

# GlycoNet Annual/Final Report Reference Guide

Last update: **March 2019**

The reporting period is from April 1 until March 31.

## Purpose & Process

These reports will be used by the SAB and RMC, together with the AGM presentations, to evaluate current and recently completed projects. As well, the GlycoNet administrative office will include statistics from your report in its annual submission to the NCE Program Office.

The report can be accessed through the [GlycoNet Forum](#), in the "My Reports" section.

Project leaders are responsible for finalizing and submitting the annual/final project report. Trainees and coinvestigators can assist the project leader by providing comments in each section and by linking products (publications, presentations, patents, etc.) to the report. Project leaders can see these comments by clicking on the red "*NI Comments*" link.

## Please pay attention to the following:

- Each trainee name appearing on the "Project Information" page of the report should have a supervisor listed next to it, in addition to citizenship and gender. Be sure to include the % time each investigator devotes to the project on this page as well. Use the "Manage People" menu in the left sidebar to add new people to your project or to indicate your supervision of the trainees in your lab.
- The "Partner Contributions" section of the Forum has been removed from the sidebar, and is now fully integrated into the report. All matching funds (both cash and in-kind) that you have received during the fiscal year (April to March), including funds carried over from previous fiscal years, should be described in this section.
- When adding Partner Contributions, please also include the name and position of your contact within the company/organization to the "Partners and Collaborators" table on the Project Information page.
- You may regenerate and re-submit the PDF as many times as you like before the deadline. Only the latest version will be used.

## **\*\*NEW - Revised Process for the Submission of Financial Information\*\***

GlycoNet management will be working with the Network Investigators and financial offices at each member institution to ensure that project funds are accurately summarized for the NCE. We have made some adjustments this year to the financial reporting in order to simplify the process. Please review the following so that you are familiar with the process and your role in the financial reporting.

- **NCE funds:** A Form 300 report will be sent directly to GlycoNet in the spring by the financial office at each institution, or will be submitted through the FDSR system. Network investigators may be asked by their institution to review this information before submission.
- **Non-NCE cash contributions:** As part of each institution's typical reporting process, non-NCE cash contributions will be detailed by each financial office as a Statement of Account that is sent to Network Investigators in the spring. After reviewing and signing the documents, **please send a copy of all GlycoNet-related Statements of Accounts to Cécile McNeil (ccile@ualberta.ca)**. The GlycoNet office will then add the information into the NCE report. This information should also be detailed in the Partner Contributions section of the report (submitted by the lead investigator).

- **Non-NCE in-kind contributions:** Please detail the Non-NCE in-kind contributions in the Partner Contributions section of the report. Ensure that the contributions listed in your original budget are added in this section. If there are any changes from the original, please contact Cecile McNeil or Elizabeth Nanak.

Need further assistance? Please contact Ryan Snitynsky ([snitynsk@ualberta.ca](mailto:snitynsk@ualberta.ca)) with questions relating to the report content or David Turner ([support@forum.glyconet.ca](mailto:support@forum.glyconet.ca)) for technical assistance.

**Deadlines for the 2019 Annual Report:**

**March 18, 2019:** Trainees finish adding their comments to the report

**March 25, 2019:** Investigators finish adding their comments to the report

**April 15, 2019:** Project leaders complete the report and submit the document to the GlycoNet administrative office using the Forum

## Report Overview

### Project Information

Provide an estimate of the time percentage that each investigator devotes to the project. Ensure that the trainee table is complete, including citizenship and gender. Any omissions can be updated in the “Manage People” menu or in the “My Profile” section for each trainee.

### Summary/Background

Provide an executive summary (500 words) of your project that highlights the major accomplishments and challenges over the past fiscal year. The background section (1000 words) should discuss relevant literature in the field that provides context for your project, highlighting unmet needs and a rationale for further research. References in this section refer only to the executive summary and/or the background information.

### Figures

Any figures or schemes that you wish to include in your report should be combined into a single PDF document and uploaded into this section. Each figure should be labeled with a caption below it (e.g. Figure 1. Synthesis of compound X), and then referred to in the report text using this label. Co-investigators can also upload figures into this section; it is the responsibility of the project leader to compile the figures and upload the final PDF.

### Milestones

Click on the “Edit Milestones” button to update progress towards your milestones. New milestones may be added, but old ones cannot be deleted. Use the Comments field at the bottom of the page to provide additional information or justification for delayed or abandoned milestones.

### Achievements

Project leaders can view comments from co-investigators by clicking on the red “NI Comments” links. It is the responsibility of the project leader to incorporate these comments into the final report.

- The Project Objectives and Past Achievements section should briefly restate the project goals and highlight major achievements from the previous annual report.
- The Research Achievements in the Current Funding Period should provide a moderate level of detail about the most recent project achievements.
- Future Directions should describe priorities over the next fiscal year, or for future work should the project be ending.
- References in this section refer only to the Achievements page.

### KTEE

Briefly summarize any activities related to knowledge exchange and technology exploitation in the box provided – for instance, activities related to commercialization or intellectual property.

