

## User Guide for Internal Research Fund for Schools and Departments

All Internal Funds Applications are to be applied for via **Unit4 ERP**. The Application form can be accessed via

- **MyHope > My Research > Internal Research Funds** (*opens the Unit4 ERP login page*)
- [Via this Unit4 link](#) (*Create a desktop icon or bookmark for future use*)

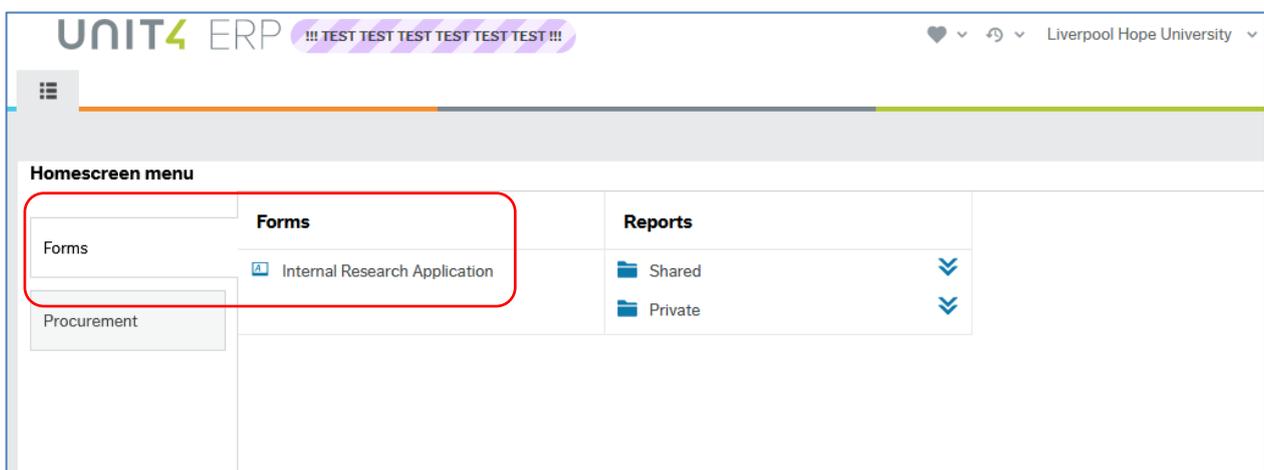
**For queries relating to access or form use contact [financesystem@hope.ac.uk](mailto:financesystem@hope.ac.uk)**

### Important things to note when using Unit4 ERP [Forms]

- **Date format is browser dependent and may appear in US format M/D/Y rather than British format D/M/Y.**
- **It is recommended to TAB through the fields rather than using a mouse.**
- **Fields are highlighted yellow when active (the colour intensity may vary between screens). TAB out of the field to save the data.**
- **An Asterix\* denotes a MANDATORY field. A form cannot be saved [as DRAFT] or submitted until all mandatory fields are populated.**
- **Fields with a 'Lookup Function' (3 dots) require a 'double TAB' to move to the next field.**
- **Lookup Functions and Dropdown Lists can be accessed by pressing the spacebar (rather than using the mouse)**
- **The form is 'dynamic' i.e. new fields and/or sections will appear based on data entered.**

### Applying for School or Department Devolved Research Funds

- Log into Unit4 ERP, and from the Homescreen Menu
  - Select **Forms > Internal Research Application** to start your application

