

# **FUTURE ENERGY SYSTEMS**

## **FORUM PROJECT MANAGEMENT SYSTEM WALKTHROUGH**

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## 1. LOGGING IN TO FORUM

- 1.1. Open a web browser and type [forum.futureenergysystems.ca](http://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](mailto:fes@ualberta.ca)

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FUTURE ENERGY SYSTEMS

Search...

Username: FES

Password: Your username is in the form of 'First.Last' (case-sensitive)

☐ Remember my Login

**Log in**

**E-mail new password**

**Report Issue**

Products Visualizations Actions

### Future Energy Systems

**THE FUTURE OF ENERGY IS HAPPENING NOW**

Our future energy needs will not be met by one source, but many. Hydrocarbons, wind, solar, biomass, geothermal, hydro, nuclear, and other technologies can all contribute to a complex system that meets our society's increasing energy needs, while reducing our carbon footprint.

Future Energy Systems focuses on multidisciplinary research that develops the energy technologies of the near future, explores how these technologies can be integrated into our present-day infrastructure, and examines possible consequences for our society and the economy. It also develops potential solutions for the challenges created by existing energy systems.

- 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.

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FUTURE ENERGY SYSTEMS

Search...

A new password has been sent to the e-mail address registered for "Samuel.Ferraz". Please wait a few minutes for the email to appear. If you do not receive an email, then contact Forum Support.

**NOTE:** Only one password reset can be requested every 10 minutes.

Samuel.Ferraz

Password

☐ Remember my Login

**Log in**

**E-mail new password**

**Report Issue**

Themes Projects People Products Visualizations Actions

### Future Energy Systems

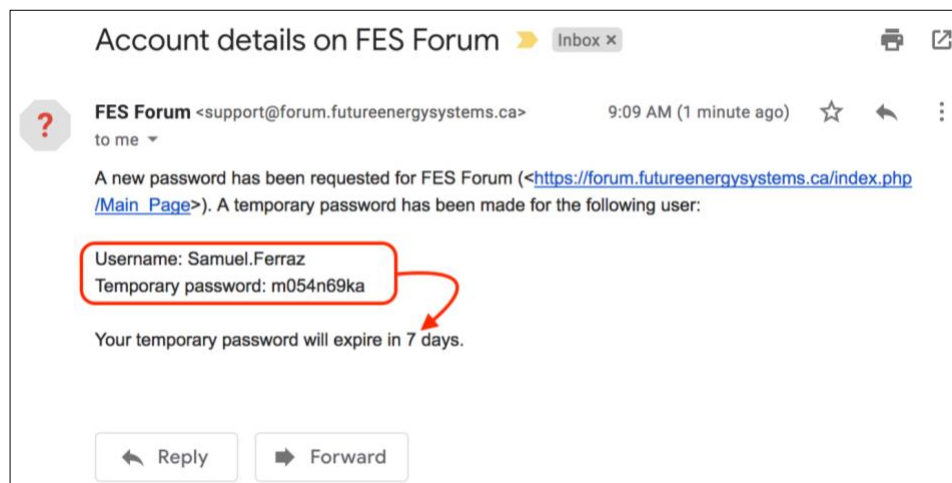
**THE FUTURE OF ENERGY IS HAPPENING NOW**

Our future energy needs will not be met by one source, but many. Hydrocarbons, wind, solar, biomass, geothermal, hydro, nuclear, and other technologies can all contribute to a complex system that meets our society's increasing energy needs, while reducing our carbon footprint.

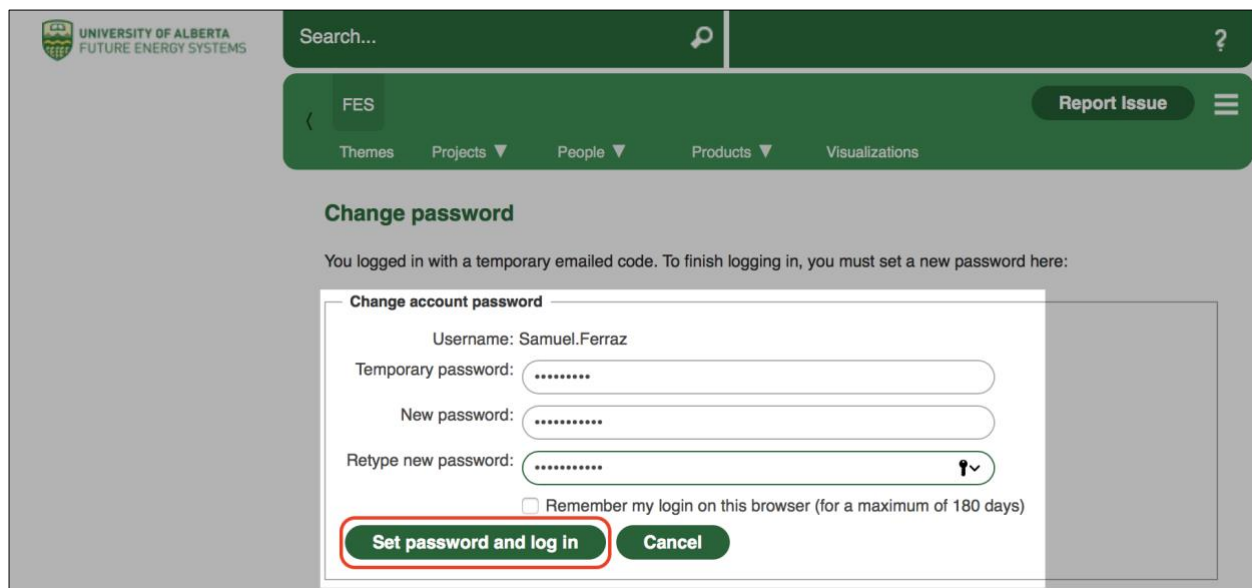
Future Energy Systems focuses on multidisciplinary research that develops the energy technologies of the near future, explores how these technologies can be integrated into our present-day infrastructure, and examines possible consequences for our society and the economy. It also develops potential solutions for the challenges created by existing energy systems.

By considering complete energy systems, this research initiative moves beyond the development of individual technologies and addresses the real complexity of integrating various energy sources and technologies.

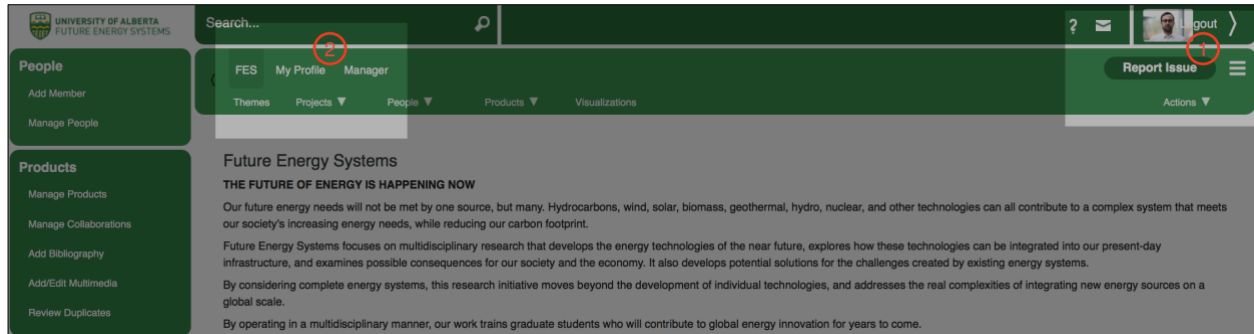
- 1.4. Once you have received an email like the one in the image below, please copy the temporary password embedded in the message and use it for logging in to [Forum](#).



- 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.

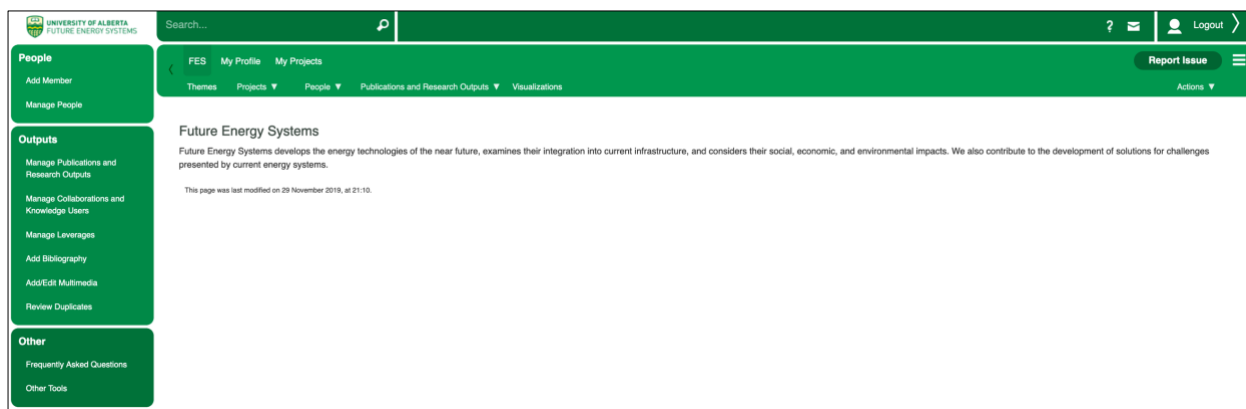


- 1.6. You are all set with your Forum username and password! Your Forum home screen should look like the image below. You should be able to see (1) your profile picture (if you do not have a photo, please contact FES admin team at [fes@ualberta.ca](mailto:fes@ualberta.ca) to have it taken) on the upper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

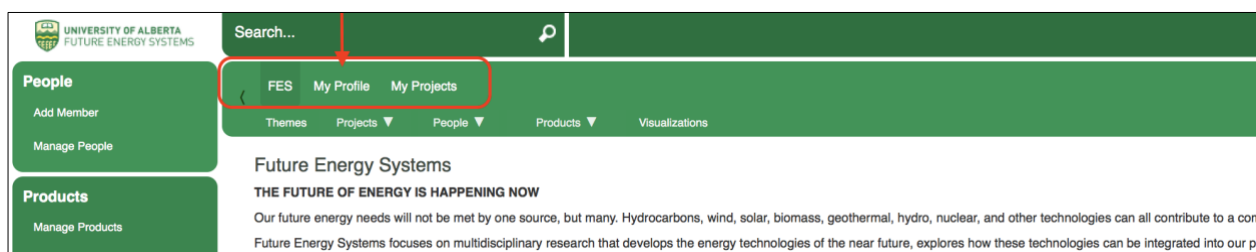


## 2. EDITING THE 'MY PROFILE' SECTION IN FORUM

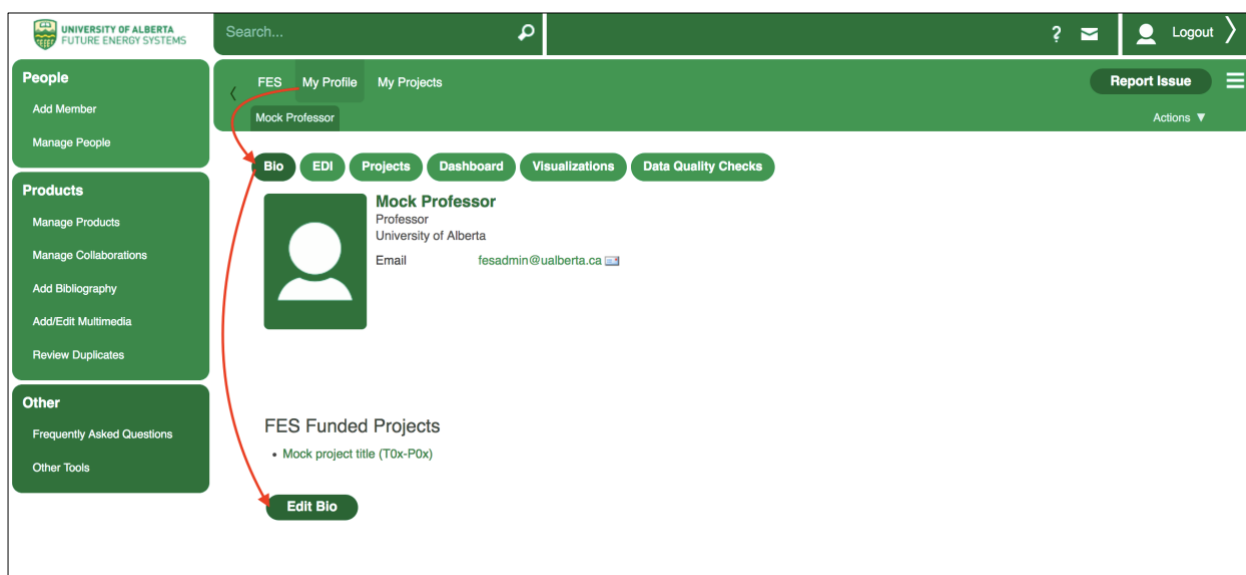
2.1. Log in to Forum. If you cannot remember your login information, please refer to steps 1.1. through 1.6. of this guide. Then, go back to your Forum home screen which should look like the image below.