Outcomes are any products arising from the funded project or associated research. These products may include publications, patents, presentations, awards, or media coverage, involving any project member. These products may be added through the “Manage Products” link in the left hand sidebar. In order to appear in your report, products must be linked to specific projects using the checkboxes in the Manage Products menu.

## **Networking**

Briefly summarize interactions between the research groups involved in the project and collaborators/partners.

## **HQP**

This section may be completed by supervisors or by HQP themselves. Briefly summarize the role of each trainee in the project, any outside training initiatives undertaken over the last year, and the current position if the trainee has graduated or moved on. Current HQP status is very difficult for the GlycoNet admin office to keep track of, and so we appreciate as much detail in this area as possible, including thesis titles for graduating students.

## **Budget**

Any deviations from the original budget should be described in the box provided. The HQP Contribution Table should also be complete; additional boxes have been added to more accurately capture financial details relating to HQP. The “# Months working on GlycoNet Project” refers to the current fiscal year (1-12); it is not cumulative.

## **Partner Contributions**

Any matching, non-NCE sources of funding can be included in this section – see the “What are eligible contributions?” link for specific details. Please provide as much detail about the contribution as possible; include contact information for a representative from the partner organization in the “Partners and Collaborators” table in the Project Information tab.

GlycoNet management is also working towards identifying potential partners who may be interested in partnering with the Network for its second cycle. Please identify potential partner organizations in the table provided. Partnerships could be at either the Network level or at the level of individual projects.

## **Request for Extension**

Round 3 and 4 Collaborative Team Grants (e.g. projects ending June 30, 2019 or December 31, 2019) may apply for a project extension to March 31, 2020 by completing this section. Letters of support are not required at the time of submission, but should be available before funding is released.

## **Review & Submit**

The report may be generated & submitted as many times as needed before the submission deadline. Older versions will be overwritten by new submissions. Be sure to also download a copy for your records.

## Common Tasks

### Log into the Forum

- User name format is "First.Last" (case sensitive)

### Update personal information

- Click on "My Profile"
- Click on the "Edit Bio" button at the bottom of the page
- Add as much of the requested information as possible. Trainees must have the Gender and Nationality fields filled in. (Supervisors can add this information for their own HQP)
- Click "Save Bio" at the bottom of the page.

### Update alumni information for trainees who have moved on

- Search for the trainee in the search box at the top of the screen and click on that trainee's name when it appears
- Click on the "HQP Alumni" tab, then on the "Edit HQP Alumni" button
- Click on "Add Alumni Info" and fill in the requested information. If the trainee is a student who has graduated, please provide a thesis title; the thesis must be added as a product first and linked to a project before it will show up in this menu.
- Click on "Save HQP Alumni"
- Click on the "Manage People" link in the left hand sidebar
- Click on the Edit icon in the "Roles" column beside the trainee's name
- Adjust the "End Date" and click on "Save"
- Click on the Edit icon in the "Projects" column beside the trainee's name
- Adjust the "End Date" and click on "Save"

### Indicate supervision of a trainee

- Click on the "Manage People" link in the left hand sidebar
- Click on the Edit icon in the "Relations" column beside the trainee's name and then click the "Add Relationship" button. Fill in the requested information and click on "Save." To specify a project, select the project from the drop-down list and then click the "+" symbol.
- If one of your trainees is not listed but is a Forum user, click on "Edit Existing Member" to search for and add that person to your list.
- If you are unable to see the user in the "Manage People" section, please contact Ryan Snitynsky ( [snitynsk@ualberta.ca](mailto:snitynsk@ualberta.ca) ).

### Add a new member to a project

- Click on the "Add Member" link in the left hand sidebar
- Provide the requested information and link that individual to a GlycoNet-funded project
- Click on "Submit Request." A registration email will be sent to the new user once a GlycoNet staff member approves the request.

### Add an existing Forum user to a project

- Click on the "Manage People" link in the left hand sidebar
- Click on the "Edit Existing Member" button
- Search for and select the user's name from the drop-down list and click "Add"

- Use the edit icons in the “Roles” and “Projects” columns beside the user’s name to adjust their role(s), start dates, and to select which project that person is involved with. To specify a project, select the project and then click the “+” symbol.
- If you are unable to see the user in the “Manage People” section, please contact Ryan Snitynsky ( [snitynsk@ualberta.ca](mailto:snitynsk@ualberta.ca) ).

**Add a product (publications, presentations, awards, patents, etc.)**

- Click on the “Manage Products” link in the left hand sidebar
- To import multiple products from your CCV, click on “Upload CCV”
  - Choose a file to upload; leave the “Overwrite existing products?” box blank
  - Manually select which products you want to make visible by un-checking the boxes in the “Private” column; alternatively, click the “Release All Private” button
- To add a single product, click on the “Add Product” button and provide as much of the requested information as possible. For publications, a much faster method is to click on the “Add from DOI” button and paste the DOI into the box provided; some manual editing may be required.
- Click on the edit icon to manually adjust any of your products. Variations in author initials or spellings may result in attribution errors, and will be highlighted with yellow shading in the Authors column.
- Connect products to projects by using the boxes on the left hand side of the table. Be sure to click “Save All” when you are finished.