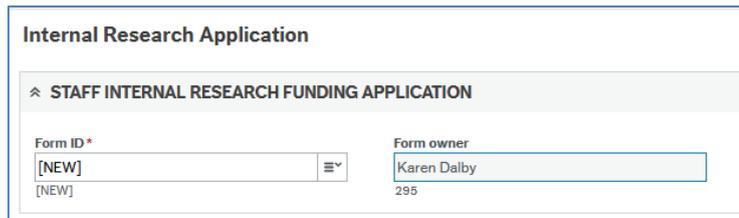


# Internal Research Application

## 1. Form Header

### 1.1. Creating a New Application

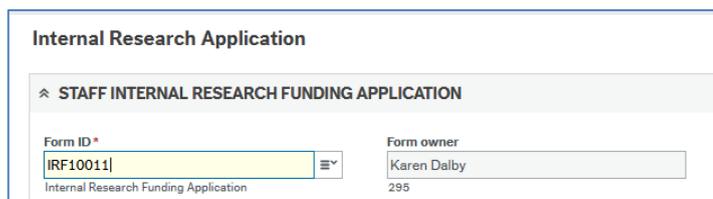
- Do not attempt to populate the **Form ID\* [NEW]** field.
- A reference number [IRF1\*\*\*\*\*] is automatically generated (in the **Form ID\*** field) when a **NEW** FORM is saved as a **DRAFT**. This is your application reference that can be used to access the form at a later date (see below).
- When all of the mandatory fields are complete [PI Detail tab] the form can be saved as **DRAFT**.



The screenshot shows the 'Internal Research Application' form header. Under the sub-header 'STAFF INTERNAL RESEARCH FUNDING APPLICATION', there are two input fields. The 'Form ID\*' field contains '[NEW]' and has a dropdown arrow. The 'Form owner' field contains 'Karen Dalby' and '295' below it.

### 1.2. Opening a previously saved (DRAFT) Application

- To re-open a **DRAFT** form, enter the previously generated reference number (see above) in the **Form ID\*** field by overwriting **[NEW]**.
- Tab out of the field to open an existing form.

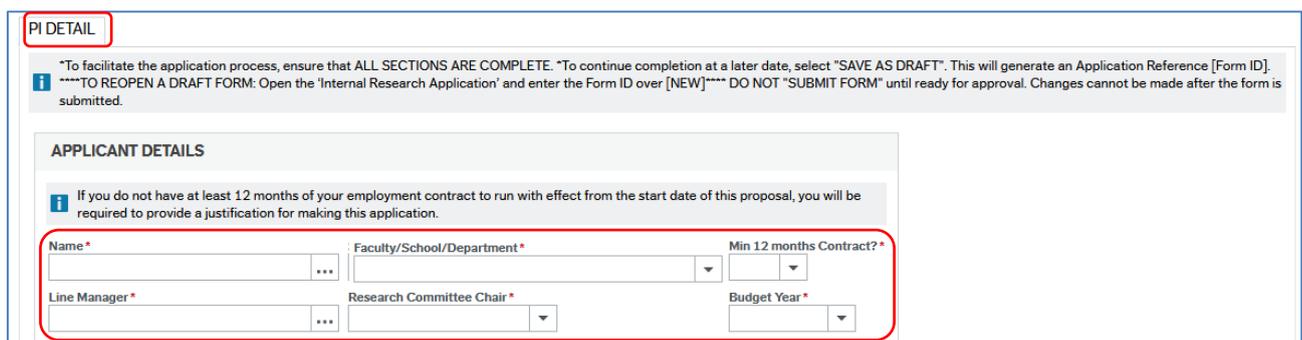


The screenshot shows the 'Internal Research Application' form header. Under the sub-header 'STAFF INTERNAL RESEARCH FUNDING APPLICATION', there are two input fields. The 'Form ID\*' field contains 'IRF10011' and has a dropdown arrow. The 'Form owner' field contains 'Karen Dalby' and '295' below it.

## 2. PI DETAIL tab (2 sections: the information determines the approval route of the application)

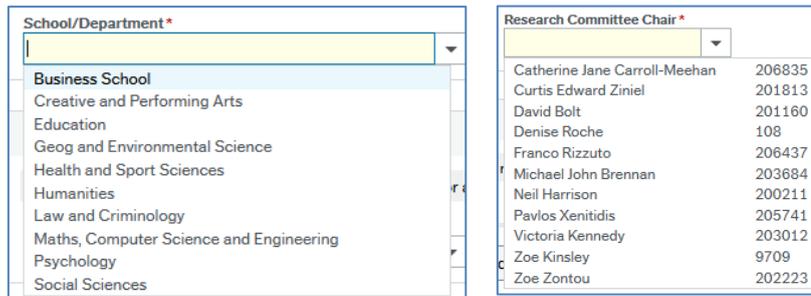
### 2.1. APPLICANT DETAILS

- **Name:** start typing your surname / last name, select your name from the list and tab onto the next field.
- **Min 12 months contract?** If you have more than 12 months on your contract select YES
- **Line Manager:** start typing your line managers surname / last name, select the appropriate name from the list and tab onto the next field.
- **Faculty/School/Department; Research Committee Chair; Budget Year:** Select the appropriate data from the dropdown lists.



