Grantium.ai

AI-Powered Grant Management Platform

User Guide

Complete Reference for Researchers & Administrators
with Demo Walkthrough

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SoftSim Technologies Inc. | Montreal, Canada
https://grantium.ai

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Getting Started

CHAPTER 1

Introduction

Grantium.ai is a comprehensive, AI-powered grant management platform designed to streamline the entire grant lifecycle—from discovering funding opportunities and building researcher profiles, through writing and submitting proposals, to managing awarded grants. Built by SoftSim Technologies Inc. in Montreal, Canada, the platform serves researchers, academics, and institutions worldwide.

Key Capabilities

- AI-powered funding matchmaker that scores and ranks programs against your profile
- Multi-format CV management with AI extraction (CCV, NSF Biosketch, NIH Biosketch, Academic, Industry)
- Intelligent proposal drafting with AI content generation, enhancement, and review
- Automated compliance checking against funder requirements before submission
- AI-simulated peer review with success prediction scoring
- Resubmission intelligence—AI analyzes reviewer feedback and generates response strategies
- Post-award grant operating system: milestones, budget, claims, tasks, reports, and team collaboration
- Opportunity discovery with RSS feeds and AI-powered change detection
- Multi-year funding roadmap generation based on career stage and research profile
- Full bilingual support (English, French, German, Spanish, Italian, Portuguese, Arabic)

User Roles

Grantium.ai supports two primary roles:

- Researcher — Full access to the 8-step grant workflow, AI features, CV management, and post-award management. This is the default role for all new accounts.
- Administrator — All researcher capabilities plus user management, funder database administration, and security audit trails.

Supported Funders

The platform includes built-in funder packs with detailed program data, compliance rules, and portal templates for:

- CIHR — Canadian Institutes of Health Research (Project Grant, Catalyst Grant)

- NSERC — Natural Sciences and Engineering Research Council (Discovery Grant, Alliance Grant)
- NRC-IRAP — National Research Council Industrial Research Assistance Program
- NSF — National Science Foundation, US (Standard Grant, CAREER Award)
- NIH — National Institutes of Health, US (R01, R21)

Additional funders with limited data include SSHRC, Mitacs, CFI, Genome Canada, CANARIE, Canada Council for the Arts, Brain Canada, Heart & Stroke Foundation, Canadian Cancer Society, Terry Fox Research Institute, Ontario Research Fund, Fonds de recherche du Québec, Michael Smith Foundation, Alberta Innovates, Saskatchewan Health Research Foundation, Research Manitoba, New Brunswick Innovation Foundation, and SickKids Foundation. Administrators can add custom funders and programs at any time.

CHAPTER 2

Account Setup

Creating an Account

To get started with Grantium.ai:

1. Navigate to grantium.ai/grants/register.html in your web browser.
2. Enter your full name, email address, and a password (minimum 8 characters).
3. Confirm your password and click "Create Account".
4. Depending on your organization’s settings, you may be logged in immediately or receive an activation code by email.

Activation Codes

If your administrator requires activation, you will receive a 6-character activation code by email. Enter your email and the code on the activation form to complete setup. Activation codes may have an expiry period set by the administrator (1 day, 7 days, 30 days, or permanent).

Logging In

Visit grantium.ai/grants/login.html and enter your email and password. Your session is maintained for 7 days via a secure JWT token. Click "Sign Out" in the sidebar footer to end your session.

TIP

If you forget your password, contact your administrator to issue a password reset.

CHAPTER 3

Dashboard Overview

After logging in, you land on the Command Centre—the central hub of Grantium.ai. The dashboard provides a bird's-eye view of your grant workflow progress and quick access to all features.

Navigation Sidebar

The left sidebar provides quick access to all areas of the platform:

- Dashboard — Return to the Command Centre at any time
- Workflow section (8 steps): Build Profile, Find Funding, Write Proposal, Upload Documents, AI Review, Manage Grant, Resubmit
- Tools section: Opportunity Alerts, Settings
- Admin section (admin users only): User Management, Funder Management, Audit Trail

8-Step Workflow Cards

The top of the dashboard displays eight workflow step cards arranged in a horizontal grid. Each card shows:

- Step number and icon
- Step name and brief description
- Status badge: Not Started (grey), In Progress (amber), or Complete (green)

Click any step card to navigate directly to that feature. The cards automatically update their status based on your profile completeness and application data.

Statistics Overview

Below the workflow cards, four stat cards provide at-a-glance metrics:

- Total Applications — All applications in your workspace
- In Progress — Applications in DRAFT or IN_PROGRESS status
- Submitted — Applications that have been submitted
- Awarded — Applications that have been funded

Recent Applications & Upcoming Deadlines

Two dashboard panels show your most recent applications (with status badges and quick links) and upcoming program deadlines. Click "View All" to see the complete applications list below.

Profile Completeness

The progress bar in the page header shows your profile completion percentage. A complete profile enables better AI matching and more accurate funding recommendations.

CHAPTER 4

Language & Accessibility

Grantium.ai supports seven languages with full interface translation:

- English (EN) — Default
- French (FR) — Français
- German (DE) — Deutsch
- Spanish (ES) — Español
- Italian (IT) — Italiano
- Portuguese (PT) — Português
- Arabic (AR) — bvDc–1b†Jb’ ‡v—F, gVÆÂ ight-to-left layout support)

Use the language toggle in the top navigation bar to switch languages. Your preference is saved locally and persists across sessions.

