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VIDATUM

Wrexham Grant Management System User Guide for Applicants



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1. Logging In

You can access the Wrexham Grant Management System by going to wris.wrexham.ac.uk
To log in **always** select the 'Office 365' button. This is linked to your University 365 account.

English ▾

Prifysgol Wreccsam
Wrexham University
Vidatum Academic

Office 365

OR

Username

Password

Logout when the browser close

Login

[Forgot password?](#)

WGU4.0.2.0

You might be asked to log in using your University credentials or to verify your identity as shown in the below screens.

Microsoft

thomasonf@glyndwr.ac.uk

Enter password

Your organizational policy requires you to sign in again after a certain time period.

.....

[Forgot my password](#)

[Sign in with another account](#)

Sign in

Microsoft

thomasonf@glyndwr.ac.uk

Verify your identity

Text +XX XXXXXXXXXX58

Call +XX XXXXXXXXXX58

[More information](#)

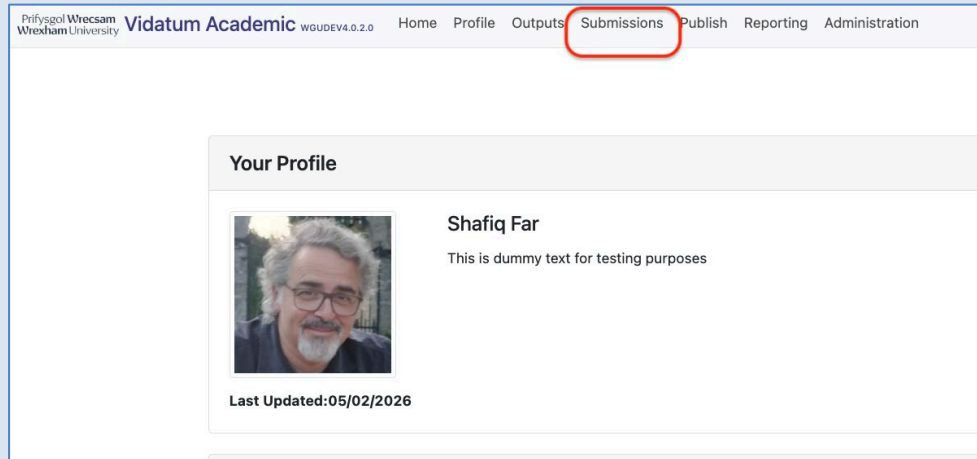
Are your verification methods current? Check at <https://aka.ms/mfasetup>

Cancel



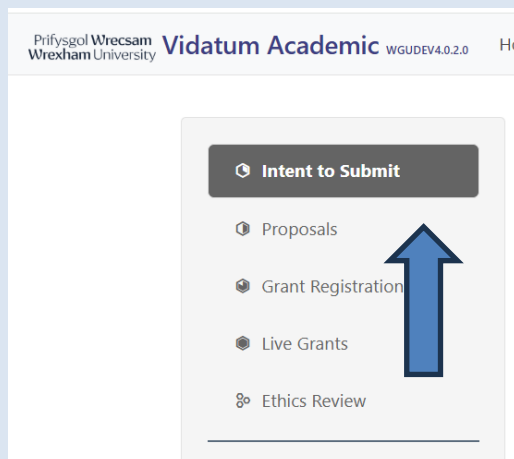
2. Getting to the Grants module

Upon logging in, you will be brought to the home page. From there, click on the “Submissions” button on the navigation bar.



On the left-hand side on the screen you will see the different form options, you should always start with 'Intent to Submit'.

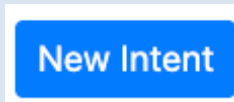
****Only skip the 'Intent' stage and start with 'Proposal' if you have written permission from your line manager to do so****





3. Creating an Application

Step 1: Select this button which can be found on the right-hand side of the screen



Stage 2: Enter the name/title of your project and the project type which can either be Research or Non-Research.