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



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



- 2.4. Edit your **(1)** contact and **(4)** bio information<sup>1</sup>. 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 **Save Bio** **(5)**. If you wish to discard all changes, click on **Cancel**.

Make sure you complete these two new sections (faculty only)

**1** Contact Information

**2** New Questions (Faculty Only)

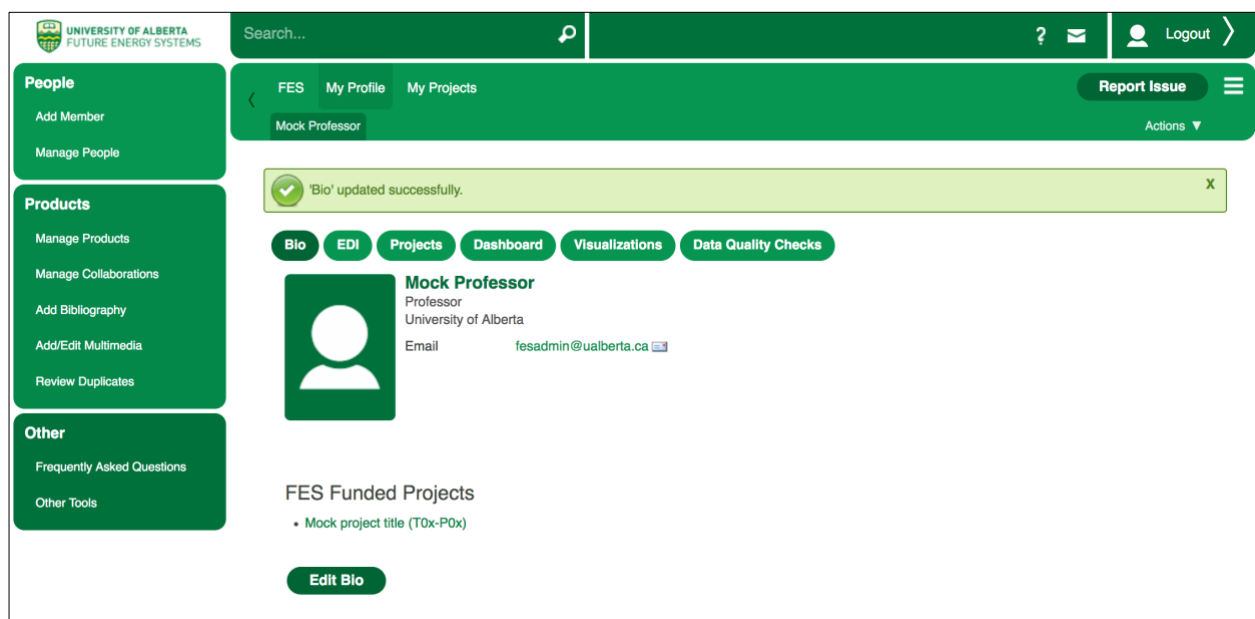
**3** Institution/Faculty/Position Table

**4** Profile Section

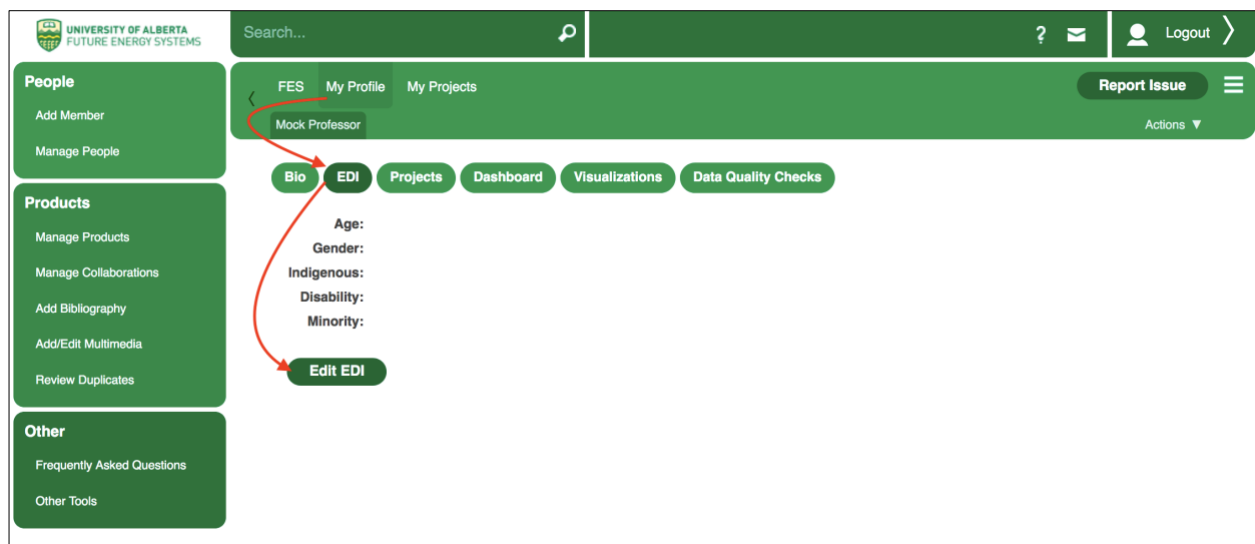
**5** Save Bio Button

<sup>1</sup> 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](mailto: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<sup>2</sup>, please go to your EDI tab and then click **Edit EDI**.



<sup>2</sup> 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.

The screenshot shows the FES profile page with the 'My Profile' tab selected. The left sidebar contains sections for 'People', 'Products', and 'Other'. The main content area has tabs for 'Bio', 'EDI', 'Projects', 'Relations', 'Dashboard', 'Visualizations', and 'Data Quality Checks'. The 'EDI' tab is active, displaying a form with the following fields: 'Date of birth: yyyy - mm - dd', 'Gender: ---', 'Do you identify as Indigenous?: ---', 'Are you a person with a disability?: ---', and 'Do you identify as a member of a visible minority in Canada:'. A dropdown menu is open for the last question, showing options 'Yes', 'No', and 'I prefer not to answer' (which is selected). At the bottom of the form are 'Save EDI' and 'Cancel' buttons. The 'Save EDI' button is highlighted with a red rectangle.

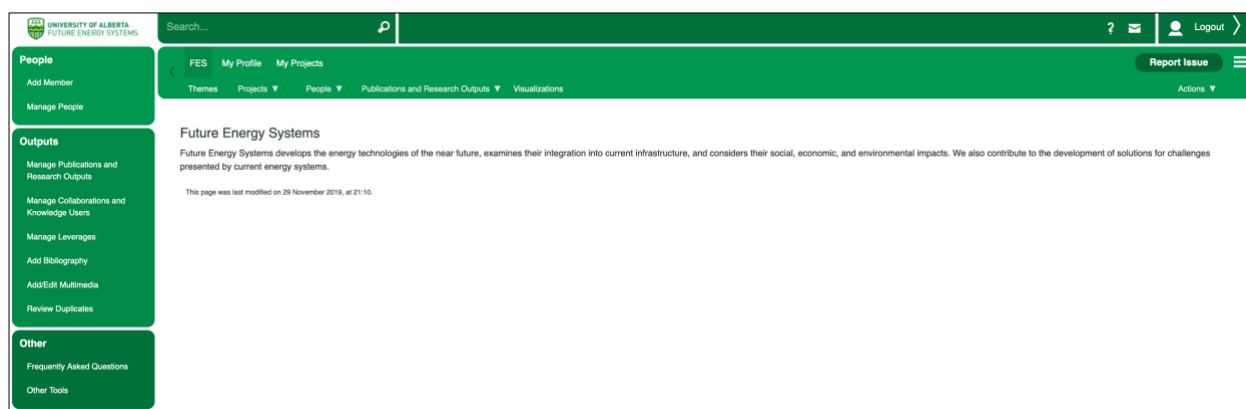
- 2.8. If you saved changes to your EDI info, the system will take you back to your EDI main page and show you the 'EDI' updated successfully message.

The screenshot shows the FES profile page after saving changes. A green success message banner at the top reads 'EDI updated successfully.' with a green checkmark icon and a close button (X). Below the banner, the 'EDI' tab is still active. The form fields are now populated with the following values: 'Age: 30', 'Gender: Male', 'Indigenous: No', 'Disability: No', and 'Minority: No'. A red arrow points from the text 'Your EDI info' to the 'Age' field. At the bottom of the form is an 'Edit EDI' button.

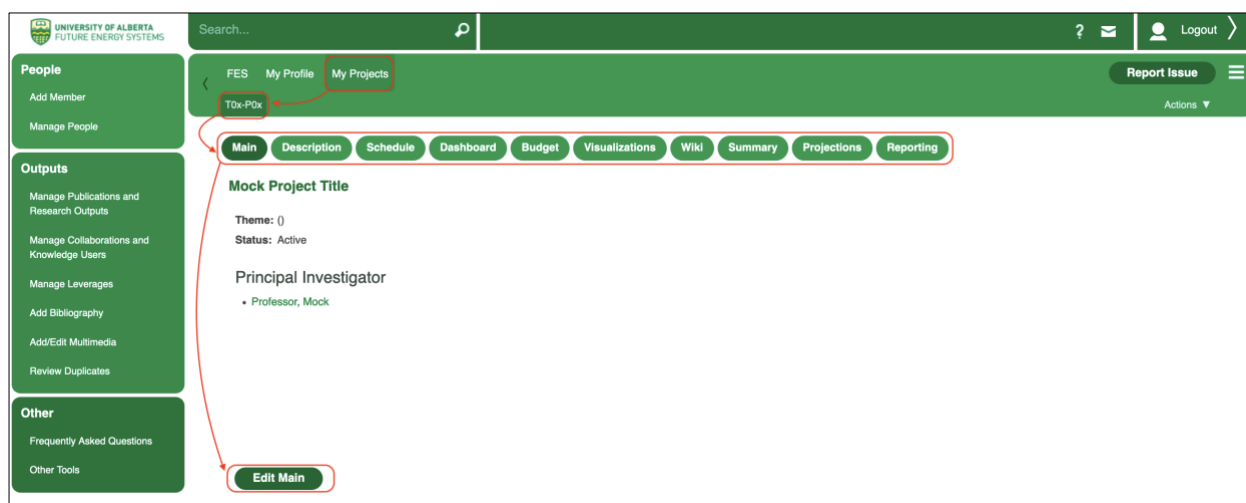


### 3. SETTING UP A FES PROJECT PAGE IN FORUM<sup>3</sup>

- 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 [Edit Main](#) (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

<sup>3</sup> 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](http://www.futureenergysystems.ca) website. Click on 'Save Main' to register the changes made, otherwise click on 'Cancel'.

