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Wrexham University

VIDATUM

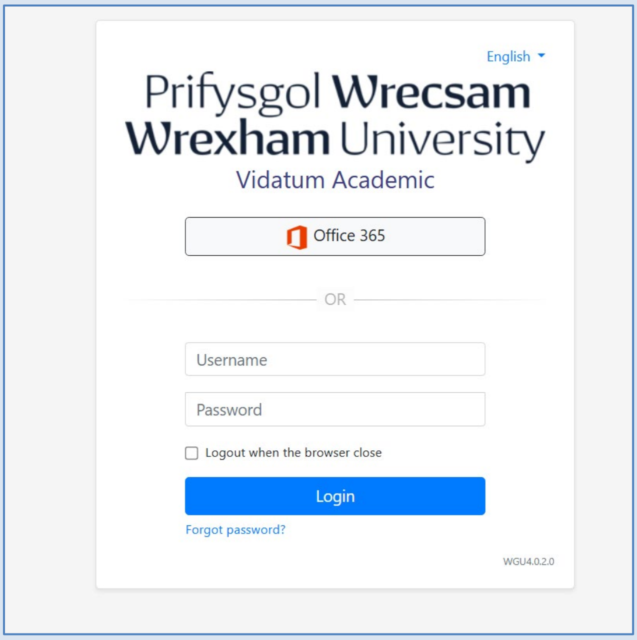
Wrexham Grant Management System
User Guide for Applicants

1. CONTENTS

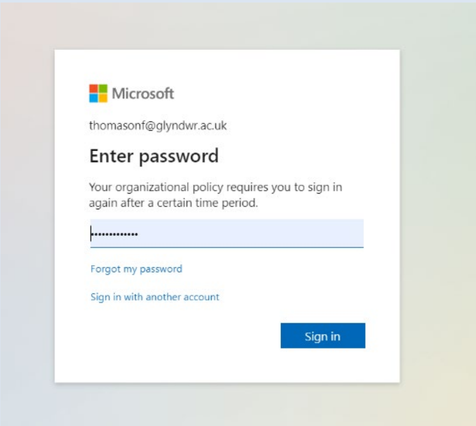
1. Logging In

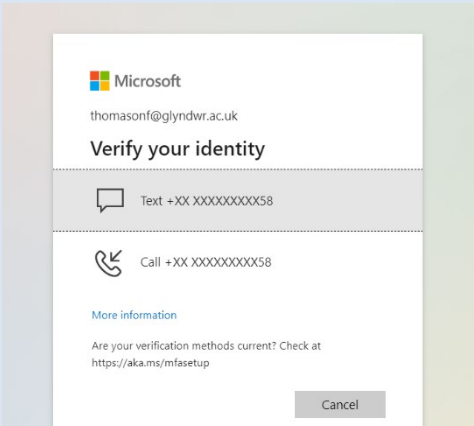
You can access the Wrexham Grant Management System by going to wris.wrexham.ac.uk

To log in **always** select the 'Office 365' button. This is linked to your University 365 account.



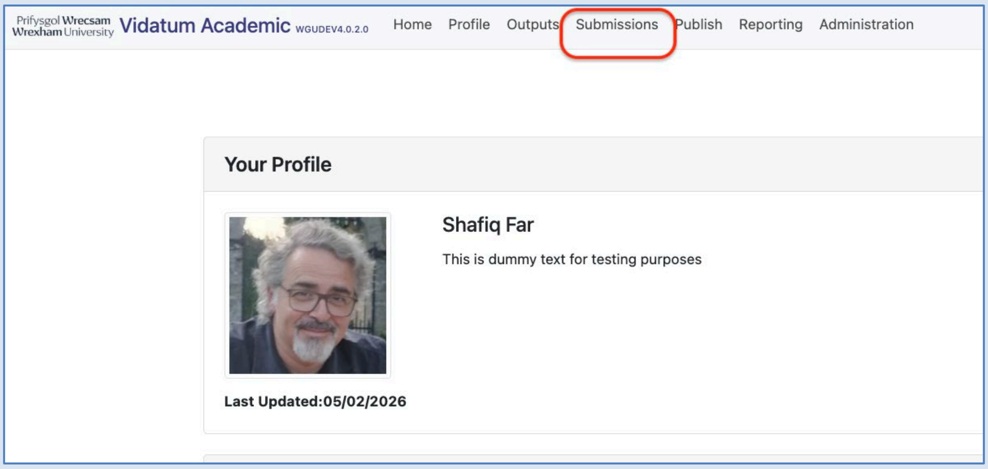
You might be asked to log in using your University credentials or to verify your identity as shown in the below screens.





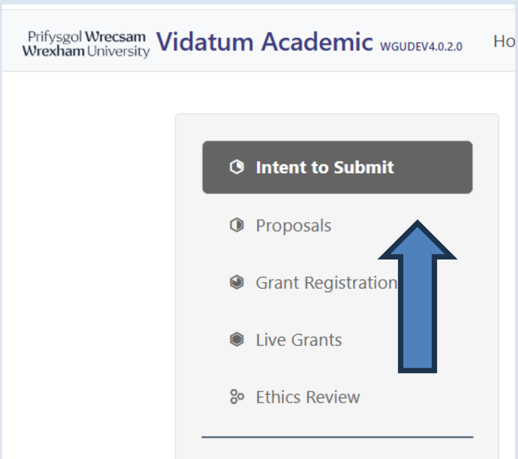
2. Getting to the Grants module

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’.