The screenshot shows a form titled "New Intent" with a close button (X) in the top right corner. The form contains two main sections:

- Title of the Project ***: A text input field.
- Project Type ***: A dropdown menu with the following options:
 - Please Select -- (highlighted in blue)
 - Research
 - Non-Research



4. Navigating the System

The form is split into different sections, and additional fields may appear depending on the information you have filled out.

All question marks with an asterisk* must be completed.

You should select 'save' throughout, the **red errors button** indicates sections left to complete, this will turn to a **blue submit button** once all relevant sections have been completed.

Every section includes help text, please ensure you read this carefully.

There are four forms in total, intent to submit, proposal, grant registration and live grant. Each form must be processed and approved before you can move to the next stage.

The screenshot displays a grant application form interface. At the top, a progress bar shows four stages: 'Intent to Submit', 'Proposal', 'Grant Registration', and 'Live Grant'. The 'Proposal' stage is currently active. To the right of the progress bar are three buttons: a red button with a left arrow and the text 'Errors', a green button with the text 'Save', and a grey button with the text 'Cancel'. Below the progress bar is a section titled 'Main' containing several form fields:

- Project Type**: A dropdown menu with 'Research' selected.
- Reference No**: A text input field containing '2026/0033'.
- Title of the Project ***: A text input field containing 'testing'.
- Select WU PI / Project Leader ***: A dropdown menu with 'Richard Day' selected.
- PI FTE on Project ***: An empty text input field.
- Select Department ***: A dropdown menu with '-- Please Select --' selected.
- Abstract ***: A large text area for entering the project abstract.
- Multi Partner (Y/N) ***: A dropdown menu with '-- Please Select --' selected.
- Estimated Start Date ***, **Estimated End Date ***, and **Application Deadline ***: Three date input fields, each with a calendar icon.
- Full Cost of Project**: An empty text input field.

On the right side of the form, there is a light blue sidebar with the following content:

- Main Details**: A section of text explaining that the user must complete the relevant details of the Principal Investigator and that they cannot submit an application on behalf of another staff member. It also provides instructions on how to enter the estimated requirement for the principal investigator or project lead applicant, with examples: 'Full time Equivalent eg 0.2= 1 day pw; 0.6= 3 days per week.'
- Abstract**: A section of text stating that this section should be descriptive, giving a brief overview of the project, detailing the main aims and objectives and the framework used to conduct the study. It notes that long scientific descriptions and technical language should be avoided.