The platform uses a responsive design that adapts to desktop, tablet, and mobile screen sizes. The sidebar collapses on smaller screens, and workflow cards reflow from 8 columns to 4 or 2 columns as needed.

PART

Researcher Workflow

CHAPTER 5

Step 1: Build Your Profile

The Capability Profile is the foundation of your Grantium.ai experience. A complete profile enables AI-powered funding matching, intelligent proposal generation, and automatic CV population. Access it from the sidebar under "Build Profile" or by clicking Step 1 on the dashboard.

Profile Tabs

Your profile is organized into eight tabs:

1. Personal Information

Core identity fields including your title (Dr., Prof., etc.), applicant type (Individual, Organization, or Collaboration), phone, bio, career stage, country, citizenship, and years post-PhD.

2. Organization

Your institutional affiliation: organization name, size, sector, institution type, address, website, registration number, and partner institutions.

3. CV & Expertise

Research credentials organized into four sub-sections:

- Expertise — Field of research, disciplines, keywords, institution, and research summary
- Education — Degree, field, institution, and year for each qualification
- Publications — Title, journal, year, and DOI for each publication
- Active Grants — Title, funder, amount, status, and year for current funding

4. Financial Profile

Your financial track record: annual budget experience, total grants managed, preferred funding range, overhead rate, and financial contact information.

5. Products & Services

Intellectual property and commercializable outputs: patents, software, datasets, products, and technology readiness levels.

6. Funding Preferences

Guide the AI matchmaker by specifying preferred jurisdictions (countries), funder types, grant sizes, and career-stage-appropriate programs.

7. References

Professional references with name, title, email, institution, and relationship. These can be included in submission packages.

8. Supporting Documents

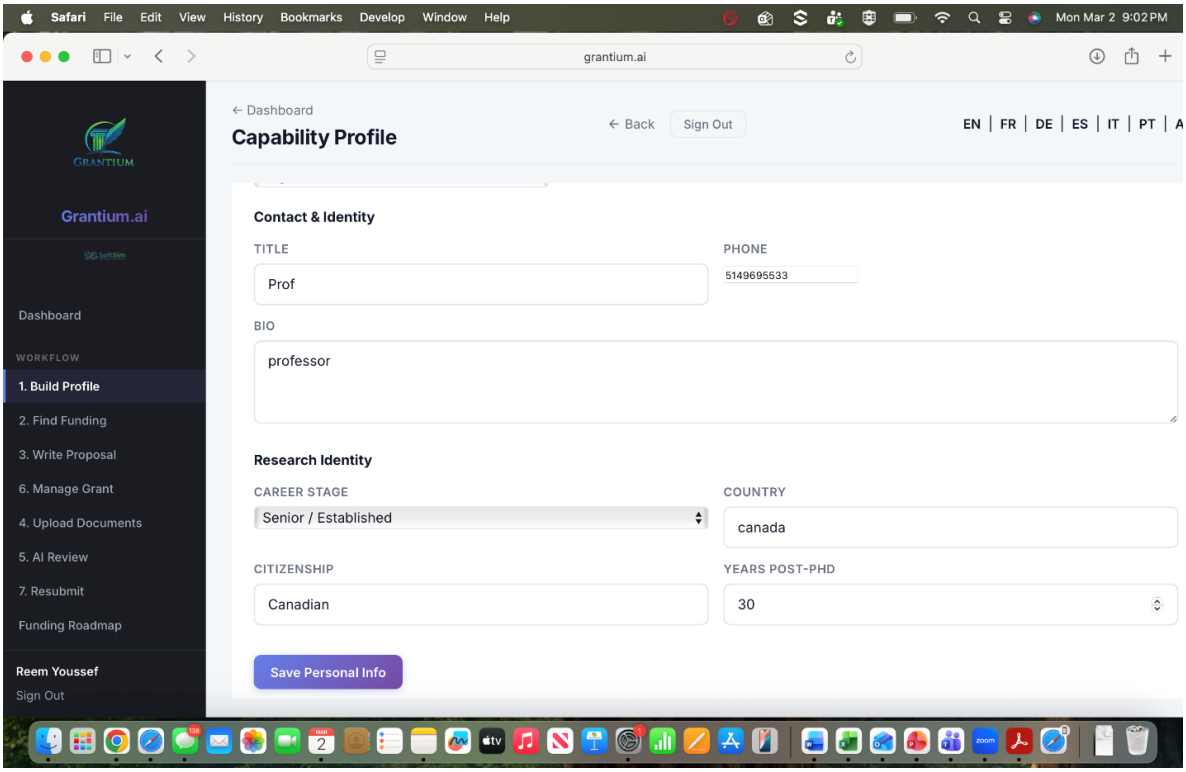
Upload CVs, letters of reference, publication lists, and other materials. Supported formats include PDF, DOCX, and TXT. Each document can have a title, description, and type classification.

AI Assist

Each tab includes an "AI Assist" button that analyzes your existing data and suggests improvements or auto-fills missing fields based on your uploaded CV and other profile information.

> **TIP**
> Complete your profile to at least 80% before using the funding matchmaker for best results. The more data the AI has, the more accurate your match scores will be.

Figure: Capability Profile — Personal Information tab (Safari on Mac)



CHAPTER 6

Step 2: Find Funding

The Funding Finder helps you discover and evaluate grant programs that match your research profile. Access it via the sidebar or Step 2 on the dashboard.