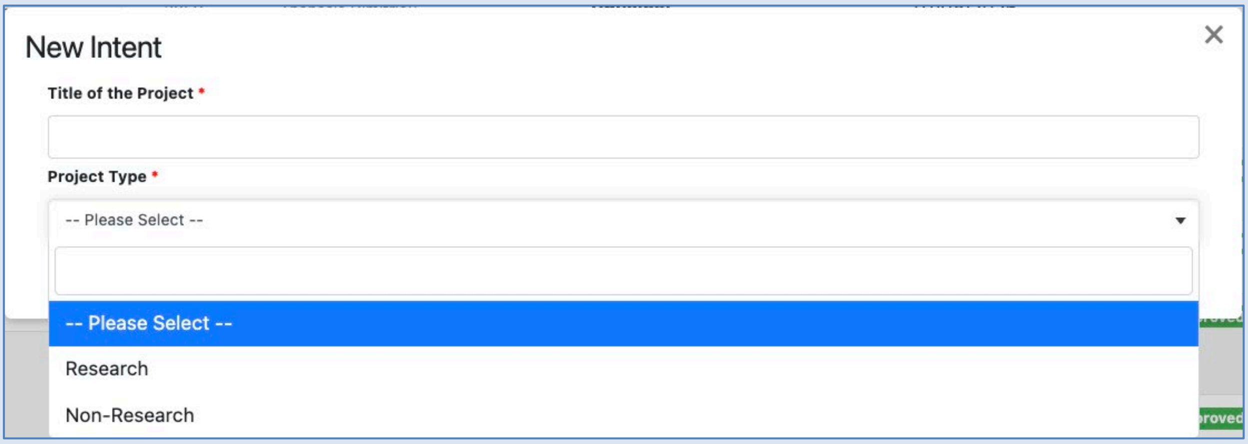
Only skip the ‘Intent’ stage and start with ‘Proposal’ if you have written permission from your line manager to do so



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.



4. Navigating the System

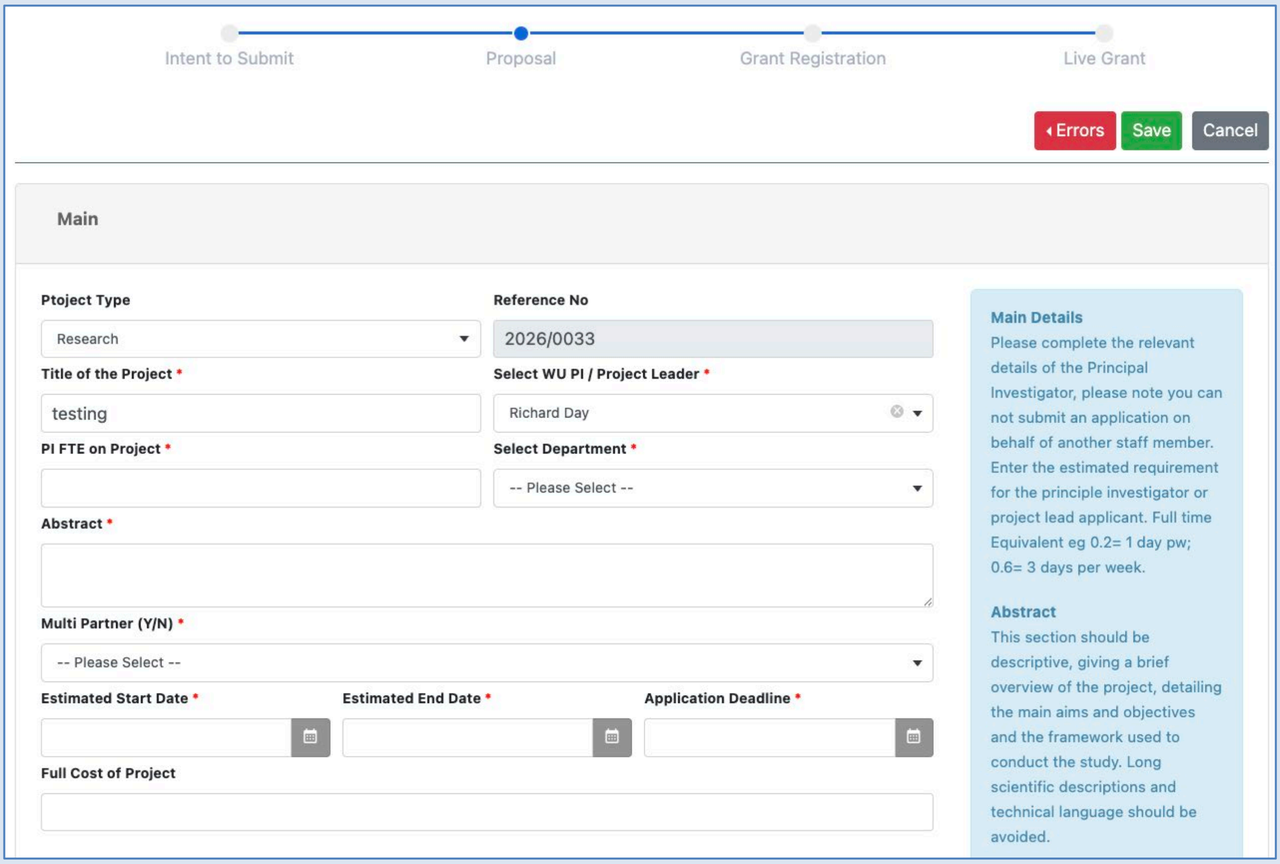
The form is split into different sections, and additional fields may appear depending on the information you have filled out.

