

# Grants and Projects System (GaP) Training Session

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# What is GaP?

- New Software for externally funded projects including Grant applications and Knowledge Exchange Projects
- Base platform procured from Unit 4 and tailored by the LJMU project team encompassing Finance, RIS, CSST and ITS.



UNIT4

# Why did we invest in it?

- Support the University's strategic aim to increase external funding from Research & Enterprise activity
- Empower our academic community to create their projects and develop their costings
- One single source of information
- Reduce paperwork and email traffic
- One process for research and enterprise activities

# Features

- Costing and Pricing tool
- Collaborate in one space with RIS and Finance
- Transparency on bid and project status
- Reporting capability
- Automated sign off

# Basic GaP Training

GaP training will provide you with an introduction to the new system. By the end of the session you will be able to:

- Generate your unique GaP number
- Create your own costings
- Understand how your project will progress through the system
- Find information about your project
- Know what support is available

# Exercise 1 – Creating a Project

- Add basic information
- Learn how to navigate within the system
- Select a project status
- Generate a GaP number

**Project setup**

Project | Project Information | Peer Review | In Kind & Funders | Faculty | Project Management | Risk Assessment | Primary Contract | Secondary Contract | Awarded | Ethics

Search

GaP no.  Short title  Status

Project title\*

Costing type	Version	Active	Funder deadline	RS deadline
<input type="button" value="Add"/>	<input type="button" value="Make active"/>			

**Principal Investigator**

<input type="checkbox"/>	Name	School 1	Lead Dept?
<input type="button" value="Add"/>	<input type="button" value="Delete"/>	<input type="button" value="Change department"/>	

**Lead Funder Only**

<input type="checkbox"/>	Funder nam...	Proposed start date	Proposed duration (mths)	Proposed end date	Scheme na...	Version	Funder deadline	Currency	Rate	Price limit currency	Price limit amount	Lead Funder
<input type="button" value="Add"/>	<input type="button" value="Delete"/>	<input type="button" value="Currency revaluation"/>	<input type="button" value="Change scheme"/>	<input type="button" value="Change proposed dates"/>	<input type="button" value="Use dates as default"/>							<input type="button" value="↕"/>

**External partner(s)**

<input type="checkbox"/>	Partner PI name	Partner name	Is partner leading?	Funds paid via
<input type="button" value="Add"/>	<input type="button" value="Delete"/>	<input type="button" value="Edit name"/>		

**Individual costings**

PI name	Funder	Funder deadline	School 1 Dept	School deadline	School Ref	RS deadline	External Ref	Price GBP	Costing status

# Exercise 2 – Creating a Costing

- Locate your project
- Check in and Check out
- Add staff, equipment and non-staff costs
- Complete the project information fields
- Change the project status

**Costing**

Project title: GaP Project Study | Short title: GaP Project Study | Lead Dept: School of Nursing and Allied Health

Costing status: Application v1 | Draft | PI: Green, Ms. Teresa

GA# No.: GAP60000146 | RS deadline: 04/03/2019 | Funder deadline: 15/04/2019 | Currency: Sterling Pound (GB) | Rate: 0.00000000

**Further summary data**

Proposed project information: Start date: 01/05/2019 | Duration (mths): 24.00 | End date: 30/04/2021

	GBP	Currency
Total FAC	0.00	0.00
Total price	0.00	0.00
Price limit	0.00	0.00

Funder: Unilever UK Ltd | School: School of Nursing and Allied Health | Currency: Sterling Pound (GB)

Staff | Students | Equipment | Non-staff | FEC | Price | Notes | Conf questions | Action overview