Browse Tab

Browse available programs filtered by jurisdiction. Click jurisdiction chips (All, Canada, US, EU, UK, France, Germany, Australia, NZ) to filter. Each funder card shows the funder name, available programs, upcoming deadlines, and AI match score.

Search Tab

Search for specific funders or programs by name. Results are ranked by relevance and can be further filtered by jurisdiction, funding amount range, and career stage eligibility.

AI Matchmaker

The Matchmaker tab runs an AI analysis of your complete profile against all available programs. For each match, you receive:

- Compatibility score (0–100%) based on field keywords, career stage, institution type, and jurisdiction alignment
- Strengths — areas where your profile is a strong fit
- Weaknesses — gaps or misalignments to address
- Recommendations — specific actions to improve your chances
- "Should I Apply?" analysis with clear rationale

Click any funder card to view full program details including eligibility criteria, deadlines, funding amounts, and required documents. You can create a new application directly from a matched program.

CHAPTER 7

Step 3: Upload & Analyze

The Evidence Vault is your centralized document repository. Upload grant-related documents and let AI analyze them for gaps and issues.

Uploading Documents

Click "Upload Document" to add files to your evidence vault. Select the document type from the dropdown:

- Proposal — Research proposal drafts
- Budget Justification — Detailed budget breakdowns
- References — Cited references list
- Reviews — Reviewer feedback from previous submissions
- Decision Notice — Funding decision letters
- Registration — Portal registration confirmations
- Summary of Progress — Progress reports
- Response to Reviews — Rebuttal documents
- Other — Any supporting material

Supported file formats: PDF, DOCX, DOC, and TXT. Text is automatically extracted for AI analysis.

AI Gap Analysis

After uploading documents, click "Extract Findings" to run AI analysis. The system:

1. Reads all uploaded documents for the selected application.
2. Compares document content against funder requirements from the program's funder pack.
3. Identifies missing sections, weak arguments, formatting issues, and compliance gaps.
4. Generates a list of findings with severity ratings (Critical, Major, Minor).

Findings appear as actionable cards that you can track through the Issues board (To Do, In Progress, Done).

CHAPTER 8

Step 4: Write Proposal

Create and manage grant applications through the application editor. Start a new application from the dashboard's "+ New Bid" button or Step 4 on the workflow.

Creating an Application

The create form uses cascading dropdowns:

1. Select a Funding Country (Canada, US, EU, UK, France, Germany, Australia, NZ, Other).
2. Choose a Funder from the filtered list.
3. Select a Program (if the funder has multiple programs).
4. Enter a title, year, and requested amount.
5. Click "Create" to initialize the application.

Application Editor

The editor provides a wizard-style interface for building your proposal:

- Multi-step navigation with progress indicators
- Document sections auto-populated from the funder pack’s required sections
- Rich text editing areas for each proposal section
- Auto-save with manual save option and save status indicators
- Export to PDF or Word format

AI Content Generation

Each proposal section includes an "AI Assist" button that can:

- Generate — Create a complete draft from scratch based on your profile and program requirements
- Enhance — Improve existing text for clarity, impact, and compliance
- Review — Get AI feedback on strengths and weaknesses of your section
- Custom instructions — Provide specific guidance for the AI (e.g., "Make this more concise" or "Add more quantitative data")

TIP

Use the AI Chat feature for contextual questions about your application. The AI has access to all your uploaded documents and profile data.

CHAPTER 9

Step 5: Simulate Review

Before submission, use the Reviewer Intelligence module to get AI-simulated peer review feedback and predict your chances of success.

Knowledge Graph

The system builds an interactive knowledge graph for your target program, mapping:

- Program evaluation criteria and their relative weights
- Historical success patterns and common reviewer expectations
- Your proposal's alignment with each criterion
- Connected funders, programs, and research themes

The visual network graph uses color-coded nodes and connections. Click any node to view details in the side panel.

Success Prediction

A circular gauge displays your predicted success probability (0–100%) based on:

- Criterion coverage analysis (FULL, PARTIAL, or MISSING for each criterion)
- Profile-to-program alignment strength
- Document completeness and quality signals
- Historical patterns from similar applications

Reviewer Simulation

Run a full AI peer review simulation to receive:

- Detailed reviewer-style feedback organized by section
- Strengths and weaknesses assessment
- Specific improvement suggestions ranked by potential impact
- Multiple reviewer personas (Expert, General, Strict) for varied perspectives

CHAPTER 10

Step 6: Submit

The submission workflow ensures your application is complete, compliant, and properly formatted before you submit to the funder.

Compliance Gate

Navigate to the Compliance page to run automated checks against funder requirements:

- Required documents — Verifies all mandatory documents are uploaded
- Document format — Checks file types match funder requirements (PDF, DOCX)
- Page limits — Validates proposal sections are within specified page counts
- Section completeness — Ensures all required sections are present
- Funder-specific rules — Checks against the funder pack's compliance rules

Results are color-coded: green (pass), amber (warning), red (fail/blocker). Blocker-level issues must be resolved before submission.

Submission Package

Export your complete submission as a ZIP package containing:

- All uploaded documents in the correct format
- Application metadata and manifest
- CCV PDF (automatically attached for Canadian funders)
- Portal-specific templates with autofill mapping (CIHR, NSF, NIH)
- Submission instructions document

Portal Templates

For supported funders (CIHR, NSF, NIH), the system generates portal-specific instructions showing:

- Step-by-step submission portal navigation
- Field-by-field mapping from your application to portal fields
- Required file naming conventions
- Attachment upload order and format requirements

CHAPTER 11

Step 7: Resubmit

If your application is not funded, the Resubmission Intelligence module helps you analyze reviewer feedback and build a stronger next submission.

