Costing PACE Applications:
Worktribe 'Standalone Budgets'

Introductory Guidance

The below instructions have been developed for applicants considering submitting an application to the PACE fund and for how to go through the costing process using Worktribe.
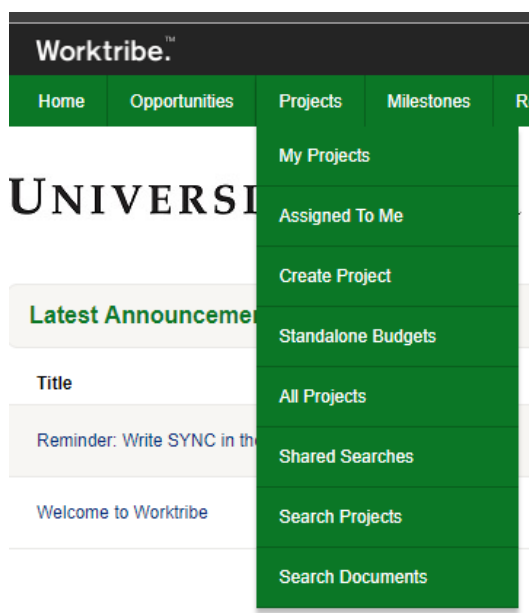
If the instructions do not allow you to export the level of details required then you can use the main part of Worktribe. If you do need to do this, please start the Project Title with ~DNS~ (Do Not Submit) and select the Project Activity Type to be "Other".

Standalone Budgets

- Standalone budgets are cut down projects that only contain the Budget, Details and Summary tabs. Standalone budgets can be created and shared with specific named people, but they have no workflow.
- Previously standalone budgets could not be turned into standard budgets that have a workflow but there is now a feature that enables the user to create a 'standard' project from a Standalone budget.
- If you turn a stand alone budget into a standard budget be sure to check that the 'Project Activity Type' and 'Project Type' categories match on the newly created standard.
- Standalone budgets will assist Departments in costing non-research activity (such as consultancy) and performing quick costing that do not require a full project to be created (PACE application).

Step-by-step guide

1. Select Projects and Standalone Budgets from the main menu.

2. Click the Add Standalone Budget button and fill out the Create form. Under Editors you can add other people you want to share the budget with.

3. To save this entry, click Add

4. Choose Research England as the funder and then manually amend the Scheme to be 'HEIF Funding Only - Research England' as below:

5. Create the project as a DNS project as it cannot be workflowed (only R or R coded projects are able to be workflowed in Worktribe).

6. In the Budget tab you can add budget lines in the same way you can with a full project. Please be aware, that if you cost in a named person on a standalone budget, they will receive a notification email saying that you have added them into the budget. For further information on developing a budget please refer to our please refer to our adding costs to your application guide.

7. You can set the currency for your budget and set the exchange rate.

8. Standalone budgets cannot be turned into full projects, however, under Actions > Export Budget you can download your budget as a spreadsheet.

Converting a standalone budget to a full live project.

As of Worktribe release 2021.1 you will be able to create a full live project from a stand alone budget by clicking the green button "Convert to project". The original standalone budget will remain but you will now also have a live project based on your standalone budget.

The red square indicates missing data (for example, selecting Project Type).

Live project made from standalone budget

If you turn a stand alone budget into a standard budget be sure to check that the 'Project Activity Type' and 'Project Type' categories match on the newly created standard