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People

Add Member

Manage People

Outputs

Manage Publications and Research Outputs

Manage Collaborations and Knowledge Users

Manage Leverages

Add Bibliography

Add/Edit Multimedia

Review Duplicates

Other

Frequently Asked Questions

Other Tools

Search...

?

Logout

FES

My Profile

My Projects

T0x-P0x

Report Issue

Actions

Main

Description

Schedule

Dashboard

Budget

Visualizations

Wiki

Summary

Projections

Reporting

Mock Project Title (T0x-P0x)

New Title: Mock Project Title

Theme: Not Specified

Status: Active

Website: http://

Project Overview (live on website)

Powered by TinyMCE

Words: 0

Save Main

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<sup>4</sup>.

<sup>4</sup> 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.

The screenshot displays a web application interface for project management. On the left is a green sidebar with navigation links under 'Manage People', 'Outputs', and 'Other'. The main content area has a top navigation bar with tabs: Main, Description, Schedule (active), Dashboard, Budget, Visualizations, Wiki, Summary, Projections, and Reporting. Below the tabs, the page title is 'Mock Project Title (T0x-P0x)' and the section is 'Activity Schedule'. There are two buttons: 'Add Activity' (highlighted with a red box) and 'Add Task'. A red arrow points from the 'Add Activity' button to a modal dialog box titled 'Add Activity'. The dialog box contains a text input field with 'Activity 1' and two buttons: 'Add Activity' and 'Cancel'. Below the dialog box, there are two buttons: 'Save Schedule' (highlighted with a red box) and 'Cancel'. A red arrow points from the 'Save Schedule' button to the 'Add Activity' button in the dialog box. On the right side of the main content area, there are two legends. The first legend, titled 'Legend', shows status indicators: New (grey), Completed (blue), On Going (green), Late (yellow), Problem (orange), and Abandoned (red). The second legend, titled 'Modification' and 'Status', shows modification indicators: N/A (grey), New (grey), Completed (blue), Pending (green), and Abandoned (red).

- 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.

Manage People

Outputs

- Manage Publications and Research Outputs
- Manage Collaborations and Knowledge Users
- Manage Leverages
- Add Bibliography
- Add/Edit Multimedia
- Review Duplicates

Other

- Frequently Asked Questions
- Other Tools

Main Description **Schedule** Dashboard Budget Visualizations Wiki Summary Projections Reporting

Mock Project Title (T0x-P0x)

Activity Schedule

**Add Activity** **Add Task**

If a task was mistakenly added, then contact someone on staff to delete it. If a task was planned, but was abandoned, then select the 'Abandoned' status.

Task	FY2 Apr2017 – Mar2018				FY3 Apr2018 – Mar2019				FY4 Apr2019 – Mar2020				FY5 Apr2020 – Mar2021				FY6 Apr2021 – Mar2022				FY7 Apr2022 – Mar2023				FY8 Apr2023 – Sep2023		Leader	Personnel	Status
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2							
Activity 1																													
Activity 2																													
Activity n																													

Legend

- New
- Completed
- On Going
- Late
- Problem
- Abandoned

Milestones

**Add Milestone**

If a milestone was mistakenly added, then contact someone on staff to delete it. If a milestone was planned, but was abandoned, then select the 'Abandoned' status.

**Add Task**

Activity: **Activity 1**


Title: Task 1

**Add Task** **Cancel**

**Save Schedule** **Cancel**

Modification Status


- N/A
- New
- Completed
- On Going
- Late
- Problem
- Abandoned


- 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**.

Task	FY2 Apr2017 – Mar2018				FY3 Apr2018 – Mar2019				FY4 Apr2019 – Mar2020				FY5 Apr2020 – Mar2021				FY6 Apr2021 – Mar2022				FY7 Apr2022 – Mar2023				FY8 Apr2023 – Sep2023		Leader	Personnel	Status
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2											
Activity 1																													
Task 1																													
Activity 2																													
Activity n																													




Legend

- New
- Completed
- On Going
- Late
- Problem
- Abandoned

- 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** .



Search...

Logout

FES

My Profile

My Projects

Report Issue

Actions

People

Add Member

Manage People

Outputs

Manage Publications and Research Outputs

Manage Collaborations and Knowledge Users

Manage Leverages

Add Bibliography

Add/Edit Multimedia

Review Duplicates

Other

Frequently Asked Questions

Other Tools

Main

Description

Schedule

Dashboard

Budget

Visualizations

Wiki

Summary

Projections

Reporting

Mock Project Title (T0x-P0x)

Activity Schedule

Add Activity

Add Task

If a task was mistakenly added, then contact someone on staff to delete it. If a task was planned, but was abandoned, then select the 'Abandoned' status.

	FY2 Apr 2017 – Mar 2018				FY3 Apr 2018 – Mar 2019				FY4 Apr 2019 – Mar 2020				FY5 Apr 2020 – Mar 2021				FY6 Apr 2021 – Mar 2022				FY7 Apr 2022 – Mar 2023				FY8 Apr 2023 – Sep 2023				
Task	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Leader	Personnel	Status
Activity 1																													
Task 1																											Mock I	<div>Type team member names here</div>	<div>New</div>
Activity 2																													
Activity n																													

Legend

New

Completed

On Going

Late

Problem

Abandoned

Milestones

Add Milestone

If a milestone was mistakenly added, then contact someone on staff to delete it. If a milestone was planned, but was abandoned, then select the 'Abandoned' status.

Description	FY2 Apr 2017 – Mar 2018				FY3 Apr 2018 – Mar 2019				FY4 Apr 2019 – Mar 2020				FY5 Apr 2020 – Mar 2021				FY6 Apr 2021 – Mar 2022				FY7 Apr 2022 – Mar 2023				FY8 Apr 2023 – Sep 2023					
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Leader	Personnel	Status	Modification
MST02-T0x-P0x																														
Milestone 2																											Mock	<div>Type team member names here</div>	<div>Ne</div>	
MST01-T0x-P0x																											Mock	<div>Type team member name(s) here</div>	<div>Ne</div>	
Milestone 1																											Mock	<div>Type team member name(s) here</div>	<div>Ne</div>	

Modification

N/A

New

Completed


Pending

Abandoned

Save Schedule

Cancel

2020.01.20



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www.futureenergysystems.ca

3.10. The image below shows how the 'Schedule' section would look like after successfully adding activities, tasks and milestones to your project page.

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Search...

FES My Profile My Projects

T0x-P0x

Report Issue

Actions

✓ 'Schedule' updated successfully.

Main Description **Schedule** Dashboard Budget Visualizations Wiki Summary Projections Reporting

Mock Project Title (T0x-P0x)

Activity Schedule

	FY2 Apr2017 – Mar2018				FY3 Apr2018 – Mar2019				FY4 Apr2019 – Mar2020				FY5 Apr2020 – Mar2021				FY6 Apr2021 – Mar2022				FY7 Apr2022 – Mar2023				FY8 Apr2023 – Sep2023			
Task	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Leader	Personnel
Activity 1																												
Task 1																											Mock Professor	Type team member names here
Activity 2																												
Activity n																												

Legend

- New
- Completed
- On Going
- Late
- Problem
- Abandoned

Milestones

	FY2 Apr2017 – Mar2018				FY3 Apr2018 – Mar2019				FY4 Apr2019 – Mar2020				FY5 Apr2020 – Mar2021				FY6 Apr2021 – Mar2022				FY7 Apr2022 – Mar2023				FY8 Apr2023 – Sep2023			
Description	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Leader	Personnel
MST01-T0x-P0x																												
Milestone 1																											Mock Professor (UoA)	Type team member name(s) here
MST02-T0x-P0x																												
Milestone 2																											Mock Professor (UoA)	

Modification Status

- N/A
- New
- Completed
- Pending
- Abandoned

Edit Schedule

3.11. Moving forward, please go to the 'Budget' section and click on [Edit Budget](#).

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FUTURE ENERGY SYSTEMS

Search...

FES My Profile My Projects

T0x-P0x

Report Issue

Actions

Main Description Schedule **Budget** Dashboard Visualizations Wiki Summary Projections Reporting

Mock Project Title (T0x-P0x)

2019/20

Allocation Amount

TBA

No budget could be found for 2019

Budget Justification

2018/19

2017/18

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<sup>5</sup>. Upload your completed project budget file (non-protected excel version), provide details about your budget using the 'Budget Justification' box, and click on **Save Budget** to have your file uploaded and other changes registered. Otherwise, click **Cancel**.

The screenshot displays the FES web application interface. On the left is a green sidebar with navigation links under 'People', 'Outputs', and 'Other'. The top header is green with a search bar, user profile, and 'Logout' button. Below the header, a green bar contains tabs for 'FES', 'My Profile', and 'My Projects'. A secondary green bar shows a breadcrumb trail: 'Main' > 'Description' > 'Schedule' > 'Dashboard' > 'Budget' (highlighted with a red box) > 'Visualizations' > 'Wiki' > 'Summary' > 'Projections' > 'Reporting'. The main content area is titled 'Mock Project Title (T0x-P0x)' and features a dropdown for the fiscal year '2019/20'. Below this, the 'Allocation Amount' is set to 'TBA'. The 'Upload Budget' section includes a 'Browse...' button (highlighted with a red box) and the text 'No file selected.'. Below the upload section is a 'Budget Template' link (highlighted with a red box) and a large 'Budget Justification' text area (highlighted with a red box). At the bottom, there are buttons for 'Save Budget' and 'Cancel' (both highlighted with red boxes). A list of previous fiscal years (2018/19, 2017/18) is visible below the main form.

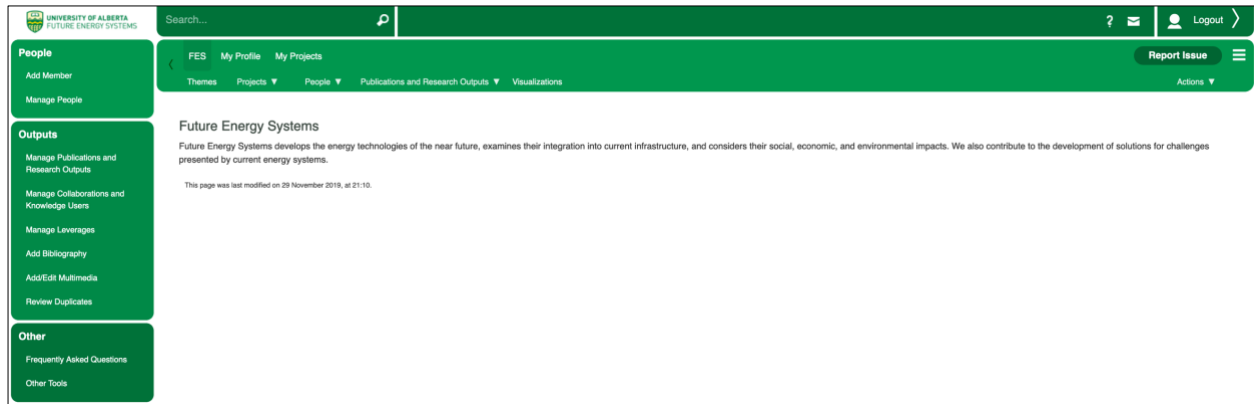
Please note that the FES office will periodically monitor the progress of your project page setup. If you face any difficulties during the setup process, please contact the FES team at [fes@ualberta.ca](mailto:fes@ualberta.ca).

<sup>5</sup> Altering the template's form may result in the Forum platform being unable to correctly display your project budget.