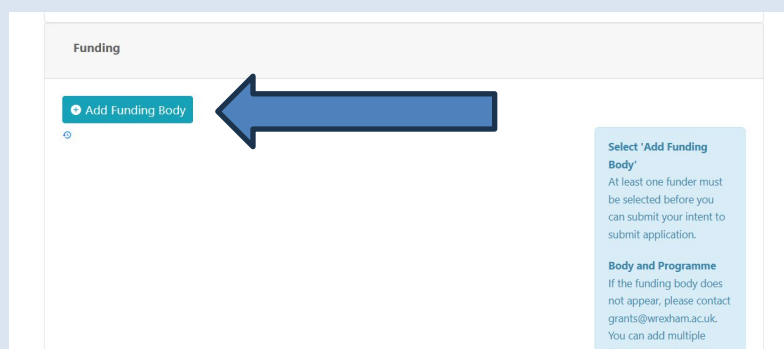


5. Intent to Submit

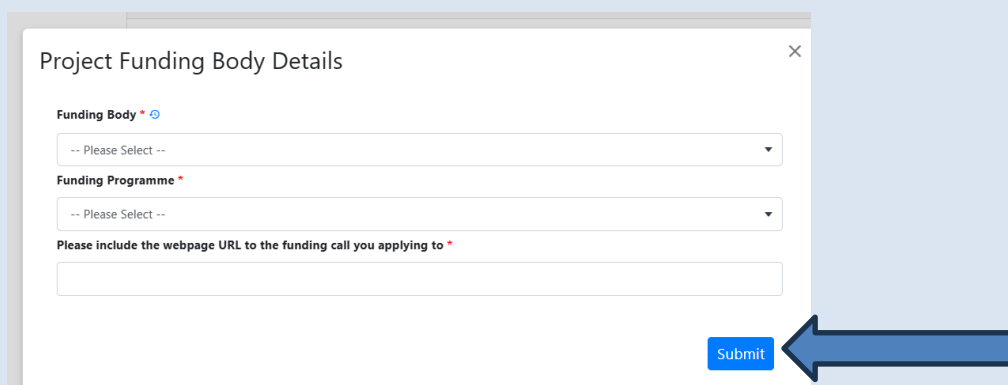
Start with 'Intent to Submit'. An intent to submit is an internal notification or pre-registration required to inform the grant management team and your line manager that you plan to apply for a grant. It acts as an early warning system, allowing us to allocate resources and time, ensure your project meets compliance standards and ensuring your line manager supports the development of a full application, before you begin to start developing your grant application.

At intent to submit, you might not have all the details of your grant application yet, at intent you only need to have the following to submit:

- The FTE of your role on the project- entered as a percentage
- If the project will involve partners
- Wrexham University's role in the grant
- The estimated full cost of the project
- Funding Body Details
 - Select 'Add Funding Body'

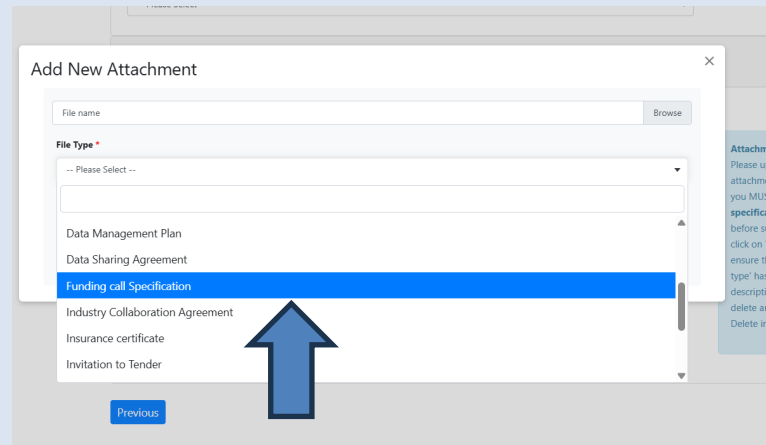
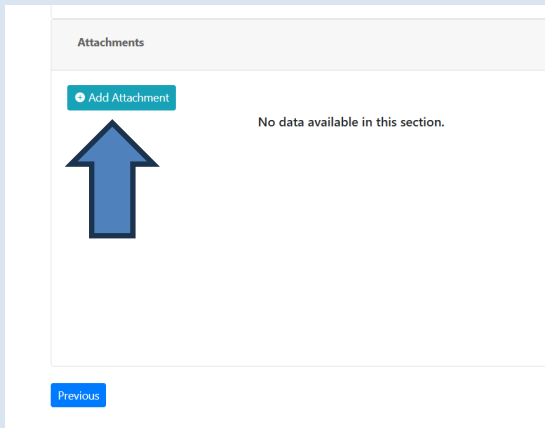


- Select the **Funding Body** from the drop-down menu, if the funder does not appear contact grants@wrexham.ac.uk
- Select the **Funding Programme**, if not listed please 'other' and enter the programme name, if not known select 'default'
- Provide the URL link of the webpage where the funding call is listed
- Press Submit
- You can add more than one funder by selecting 'Add Funding Body' again.

