thousand separators, and round up/down to the nearest integer.

A. **New field:** Brief description

When entering a new Collaboration/Knowledge User, you will be asked to provide a brief description.

**Required action:** Go to your ‘Manage Collaborations and Knowledge Users’ section and edit all entries on your summary table to fill out this field for each one of them. To edit a Collaboration/Knowledge User, click on the organization name, followed by [Edit Collaboration]. Please do not use any thousand separators, and round up/down to the nearest integer.