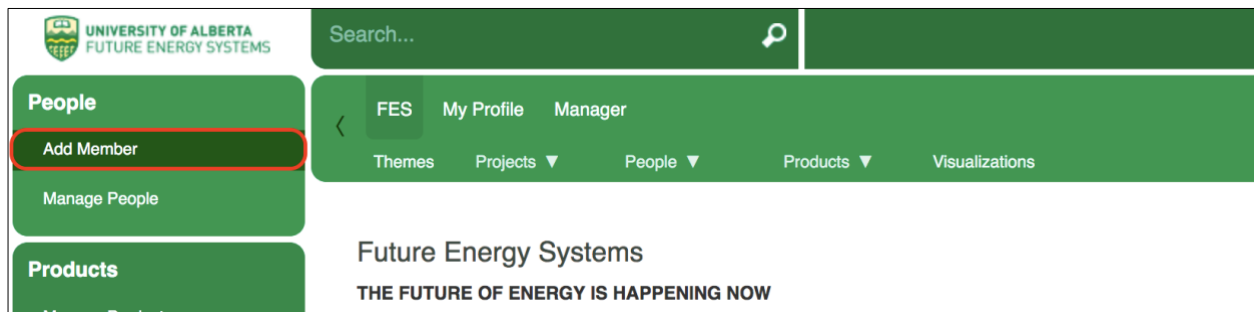


## 4. ADDING A MEMBER IN FORUM

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.



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



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.

Search...

FES

My Profile

My Projects

Themes

Projects

People

Publications and Research Outputs

Visualizations

People

Add Member

Manage People

Outputs

Manage Publications and Research Outputs

Manage Collaborations and Knowledge Users

Manage Leverages

Add Bibliography

Add/Edit Multimedia

Review Duplicates

Other

Frequently Asked Questions

Other Tools

Add Member

Adding a member to the forum will allow them to access content relevant to the user roles and projects which are selected below. By selecting projects, the user will be automatically added to the project. A new user's email must be provided as it will be used to send a randomly generated password to the user. After pressing the 'Submit Request' button, an administrator will be able to accept the request. In the name, then you may be contacted by the administrator about the request.

1

First Name:

Mock

Last Name:

Student

Email:

mock.student@ualberta.ca

Send Registration Email?

☒

Please keep checked

2

Roles:

☐ Co-Investigator
 ☐ Highly Qualified Person
 ☐ Partner
 ☐ Project Assistant

3

Associated Projects: Biomass (T01)

☐ T01-F01
 ☐ T01-P03
 ☐ T01-Q01
 ☐ T01-Q02
 ☐ T01-T01

☐ T01-N01
 ☐ T01-P04
 ☐ T01-P05
 ☐ T01-P06

☐ T01-P01
 ☐ T01-P02

Carbon CUS (T02)

☐ T02-C01
 ☐ T02-P03
 ☐ T02-Q01
 ☐ T02-T01
 ☐ T02-T02
 ☐ T02-Z01

☐ T02-C02
 ☐ T02-P04
 ☐ T02-P05
 ☐ T02-P06

☐ T02-P01
 ☐ T02-P02

Communities and Aboriginal (T03)

☐ T03-P02
 ☐ T03-P07
 ☐ T03-P11
 ☐ T03-P12

☐ T03-P04
 ☐ T03-P10

Energy Humanities (T04)

☐ T04-P01
 ☐ T04-P02
 ☐ T04-P03

Geothermal (T05)

☐ T05-P01
 ☐ T05-P03
 ☐ T05-P04

☐ T05-P02

Grids and Storage (T06)

☐ T06-F01
 ☐ T06-P04
 ☐ T06-T01
 ☐ T06-T02
 ☐ T06-Z01

☐ T06-M01
 ☐ T06-P05
 ☐ T06-P06
 ☐ T06-P07
 ☐ T06-Q01

☐ T06-P01
 ☐ T06-P02
 ☐ T06-P03

Heavy Oil - In-Situ (T07)

☐ T07-C01
 ☐ T07-C04
 ☐ T07-P05
 ☐ T07-P06
 ☐ T07-T01

☐ T07-C02
 ☐ T07-P03
 ☐ T07-P04

☐ T07-C03

Heavy Oil - Non-Aqueous Recovery (T08)

☐ T08-P01
 ☐ T08-P03
 ☐ T08-P02
 ☐ T08-Q01

Heavy Oil - Partial Upgrading (T09)

☐ T09-C01

Land / Water (T10)

☐ T10-P04
 ☐ T10-T02
 ☐ T10-T03
 ☐ T10-T04

☐ T10-T01

Non-Electric Infrastructure (T11)

☐ T11-P01
 ☐ T11-Q01

Solar (T12)

☐ T12-P01
 ☐ T12-P04
 ☐ T12-Z01

☐ T12-P02
 ☐ T12-P05
 ☐ T12-Q01

☐ T12-P03

System Wide (T13)

☐ T13-C01
 ☐ T13-M02
 ☐ T13-P04
 ☐ T13-P05

☐ T13-C02
 ☐ T13-P01
 ☐ T13-P02

☐ T13-M01

Wind (T14)

☐ T14-P02
 ☐ T14-P04
 ☐ T14-Q01
 ☐ T14-T01

☐ T14-P03
 ☐ T14-P05

Other

☐ T0x-P0x

4

Institution:

University of Alberta

Faculty:

Arts

Submit Request

2020.01.20

UNIVERSITY OF ALBERTA  
FUTURE ENERGY SYSTEMS

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- 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 **Submit Request**

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FUTURE ENERGY SYSTEMS

Search...

People  
Add Member  
Manage People

Outputs  
Manage Publications and Research Outputs  
Manage Collaborations and Knowledge Users  
Manage Leverages  
Add Bibliography  
Add/Edit Multimedia  
Review Duplicates

Other  
Frequently Asked Questions  
Other Tools

FES My Profile My Projects  
Themes Projects People Publications and Research Outputs Visualizations

Report Issue

### Add Member

Adding a member to the forum will allow them to access content relevant to the user roles and projects which are selected below. By selecting projects, the user will be automatically added to the projects on the forum, and subscribed to the project mailing lists. The new user's email must be provided as it will be used to send a randomly generated password to the user. After pressing the 'Submit Request' button, an administrator will be able to accept the request. If there is a problem in the request (ie. there was an obvious typo in the name), then you may be contacted by the administrator about the request.

First Name: Mock  
Last Name: Student  
Email: mock.student@ualberta.ca  
☒ Send Registration Email?

Roles: ☐ Co-Investigator ☒ Highly Qualified Person ☐ Partner ☐ Project Assistant

Associated Projects:  
☒ Other ☐ T0x-P0x

Institution: University of Alberta  
Faculty: Arts  
HQP Academic Status: Other

Submit Request

- 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.

UNIVERSITY OF ALBERTA  
FUTURE ENERGY SYSTEMS

Search...

People  
Add Member  
Manage People

Products  
Manage Products  
Manage Collaborations  
Add Bibliography  
Add/Edit Multimedia  
Review Duplicates

Other  
Impersonate

FES My Profile Manager  
Themes Projects People Products Visualizations


### Add Member

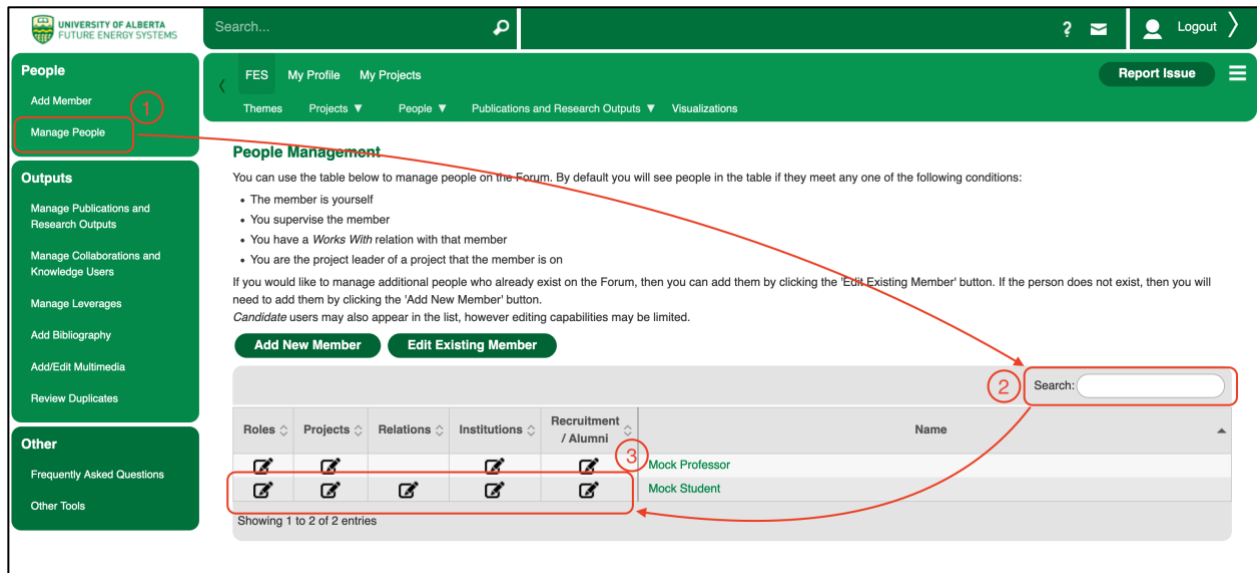
✓ User Creation Request Submitted. Once an Admin sees this request, the user will be accepted, or if there is a problem they will email you.

### View Requests

Adding a member to the forum will allow them to access content relevant to the user roles and projects which are selected below. By selecting projects, the user's email must be provided as it will be used to send a randomly generated password to the user. After pressing the 'Submit Request' button, an administrator will be able to accept the request. If there is a problem in the request (ie. there was an obvious typo in the name), then you may be contacted by the administrator about the request.

First Name:   
Last Name:   
Email:

- 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**

You can use the table below to manage people on the Forum. By default you will see people in the table if they meet any one of the following conditions:

- The member is yourself
- You supervise the member
- You have a *Works With* relation with that member
- You are the project leader of a project that the member is on

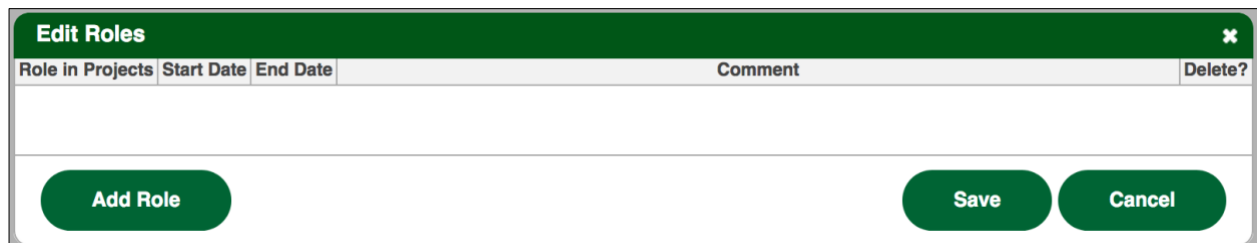
If you would like to manage additional people who already exist on the Forum, then you can add them by clicking the 'Edit Existing Member' button. If the person does not exist, then you will need to add them by clicking the 'Add New Member' button. Candidate users may also appear in the list, however editing capabilities may be limited.

**Add New Member** **Edit Existing Member**

Roles	Projects	Relations	Institutions	Recruitment / Alumni	Name
					Mock Professor
					Mock Student

Showing 1 to 2 of 2 entries

- 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**

Role in Projects	Start Date	End Date	Comment	Delete?
------------------	------------	----------	---------	---------

**Add Role** **Save** **Cancel**

- 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**.

The screenshot shows the 'Edit Roles' form with the following details:

- Role in Projects:** A dropdown menu is open, showing a list of roles and projects. The selected role is 'Highly Qualif...' (1). The selected project is 'T0x-P0x' (2).
- Start Date:** '2019-10-07' (4).
- End Date:** '0000-00-00' (4).
- Delete?:** Unchecked.
- Buttons:** 'Add Role', 'Save', and 'Cancel'.