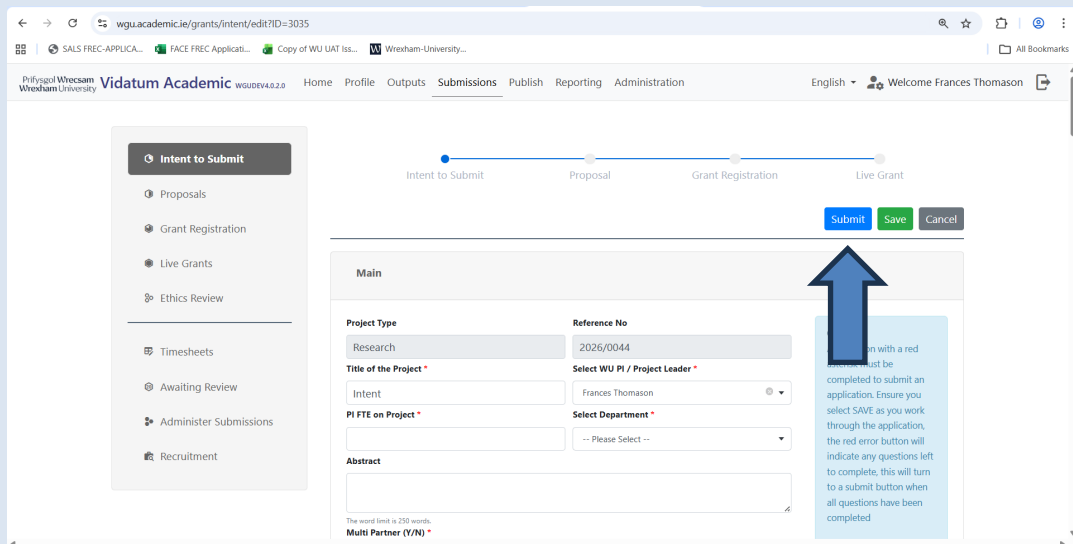




- Finally in order to submit an intent to submit you must upload a copy of the Funding Call Specification, under the attachments section, ensuring you select 'Funding Call Specification' as the document type.



Once these sections have been completed and saved, the blue submit button will appear




Once submitted your application is locked for review, meaning you cannot make any edits or changes. You will receive a notification via email when your application has been successfully submitted. You can check back to the system at any time to review the status of your application.



Intent to Submit New Intent

Search:

REF#	Project	Funder	Amt Requested	Period	Deadline	Status	Actions
2026/0044 3035	Intent Frances Thomason	Coleg Cymraeg Cenedlaethol, Wellcome Tender, Accelerator	0			Awaiting Line Manager approval	



At Intent, only your line manager will receive and approve your application. You will receive an email notification once this has been processed.

At intent your line manager can either:

- **Approve**- You can now start to develop your full proposal- you **MUST** contact the Bid Development team and your Finance Business Partner when starting your full proposal.
- **Reject**- If your application is rejected, check the system for comments that have been left by your line manager.



6. Proposal

Proposal expands the intent into a full application. Includes:

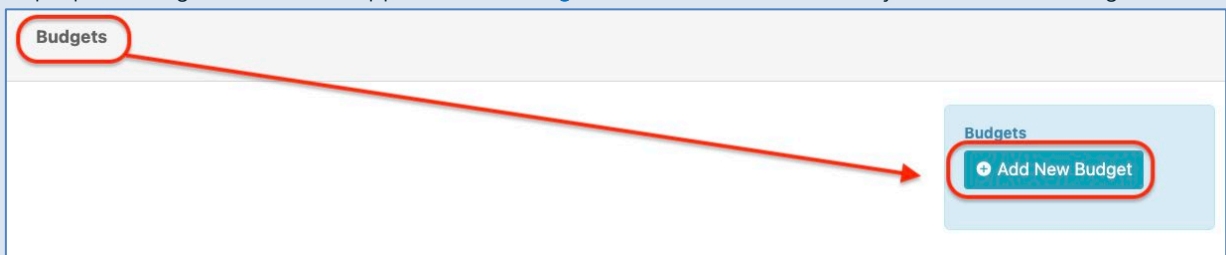
- Project description
- Abstract
- Collaborators
- Funder details
- Budget
- Resources
- Supporting documents (application to funder)
- Risks and benefits

Proposals **MUST** be developed in the system with the Bid Development Managers and Finance Business Partners

Proposals **MUST** be completed and submitted for approval **2 weeks** before being submitted to the external funder.