Feedback Analysis

Paste reviewer comments or upload the decision notice document. The AI analyzes the feedback and categorizes issues by severity:

- Critical — Fundamental issues that must be addressed (methodology, feasibility)
- Major — Significant concerns requiring substantial changes
- Minor — Smaller points that should be improved
- Suggestion — Optional improvements for strengthening the application

Correction Plan

The AI generates a comprehensive correction plan with:

- Overall resubmission strategy (2–3 sentence summary)
- Section-by-section update recommendations with change types: REWRITE, EXPAND, ADD_NEW, CLARIFY, or ADD_EVIDENCE
- Effort estimates (Low, Medium, High) for each change
- Priority ranking to focus on highest-impact changes first

Section Rewrites

For each section needing updates, click "Generate Update" to get AI-written revised text that directly addresses reviewer concerns while preserving your original arguments.

Response Letter

Generate a formal response-to-reviewers letter that:

- Quotes each reviewer concern
- Acknowledges the feedback professionally
- Details the specific changes made in response
- References exact page numbers and sections where changes appear

CHAPTER 12

Step 8: Manage Grant

Once your grant is awarded, the Post-Award Management module provides a complete grant operating system. Access it from the sidebar under "Manage Grant" or Step 8.

Overview Tab

The award overview shows key metrics at a glance:

- Award amount and funding period
- Budget utilization percentage
- Milestones completed vs. total
- Days remaining in the award period

Milestones Tab

Create and track key project milestones:

- Set milestone title, target date, and description
- Track status: Planned, In Progress, Complete
- Link deliverables and tasks to specific milestones
- Monitor completion dates against targets

Deliverables Tab

Manage required project outputs:

- Define deliverables with title, description, and target date
- Link each deliverable to its parent milestone
- Upload completion files as evidence
- Track delivery status

Budget Tab

Track financial performance:

- Create budget line items by category (Personnel, Equipment, Travel, Other)
- Set planned amounts vs. actual spend
- Monitor budget utilization in real-time
- Identify over- or under-spending by category

Claims Tab

Submit and track expense reimbursement claims:

- Create claims with claim number, date, and period
- Add line items to each claim with amounts and descriptions
- Upload supporting receipts and documentation
- Track claim status: Draft, Submitted, Approved, Paid

Tasks Tab

Manage project work with a Kanban-style task board:

- Three columns: To Do, In Progress, Done
- Set task priority (High, Medium, Low) and assignee
- Assign due dates and link to milestones
- Drag tasks between columns to update status

Reports Tab

Track and submit required reports:

- Create progress reports, final reports, and scientific reports
- Set due dates for deadline tracking
- Upload report documents
- Track submission status: Pending, Submitted, Approved

Team Tab

Manage collaborators on your grant:

- Invite team members by email address
- Assign roles: Viewer, Commenter, Editor, or Admin
- Customize permissions per collaborator (view, comment, edit, budget, submit)
- Remove collaborators or change roles at any time

ROLES

Viewer: Read-only access to award data. Commenter: Can view and add comments. Editor: Full edit access to milestones, deliverables, tasks, and reports. Admin: Full access including budget management, claims, and team administration.

PART

AI-Powered Features

CHAPTER 13

AI Configuration

Grantium.ai supports multiple AI providers. Configure your preferred provider in Settings (accessible from the sidebar).

Supported Providers

- Claude (Anthropic) — Recommended. High-quality academic writing and analysis. Models: claude-sonnet-4-5-20250929 and others.
- OpenAI — GPT-4 and other OpenAI models.
- Gemini (Google) — Google's AI models with Project ID authentication.
- Ollama (Local) — Run open-source models locally on your own hardware for maximum privacy.

Configuration Steps

1. Navigate to Settings from the sidebar.
2. Select your preferred AI provider using the radio buttons.
3. Enter your API key (obtained from the provider's website).
4. Optionally select a specific model and configure the base URL for custom endpoints.
5. Check "Use Default" to use the system-wide API key (if configured by your administrator).
6. Click "Test Connection" to verify your credentials.
7. Click "Save Settings" to persist your configuration.

TIP

Your API key is stored securely and only the last 4 characters are visible after saving. You can reset to defaults at any time.

CHAPTER 14

AI Capabilities

AI assistance is available throughout the platform. Here is a summary of all AI-powered features:

Content Generation & Enhancement

- Generate — Create complete proposal sections from scratch based on your profile and program requirements
- Enhance — Improve existing text for clarity, impact, academic tone, and funder alignment
- Review — Get detailed AI feedback on any text with strengths, weaknesses, and suggestions
- Chat — Ask contextual questions about your application with full access to your documents

Analysis & Matching

- Profile-to-Funder Matching — AI scores and ranks funding programs against your profile
- Eligibility Check — AI evaluates whether you qualify for a specific program
- Gap Analysis — AI identifies missing evidence and weak areas in your documents
- Compliance Checking — Automated validation against funder requirements

Review & Prediction

- Reviewer Simulation — Full AI peer review with multiple reviewer personas
- Success Prediction — Probability scoring based on knowledge graph analysis
- Evidence Assessment — AI evaluates the strength and quality of your supporting evidence
- Knowledge Graph — Visual mapping of program criteria, research themes, and alignment

Strategy & Planning

- Resubmission Strategy — AI analyzes reviewer feedback and generates correction plans
- Response Letter Generation — Formal response-to-reviewers with specific change references
- Funding Roadmap — Multi-year career funding strategy based on your profile and goals
- CV Parsing — AI extracts structured data from uploaded CVs into CCV/format-specific fields

PART

CV Management

CHAPTER 15

Canadian Common CV (CCV)

The CCV module provides full support for the Canadian Common CV standard used by CIHR, NSERC, SSHRC, and other Canadian tri-council agencies.

