

User Guide for Internal Research Fund for Schools and Departments

For the Academic Year commencing September 2023, all Internal Funds Applications are now applied for via Unit 4 ERP.

This is accessed via **MyHope** and the **MyResearch** and then select the **Internal Research Funds** box. It can also be accessed via your usual U4ERP desktop icon / bookmark.

Important things to remember when using Unit4 ERP

Tab through the fields (boxes) – do not use the Arrow Keys

A field (box) that has a 'lookup function' (3 dots) requires a 'double tab' to move to the next field. Fields are highlighted yellow when active (the intensity of colour can vary between screens)

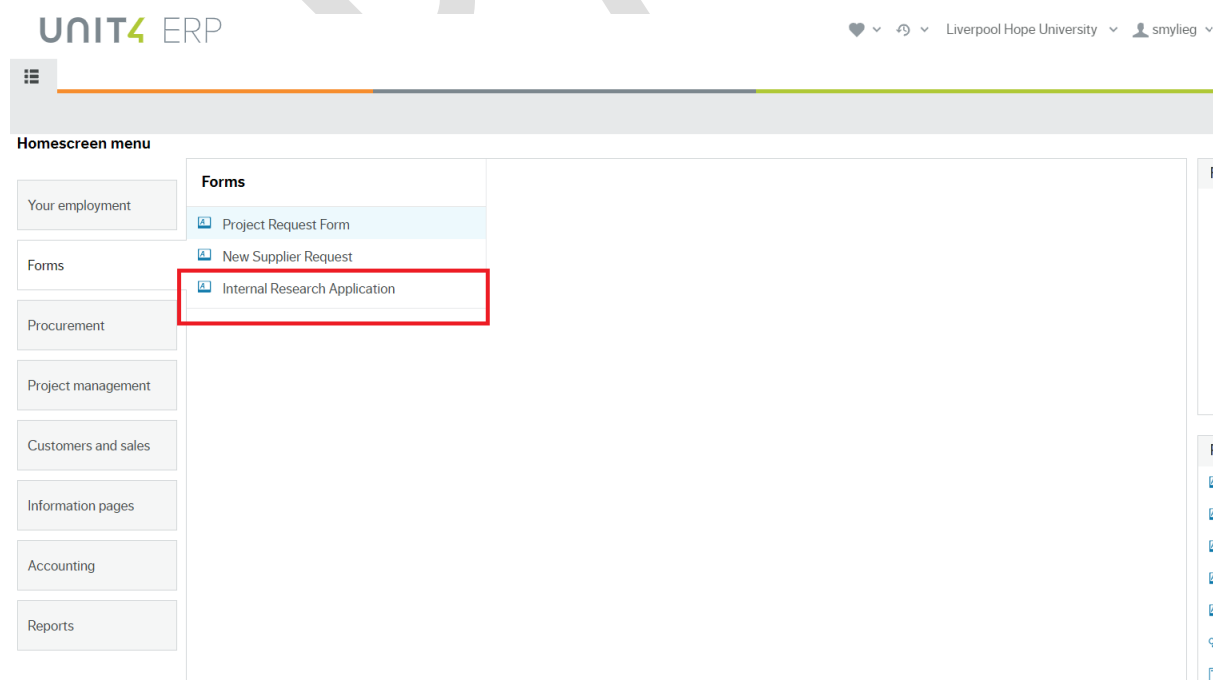
All boxes with an Asterix are mandatory

Dropdown menus can be accessed with the Spacebar or the associated box's down arrow

Date format is browser dependent and may show as US format M/D/Y rather than British format D/M/Y.

To apply for devolved Research Funds from your School or Department, go to the Unit4 ERP **Homescreen Menu** select the **Forms** tab, which will provide you with the options highlighted below.