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.



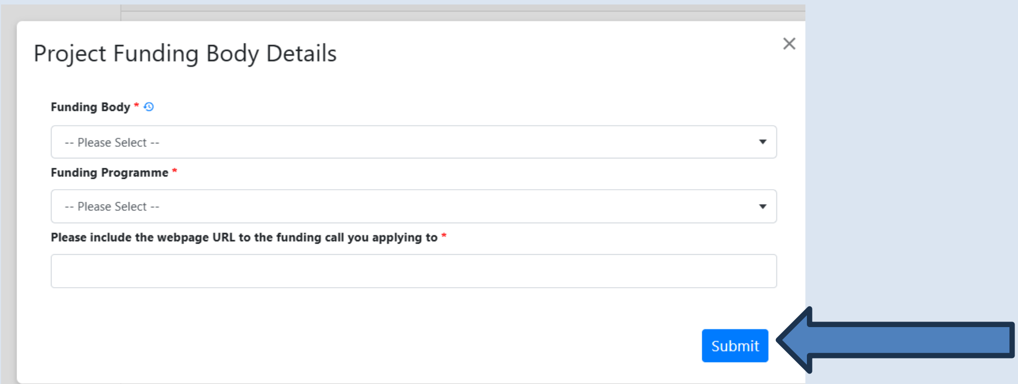
5. Intent to Submit

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.

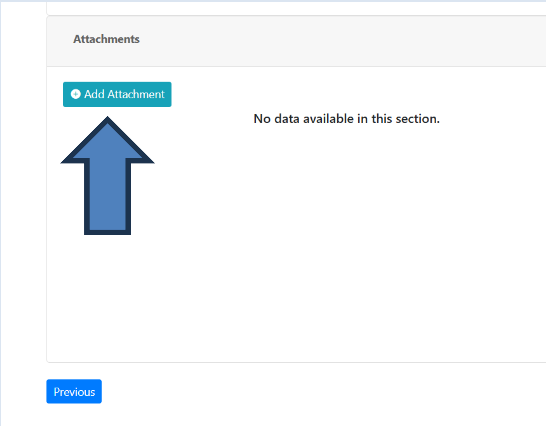
At intent to submit, you might not have all the details of your grant application yet, at intent you only need to have the following to submit:

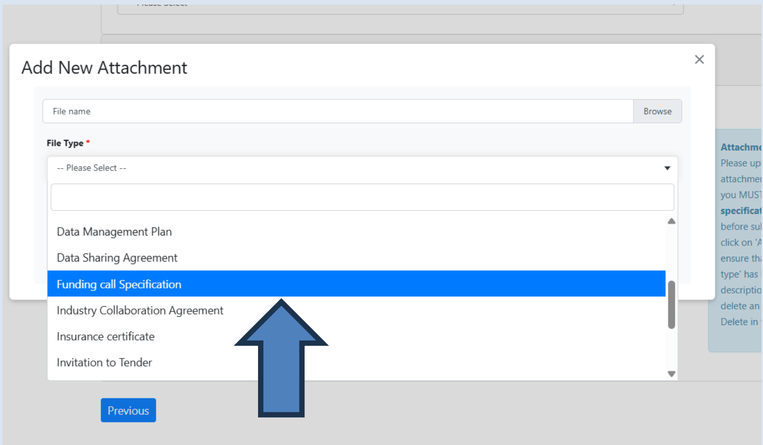
- The FTE of your role on the project- entered as a percentage
- If the project will involve partners
- Wrexham University’s role in the grant
- The estimated full cost of the project
- Funding Body Details
    - Select ‘Add Funding Body’

- 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.

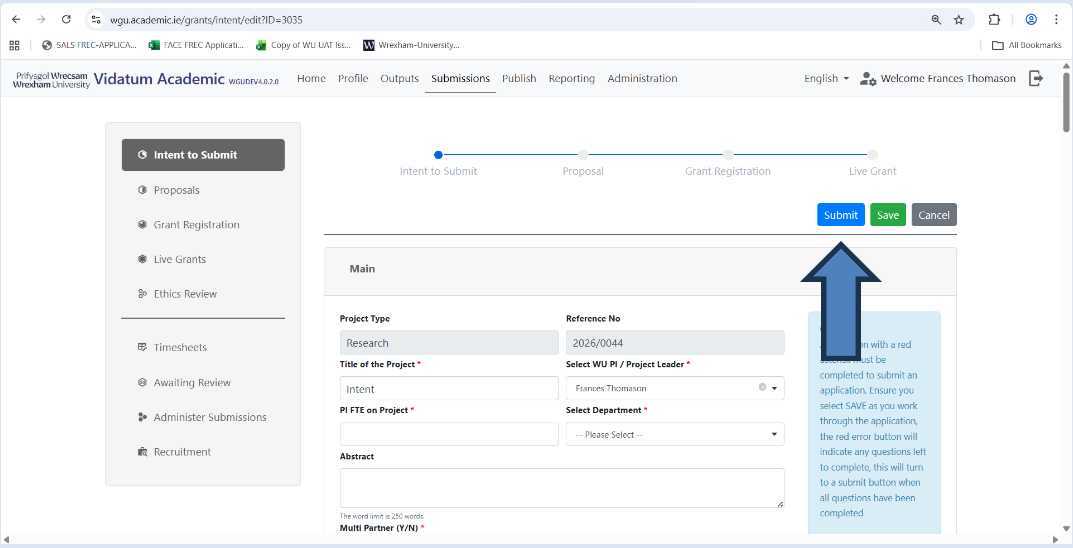


- Finally in order to submit an intent to submit you must upload a copy of the Funding Call Specification, under the attachments section, ensuring you select ‘Funding Call Specification’ as the document type.