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

The screenshot shows the 'Edit Roles' form with the following details:

- Role in Projects:** The dropdown menu is closed, and the project identifier 'T0x-P0x' is displayed above the dropdown list, replacing the 'No Projects' phrase. A red box highlights the 'T0x-P0x' text.
- Start Date:** '2019-10-07'.
- End Date:** '0000-00-00'.
- Delete?:** Unchecked.
- Buttons:** 'Add Role', 'Save', and 'Cancel'.

- 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.

The screenshot shows the 'Edit Roles' form with the following details:

- Role in Projects:** Two roles are listed. The first role is 'Highly Qualif...' with project 'T0x-P0x'. The second role is 'Project Assis...' with project 'T0x-P0x'.
- Start Date:** '2019-10-07' for both roles.
- End Date:** '0000-00-00' for both roles.
- Delete?:** The checkbox for the second role is checked.
- Buttons:** 'Add Role', 'Save', and 'Cancel'.

- 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.

**Edit Recruitment/Alumni** ✕

**Recruitment**  

Recruited from outside Canada ▾

Country:

**Alumni**  
Has this person moved on to a job in Canada or abroad?  

Yes, abroad ▾

Country:

Sector:  

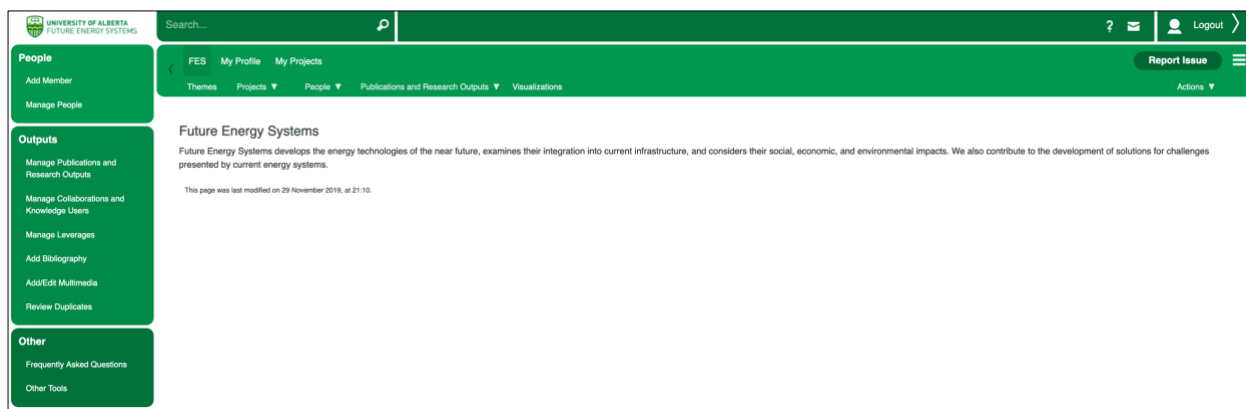
Academic/Research Institution ▾

Save

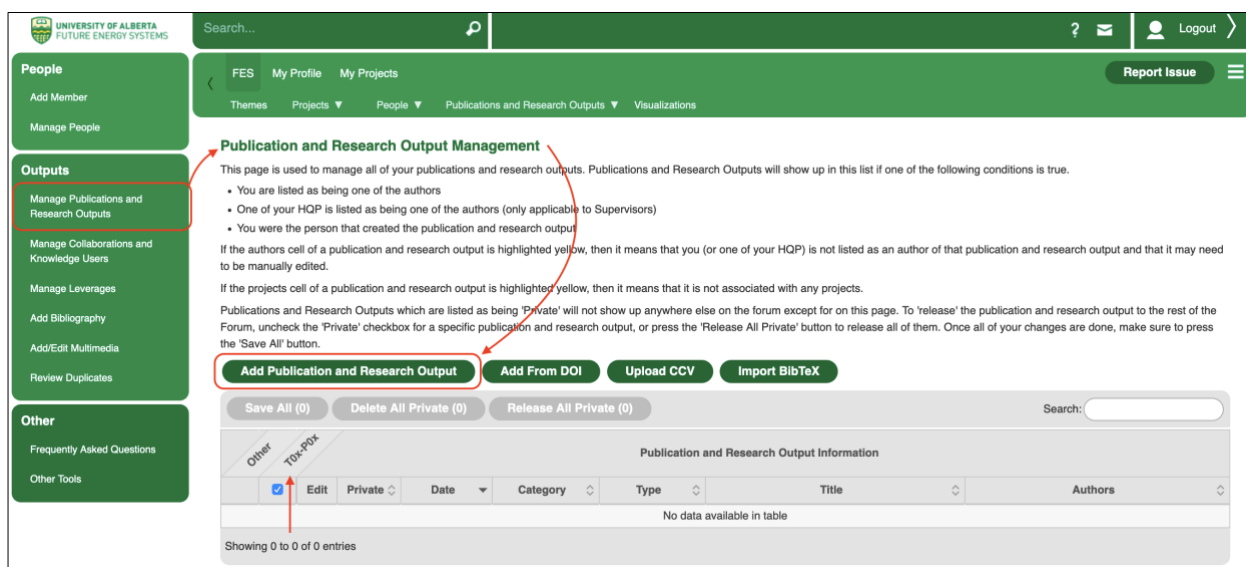
Cancel

## 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.



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

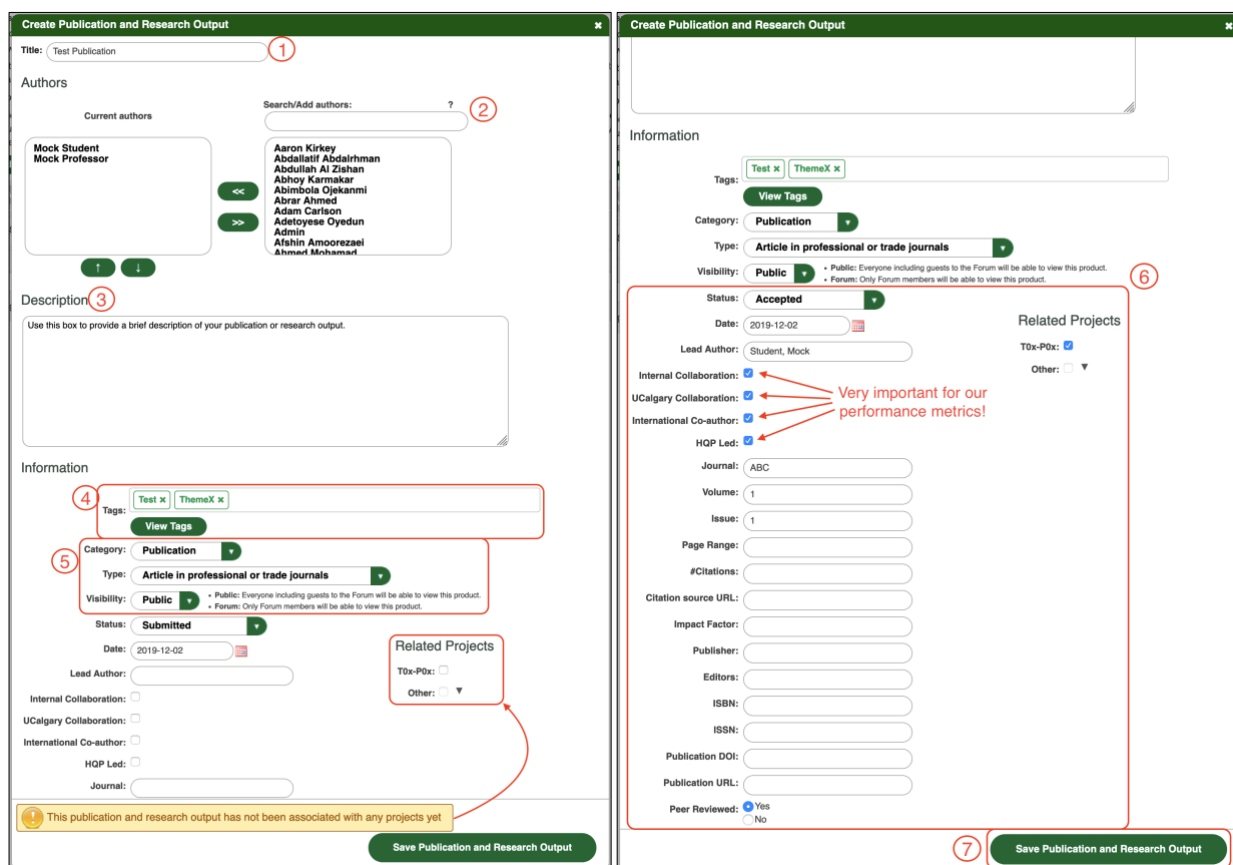


5.3. Forum will display a pop-up window where you can provide all the details associated to the research output you want to add. Please note that you can scroll up and down within this page to see all input fields (refer to the images below). Provide information in the following sections:

- Title
- 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 .
- Description
- Tags. You may either browse from the tag list by clicking , or manually enter tags.
- 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.
- 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](http://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.**

- Click on 



The image displays two screenshots of the 'Create Publication and Research Output' form. The left screenshot shows the 'Authors' section with a list of authors and a search bar. The right screenshot shows the 'Information' section, including 'Tags', 'Category', 'Type', 'Visibility', 'Status', 'Date', 'Lead Author', and 'Related Projects' checkboxes. Red circles and arrows highlight specific fields and checkboxes.

**Left Screenshot:**

- Title:** Test Publication (1)
- Authors:** Search/Add authors: (2)
- Description:** (3)
- Information:**
  - Tags:** Test x, ThemeX x (4)
  - Category:** Publication (5)
  - Type:** Article in professional or trade journals
  - Visibility:** Public
  - Status:** Submitted
  - Date:** 2019-12-02
  - Lead Author:** Student, Mock
  - Related Projects:** Tdx-Pdx: ☐ Other: ☐

**Right Screenshot:**

- Information:**
  - Tags:** Test x, ThemeX x
  - Category:** Publication
  - Type:** Article in professional or trade journals
  - Visibility:** Public
  - Status:** Accepted
  - Date:** 2019-12-02
  - Lead Author:** Student, Mock
  - Related Projects:** Tdx-Pdx: ☒ Other: ☐ (6)
  - Internal Collaboration:** ☒
  - UCalgary Collaboration:** ☒
  - International Co-author:** ☒
  - HQP Led:** ☒
  - Journal:** ABC
  - Volume:** 1
  - Issue:** 1
  - Page Range:**
  - #Citations:**
  - Citation source URL:**
  - Impact Factor:**
  - Publisher:**
  - Editors:**
  - ISBN:**
  - ISSN:**
  - Publication DOI:**
  - Publication URL:**
  - Peer Reviewed:** ☒ Yes ☐ No

**Save Publication and Research Output** (7)



- 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.

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Search...

People  
Add Member  
Manage People

Outputs  
Manage Publications and Research Outputs  
Manage Collaborations and Knowledge Users  
Manage Leverages  
Add Bibliography  
Add/Edit Multimedia  
Review Duplicates

Other  
Frequently Asked Questions  
Other Tools

FES My Profile My Projects  
Themes Projects People Publications and Research Outputs Visualizations

Report Issue

✓ The Publication and Research Output has been saved successfully

### Publication and Research Output Management

This page is used to manage all of your publications and research outputs. Publications and Research Outputs will show up in this list if one of the following conditions is true.

- You are listed as being one of the authors
- One of your HQP is listed as being one of the authors (only applicable to Supervisors)
- You were the person that created the publication and research output

If the authors cell of a publication and research output is highlighted yellow, then it means that you (or one of your HQP) is not listed as an author of that publication and research output and that it may need to be manually edited.