Budgeting Tool

At proposal stage a button will appear in the **Budgets** section which will allow you to create a budget.



Clicking on “Add new budget” will open a new dialogue window where you can customise the type of budget they wish to set up

Add New Budget

Budget Title *

Select Funder *

Type *

Income Currency *

Overhead Calculation *

Overhead Percentage *

Salary Increments? *

Salary Inflation? *



- **Budget Title:** A title for the budget you are creating
- **Select Funder:** This will pull from the list of funders the user previously specified
- **Type:** This will allow you to select from a budget template that comply with different funder or regulatory requirements (Select Standard).
- **Income Currency:** The currency of which the budget will be based on
- **Overhead Calculation:** The field asks how indirect costs should be applied to the budget (Please consult with your finance business partner before completing this).
- **Overhead Percentage:** The percentage for the overhead calculation or the percentage of direct costs (Please consult with your finance business partner before completing this).
- **Salary Increments:** Yes/no dropdown, specifies if the staff will receive scheduled pay raises/increases
- **Salary Inflation:** Yes/no dropdown, allows the system to account for inflation adjustments.

When all the mandatory fields have been filled in, click on **Save** and a budget template will be created.

Then, select EDIT to open and build the budget.

Wellcome
Accelerator
FrancesThomason

Budget Outline

Edit
Delete
Copy
Download

	Yr 1 GBP		Total	
	Budget	From Funder	Budget	From Funder
Incurred Staff	£0	£0	£0	£0
Allocated Staff	£0	£0	£0	£0
Temporary Staff	£0	£0	£0	£0
Staff Total	£0	£0	£0	£0
Non-Pay				
Travel	£0	£0	£0	£0
Other Non-Pay Costs	£0	£0	£0	£0
Non-Pay Total	£0	£0	£0	£0
Direct Total	£0	£0	£0	£0
Indirect Costs				
Overheads	£0	£0	£0	£0
Indirect Total	£0	£0	£0	£0
Total Economic Cost	£0	£0	£0	£0

Budgets

Please note 'Add Budget' will not appear until the project dates and funder details have been entered.

Please contact your Finance Business Partner to assist with this stage of the process - financebusinesspartners@wrexham.ac.uk

Choose "Add New Budget" and update the fields in the pop-up screen.

Budget Title - Give your budget a title e.g. "Milestone 1 Budget" or "Project Budget".

Type - Always choose "Standard".

Income Currency - Would normally be British Pounds unless this is a bid to an overseas funding body.

Overhead Calculation - Funding rules may dictate what this is. UKRI will always be UKRI Dispensation. If the funder does not dictate a method, choose UKRI Dispensation.

Overhead Percentage - A figure must be entered here. If choosing UKRI Dispensation - enter 0. Enter relevant percentage if choosing alternative methods.

Salary Increments - Dependent on funding body rules. If a UKRI application, salary increments must



Filling in a Budget

Yr. 1		Yr. 2		Yr. 3		Total		
Budget	From Funder	Budget	From Funder	Budget	From Funder	Budget	From Funder	Actions

The process to begin entering budget information usually follows the same process:

1. Specify a Category
2. Specify a Subcategory
3. Click on Add

A new set of fields will appear corresponding to the data being captured by that particular budget section.

Entering Staff costs

There are two ways of adding staff related costs and can either be calculated by

- **Person:** This will use a set of rates unique to a particular person or staff member that is currently in the system. The rates are updated using automated feeds. When the user specifies to calculate the cost by person, they can select from a list of users using the typeahead field.

- **Rate:** This will specify a general rate or grade instead of a person-specific rate



After specifying the calculation method, the user will have to fill in the remaining fields

- Start and End Date: The duration of which this particular staff member will be participating in this project
- FTE: The staff member's Full Time Equivalent or the percentage of time they are devoting to this project
- Description: A brief description of this particular budget line

When all the relevant fields have been filled out, the system will calculate the total cost based on the details entered.