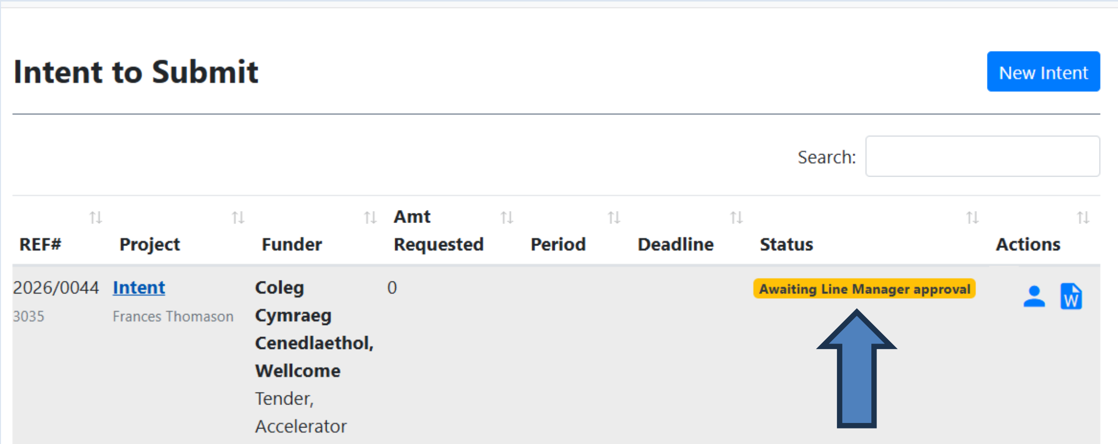




Once these sections have been completed and saved, the blue submit button will appear



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.



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 you 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

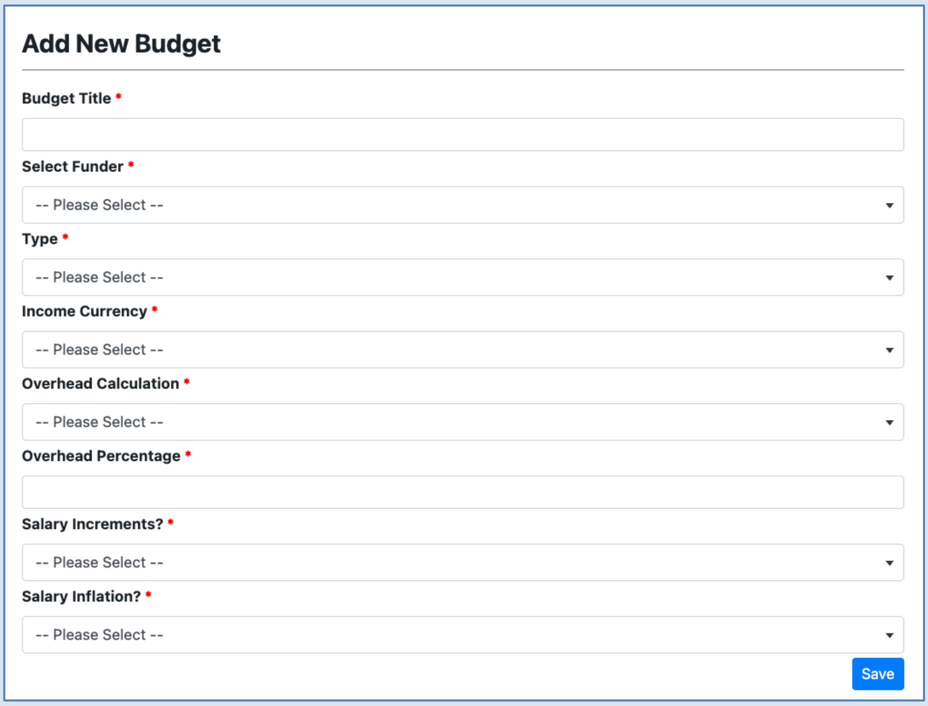
Proposals **MUST** be developed in the system with the Bid Development Managers and Finance Business Partners

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.