If the projects cell of a publication and research output is highlighted yellow, then it means that it is not associated with any projects.

Publications and Research Outputs which are listed as being 'Private' will not show up anywhere else on the forum except for on this page. To 'release' the publication and research output to the rest of the Forum, uncheck the 'Private' checkbox for a specific publication and research output, or press the 'Release All Private' button to release all of them. Once all of your changes are done, make sure to press the 'Save All' button.

Add Publication and Research Output Add From DOI Upload CCV Import BibTeX

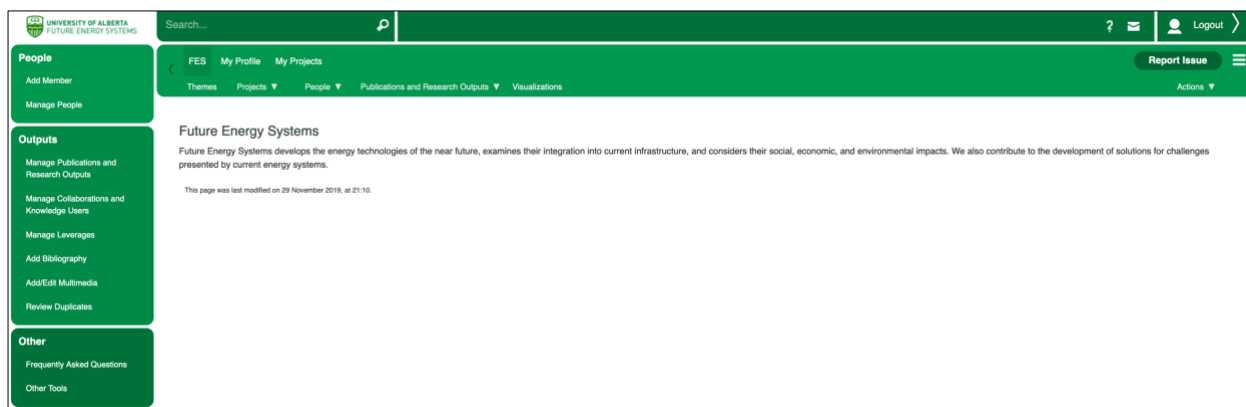
Save All (0) Delete All Private (0) Release All Private (0) Search:

Other	TOX-POX	Publication and Research Output Information						
		Edit	Private	Date	Category	Type	Title	Authors
<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>	2019-12-02	Publication	Article in profe...	Test Publication	Mock.Student, Mock.Professor

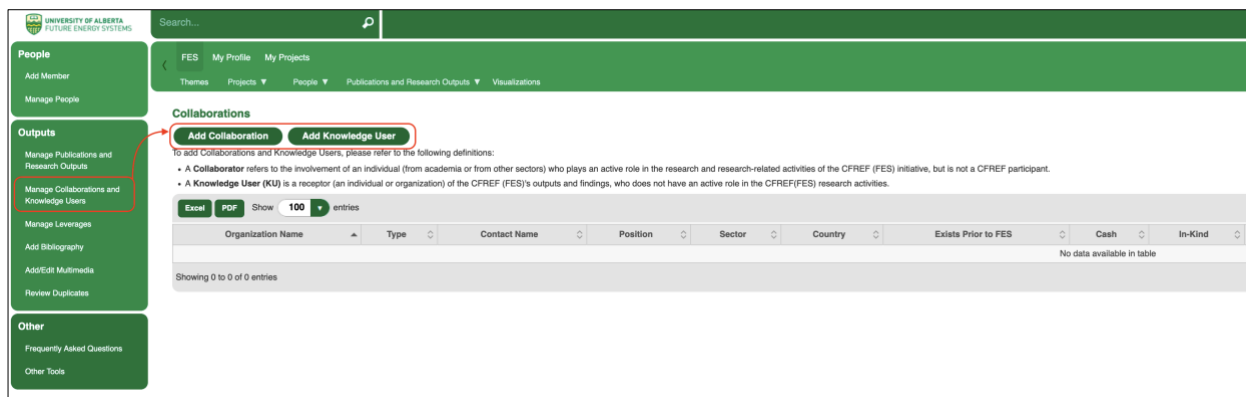
Showing 1 to 1 of 1 entries

## 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.

**UNIVERSITY OF ALBERTA**  
FUTURE ENERGY SYSTEMS

Search... ? [User Icon] Logout

**People**  
Add Member  
Manage People

**Outputs**  
Manage Publications and Research Outputs  
Manage Collaborations and Knowledge Users  
Manage Leverages  
Add Bibliography  
Add/Edit Multimedia  
Review Duplicates

**Other**  
Frequently Asked Questions  
Other Tools

**New Collaboration**  
This collaboration is for the 2018/19 fiscal year  
A **Collaborator** refers to the involvement of an individual (from academia or from other sectors) who plays an active role in the research and research-related activities of the CFREF (FES) initiative, but is not a CFREF participant.

**End Year:**  
**Active**

**Organization:**  
[Text Field]

**Contact:**  
Name [Text Field]  
Position [Text Field]

**Collaboration existed prior to FES grant?**  
[Toggle Switch]

**To date, have you received in-kind and/or cash support from this organization?**  
☒ Yes ☐ No  
Cash Contribution Value (CAD equivalent): [Text Field]  
In-kind Contribution Value (CAD equivalent): [Text Field]

**Country:**  
[Select an Option]

**Sector:**  
[Select an Option]

**Planning of Research** ☐ **Design/Data Collection** ☐ **Analysis of Results** ☐ **Exchange/Disseminate Research Knowledge** ☐ **User of Research Knowledge** ☐

**Brief Description:**  
[Text Area]

**Related Projects**  
T0x-P0x: ☐ **Other:** [Select an Option]

**Create Collaboration** **Cancel**

Make sure you check at least one project checkbox

- 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'.

**Organization Name**

Year 2018/19 - Active

**Contact**

Name Contact Name  
Position Contact Position

Country Canada  
Sector Private sector in Canada  
Existed prior to FES grant? No  
Cash \$1.00  
In-Kind \$2.00

**Attributes**

- Planning of Research
- Design/Data Collection
- Analysis of Results
- Exchange/Disseminate Research Knowledge
- User of Research Knowledge

**Related Projects**

- T0x-P0x

**Brief Description:**

This is a brief description of the collaboration with Organization Name.

[Edit Collaboration](#) [Delete Collaboration](#)

[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.

**Collaborations**

[Add Collaboration](#) [Add Knowledge User](#)

To add Collaborations and Knowledge Users, please refer to the following definitions:

- A **Collaborator** refers to the involvement of an individual (from academia or from other sectors) who plays an active role in the research and research-related activities of the CFREF (FES) initiative, but is not a CFREF participant.
- A **Knowledge User (KU)** is a receptor (an individual or organization) of the CFREF (FES)'s outputs and findings, who does not have an active role in the CFREF(FES) research activities.

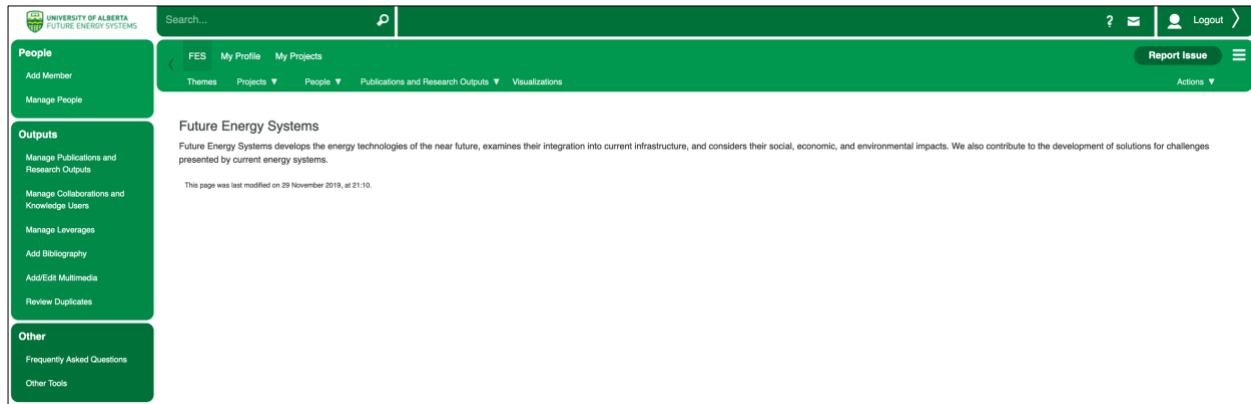
Excel PDF Show 100 entries Search:

Organization Name	Type	Contact Name	Position	Sector	Country	Existed Prior to FES	Cash	In-Kind	Attributes	Creator	Projects	Year	End Year	Description	Last Changed
Organization Name	Collaboration	Contact Name	Contact Position	Private sector in Canada	Canada	No	1.00	2.00	<ul style="list-style-type: none"> <li>Planning of Research</li> <li>Design/Data Collection</li> <li>Analysis of Results</li> <li>Exchange/Disseminate Research Knowledge</li> <li>User of Research Knowledge</li> </ul>	Mock Professor	T0x-P0x	2018/19	Active	This is a brief de...	2019-12-02

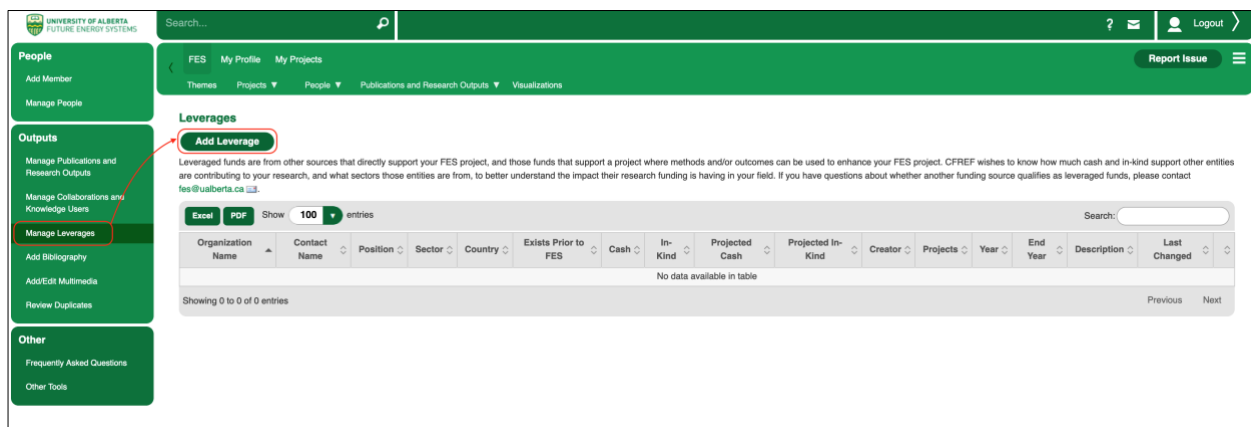
Showing 1 to 1 of 1 entries Previous 1 Next

## 7. ADDING LEVERAGES<sup>6</sup> 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**.



<sup>6</sup> 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](mailto: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 **Create Leverage** to record this entry, otherwise click **Cancel**.

FESMy ProfileManager

Report Issue

ThemesProjects▼People▼Publications and Research Outputs▼Visualizations

### New Leverage

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](mailto:fes@ualberta.ca).