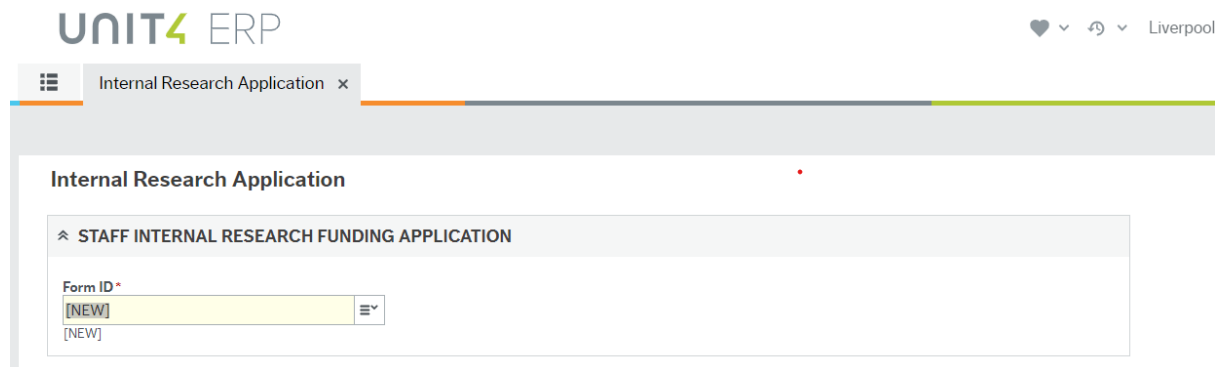
Please select **Internal Research Application** to start your application



Internal Research Application

Step 1 Form Header

You are creating a NEW form so a reference number will be automatically created [IRF1*****] when you save the form as a draft. Therefore, please do not try to populate the **Form ID box – [NEW]**



The screenshot shows the Unit4 ERP interface. At the top, there's a logo for 'UNIT4 ERP' and a user profile for 'Liverpool'. Below this is a navigation bar with a tab labeled 'Internal Research Application'. The main content area is titled 'Internal Research Application' and contains a section for 'STAFF INTERNAL RESEARCH FUNDING APPLICATION'. Within this section, there is a 'Form ID' field with a dropdown menu showing '[NEW]' and a button with a plus icon.

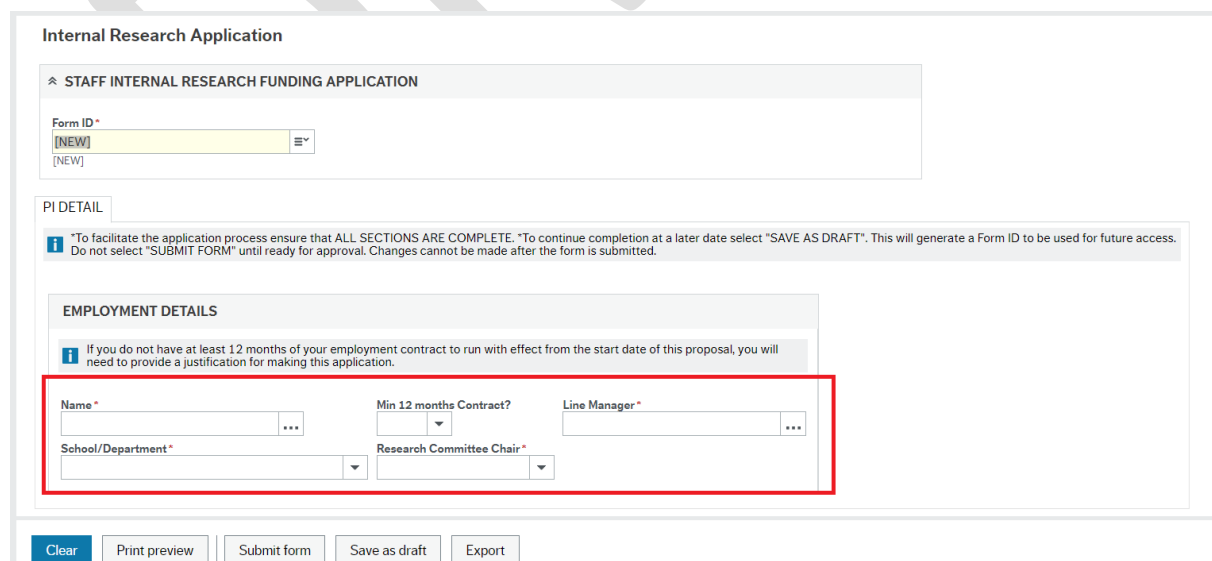
Step 2 Employment Detail (PI Detail tab) (This information is required for approval of the application)

Name start typing your surname / last name, select your name from the list and tab onto the next box

Min 12 months contract? Press spacebar for options

If you have more that 12 months on your contract select **YES**

Line Manager start typing your line managers second name and select from the list and tab onto the next box