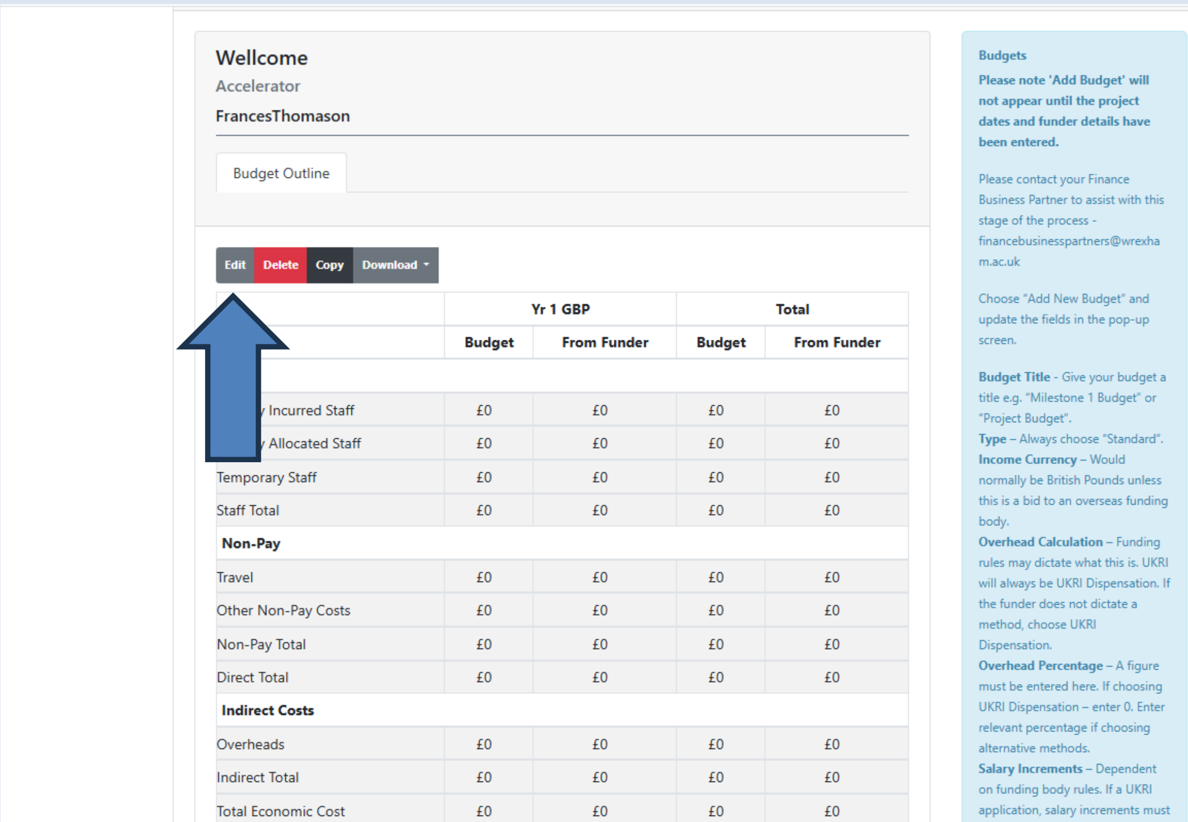
Clicking on "Add new budget" will open a new dialogue window where you can customise the type of budget they wish to set up



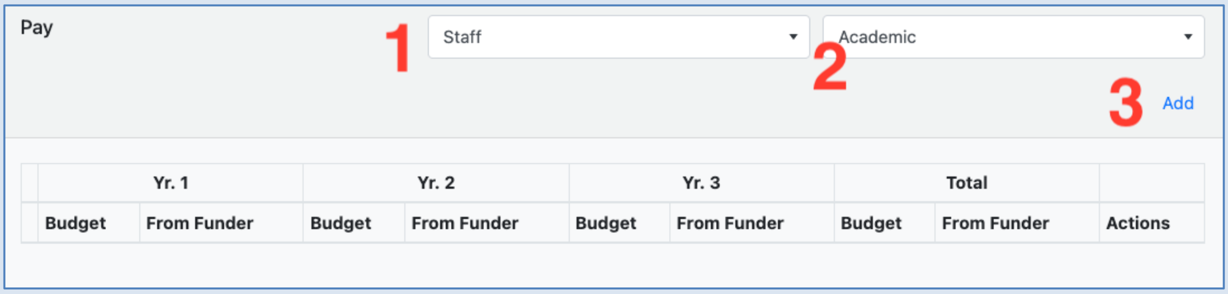
- Budget Title: A title for the budget you are creating
- Select Funder: This will pull from the list of funders the user previously specified
- Type: This will allow you to select from a budget template that comply with different funder or regulatory requirements (Select Standard).
- Income Currency: 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.



Filling in a Budget



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

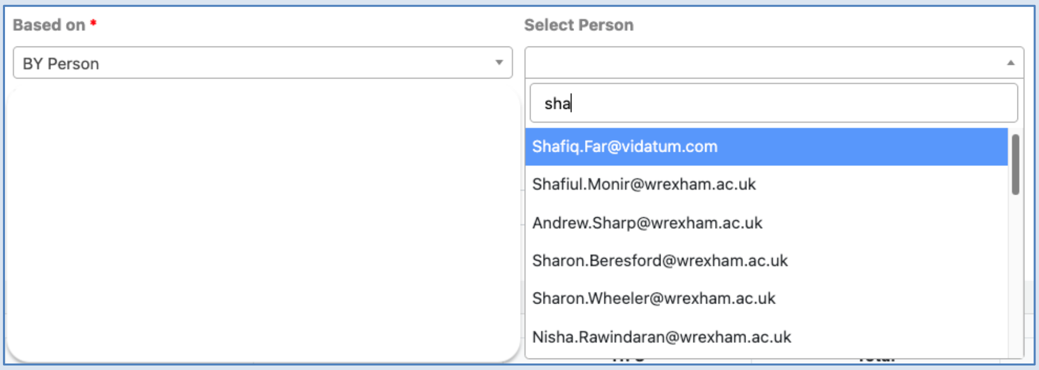
1. Specify a Category
2. Specify a Subcategory
3. Click on Add