**DI total**

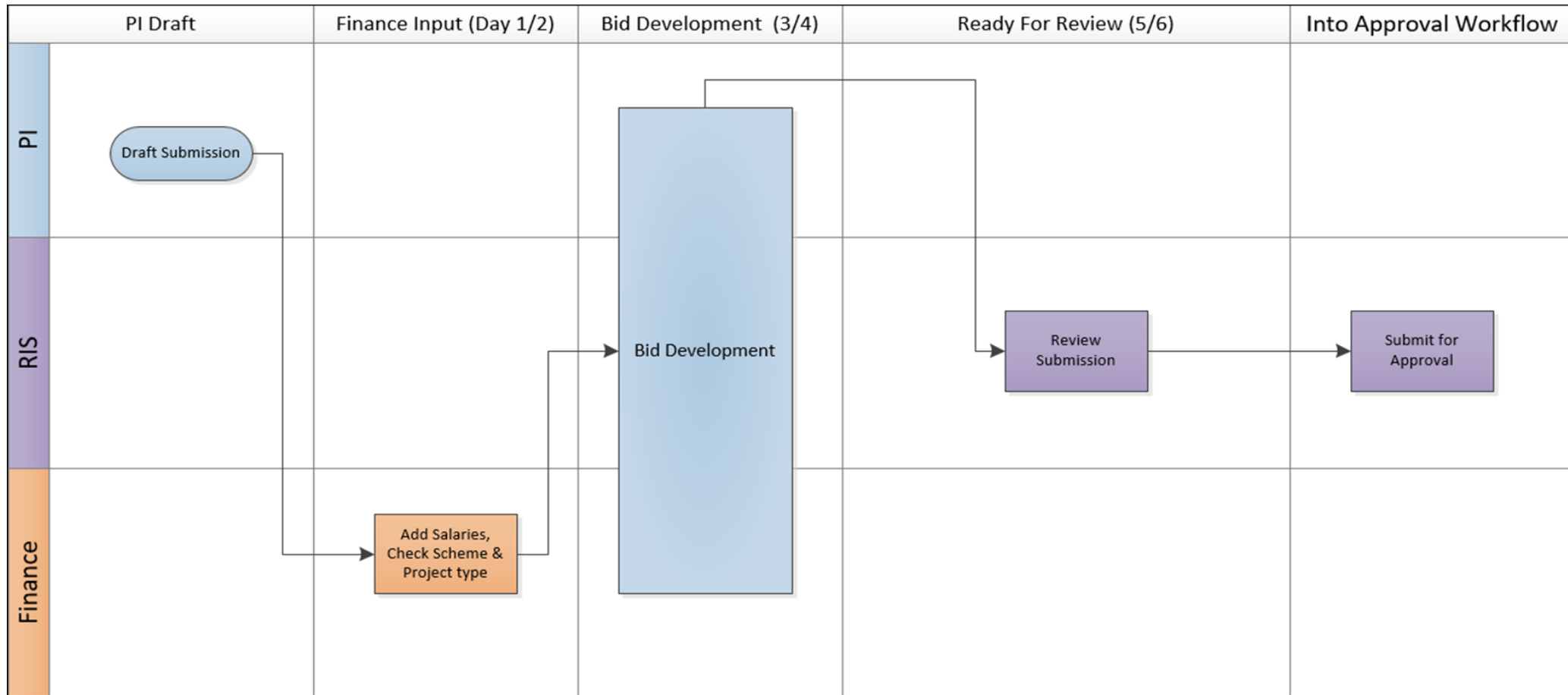
No of DI posts	DI salary total	DI staff total
0	0.00	0.00

**Breakdown by person**

Name	Role	School	Grade	Scale	Current staff?	Supann scheme	Start date	Duration (mths)	End date	Effort type	Effort value	Cost type	Funder budget heading	Finance budget heading	Salary total
Green, Ms. T.	PI	SCHO21	GR5	19	✓	LGPS	01/05/2019	24.00	30/04/2021	FTE	0.00	DA	DA Staff Costs	E234 - Overheads	0.00

Buttons: Save | Cancel | Project setup | Copy | Validate | Submit | Check out | Export