CV Types

Three CV types are supported, each showing different sections as required by the agency:

- Academic CV — Full academic curriculum vitae for CIHR/NSERC/SSHRC
- Biosketch — Condensed CV focusing on key contributions
- Knowledge User — Specialized CV for knowledge mobilization applicants

Sections

The CCV schema includes 10+ major sections with 120+ fields:

- Personal Information — Name, contact, identifiers
- Education — Degrees, institutions, years, thesis titles
- Employment History — Positions, organizations, dates
- Recognitions — Honours, awards, prizes
- Research Funding History — Past and current grants
- Research Contributions — Publications, presentations, artistic works
- Teaching Activities — Courses, supervisions, mentoring
- Service — Committee memberships, peer review, editorial work
- Collaborations — Research partnerships and networks
- Special Skills — Languages, technical competencies

Managing Entries

Each section uses an accordion-style interface. Click a section to expand it and view/add entries:

1. Click "Add Entry" to open the entry form drawer.
2. Fill in the fields for the selected section.
3. Click "Save" to add the entry.
4. Click any existing entry to edit or delete it.
5. Use drag handles to reorder entries within a section.

Import CV

Upload an existing CV file (PDF, DOCX, or TXT) and let AI automatically extract and populate CCV fields. Review the extracted entries before confirming to save.

Export

- Export as PDF — Generates a formatted CCV document ready for submission. Automatically attached to submission packages for Canadian funders.
- Export as XML — Generates machine-readable XML for integration with CCV online portal.

CHAPTER 16

Multi-Format CV Manager

Beyond the CCV, Grantium.ai supports multiple international CV formats through the CV Manager (accessible from the sidebar).

Supported Formats

- Canadian Common CV (CCV) — Tri-council agencies
- NSF Biographical Sketch — National Science Foundation (US)
- NIH Biosketch — National Institutes of Health (US)
- Standard Academic CV — General academic use
- Industry CV — For industry/commercialization grants

Upload & AI Extraction

Upload any existing CV document and the AI will:

1. Parse the document text from PDF, DOCX, or TXT format.
2. Identify sections and extract structured data.
3. Map extracted entries to the target CV format's schema.
4. Present extracted entries for your review and confirmation.
5. Save confirmed entries to your CV profile.

Format Conversion

Convert your CV data between formats:

1. Click "Convert" to open the conversion modal.
2. Select the source format (where your data currently is).
3. Select the target format (where you want to convert to).
4. Click "Convert" to run the AI-powered format mapping.
5. Review conversion results including success/error counts.

TIP

Converting between formats preserves as much data as possible, but some fields may not have direct equivalents. Review converted entries carefully.

PART

Advanced Features

CHAPTER 17

Opportunity Discovery

Stay informed about new funding opportunities, deadline changes, and program updates through the Discovery module (accessible from "Opportunity Alerts" in the sidebar).

Discovery Sources

Add sources to monitor for changes:

- Funder-based sources — Monitor a specific funder's website for program changes
- URL-based sources — Monitor any webpage for updates
- RSS feeds — Subscribe to funder RSS/Atom feeds for automatic updates

Event Types

The AI classifies detected changes into categories:

- New Program — A new funding program has been announced
- Deadline Change — Application deadline has been modified or extended
- Eligibility Change — Program eligibility criteria have changed
- Amount Change — Funding amounts have been updated
- Policy Update — Guidelines or policies have been revised
- Closure — A program is no longer accepting applications

Each event is rated by significance: Critical, High, Medium, or Low.

Subscriptions & Notifications

Create subscriptions to receive alerts for opportunities matching your interests:

- Subscribe by funder, jurisdiction, or keywords
- Receive in-app notifications with unread count badge
- View notification history and mark as read

Automatic Discovery

The system runs discovery automatically every hour, checking all configured sources. Administrators can also trigger manual discovery runs.

CHAPTER 18

Funding Roadmap

Plan your multi-year research funding strategy with the AI-powered Funding Roadmap (accessible from the sidebar).

Generating a Roadmap

Click "Generate Roadmap" to have the AI create a personalized funding strategy based on your profile, career stage, research interests, and preferred jurisdictions. The AI follows a logical 5-stage funding progression:

1. Seed/Feasibility — Small, high success-rate grants to establish preliminary data
2. Pilot/Early-career — Build team and proof of concept
3. Major Research — Full-scale research program grants
4. Scale/Infrastructure — Grow research capacity and resources
5. Commercialization/Translation — Bring results to market or policy impact

Timeline View

The roadmap displays as a year-based horizontal timeline with color-coded milestone cards. Each milestone shows:

- Recommended program and funder
- Target year and funding amount
- Success probability (High, Medium, Low)
- Prerequisites and what this milestone enables
- Rationale for this funding step

Managing Milestones

Click any milestone to view details and update its status. Add custom milestones, adjust timelines, or regenerate recommendations as your career evolves.