The screenshot shows the 'PI DETAIL' tab. At the top, there is a warning message: "To facilitate the application process, ensure that ALL SECTIONS ARE COMPLETE. To continue completion at a later date, select 'SAVE AS DRAFT'. This will generate an Application Reference [Form ID]. TO REOPEN A DRAFT FORM: Open the 'Internal Research Application' and enter the Form ID over [NEW] DO NOT 'SUBMIT FORM' until ready for approval. Changes cannot be made after the form is submitted." Below this is the 'APPLICANT DETAILS' section. A red box highlights the following fields: 'Name\*' (with a dropdown arrow), 'Faculty/School/Department\*' (with a dropdown arrow), 'Min 12 months Contract?\*' (with a dropdown arrow), 'Line Manager\*' (with a dropdown arrow), 'Research Committee Chair\*' (with a dropdown arrow), and 'Budget Year\*' (with a dropdown arrow).

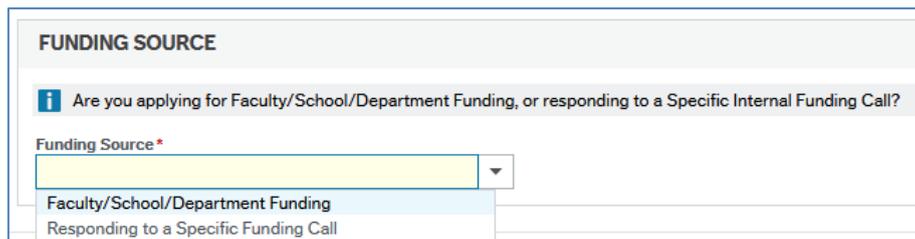
Press the **Spacebar** or select the **Down Arrow** (to the right of the field) to access the lists.



School/Department *	Research Committee Chair *
Business School	Catherine Jane Carroll-Meehan 206835
Creative and Performing Arts	Curtis Edward Zinief 201813
Education	David Bolt 201160
Geog and Environmental Science	Denise Roche 108
Health and Sport Sciences	Franco Rizzuto 206437
Humanities	Michael John Brennan 203684
Law and Criminology	Neil Harrison 200211
Maths, Computer Science and Engineering	Pavlos Xenitidis 205741
Psychology	Victoria Kennedy 203012
Social Sciences	Zoe Kinsley 9709
	Zoe Zontou 202223

## 2.2. Funding Source

- Select the Funding you are applying for (*for devolved funds select **Faculty/School/Department***)