# Project Development





- Make changes within the Costing screen
- Add documents
- Validate your project
- Change project status

Costing dashboard

Quick search

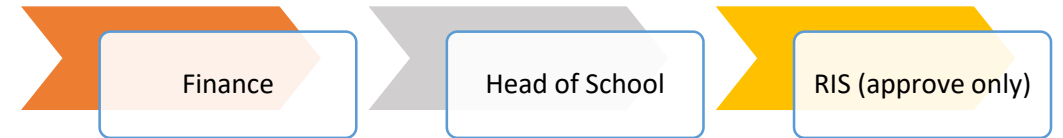
Search for

Drafts Workflow Recent

GaP No.	PI name	Funder	Short title	Price GBP	Costing status	School deadline	RS deadline	Funder deadline	School	Creator
GAP50000...	Clever, Profe...	46931	test	0	Application v1 - Draft	17/01/2019	17/01/2019	28/02/2019	SCH098	772589
GAP50000...	Clever, Profe...	99999997	test	0	Application v1 - Draft	18/01/2019	18/01/2019	01/03/2019	SCH098	772589
GAP60000...	Clever, Profe...	46110	Bob	115,306	Application v1 - Draft	01/02/2019	01/02/2019	15/03/2019	SCH098	772589
GAP60000...	Clever, Profe...	46110	test	0	Application v1 - Draft	07/02/2019	07/02/2019	21/03/2019	SCH098	772589
GAP50000...	Clever, Profe...	46110	Stage Progression_280219	50,539	Application v1 - Draft	18/02/2019	18/02/2019	30/03/2019	SCH098	772589
GAP50000...	Clever, Profe...	46110	PI Windows Access 280219 DC	0	Application v1 - Draft	18/02/2019	18/02/2019	31/03/2019	SCH098	772589
GAP60000...	Clever, Profe...	46110	KS Test PI	0	Application v1 - Draft	20/02/2019	20/02/2019	13/03/2019	SCH098	772589