**End Year:**

**Active** ▼

**Organization:**

\_\_\_\_\_

**Partnership existed prior to FES grant?**

\_\_\_\_\_ ▼

**To date, have you received in-kind and/or cash support from this organization?**

☒ Yes ☐ No

Cash amount contributed to date (CAD equivalent): 0

In-kind amount contributed to date (CAD equivalent): 0

Cash amount committed for remainder of grant: 0

In-kind amount committed for remainder of grant: 0

Round to nearest integer

**Country:**

Select an Option ▼

**Sector:**

- ☐ Canadian Academic Institutions
- ☐ Other Canadian research organizations (including research hospitals)
- ☐ Academic and research institutes abroad (including research hospitals)
- ☐ Federal Government of Canada (not from CIHR, NSERC, SSHRC or CFI)
- ☐ Funding from the federal tri-agencies (CIHR, NSERC, and SSHRC) and CFI related to FES-funded research
- ☐ Private sector in Canada
- ☐ Private sector abroad
- ☐ Public sector in Canada
- ☐ Public sector abroad
- ☐ Philanthropic/not-for-profit/Other in Canada
- ☐ Philanthropic/not-for-profit/Other abroad

**Funding title (if any) AND brief description of partnership activities:**

\_\_\_\_\_

**Related Projects**

Other: ☒ ▼

Make sure a project box is selected

**Create Leverage** **Cancel**

- 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.

**ABC Organization**

Year Active

Country	Canada
Sector	Federal Government of Canada (not from CIHR, NSERC, SSHRC or CFI)
Existed prior to FES grant?	No
Cash	\$10000.00
In-Kind	\$20000.00
Projected Cash	\$30000.00
Projected In-Kind	\$40000.00

**Related Projects**

- T0x-P0x

**Funding title (if any) AND brief description of partnership activities:**

ABC Grant.  
This is a brief description of the partnership activities.

**Edit Leverage** **Delete Leverage**

**Back to Leverages**

Click here to go back to the main 'Leverages' page

- 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'.

**Leverages**

**Add Leverage**

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](mailto:fes@ualberta.ca).

Excel PDF Show 100 entries

Organization Name	Contact Name	Position	Sector	Country	Exists Prior to FES	Cash	In-Kind	Projected Cash	Projected In-Kind	Creator	Projects	Year	End Year	Description	Last Changed
ABC Organization			Federal Government of Canada (not from CIHR, NSERC, SSHRC or CFI)	Canada	No	10000.00	20000.00	30000.00	40000.00	Mock Professor	T0x-P0x	2019/20	Active	ABC Grant This ...	2020-01-17

Showing 1 to 1 of 1 entries

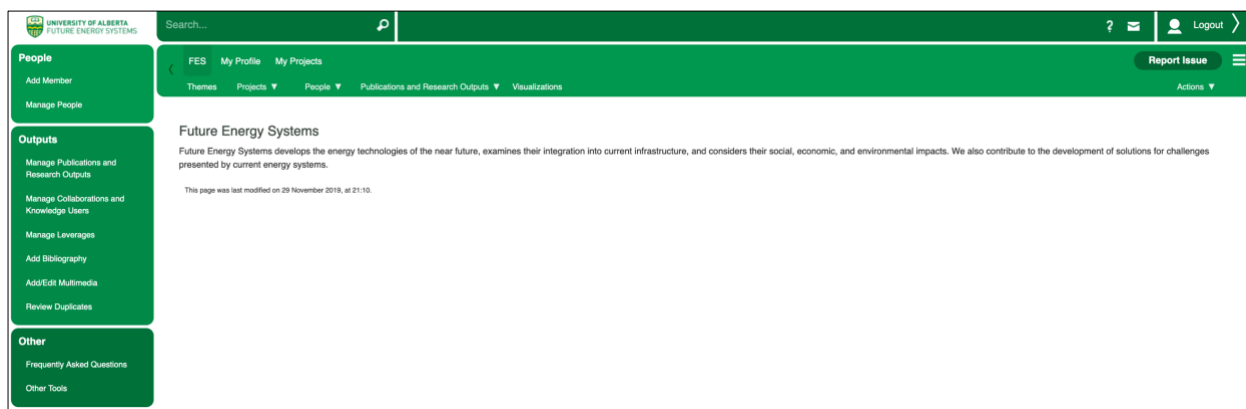
Previous 1 Next

Click here if you want to delete this entry

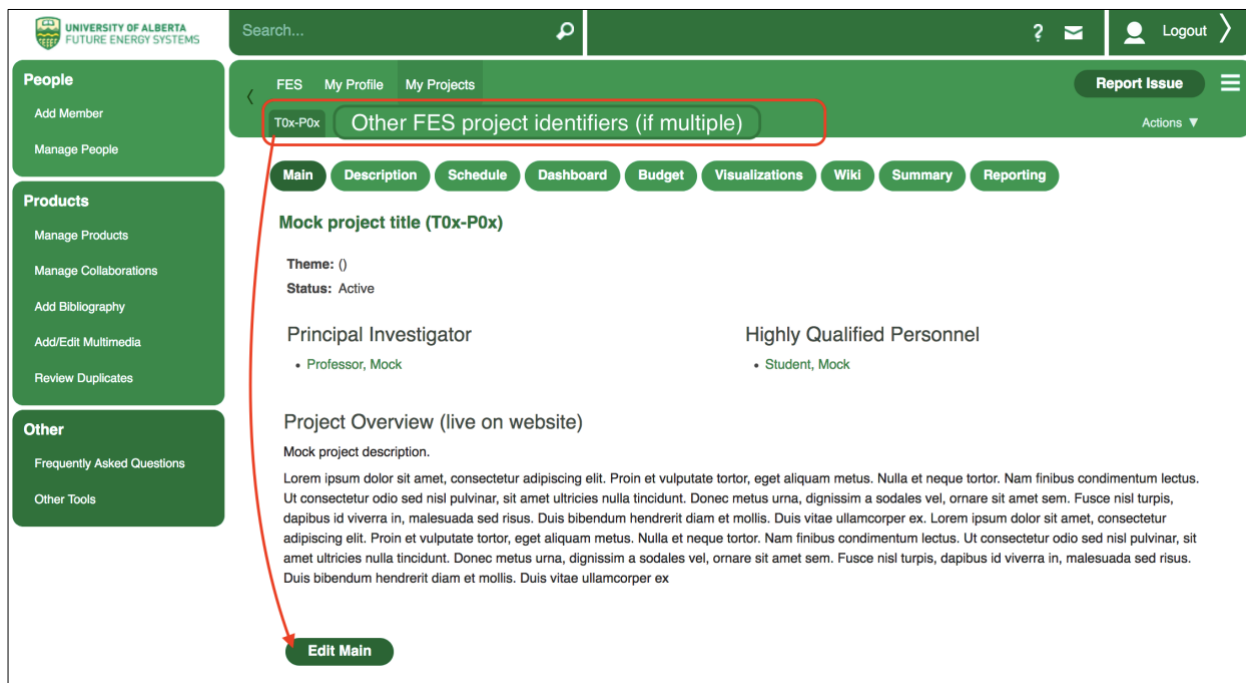


## 8. ANNUAL REPORTING PROCESS (to be completed by Principal Investigators and Project Assistants/Admins only, during the annual reporting period<sup>7</sup>; there may be some overlap with the midterm reporting process<sup>8</sup>)

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**.



<sup>7</sup> Reporting periods may vary between fiscal years. Please contact [fes@ualberta.ca](mailto:fes@ualberta.ca) for more detailed information about the current/upcoming reporting period.


<sup>8</sup> 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](#).

The screenshot shows a web application interface for managing projects. On the left is a green sidebar with navigation links: 'People' (Add Member, Manage People), 'Products' (Manage Products, Manage Collaborations, Add Bibliography, Add/Edit Multimedia, Review Duplicates), and 'Other' (Frequently Asked Questions, Other Tools). The main content area has a top navigation bar with 'FES', 'My Profile', and 'My Projects'. Below this is a sub-header 'T0x-P0x' with an 'Actions' dropdown. The main content area has tabs: 'Main' (selected), 'Description', 'Schedule', 'Dashboard', 'Budget', 'Visualizations', 'Wiki', 'Summary', and 'Reporting'. The 'Main' tab displays 'Mock project title (T0x-P0x)' and several input fields: 'New Title' (Mock Project Title), 'Theme' (Not Specified), 'Status' (Active), and 'Website' (http://). A red box labeled '1' highlights the 'Website' field. Below these fields is a 'Project Overview (live on website)' section, also highlighted by a red box labeled '2'. This section contains a rich text editor with a toolbar (undo, redo, bold, italic, underline, link, unlink, list, ordered list, indent, outdent, fullscreen) and a text area containing placeholder text. At the bottom of the main content area, there are two buttons: 'Save Main' (highlighted by a red box labeled '3') and '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 31<sup>st</sup> 2019 - April 1<sup>st</sup> 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<sup>st</sup> 2020 - April 1<sup>st</sup> 2021) can be amended. Also, new milestones may be added for FY5.
- 8.7. Milestones for Fiscal Year 6 (FY6: March 31<sup>st</sup> 2021 - April 1<sup>st</sup> 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**.

**Milestones**

**Add Milestone**

If a milestone was mistakenly added, then contact someone on staff to delete it. If a milestone was planned, but was abandoned, then select the 'Abandoned' status.

Description	FY2 Apr 2017 – Mar 2018				FY3 Apr 2018 – Mar 2019				FY4 Apr 2019 – Mar 2020				FY5 Apr 2020 – Mar 2021				FY6 Apr 2021 – Mar 2022				FY7 Apr 2022 – Mar 2023				FY8 Apr 2023 – Sep 2023		Leader	Personnel	Status	Modification
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2								
MST01-T0x-P0x Milestone 1																								Mock Student	Mock Student X	Completed				
MST02-T0x-P0x Milestone 2																								Mock Student	Mock Student X	Pending	Revised			
MST03-T0x-P0x Milestone 3																								Mock Student	Mock Student X	Pending	Postponed			
MST04-T0x-P0x Milestone 4																								Mock Student	Mock Student X	New				

Modification: N/A, Pending, Postponed, Completed, Abandoned  
Status: New, Completed, Pending, Abandoned

**Save Schedule** **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 [Edit Top Research Outcomes](#) or [Edit Technology](#), as per the image below.<sup>9</sup>

Main
Description
Schedule
Dashboard
Budget
Visualizations
Wiki
Summary
Projections
Reporting

Mock Project Title (T0x-P0x)

Top Research Outcomes

Year	Category	
2019	Activity	Mock Professor, Mock Student (2019 Oct). TESTEST - FES Admin product. Invited

Last updated on: Mar 23, 2018

[Edit Top Research Outcomes](#)

Technology Evaluation/Adoption

Have your research group evaluated and/or adopted any new technology since the beginning of the project?

[Edit Technology](#)

<sup>9</sup> 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).<sup>10</sup>

**Main** Description Schedule **Dashboard** Budget Visualizations Wiki Summary Projections Reporting

**Mock Project Title (T0x-P0x)**

### Top Research Outcomes

Select up to 2 research outcomes that you believe showcase the productivity of T0x-P0x the greatest. The order that you specify them in does not matter. The publications and research outputs will be sorted in descending order by date. These top publications and research outputs will be shown in the annual report. ie:

- Publication in a high-impact journal
- Major partnerships or collaborations
- Licensing a product
- High profile awards
- Formation of a start-up company

(2019) Patent: Test IP Management ▼

(2019) Article in professional or trade journals: Test Publication ▼

**Save** **Cancel**

### Technology Evaluation/Adoption

Have your research group developed any new technology that has been assessed and/or adopted by a third party organization?

**Yes, both assessed and adopted** ▼

Please provide the name of the technology:

Test Technology

Please provide the name, sector and country of the third party organization which assessed your technology:

Organization1 Name, Sector, Country.

Please provide the name, sector and country of the third party organization which adopted your technology:

Organization2 Name, Sector, Country.

Based on the definitions provided by Innovation Canada in the link below, please indicate the Technology Readiness Level (TRL) of the technology:

**Level 4** ▼

Please provide a brief description of your technology:

Brief description of the developed technology.