	Yr. 1		Yr. 2		Yr. 3		Yr. 4		Total		Actions
	Budget	From Funder	Budget	From Funder	Budget	From Funder	Budget	From Funder	Budget	From Funder	
Directly Allocated Staff											
Directly Allocated Staff/tst	19022.74	15218.19	0	0	0	0	0	0	19022.74	15218.19	↗ 📄
Totals	19022.74	15218.19	0	0	0	0	0	0	19022.74	15218.19	

Entering Other Costs

Entering other costs follow a similar format. We will take Non-Pay for example:

Here, you can specify the category and subcategory, then fill out;

- Description: Brief description of the budget line they are entering
- Cost per Year: These fields are automatically generated based on the number of years the course will be running for. Here, users can enter the cost on a per-year basis

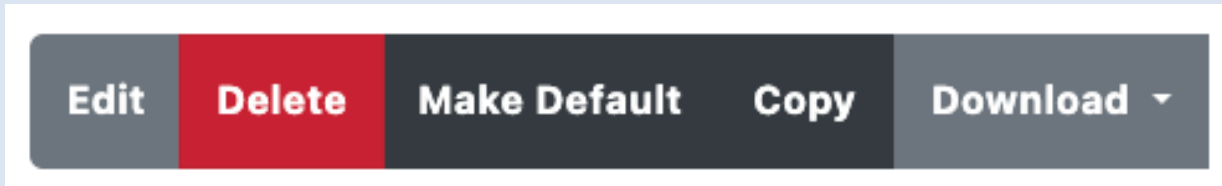
Clicking on submit will add a new line to the budgeting tool.

Once all sections have been completed select 'Submit Budget' and 'Return'.



Additional Budget functions

You can do a few additional things with the budgeting tool



- Delete: This simply deletes a budget
- Make Default: This is relevant when there is more than one budget created
- Copy: This takes the current values in a budget and creates a copy with a new name, helpful if users wish to create forecasts
- Download: This will download the budget into a Word or Excel format

At Proposal stage please make sure you attach all documentation that will be submitted to the funder. Select the document you would like to attach, then press the blue 'upload' button before continuing with the application. This is to avoid unsaved worked or attachments.

When all mandatory fields and Sections have been completed, the red "Errors" button will turn into a blue "Submit" button. This has now noted you have completed the application and it is ready for you to press the blue "Submit" button.

The screenshot shows a web form interface. At the top right, there are three buttons: a blue "Submit" button, a green "Save" button, and a grey "Exit" button. A red arrow points to the "Submit" button, which is also highlighted with a red rectangular box. Below the buttons is a section titled "Main" containing several form fields: "Project Type *" with a dropdown menu showing "Research Tender"; "Reference No : 3905"; "Title of the Project" with a text input field containing "Test multiple org affiliations"; "Short Title" with a text input field containing "testetst"; "Is this is a student led project? *"; and "Select PI / Project Leader *".

Once you press the blue "Submit" button you will be directed to the last stage of the application which is to confirm and submit you have understood all terms and information in this process.

Once completed, you can now press the blue "Submit" button for the application to go through the approval process in the workflow.

At Proposal Stage, your application will be reviewed and approved based on the amount being requested, in line with the University Finance Regulations. You can check back on the status of your application at any time and view who is currently reviewing it by selecting the Person Icon next to your application.



Role / Approver	Date	Status
Finance Business Partner Andrew Jodrell 👤 Current Approver		🕒
Finance Business Partner Charlene Fowles 👤 Current Approver		🕒
Finance Business Partner Emma Forfar 👤 Current Approver		🕒
Finance Business Partner Pete Johnson 👤 Current Approver		🕒
Finance Business Partner Shafiq Far 👤 Current Approver		🕒
Bid Development Manager Emma Taylor		👤
Bid Development Manager Estelle Brown		👤
Bid Development Manager Frances Thomason		👤
Bid Development Manager Rachel Lacey		👤
Executive Director of Finance Emma Forfar		👤
Line Manager Richard Day		👤
PVCR Richard Day		👤
Vice Chancellor Joe Yates		👤

You will be notified by email of any feedback and final approval from the University approvers.