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

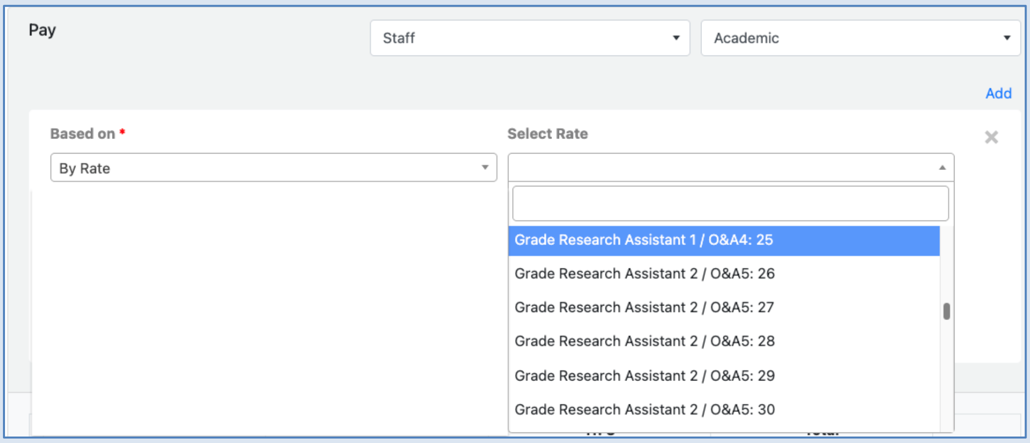
Entering Staff costs

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

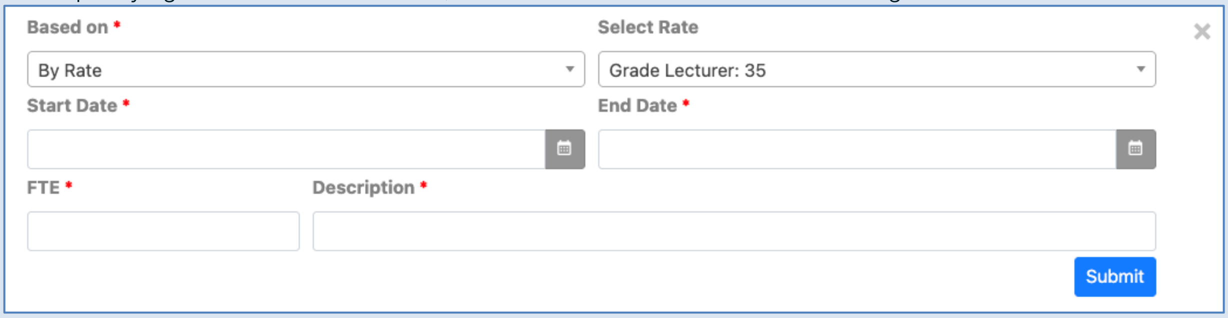
- Person: This will use a set of rates unique to a particular person or staff member that is currently in the system. The rates are updated using automated feeds. When the user specifies to calculate the cost by person, they can select from a list of users using the typeahead field.



- 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



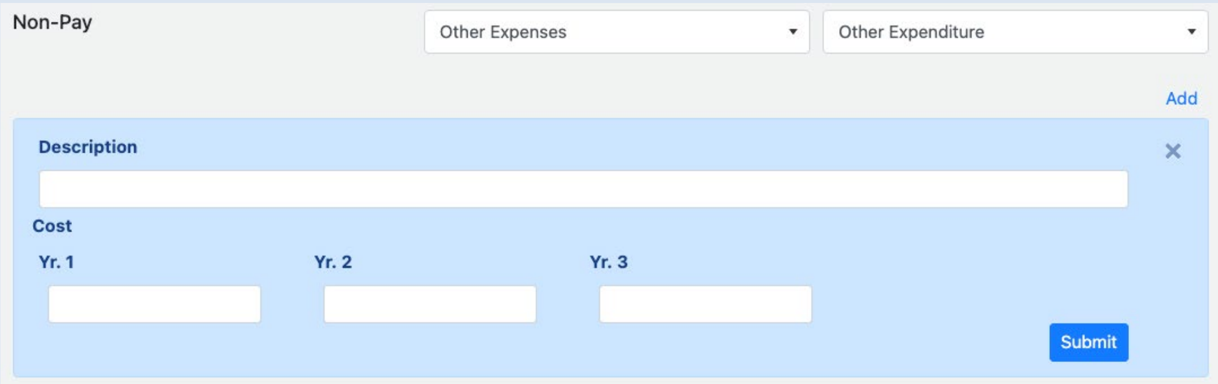
- Start and End Date: The duration of which this particular staff member will be participating in this project
- FTE: The staff member's Full Time Equivalent or the percentage of time they are devoting to this project
- Description: A brief description of this particular budget line

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		
	Budget	From Funder	Budget	From Funder	Budget	From Funder	Budget	From Funder	Budget	From Funder	Actions
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;

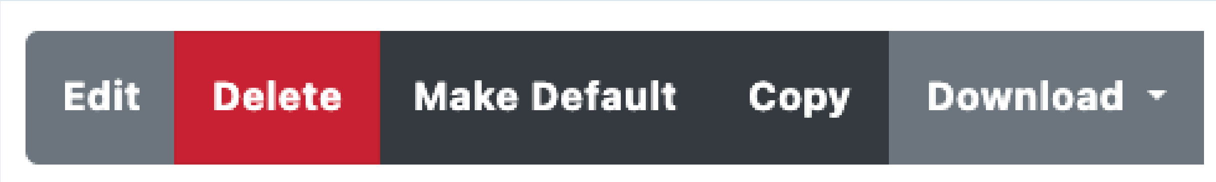
- Description: Brief description of the budget line they are entering
- Cost per Year: These fields are automatically generated based on the number of years the course will be running for. Here, users can enter the cost on a per-year basis

