



# Quick Start Guide

Forge – Grants Management System

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Funding and Contract Management

Version | 1.0

Date | 28 October 2024

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## Introduction

The purpose of this document is to provide a brief overview to get you started in Forge, Callaghan Innovation's Grants Management System (This is the system replacing IMS in November 2024).


The content of your on-screen information may differ slightly to those images displayed in this document.

If you have any questions about Forge, feel free to get in touch with the team by phoning 0800 477 8326 or by email at [fcoperations@callaghaninnovation.govt.nz](mailto:fcoperations@callaghaninnovation.govt.nz).

This document is owned by the Operations Manager, Funding and Contract Management team at Callaghan Innovation.

# 1. High-level overview of Dashboard section

First screen displayed after logging into Forge



Callaghan Innovation  
Te Pokapū Auaha

Dashboard
My Organisation

Callaghan Innovation Test Organisatio

CT

🔔
Career grant is live
✕

### Highlights for Callaghan Innovation Test Organisation

1

Application

View all applications →

1

Contract

View all contracts →

1

Condition

View all contract conditions →

1

Report & Claim

View all report & claims →

### My pending actions (All associated organisations)


➤ Application
1

➤ Contract condition
1

0 Overdue
1 Due this month
0 Remaining conditions

➤ Report & Claim
1

### Available products to apply



**R&D Career Grant**

The R&D Career Grant is designed to help a Masters or PhD (student) get their first job in a R&D business by contributing to the payment of the student's salary for the first six months of full time employment.

[Read more](#)

Apply

### Access and Notification Banner

Access your “user account”  
Access “My organisation” details  
(for the organisation as shown)  
Notification banner

### Organisation highlights

This section shows you the records that are associated with the organisation as shown at the top of the screen.

### Pending actions

This section shows you tasks or records that are assigned to you and action is required.

*Note: if you have access to more than one organisation, you will see actions required from all those organisations.*

### Available products to apply

This section shows you the products that are open to apply for funding.

*Note: Callaghan Innovation has a number of restricted products that you must be given access to in order to create an application. Please speak to your Customer Navigator or Funding Engagement Specialist. Once access granted, a card will be visible in this section.*

*Even though products may be displayed, this does not mean that eligibility is guaranteed, ensure that you review all relevant product details before applying.*

## 2. Overview of 'My Organisation' section

### 2.1 Organisation details

Dashboard My Organisation Callaghan Innovation Test Organisatio

Organisation User management

### Callaghan Innovation Test Organisation

Edit

<p><b>Organisation type</b> Company</p> <p><b>Organisation code</b> CINNO</p> <p><b>Funding Engagement Specialist</b> [Redacted]</p> <p><b>Website</b> <a href="http://www.callaghaninnovation.govt.nz">www.callaghaninnovation.govt.nz</a></p>	<p><b>Trading name</b> --</p> <p><b>ANZSIC</b> Test</p> <p><b>Funding &amp; Contract Management</b> [Redacted]</p>
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**Addresses**

<p><b>Physical address</b> 69 Gracefield Road Lower Hutt 5010</p>	<p><b>Postal address</b> 69 Gracefield Road Lower Hutt 5010</p>
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**Companies office information**

<p><b>NZBN</b> <a href="#">9429038893824</a></p> <p><b>Entity type</b> NZ Limited Company</p>	<p><b>Entity status</b> Registered</p> <p><b>Ultimate holding company</b> Yes</p>
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**Bank account**

Account name	Account number	Email for remittance	
[Redacted]	[Redacted]	[Redacted]	

**Financial**

Financial year end	Total revenue (\$NZD excl. GST):	Earnings before interest and taxation (EBIT) (\$NZD excl. GST):	Net profit before taxation (\$NZD excl. GST):	Exports revenue (\$NZD excl. GST):	Total R&D spend (\$NZD excl. GST):	Total staff (FTE):	R&D staff (FTE):
<p>No items available to display</p>							