# Workflow

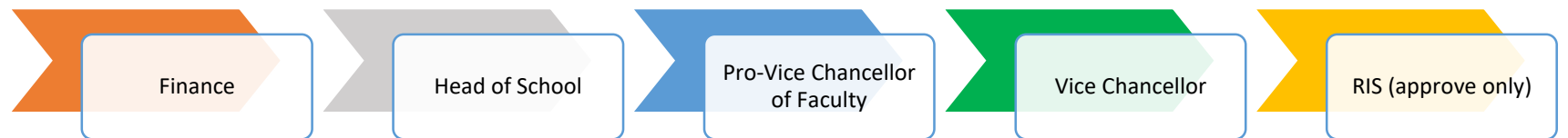
- Standard



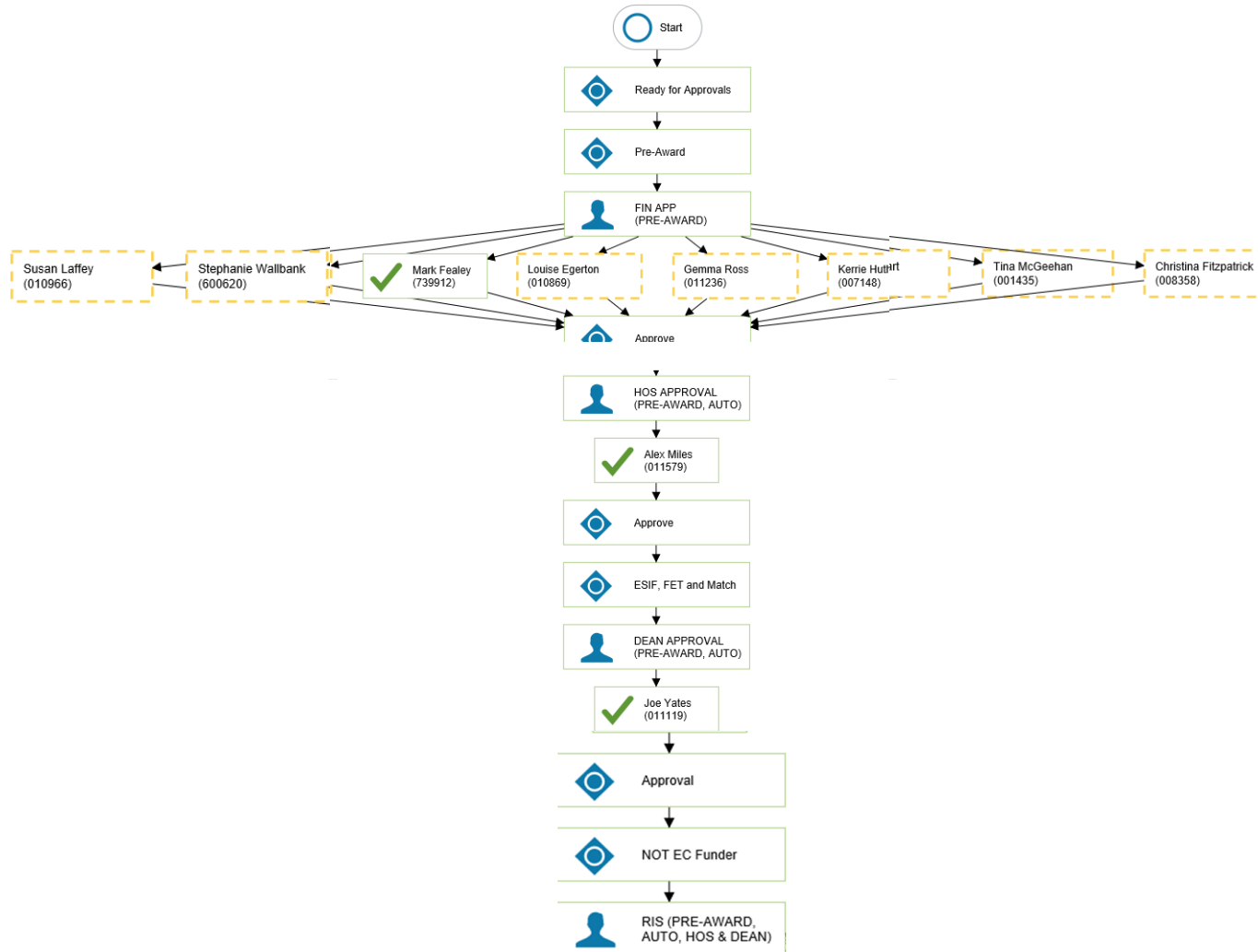
- Match funding



- ERDF/ESIF/  
Liverpool City Region  
Combined Authority



# Workflow Map



- Once you know, you can change the status from Internally Approved to either Successful, Unsuccessful or Withdrawn
- If you are successful, please upload a letter or email or success onto the Document Store – Finance will need this to process your Award on the system

