

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.

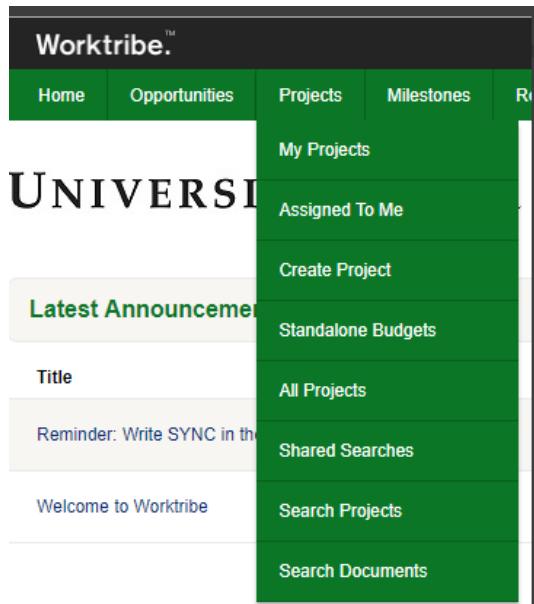
If the instructions do not allow you to export the level of details required then you can use the main part of Worktribe. If you do need to do this, please start the Project Title with ~DNS~ (Do Not Submit) and select the Project Activity Type to be "Other".

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.



- 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.

Add Standalone Budget

*Title:

*Org Unit: Select Org Units

*Funder: Select Funders

Scheme: Select Funder Schemes

*Dates: 1 May 2018 for 1 Year

*Activity Type: Select Project Activity Type

*Currency: Sterling

Currency Rate: Automatic

*Editors: Brian Biology (test2)

Add

- To save this entry, click Add
- Choose Research England as the funder and then manually amend the Scheme to be 'HEIF Funding Only - Research England' as below:

* Project Type Consultancy

* Project Activity Type Consultancy

Tags

* Funder Research England

Scheme Research England Default Scheme

Name of Call HEIF Funding Only - Research England

URL of Call

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- 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).
- 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 screenshot shows the Worktribe interface. At the top, there is a navigation bar with links for Home, Profiles, Opportunities, Projects, Contracts, Reports, Admin, and Help. A search bar is located at the top right. Below the navigation bar, there is a banner for a budget titled "Budget 950416: Pinocchio - Standalone Budget To A Real Budget". The banner includes a thumbnail image of a sunset over water and the text "Standalone Budget by you". Below the banner, there are three tabs: Summary, Details, and Budget. The Summary tab is selected. On the left side of the main content area, there is a thumbnail image of a sunset over water. To its right, the title "Pinocchio - Standalone budget to a real budget" is displayed. Below the title, it says "3M Company" and "1 Jun 2021 - 31 May 2022". Under the "Budget Summary" section, there are two rows of data: "Cost to HEI: £180,671.87" and "Cost to Funder: £180,671.87". A green button labeled "Convert to Project" is visible at the bottom left of the summary section.

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

The screenshot shows the Worktribe interface. At the top, there is a navigation bar with links for Home, Profiles, Opportunities, Projects, Contracts, Reports, Admin, and Help. A search bar is located at the top right. Below the navigation bar, there is a message: "Project created from standalone budget ID 950416" and another message: "Please set up your bid below and Submit for Approval when ready." Below these messages, there is a banner for a project titled "Project 953236: Pinocchio - Standalone Budget To A Real Budget". The banner includes a thumbnail image of a colorful abstract pattern and the text "Bid Development by you, Biology Admin, Pre-award Admin and RGC - Life and Health Sciences". Below the banner, there are ten tabs: Summary, Details (which has a red notification badge with the number 1), Partners, Budget, Contracts, Peer Review, Ethics, Documents, Milestones, and Benefits. The Details tab is selected. On the left side of the main content area, there is a thumbnail image of a colorful abstract pattern. To its right, the title "Pinocchio - Standalone budget to a real budget" is displayed. Below the title, it says "Biology Research - 3M Company" and "1 Jun 2021 - 31 May 2022". It also lists "Bid Development" and "RGC - Life and Health Sciences". At the bottom left, there is a "Project Team" section with a pencil icon, and at the bottom right, there is a "Budget Summary" section.

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