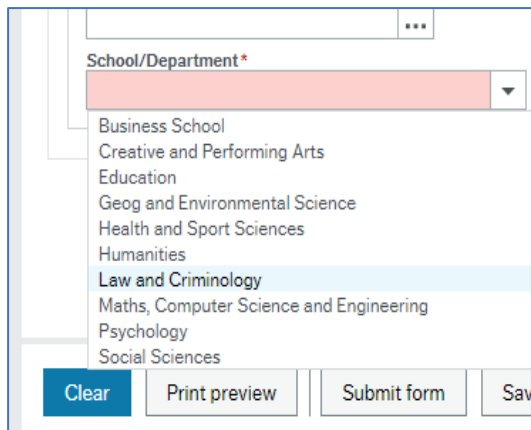
The screenshot shows the 'Internal Research Application' form, specifically the 'PI DETAIL' tab. The form is titled 'STAFF INTERNAL RESEARCH FUNDING APPLICATION'. It includes a 'Form ID' field with a dropdown menu showing '[NEW]'. Below this is a section for 'EMPLOYMENT DETAILS'. This section contains a warning message: 'If you do not have at least 12 months of your employment contract to run with effect from the start date of this proposal, you will need to provide a justification for making this application.' The form fields are: 'Name' (text input), 'Min 12 months Contract?' (dropdown menu), 'Line Manager' (text input), 'School/Department' (dropdown menu), and 'Research Committee Chair' (dropdown menu). The 'Name', 'Min 12 months Contract?', and 'Line Manager' fields are highlighted with a red box. At the bottom of the form, there are buttons for 'Clear', 'Print preview', 'Submit form', 'Save as draft', and 'Export'.

The **School/Department** and **Research Committee Chair** boxes are populated by dropdown menus.

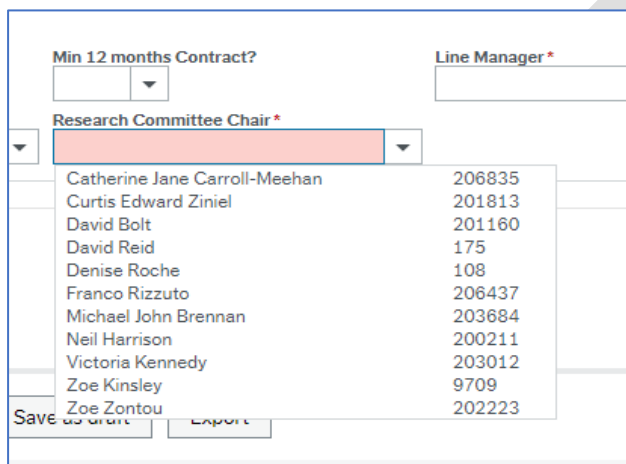
Please select the appropriate School/Department and Research Committee Chair.

Press the **Spacebar** or the **Down Arrow** to the right of the box for the dropdown menus

Please see screen shot illustrations below.



A screenshot of a web form. At the top, there is a text input field with three dots to its right. Below it is a dropdown menu labeled "School/Department*". The dropdown is open, showing a list of departments: Business School, Creative and Performing Arts, Education, Geog and Environmental Science, Health and Sport Sciences, Humanities, Law and Criminology (highlighted in blue), Maths, Computer Science and Engineering, Psychology, and Social Sciences. At the bottom of the form are four buttons: "Clear", "Print preview", "Submit form", and "Save".



A screenshot of a web form. It contains several fields: "Min 12 months Contract?" with a dropdown arrow, "Line Manager*" with a text input field, and "Research Committee Chair*" with a dropdown menu. The dropdown menu is open, showing a list of names and their corresponding IDs: Catherine Jane Carroll-Meehan (206835), Curtis Edward Ziniel (201813), David Bolt (201160), David Reid (175), Denise Roche (108), Franco Rizzuto (206437), Michael John Brennan (203684), Neil Harrison (200211), Victoria Kennedy (203012), Zoe Kinsley (9709), and Zoe Zontou (202223). At the bottom left are "Save as draft" and "Export" buttons.