Statistics

The roadmap header shows summary statistics:

- Total milestones planned
- Milestones completed
- Upcoming milestones
- Total potential investment across the timeline

CHAPTER 19

Issues & QA

Track proposal issues, compliance findings, and quality assurance tasks through the Issues board (accessible from the sidebar or via finding extraction).

Kanban Board

Issues are organized in three columns:

- To Do — Open issues that need attention (red)
- In Progress — Issues currently being worked on (amber)
- Done — Resolved issues (green)

Issue Cards

Each issue card displays:

- Issue type badge
- Title and description
- Priority indicator (Low, Medium, High, Critical)
- Assignee (if assigned)
- Click to expand for full details, comments, and attachments

Managing Issues

Create issues manually or let AI generate them from document analysis. Assign issues to team members, add comments, attach files, and drag between columns to update status.

CHAPTER 20

Collaboration

Grantium.ai supports team-based grant preparation and management through its collaboration system.

Inviting Collaborators

On any application or award, navigate to the Team tab and enter a colleague's email address to send an invitation. They will receive an email with a link to accept the invitation.

Collaboration Roles

Four roles provide granular access control:

- Viewer — Read-only access to all application/award data
- Commenter — Can view data and add comments or notes
- Editor — Full edit access to content, milestones, deliverables, and tasks
- Admin — Full access including budget management, claims, team administration, and submission

Permission Customization

Beyond the standard roles, administrators can customize specific permissions per collaborator using the permissions matrix: view, comment, edit, budget, and submit.

PART

Administration

The following features are available exclusively to users with the Administrator role.

CHAPTER 21

User Management

Administrators can manage all user accounts from the Admin > Users page.

Creating Users

Fill in the form at the top of the page:

1. Enter the user's full name.
2. Enter their email address (must be unique).
3. Set an initial password (minimum 8 characters).
4. Select a role: Researcher (default) or Admin.
5. Click "Create User" to create the account.

The new user can log in immediately or, optionally, you can send an activation code.

Sending Activation Codes

For controlled onboarding, administrators can generate activation codes:

1. Find the user in the users table.
2. Click the activation action.
3. Set the code expiry period (1 day, 7 days, 30 days, 1 year, or permanent).
4. The system generates a 6-character hex code and sends an HTML email with login instructions.

Managing Existing Users

The users table shows all accounts with columns for ID, Name, Email, Role, Status, and Created Date. Available actions per user:

- Edit — Change name or other details
- Change Role — Switch between Researcher and Admin
- Enable/Disable — Activate or deactivate the account
- Reset Password — Set a new password (minimum 8 characters)
- Delete — Permanently remove the user and all their data (cannot delete your own admin account)

WARNING

Deleting a user permanently removes their workspace, applications, documents, CV data, and all associated records. This action cannot be undone.

CHAPTER 22

Funder Management

Administrators can manage the funder database from the Admin > Funders page.

Adding Funders

Use the form at the top of the page:

1. Select the jurisdiction/country for the funder.
2. Enter the funder name.
3. Enter the funder's website URL.
4. Click "Add Funder" to create the record.

Managing Programs

Each funder can have multiple programs. Click a funder in the table to manage its programs:

- Add programs with name, description, deadlines, funding amounts, and eligibility criteria
- Edit existing program details
- Delete programs (with cascade handling for linked applications)
- View program statistics and application counts

Built-in Funder Packs

Five funder packs are pre-installed with detailed program data, compliance rules, and portal templates:

- CIHR — Project Grant, Catalyst Grant
- NSERC — Discovery Grant, Alliance Grant
- NRC — IRAP Program
- NSF — Standard Grant, CAREER Award
- NIH — R01 Research Project Grant, R21 Exploratory Grant

Funder packs cannot be deleted but can be supplemented with custom programs.

CHAPTER 23

Login Audit Trail

Monitor system access and security from the Admin > Audit page.

Statistics Dashboard

Four cards at the top provide quick security metrics:

- Last 24 Hours — Total login attempts
- Successful (24h) — Successful logins in the past day
- Failed (24h) — Failed login attempts in the past day
- Failed (7 days) — Failed attempts over the past week

Audit Log Table

The detailed audit log table shows every login attempt with:

- Timestamp — Date and time of the attempt
- Email — Email address used
- IP Address — Source IP of the request
- User Agent — Browser/client information
- Status — Success (green) or Failed (red)
- Error Reason — Why the login failed (invalid email, wrong password, disabled account)

Filtering

Use the filter controls to narrow results:

- Search by email address (partial match supported)
- Filter by status: All, Successful, or Failed
- Filter by date range: 1 day, 7 days, 30 days, 90 days, or All time

TIP

Review failed login patterns regularly to identify potential unauthorized access attempts. Multiple failures from the same IP or targeting the same email may indicate a brute-force attack.

CHAPTER 24

System AI Configuration

Administrators can configure the system-wide AI provider and API key from the Admin > Settings page (admin_settings.html). These settings apply to all users who have not configured their own personal AI key in their user Settings.

Accessing Admin Settings

1. Log in with an Administrator account.
2. Click "Admin: Settings" in the sidebar navigation (visible to admins only).
3. The AI Configuration card shows the current provider, API key status, and model.

Configuring the AI Provider

Select from three supported providers:

- Claude (Anthropic) — Recommended. Best for academic writing, peer review simulation, and eligibility assessment. Default model: claude-sonnet-4-5-20250929.
- OpenAI — GPT-4o. Good general-purpose AI. Default model: gpt-4o.
- Gemini (Google) — Fast and cost-effective. Default model: gemini-2.5-flash.