**FUNDING SOURCE**

**i** Are you applying for Faculty/School/Department Funding, or responding to a Specific Internal Funding Call?

Funding Source \*

Faculty/School/Department Funding

Responding to a Specific Funding Call

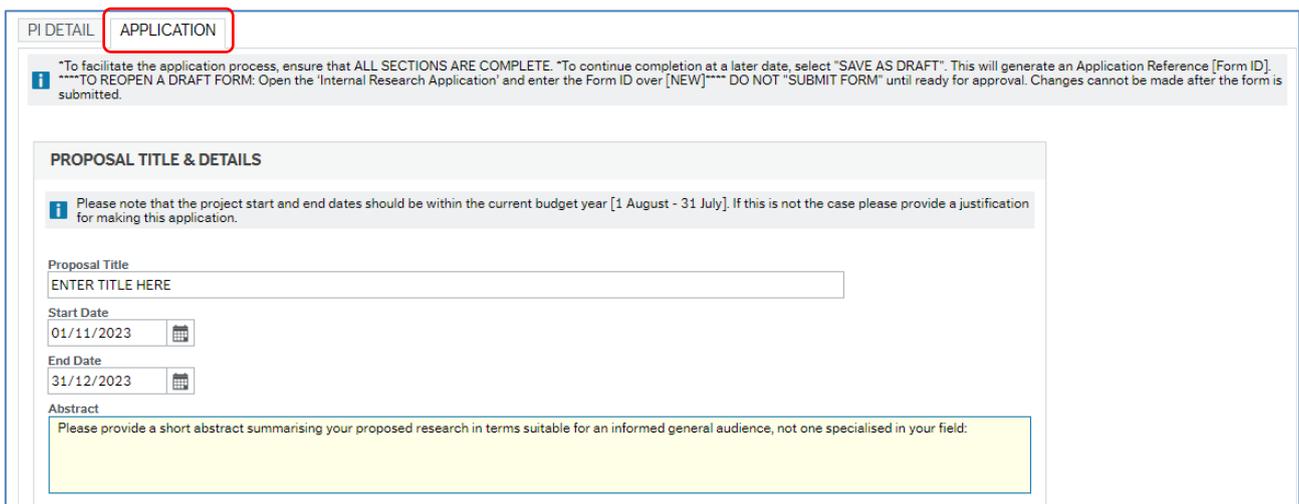
When the **PI DETAIL** tab is complete **SAVE the form as a DRAFT** and move onto the **APPLICATION** tab.

## 3. APPLICATION tab (sections available will depend on previous selections)

- Proposal Title and Details
- Schemes
- Co-Investigators
- Funding / Budget Detail
- Justification
- Planned Research Outputs

### 3.1. Proposal Title and Details

- Enter the **Proposal Title, Start and End Dates, and Abstract**



PI DETAIL APPLICATION

**i** \*To facilitate the application process, ensure that ALL SECTIONS ARE COMPLETE. \*To continue completion at a later date, select "SAVE AS DRAFT". This will generate an Application Reference [Form ID]. \*\*\*\*\*TO REOPEN A DRAFT FORM: Open the 'Internal Research Application' and enter the Form ID over [NEW]\*\*\*\*\* DO NOT "SUBMIT FORM" until ready for approval. Changes cannot be made after the form is submitted.

**PROPOSAL TITLE & DETAILS**

**i** Please note that the project start and end dates should be within the current budget year [1 August - 31 July]. If this is not the case please provide a justification for making this application.

Proposal Title  
ENTER TITLE HERE

Start Date  
01/11/2023

End Date  
31/12/2023

Abstract  
Please provide a short abstract summarising your proposed research in terms suitable for an informed general audience, not one specialised in your field:

### 3.2. Schemes

- Select the appropriate scheme(s)

**SCHEMES**

**i** Tick all that apply, and add subcategories as required.

<input type="checkbox"/> Research Centre	<input type="checkbox"/> Individual Research Grant	<input type="checkbox"/> Travel Grant	<input type="checkbox"/> Publications	<input type="checkbox"/> Conference Organisation
<input type="checkbox"/> Open Access	<input type="checkbox"/> Research Environment	<input type="checkbox"/> Impact	<input type="checkbox"/> Other Scheme	

- When the boxes are ticked further options may appear.
- Select the relevant information from the dropdown boxes. See example below:

**SCHEMES**

**i** Tick all that apply, and add subcategories as required.

<input type="checkbox"/> Research Centre	<input checked="" type="checkbox"/> Individual Research Grant	<input type="checkbox"/> Individual Grant Subcat	<input checked="" type="checkbox"/> Travel Grant	<input type="checkbox"/> Travel Grant Subcategory
		Early Career Researcher		Preparation Travel
<input checked="" type="checkbox"/> Publications	<input type="checkbox"/> Publication Subcategory	<input type="checkbox"/> Conference Organisation	<input type="checkbox"/> Open Access	<input type="checkbox"/> Research Environment
	Journal			
<input type="checkbox"/> Impact	<input type="checkbox"/> Other Scheme			

### 3.3. Co-Investigators

- Complete this section if you have collaborators.
- Tick Internal and/or External, as appropriate, to open the detail sections for completion.