Once you have completed the **Employment Details (PI Details tab)**, the Application Tab will appear. Now move on to the **Application Tab** – see below

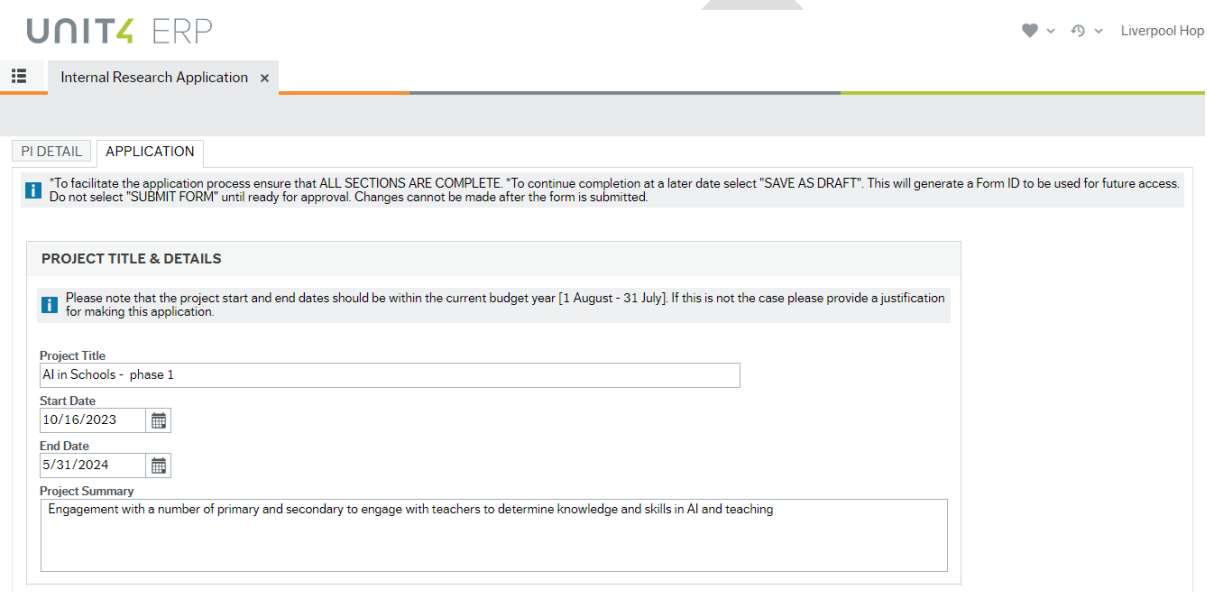
Step 3 – Application tab

This tab comprises of 6 sections:

- Project Title and Details
- Funding Source
- Co-Investigators
- Project Budget
- Justification
- Planned Research Outputs

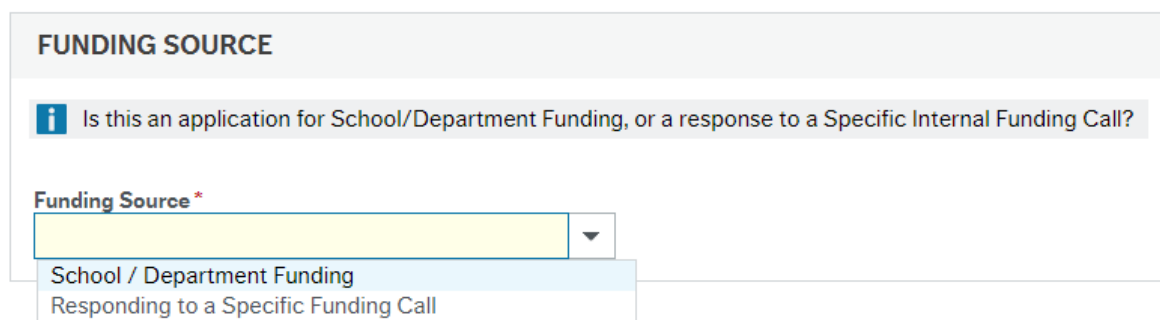
Project Title and Details

Insert your **Project Title**, **Start** and **End Dates** and **Project Summary** (example below)



The screenshot shows the 'UNIT4 ERP' logo at the top left and 'Liverpool Hop' at the top right. Below the logo is a navigation bar with 'Internal Research Application' and a close button. The main content area has two tabs: 'PI DETAIL' and 'APPLICATION'. The 'APPLICATION' tab is active. A message box states: "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 a Form ID to be used for future access. Do not select 'SUBMIT FORM' until ready for approval. Changes cannot be made after the form is submitted." Below this is the 'PROJECT TITLE & DETAILS' section. It contains a message box: "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." The form fields are: 'Project Title' (text input with value 'AI in Schools - phase 1'), 'Start Date' (calendar input with value '10/16/2023'), 'End Date' (calendar input with value '5/31/2024'), and 'Project Summary' (text input with value 'Engagement with a number of primary and secondary to engage with teachers to determine knowledge and skills in AI and teaching').