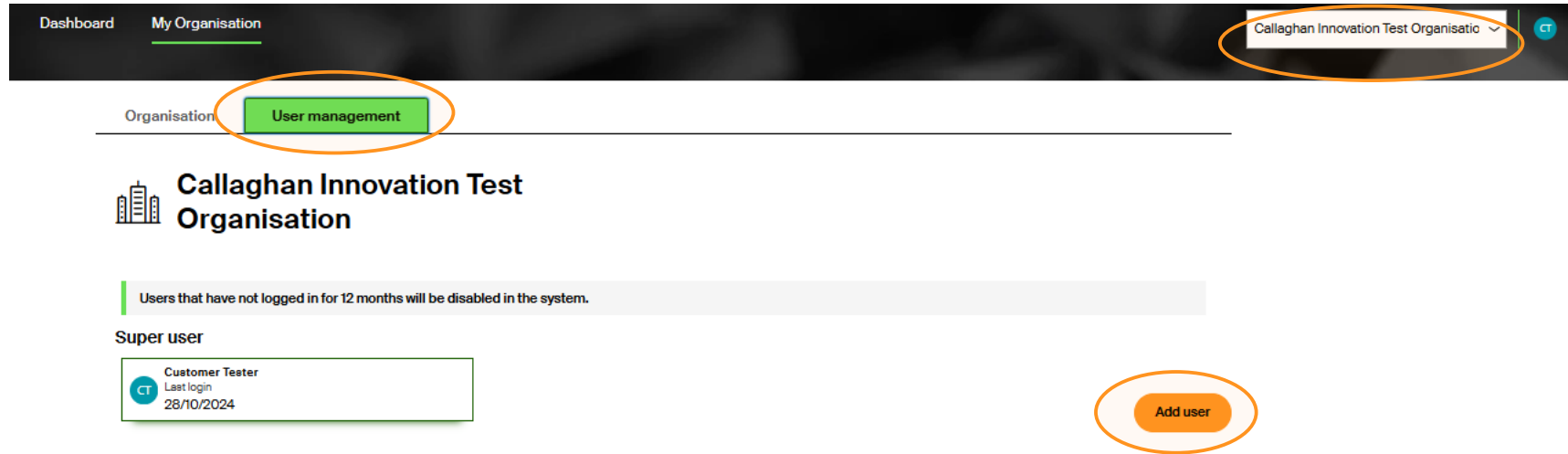
### My Organisation > Organisation

This section allows you to review the information for your organisation. The organisation details are for that of the one shown in the top banner.

The information you can edit is as follows:


- Address details
- Bank account
- Financial information

## 2.2 User management




Dashboard My Organisation Callaghan Innovation Test Organisatio

Organisation **User management**

 **Callaghan Innovation Test Organisation**

Users that have not logged in for 12 months will be disabled in the system.

Super user

 Customer Tester  
Last login  
28/10/2024

**Add user**

### My Organisation > User management

This section allows you to review users who have access to the organisation records within the Grants Management system, Forge (for the organisation as shown in the top banner)

As a super\_user you can:

- Add new users
- Remove access
- Reset passwords for other users

## 3 Quick navigation

### 3.1 How do I start a report and claim?

**Highlights for Callaghan Innovation Test Organisation**

**1**  
Application  
View all applications →

**1**  
Contract  
View all contracts →

**1**  
Condition  
View all contract conditions →

**1**  
Report & Claim  
View all report & claims →

**1. Click on the contract card**

*This will take you to the list of your open and closed contracts.*

Callaghan Innovation Te Pokapū Auaha | Dashboard | My Organisation | Callaghan Innovation Test Organisatio | CT

**Open contracts**

Contract ID	Contracting organisation	Product	Contract value (GST excl.)	Status
CONT-1997-ASG-CINNO	Callaghan Innovation	Ārohia Seed Grant	\$25,000.00	Active

Application title: Arohia Seed Contract - Testing

View more  
**2** Action ▾

**2. Select the 'Action' button**

**Open contracts**

Contract ID	Contracting organisation	Product	Contract value (GST excl.)	Status
CONT-1997-ASG-CINNO	Callaghan Innovation	Ārohia Seed Grant	\$25,000.00	Active

Application title: Arohia Seed Contract - Testing

View more  
Action ▾  
View contract  
**3** Request Report & Claim  
Request variation

**Closed contracts**

**3. Select 'Request Report & Claim'**

*You will be able to select the type of report that you wish to create. You will be presented with a series of sections to complete and upload the necessary documentation.*

*NOTE: You don't have to complete in one sitting, you can save your progress and return at any time. The Report and Claim will be available in your 'Pending Actions' via the Dashboard.*

## 3.2 How do I submit information to satisfy a condition?

**Highlights for Callaghan Innovation Test Organisation**

1

Application

View all applications →

1

Contract

View all contracts →

1

Condition

View all contract conditions →

1

Report & Claim

View all report & claims →

**My pending actions (All associated organisations)**

Application 1

1
1

0 Overdue
1 Due this month
0 Remaining conditions

**CONT-1997-ASG-CINNO-CC1**

<b>Contracting organisation</b> Callaghan Innovation	<b>Product</b> Arohia Seed Grant	<b>Condition type</b> Contract	<b>Condition due date</b> 31/10/2024	<a href="#">View more</a> <span style="border: 1px solid green; border-radius: 50%; padding: 2px 5px; color: green; font-weight: bold; margin-left: 10px;">2</span> <span style="border: 1px solid green; border-radius: 50%; padding: 2px 5px; color: green; font-weight: bold; margin-left: 5px;">Go</span>
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**Application title**  
Arohia Seed Contract - Testing

**Condition**  
Condition for customer review and testing

**1. Expand the contract condition pending action section**

*This will show you all the conditions that are awaiting action and their status.*

**2. Click on 'Go'**

*This will take you into the area where you can upload and provide comment on the contract condition.*