Setting the API Key

1. Select your preferred provider by clicking the provider card.
2. Enter your API key in the "API Key" field. Get keys from: console.anthropic.com (Claude), platform.openai.com (OpenAI), or aistudio.google.com (Gemini).
3. Optionally override the default model name in the "Model" field.
4. Click "Save AI Settings" to persist the configuration.
5. Click "Test Connection" to verify the AI responds correctly.

Settings Fallback Chain

The AI system uses a three-level fallback chain to determine which credentials to use:

1. User Settings — If a user has configured their own API key in Settings, that key is used.
2. System Settings — If no user key exists, the admin-configured system key is used.
3. Environment Variables — If no system key exists, the server's environment variables (ANTHROPIC_API_KEY, OPENAI_API_KEY, GEMINI_API_KEY) are used.

TIP

For most organizations, configure the API key once in Admin Settings. Individual researchers only need their own key if they want to use a different provider or model.

System Status Card

Below the configuration form, the System Status card shows the current active configuration: provider name, API key status (masked for security), and model in use. This helps verify settings are saved correctly.

PART

Demo Walkthrough

CHAPTER 25

Full Grant Lifecycle: Dr. Marie Curie-Test

This chapter walks through a complete grant lifecycle using the built-in demo account. Follow along to see every feature of Grantium.ai in action.

Demo Account

The demo researcher account is pre-loaded with a complete profile, application, and award:

- Email: qa.tester.1772559279471@grantium.ai
- Password: Test1234!
- Name: Dr. Marie Curie-Test
- Institution: McGill University
- Field: Molecular Biology and Genetics (CRISPR, epigenetics, cancer)

Step 1: Researcher Profile

Dr. Curie-Test has a fully populated profile including:

- Personal Info — Senior researcher, 15 years post-PhD, based in Canada
- Organization — McGill University, Department of Biochemistry
- CV & Expertise — 3 publications (Nature Biotechnology, Science Advances, Cell), CRISPR/epigenetics keywords
- Financial Profile — $3.2M+ in career funding from CIHR, NSERC, and Genome Canada
- Funding Preferences — $100K–$750K range, Canada and US jurisdictions
- References — Dr. Jean-Pierre Bhatt (Co-PI, UdeM) and Dr. Sarah Chen (Referee, MIT)

Profile completeness: 36% (basic profile). Navigate to the Capability Profile page to see all tabs and data.

Step 2: Funding Discovery

With 86 programs in the database, the AI matchmaker found 20 matches for Dr. Curie-Test's profile. Top matches include:

- NIH Designing Synthetic Cells (score: 22, cross-border)
- CIHR Project Grant — Spring 2026 (score: 18, home country)
- NSERC Discovery Grants Program 2026 (home country)

The matchmaker uses keyword scoring, career stage matching, jurisdiction alignment, and country-proximity bonuses to rank programs.

Step 3: Grant Application

A CIHR Project Grant application was created:

- Title: "CRISPR-Mediated Epigenome Editing for Triple-Negative Breast Cancer Therapy"
- Amount Requested: $650,000 CAD over 3 years
- Funder: CIHR | Program: Project Grant — Spring 2026
- Target Deadline: September 15, 2026

Step 4: Document Upload & Analysis

Four documents were uploaded to the application:

- Proposal PDF — 7-section research proposal covering summary, background, objectives, methodology, timeline, budget justification, and significance
- Budget PDF — Detailed 3-year budget breakdown ($507K personnel, $295K non-personnel)
- CV PDF — Academic curriculum vitae with education, publications, and funding history
- Peer Reviews PDF — Simulated reviewer feedback from two reviewers with strengths, weaknesses, and scores

Text extraction automatically processed all documents. The proposal text (2,779 characters) was indexed for AI analysis.

Step 5: AI Review Findings

The automated findings extractor analyzed the peer review document and identified 17 findings across multiple categories:

- OBJECTIVES — Overlapping objectives (Objectives 3.1 and 3.4)
- DEFINITIONS — Unclear definition of "tumor regression" in murine models
- METHODS — Video recording scalability concerns with 60 mice
- FEASIBILITY — Missing formal power analysis for sample size justification
- PRIVACY_SECURITY — Inconsistency between raw video storage and data management plan
- DATA_LABELING — Risk of missed episodes leading to false negatives
- BUDGET — Heavy personnel allocation with limited equipment justification
- IMPACT — Weak SGBA+ section needing broader sex/gender analysis

Each finding was automatically created as a trackable issue in the Issues board.

Step 6: AI Peer Review Simulation

A domain expert AI peer review simulation was run using Claude, returning:

- Overall Score: 68.0 / 100

- Detailed section-by-section feedback
- Strengths: innovative CRISPR approach, strong preliminary data, excellent PI track record
- Weaknesses: overlapping objectives, missing power analysis, weak SGBA+ integration
- Improvement actions prioritized by potential impact

Step 7: Eligibility Check

An AI-powered eligibility assessment was performed against the CIHR Project Grant:

- Verdict: ELIGIBLE
- Career Stage: PASS — Senior researcher matches "any" career stage requirement
- Country/Jurisdiction: PASS — Canada matches CIHR's Canadian jurisdiction
- Institution Type: PASS — University is an eligible institution type
- Budget Range: PASS — $650K within $50K–$750K program range

Step 8: Submission

The application was marked as SUBMITTED after passing readiness checks. The submission history records the status change with timestamp.