Insert the Funding you are applying for. For devolved funds select **School/Department funding**



The screenshot shows the 'FUNDING SOURCE' section. It contains a message box: "Is this an application for School/Department Funding, or a response to a Specific Internal Funding Call?". Below this is a dropdown menu labeled 'Funding Source *'. The dropdown is open, showing two options: 'School / Department Funding' and 'Responding to a Specific Funding Call'.

Once you have selected **School/Department Funding** you will need to insert the appropriate **Schemes**

FUNDING SOURCE

i Is this an application for School/Department Funding, or a response to a Specific Internal Funding Call?

Funding Source*

School / Department Funding ▼

SCHEMES

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

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 <input type="checkbox"/>	

A completed example of the **Schemes** box is shown below:

SCHEMES

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

Research Centre <input type="checkbox"/>	Individual Research Grant <input checked="" type="checkbox"/>	Individual Grant Subcat First time Applicant ▼	Travel Grant <input checked="" type="checkbox"/>	Publications <input checked="" type="checkbox"/>
Publication Subcategory Journal ▼	Conference Organisation <input checked="" type="checkbox"/>	Open Access <input checked="" type="checkbox"/>	Research Environment <input type="checkbox"/>	Impact <input type="checkbox"/>
Other Scheme <input type="checkbox"/>				

Co-Investigators (non-mandatory section)

If you have collaborators please complete this section.

Completed examples below:

Internal Co-Investigators (see next page)

CO-INVESTIGATORS

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

Internal ☒ External ☐

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

External Collaborator(s)

CO-INVESTIGATORS

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

Internal ☐ External ☒

External Co-Investigators

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

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

Add Delete

Project Budget

Add items to your Budget – select **Add**

PROJECT BUDGET

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.

<input type="checkbox"/>	Category	Detail	iREF Funding £	Other Sources £	Totals £
<input type="checkbox"/>	Travel & Subsistence	Return travel to 5 schools	500.00	0.00	500.00
<input type="checkbox"/>	Equipment	handheld devices	20.00	0.00	20.00
Σ			500.00	0.00	500.00

Add Delete

Choose the **Category** from the Dropdown menu and then complete the other boxes by Tabbing between the boxes. Please include income from other sources (if any). The total in the final column is not automated so needs to be entered manually.

If you decide to **Delete** an item, select it by putting a tick in the left-hand box on the items line and then select **Delete**

Click on the **up arrow** to add up all items to work out the total (**see example below**)

PROJECT BUDGET

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.

<input type="checkbox"/>	Category	Detail	iREF Funding £	Other Sources £	Totals £
<input type="checkbox"/>	Travel & Subsistence	Return travel to 5 schools	500.00	0.00	500.00
<input type="checkbox"/>	Equipment	handheld devices	20.00	0.00	20.00
Σ			520.00	0.00	520.00

Justification and Planned Outputs

Please insert **Justification** and **Planned Outputs** as per example below.

Also, check back through your application to ensure that you have completed all relevant sections.

JUSTIFICATION

i Please be precise and write no more than 1000 words

Case for support
Engagement with Schools for purposes of determining level of engagement of teachers with AI in teaching - no current data on the subject / Collaboration between School of Education and Computer Science

PLANNED RESEARCH OUTPUTS

Post-funding Target
Determine scope of opportunity for CPD for schools and for ITE programme development. Paper on changing techniques and principles of teaching / teacher education

Target Publication Date
9/26/2024

END OF APPLICATION

i CHECK THAT ALL RELEVANT SECTIONS ARE COMPLETE BEFORE SUBMITTING THE APPLICATION. CHANGES CANNOT BE MADE ONCE SUBMITTED.

Once all is complete **Save as Draft** – this will produce a **Project ID** for your **Application** – **It is important that you make a note of this for future reference.**

Now you have a draft it can be revisited and updated by returning to your application using your **Project ID**.

Approval

Once you have a final version it can be submitted for approval [**Submit Form**].

Your form will go first to your **Line Manager** and then your **Chair of Research Committee**. They will be prompted to review your application via email alerts.

There are three potential outcomes:

- (i) Approved
- (ii) Rejected for amends/changes and then able to resubmit
- (iii) Rejected

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

Application Approval

If your application is approved then a further Tab will appear, the **Final Report Tab**. This will need to be completed once your project is complete.

DRAFT