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

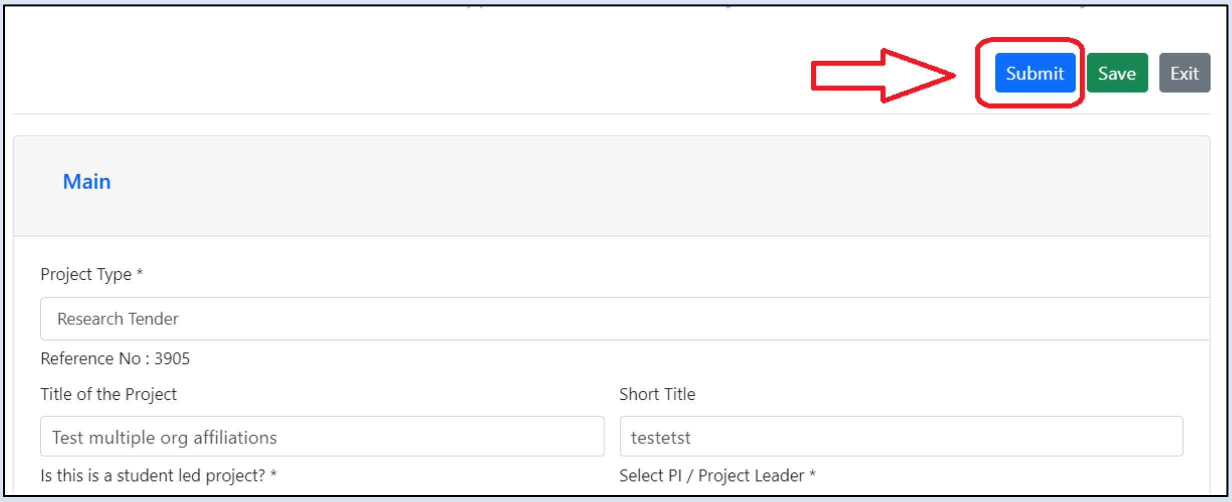
You can do a few additional things with the budgeting tool



- 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 of 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.



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 they system to reflect the date it was submitted

Update Status To:

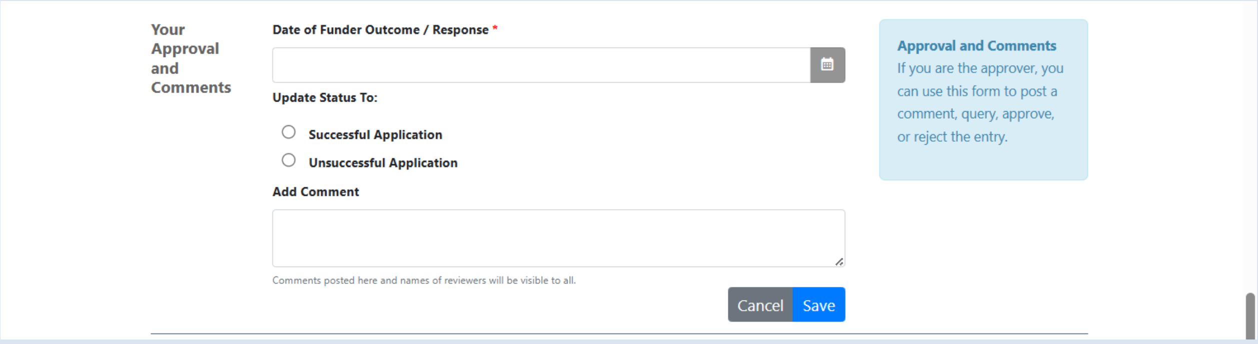
- (•) Submitted to Funder
- ( ) Not Submitted to funder
- ( ) Send back to Applicant for changes

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



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.