**CO-INVESTIGATORS**

**i** To add Co-Investigator details please tick all that apply. A new section(s) will open below for completion.

<input checked="" type="checkbox"/> Internal	<input type="checkbox"/> External
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#### 3.3.1. Internal Co-Investigators

- Click 'Add' to create a new line. Tick the box and 'Delete' to remove unwanted lines.
  - Type ahead to search, using surname / last name, and select from list as required.
  - Select Department from dropdown list

**INTERNAL CO-INVESTIGATORS**

**i** Click 'Add' to start a new row. Type ahead or select from drop-down list to enter details.

<input type="checkbox"/>	Name	Department
<input type="checkbox"/>	Neil Buckley	Maths, Computer Science and Engineering
<input type="checkbox"/>	Susan Cronin 6217	Education

Add Delete

### 3.3.2. External Co-Investigators

- Click 'Add' to create a new line. Tick the box and 'Delete' to remove unwanted lines.
  - Enter all information using free text

**External Co-Investigators**

**i** Click 'Add' to start a new row. Enter full details of participant.

	Full Name	Institution	Department	
<input type="checkbox"/>	Fred Bloggs	University of Scunthorpe	Psychology	
<input type="checkbox"/>	Mavis Jones	University of Hampchester	School of Educational Development	▲

Add Delete

### 3.4. Funding / Budget Detail

- Click 'Add' to create a new line. Tick the box and 'Delete' to remove unwanted lines
- Add items to the Budget tabbing across the columns
  - Choose the **Category** from the Dropdown menu
  - Enter more **Detail** (free text) as required
  - Enter the amount of **Internal Funding** requested
  - Enter the funding requested from **Other Sources** (if any).
  - Enter the **Totals** in the final column (*this is not automatically calculated!*)
- At any point click on the **up arrow**, at the end of the row, to show the row totals (see below)

**FUNDING / BUDGET DETAIL**

**i** Please be thorough in entering your requested budget. Click Add for new lines, and select a category from the drop-down list. Include funding from alternative sources, such as your department. Enter row totals in the last column. Column totals are calculated when the 'up arrow' [at the end of the row] is selected.

	Category	Detail	iREF Funding £	Other Sources £	Totals £	
<input type="checkbox"/>	Travel & Subsistence	Return travel to 5 schools	500.00	50.00	550.00	
<input type="checkbox"/>	Equipment	Handheld devices	150.00	50.00	200.00	▲
Σ			650.00	100.00	750.00	

Add Delete

### 3.5. Justification: Case for support

- The text boxes are limited, to add further information 'Tick to add more detail (1)'.  
(Up to 10 boxes can be added as required)

**JUSTIFICATION**

**i** Please be precise and write no more than 1000 words

**Case for Support**

Please give a description of the research activity, including: rationale, plan of action and methodology as appropriate. Tick the box below to add further information as required.

**Tick to add more detail 1**

**CFS further detail 1**

Add further detail here. Tick the box below to add further information as required.

**Tick to add more detail 2**

### 3.6. Planned Research Outputs: Post-funding Target & target Publication Date

PLANNED RESEARCH OUTPUTS
<b>Post-funding Target</b> Please indicate the expected output(s) from your research activity. As appropriate, include: monograph, journal article(s), book chapter(s), digital resources, other (please specify). Insert target publication / dissemination date below.
<b>Target Publication Date</b> <input type="text"/> 

This is the end of the application. If not already done **Save as Draft** to produce an Application Reference **[Form ID]** *Make a note of this reference for future use.* A draft can be revisited and updated by returning to your application using your **[Form ID]**

#### Approval

- Check back through the application to ensure that all relevant sections have been completed
- Once you have a final version select **Submit Form** to send the application for approval. The approvers will be prompted to review your application via email alerts.
  - The order of approval is
    - Line Manager (as selected on the PI Details Tab)
    - Chair of Research Committee

#### Outcomes

- There are three potential outcomes at each step:
  - Approved
  - Rejected for amendments/changes
    - to be resubmitted
  - Rejected outright

You will receive an Alert via email [from Unit 4 ERP] advising you of the outcome of your application.

#### Final Report

For approved applications a Final Report will need to be completed once the research is complete. To access the **Final Report Tab** tick '**Open Final Report**' at the bottom of the Application page.

(see '*Submit Final Report IRF*' for further information)