Step 9: Post-Award Management

After simulating a successful funding decision, a grant award was created:

- Award: CRISPR Epigenome Editing — CIHR Project Grant
- Amount: $650,000 CAD | Period: October 2026 – September 2029
- 2 Milestones: Year 1 Progress Report (Sep 2027) and Year 2 In-Vivo Results (Sep 2028)
- 1 Deliverable: Peer-reviewed publication in Nature Biotechnology (Jun 2028)
- 5 Budget Lines: Personnel ($211K), Supplies ($60K), Equipment ($35K), Travel ($7K)
- 1 Task: "Screen 200 guide RNA candidates" assigned to Dr. Li (high priority)
- 1 Progress Report: Q1 2027 draft covering gRNA library design and cell line establishment

Step 10: AI Chat

The AI chat feature provided contextual analysis of the proposal, identifying key strengths (novel CRISPR approach, strong preliminary data) and weaknesses (overlapping objectives, missing power analysis) with specific improvement suggestions.

TIP

Log in as the demo researcher to explore all these features interactively. Every piece of data described above is live in the system and can be viewed, edited, and extended.

PART

Reference

CHAPTER 26

Supported Funders

Funder Packs (Full Support)

These funders have complete program data, compliance rules, document requirements, and portal templates:

- CIHR (Canadian Institutes of Health Research) — Project Grant (max 75 pages), Catalyst Grant
- NSERC (Natural Sciences & Engineering Research Council) — Discovery Grant, Alliance Grant
- NRC-IRAP (National Research Council) — Industrial Research Assistance Program
- NSF (National Science Foundation, US) — Standard Grant (15 pages), CAREER Award
- NIH (National Institutes of Health, US) — R01 Research Project Grant (12 pages), R21 Exploratory Grant

Additional Canadian Funders

These funders are available in the system with basic program information:

- SSHRC — Social Sciences and Humanities Research Council
- Mitacs — Research internship programs
- CFI — Canada Foundation for Innovation
- Genome Canada
- CANARIE — Digital research infrastructure
- Canada Council for the Arts
- Brain Canada Foundation
- Heart and Stroke Foundation of Canada
- Canadian Cancer Society
- Terry Fox Research Institute
- Ontario Research Fund
- Fonds de recherche du Québec (FRQ)
- Michael Smith Foundation for Health Research
- Alberta Innovates
- Saskatchewan Health Research Foundation
- Research Manitoba

- New Brunswick Innovation Foundation
- SickKids Foundation

Administrators can add any additional funder through the Funder Management interface.

CHAPTER 27

Tips & Best Practices

Profile Optimization

- Complete your profile to 100% before running the AI matchmaker for best results.
- Use specific, technical keywords in your research summary—the AI matches on these.
- Keep your publications and active grants up to date—they influence match scoring.
- Upload your full CV to the Supporting Docs tab for AI Assist to leverage.

Proposal Writing

- Always review AI-generated content carefully—use it as a starting point, not final text.
- Run the reviewer simulation before submission to catch issues reviewers would flag.
- Use the compliance gate as a final checklist—resolve all blocker-level issues.
- Export your submission package and review all documents before uploading to the funder portal.

Post-Award Management

- Create milestones and deliverables early—they serve as your project management framework.
- Log activities regularly for SR&ED claims and progress reporting.
- Invite team members with appropriate roles—use "Viewer" for stakeholders who only need visibility.
- Submit claims promptly and upload supporting documentation immediately.

Security

- Use a strong, unique password for your Grantium.ai account.
- Sign out when using shared or public computers.
- If using your own AI API key, never share it with others.
- Administrators: review the audit trail weekly for unusual login patterns.

CHAPTER 28

Troubleshooting & FAQ

Common Issues

Q: The page appears frozen or unresponsive.
Try a hard refresh (Ctrl+Shift+R on Windows/Linux, Cmd+Shift+R on Mac) to clear cached CSS and JavaScript files. If the issue persists, check your browser console for errors.

Q: AI features return errors or time out.
Verify your AI provider settings in Settings. Ensure your API key is valid and has sufficient credits. Try clicking "Test Connection" to diagnose the issue. If using Ollama, verify the local server is running.

Q: I can’t see the Admin menu in the sidebar.
The Admin section is only visible to users with the Administrator role. Contact your organization’s admin to have your role updated.

Q: My profile changes aren’t saving.
Ensure you click the "Save" button in each tab. Check for validation errors (highlighted fields). If the error mentions "value too long", try shortening the field content.

Q: Documents won’t upload.
Supported formats are PDF, DOCX, DOC, and TXT. Maximum file size is 10MB. Ensure your file is not corrupted or password-protected.

Q: The compliance check shows "blocker" issues.
Blocker-level issues must be resolved before submission. Common blockers include missing required documents, wrong file formats, or exceeding page limits. Click each blocker to see specific requirements.

Q: How do I switch between languages?
Click the language code buttons (EN, FR, DE, ES, IT, PT, AR) in the top navigation bar. Your selection is saved automatically.

CHAPTER 29

Contact & Support

Grantium.ai is developed and maintained by SoftSim Technologies Inc., based in Montreal, Canada.

Support

- Email: info@softsim.ca
- Website: https://grantium.ai
- In-app: Use the contact form at the bottom of any page

About SoftSim Technologies

SoftSim Technologies Inc. builds AI-powered tools for research, healthcare, and education. Our mission is to make grant funding more accessible and efficient for researchers worldwide by leveraging artificial intelligence throughout the grant lifecycle.