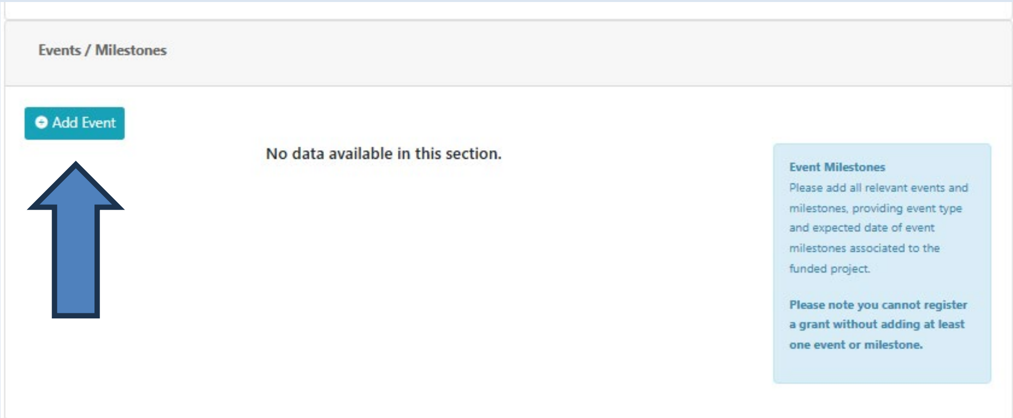
7. Grant Registration

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

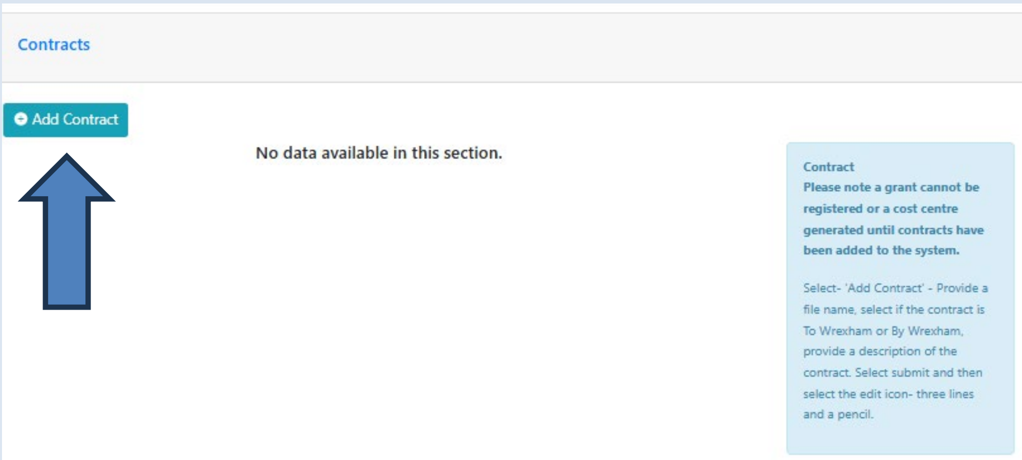
The application will copy all previous sections across that you completed when developing your grant.

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.

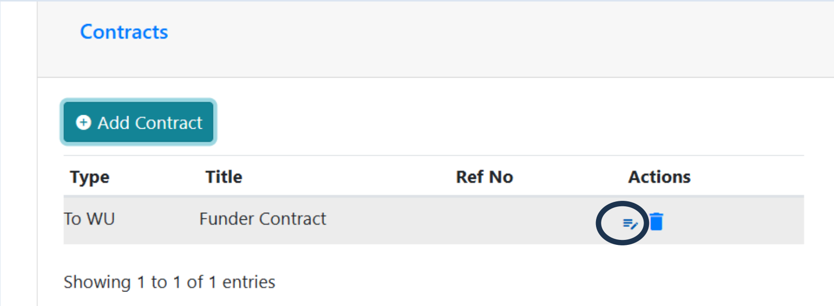
To register your grant, you must add at least one Event or Milestone, but you are encouraged to add all relevant event milestones to this section including, meetings, reports and claims.



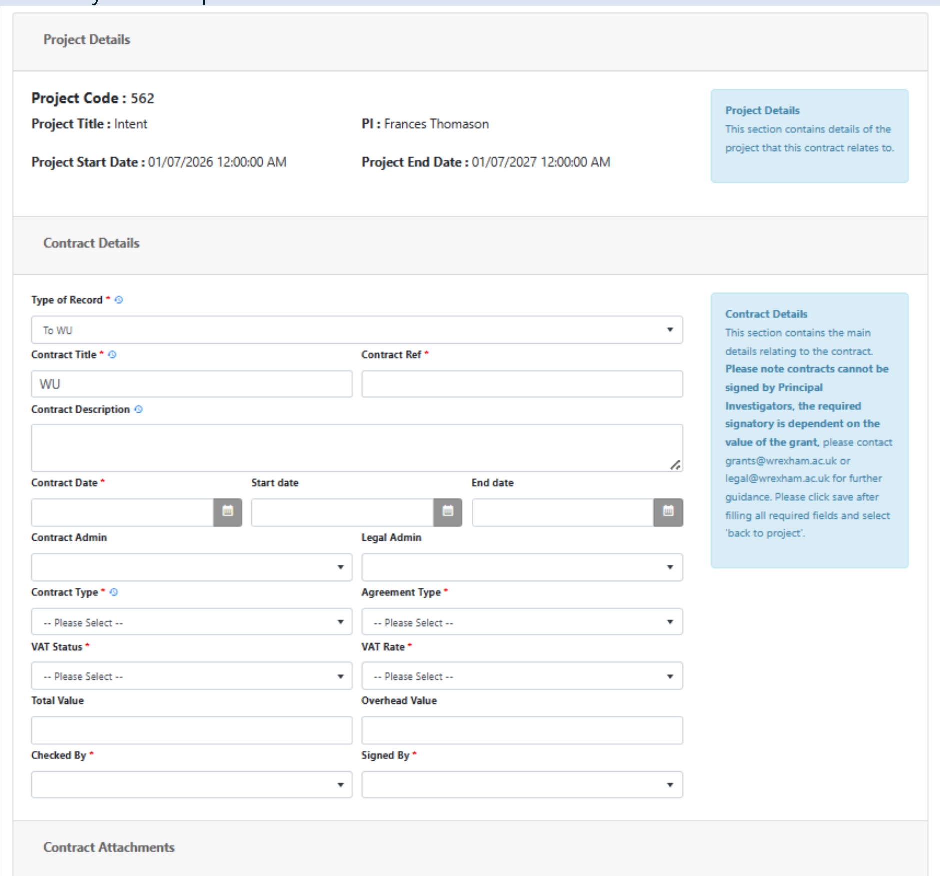
You must also complete the Contracts section of grant management before the project can begin.
Select 'Add Contracts'. Add the type of document, if it is a contract to Wrexham University or put in place by Wrexham University, provide a description and select submit.



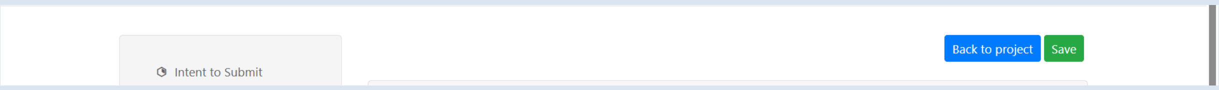
You the need to select the paper and pen icon to open and complete the contract details



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.



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 /a> 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.