Note: If your research group has developed more than one technology that have been assessed and/or adopted by a third party organization, please contact the FES office at [fes@ualberta.ca](mailto:fes@ualberta.ca)

Innovation Canada info: <https://www.ic.gc.ca/eic/site/080.nsf/eng/00002.html>

**Save** **Cancel**

<sup>10</sup> 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](mailto: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.

✓ 'Dashboard' updated successfully.

Main

Description

Schedule

Dashboard

Budget

Visualizations

Wiki

Summary

Projections

Reporting

Mock Project Title (T0x-P0x)

Top Research Outcomes

Year	Category	
2019	IP Management	<b>Mock Professor, Mock Student</b> (2019 Dec). <i>Test IP Management.</i>
2019	Publication	<b>Mock Student, Mock Professor</b> (2019 Dec). <i>Test Publication. ABC, 1(1)</i> Accepted / Peer Reviewed

Last updated on: Dec 10, 2019

Edit Top Research Outcomes

Technology Evaluation/Adoption

Have your research group developed any new technology that has been assessed and/or adopted by a third party organization?  
Yes, both assessed and adopted

Please provide the name of the technology:  
Test Technology

Please provide the name, sector and country of the third party organization which assessed your technology:  
Organization1 Name, Sector, Country.

Please provide the name, sector and country of the third party organization which adopted your technology:  
Organization2 Name, Sector, Country.

Based on the definitions provided by Innovation Canada in the link below, please indicate the Technology Readiness Level (TRL) of the technology:  
Level 4

Please provide a brief description of your technology:  
Brief description of the developed technology.


Edit Technology

Dashboard

▼ Overall

People	Roles	HQP	Publications	Activities	IP Management	Awards	Multimedia
Total:		0	All: 1	All: 1	All: 1	All: 1	0
Mock Professor	PI	0	Article in professional or trade journals(Not PB): 1	Event: 1	Patent: 1	Award: 1	0
Total:		0	All: 1	All: 1	All: 1	All: 1	0

2020.01.20



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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.

The screenshot displays the FES web application interface. On the left is a green sidebar with navigation categories: 'People' (Add Member, Manage People), 'Products' (Manage Products, Manage Collaborations, Add Bibliography, Add/Edit Multimedia, Review Duplicates), and 'Other' (Frequently Asked Questions, Other Tools). The main content area has a top navigation bar with tabs: FES, My Profile, My Projects, and a 'Report Issue' button. Below this is a sub-tab bar with: Main, Description, Schedule, Dashboard, Budget (highlighted), Visualizations, Wiki, Summary, and Reporting. The 'Budget' tab shows a 'Mock Project Title (T0x-P0x)' with a dropdown menu set to '2019/20'. Under 'Allocation Amount', it says 'TBA' and 'No budget could be found for 2019'. Under 'Budget Justification', there are expandable sections for '2018/19' and '2017/18'. A red arrow points from the 'Budget' tab to an 'Edit Budget' button at the bottom of the page.

- 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.

Manage Project

**Products**

- Manage Products
- Manage Collaborations
- Add Bibliography
- Add/Edit Multimedia
- Review Duplicates

**Other**

- Frequently Asked Questions
- Other Tools

Main Description Schedule Dashboard **Budget** Visualizations Wiki Summary Reporting

Mock Project Title (T0x-P0x)

▼ 2019/20

Allocation Amount  
TBA

Upload Budget

Browse... Updated Budget FY5-6 (T0x-P0x).xlsx

**Budget Template**

Budget Justification

Use this section to provide details/justification about your new/updated budget

► 2018/19

► 2017/18

Don't forget to save your changes after uploading the budget file

**Save Budget** **Cancel**

- 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.<sup>11</sup>

Main Description Schedule Dashboard Budget Visualizations Wiki Summary **Projections** Reporting

Mock Project Title (T0x-P0x)

2019/20

**Recruitment**

Role	Projected #
Undergrad	
MSc	
PhD	
PDF	
Research Associate	
Technician	
Other HQP ()	
Administrative Staff ()	
Other ()	

**Publications and Research Outputs**

Type	Projected #
<b>Publication</b>	
Bachelors Thesis	
Book	
Book Chapter	
Edited Volume	
Scholarly Refereed Journal	
Article in professional or trade journals	
Article in popular media	
Masters Thesis	
PhD Thesis	
Conference Proceedings	
Research Report	
Report, brief, and other forms of grey literature	
Government Publication	
Website	
Other ()	
<b>Activity</b>	
Event	
Conference/Workshop	
Invited/Keynote	
Government Briefings	
Visiting Student (outgoing)	
Visiting Student (incoming)	
Interview (Broadcast or Text)	
Other ()	
<b>IP Management</b>	
Patent	
Policy	
Copyright	
Trademark	
Utility design	
License	
Start-up Company	
Other ()	
<b>Award</b>	
Award	
Other ()	

2018/19

2017/18

Edit Projections

<sup>11</sup> 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**.

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Search...

FES My Profile My Projects

T0x-P0x

Report Issue

Actions

Main Description Schedule Dashboard Budget Visualizations Wiki Summary Projections **Reporting**

Mock Project Title (T0x-P0x)

2019/20

★ Provide a brief description of your research progress during FY4 (300 words)  
Please focus on scholarly and not administrative activities

★ Did you change your milestones for this year and moving forward? If so, why? (300 words)

★ What steps did you take to ensure equity, diversity and inclusion (EDI) within your team?  
Suggested topics to address

- What are the EDI issues in your field?
- How are you using this project to address them?
- Have you or any of your team members attended EDI related events/workshops during the past year? If yes, please provide the event title(s).

2018/19

2017/18

Save Reporting Cancel

- 8.16. Lastly, please inform the FES team (at [fes@ualberta.ca](mailto: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.

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Search...

FES My Profile My Projects

Mock Professor

Report Issue

Actions

Bio EDIT Projects Relations Dashboard Visualizations Data Quality Checks

Website Url:  First Name:

LinkedIn Url:  Last Name:

Twitter Account:  Email:

Office Address:  Nationality:

Phone Number:  Gender:

Are you currently a CRC or CERC (or equivalent)?

Was your first appointment as a professor within 5 years of the beginning of your FES research?

☐ - Yes

CFREF defines an Early Career Researcher as a researcher who has five or less experience since their first research appointment, minus eligible leaves

Institution	Start Date	End Date	Delete?
Institution: <input type="text"/> University of Alberta	2017-04-03 0	0000-00-00 0	<input type="checkbox"/>
Faculty: <input type="text"/>			
Position: <input type="text"/> Professor			

Add Institution

Save Bio Cancel

## 9.2. Dashboard (My Projects)

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

**Required action:** Go to your project page, followed by **Dashboard**. 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 **Save** to record your recent changes. Otherwise click on **Cancel**.

FES

My Profile

My Projects

Report Issue

Actions ▼

T0x-P0x

### Technology Evaluation/Adoption

Have your research group developed any new technology that has been assessed and/or adopted by a third party organization?

Yes, both assessed and adopted ▼

Please provide the name of the technology:

Test Technology

Please provide the name, sector and country of the third party organization which assessed your technology:

Organization1 Name, Sector, Country.

Please provide the name, sector and country of the third party organization which adopted your technology:

Organization2 Name, Sector, Country.

Based on the definitions provided by Innovation Canada in the link below, please indicate the Technology Readiness Level (TRL) of the technology:

Level 4 ▼

Please provide a brief description of your technology:

Brief description of the developed technology.

Note: If your research group has developed more than one technology that have been assessed and/or adopted by a third party organization, please contact the FES office at [fes@ualberta.ca](mailto:fes@ualberta.ca)

Innovation Canada info: <https://www.ic.gc.ca/eic/site/080.nsf/eng/00002.html>

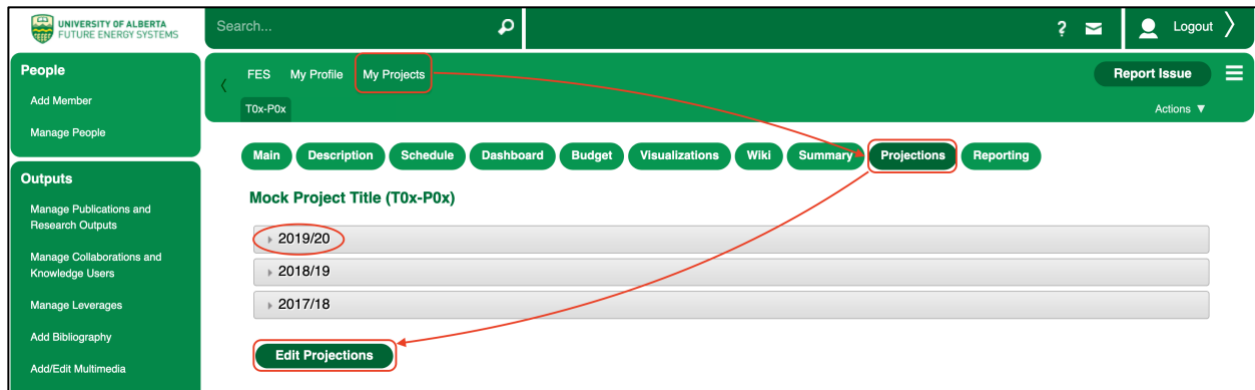
Save Cancel

### 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<sup>12</sup>. Please also ensure that all HQP have accurate start and end dates.

The screenshot shows the 'Manage People' interface. On the left, there is a sidebar with sections: 'People' (containing 'Add Member' and 'Manage People'), 'Outputs' (containing 'Manage Publications and Research Outputs', 'Manage Collaborations and Knowledge Users', 'Manage Leverages', 'Add Bibliography', 'Add/Edit Multimedia', and 'Review Duplicates'), and 'Other' (containing 'Frequently Asked Questions' and 'Other Tools'). The 'Manage People' section is highlighted with a red box. The main content area is titled 'People Management' and includes instructions on how to use the table to manage people. Below the instructions are two buttons: 'Add New Member' and 'Edit Existing Member'. A table with columns 'Roles', 'Projects', 'Relations', 'Institutions', and 'Recruitment / Alumni' is shown. The 'Recruitment / Alumni' column is highlighted with a red box. Below the table, there is a modal window titled 'Edit Recruitment/Alumni' with fields for 'Recruitment' and 'Alumni' (with a sub-question 'Has this person moved on to a job in Canada or abroad?') and a 'Sector' field. The 'Save' and 'Cancel' buttons are at the bottom of the modal.

## 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<sup>13</sup> 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 [Edit Collaboration](#).

<sup>12</sup> To add a member, please refer to **Section 4. Adding a Member in Forum**

<sup>13</sup> 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.

The screenshot shows the 'Manage Collaborations and Knowledge Users' section of the University of Alberta Future Energy Systems (FES) platform. The interface includes a sidebar with navigation options such as 'People', 'Outputs', and 'Other'. The main content area displays a table of collaborations and knowledge users. Red boxes highlight the 'Organization Name' column and the 'Exists Prior to FES' column. A red arrow points from the 'Organization Name' column to the 'Exists Prior to FES' column.

Organization Name	Type	Contact Name	Position	Sector	Country	Exists Prior to FES	Cash	In-Kind	Attributes	Creator	Projects	Year	E
Organization Name 1	Collaboration	Name LastName	Position	Private sector in Canada	Canada	Yes / No?	10000.00	0.00	• Planning of Research • Design/Data Collection • Analysis of Results • Exchange/Disseminate Research Knowledge • User of Research Knowledge	Mock Professor	T0x-P0x	2018/19	A
Organization Name 2	Knowledge User	Full Name	Position	Public sector in Canada	Canada		15000.00	0.00		Mock Professor	T0x-P0x	2018/19	A

Showing 1 to 2 of 2 entries