You **CANNOT** submit the bid externally to the funder until you have received confirmation to proceed from all approvers.

Approvers can ask for changes or further information before they approve your application, this will be entered in to the system and you will receive an email notification. To review comments left by the approvers select the blue person icon next to your application. Your application will be unlocked for you to make any changes and resubmit following the same above process.

Once all approvers have signed of you proposal you can proceed with submitting to the funder. The bid Development Team will update the system to reflect the date it was submitted

Update Status To:

Submitted to Funder

Not Submitted to funder

Send back to Applicant for changes

Add Comment

Comments posted here and names of reviewers will be visible to all.

Cancel Save



When you hear back from the funder your application will either be marked as Successful or Unsuccessful

Your Approval and Comments

Date of Funder Outcome / Response *

Update Status To:

Successful Application

Unsuccessful Application

Add Comment

Comments posted here and names of reviewers will be visible to all.

Approval and Comments
If you are the approver, you can use this form to post a comment, query, approve, or reject the entry.

Cancel Save

If your application has been successful, congratulations! you can move on to Grant Registration.

If your application was unsuccessful, read through any comments left by the funder, they might be helpful in developing your next grant application.



7. Grant Registration

If your funding has been successful, you need to register your grant in the system to generate a project cost code.

The application will copy all previous sections across that you completed when developing your grant.

Only two new sections are required at this stage; Events/ Milestones and Contracts, however if any changes have been made to the overall project details, proposal or costing please ensure these are updated before registering your grant.

To register your grant, you must add at least one Event or Milestone, but you are encouraged to add all relevant event milestones to this section including, meetings, reports and claims.

You must also complete the Contracts section of grant management before the project can begin. Select 'Add Contracts'. Add the type of document, if it is a contract to Wrexham University or put in place by Wrexham University, provide a description and select submit.

You the need to select the paper and pen icon to open and complete the contract details



Contracts			
Type	Title	Ref No	Actions
To WU	Funder Contract		

Showing 1 to 1 of 1 entries

Complete the relevant details marked with an asterisk in this section and upload any contract documents. Please contact legal@wrexham.ac.uk or grants@wrexham.ac.uk if you need support with any of the questions.

Project Details

Project Code : 562
Project Title : Intent **PI :** Frances Thomason
Project Start Date : 01/07/2026 12:00:00 AM **Project End Date :** 01/07/2027 12:00:00 AM

Contract Details

Type of Record *

Contract Title * **Contract Ref ***

Contract Description

Contract Date * **Start date** **End date**

Contract Admin **Legal Admin**

Contract Type * **Agreement Type ***

VAT Status * **VAT Rate ***

Total Value **Overhead Value**

Checked By * **Signed By ***

Contract Attachments

Once complete, select 'Save and 'Back to Project'

You can now submit your grant registration. The Finance Team will review and make final approval of your grant registration. Once approved you will receive an email notification listing your project cost code.



Message



Subject:

Grant Registration "Intent" has been approved

Message:

Dear Frances Thomason,

We are pleased to inform you that your Grant Registration has been approved. Please take note of the following details for your reference:

- Title: Intent
- Reference No: 2026/0044
- Cost Code: GDZR

Please continue to use the system to manage your active grant. This includes updating documentation, adding milestones and events, and overseeing your grant budget.

Should you require any changes or amendments to your active grant, please contact grants@wrexham.ac.uk to unlock your application.

Please do not respond back to the email. Contact grants@wrexham.ac.uk with queries.

Please refer to the Wrexham Grant Management System for Applicants User Guides for further information.