UNIT4 Business World

Project setup x

01 All Projects\_ris > Project setup

**Project setup**

Project | Project Information | Peer Review | In Kind & Funders | Faculty

**Project Information**

Project Status\*

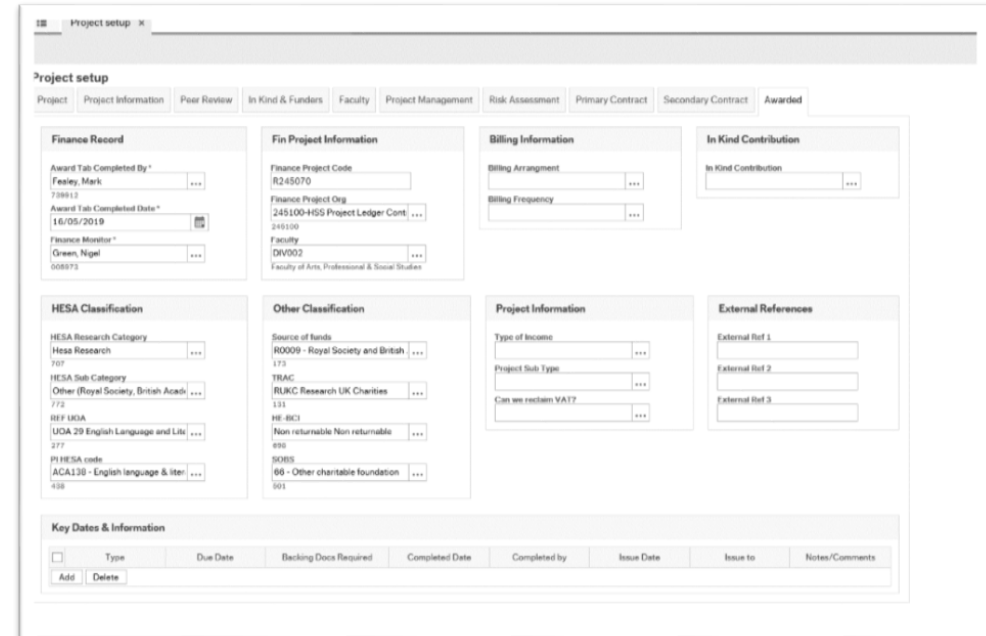
Submitted Externally	
Submitted Externally	SUBMIT
Successful	SUBSUC
Unsuccessful	SUBUN
Withdrawn	SUBWID

Name of Call

Full name of the call

# Post-Award Actions & Support

- Award costing will be completed by RIS & Finance
- Legal input will be recorded
- Finance will complete all project classifications and monitoring information
- Automatic creation within Oracle of a project code
- Email to confirm the project has been set up will be sent to you from the system



The screenshot displays the 'Project setup' form in Oracle, which is divided into several sections for data entry:

- Finance Record:** Includes fields for 'Award Tab Completed By' (Fasley, Mark), 'Award Tab Completed Date' (16/05/2019), and 'Finance Monitor' (Green, Nigel).
- Fin Project Information:** Includes 'Finance Project Code' (R245070), 'Finance Project Org' (245100-HSS Project Ledger Cont), 'Faculty' (DV002), and 'Faculty of Arts, Professional & Social Studies'.
- Billing Information:** Includes 'Billing Arrangement' and 'Billing Frequency'.
- In Kind Contribution:** Includes 'In Kind Contribution'.
- HESA Classification:** Includes 'HESA Research Category' (707), 'HESA Sub Category' (772), 'REF UKA' (377), and 'PI HESA code' (ACA138).
- Other Classification:** Includes 'Source of funds' (R0009 - Royal Society and British), 'TRAC' (RLKRC Research UK Charities), 'HE-BCI' (Non returnable Non returnable), and 'SORS' (66 - Other charitable foundation).
- Project Information:** Includes 'Type of Income', 'Project Sub Type', and 'Can we reclaim VAT?'. There is also a 'Project Information' section with 'Type of Income', 'Project Sub Type', and 'Can we reclaim VAT?'.
- External References:** Includes 'External Ref 1', 'External Ref 2', and 'External Ref 3'.
- Key Dates & Information:** A table with columns for 'Type', 'Due Date', 'Backing Docs Required', 'Completed Date', 'Completed by', 'Issue Date', 'Issue to', and 'Notes/Comments'. It includes 'Add' and 'Delete' buttons.

# Support Available

- RIS & Finance will continue to provide support
- Receive an email with a link to the user guide and training films
- Support within the system through Knowly
- Ongoing training will be available
- Quick costing
- To access GaP use the link from the Staff Pages Quick Links

# Thank you



[GaP@ljmu.ac.uk](mailto:GaP@ljmu.ac.uk)

[RIS Staff Pages](#)