FORMS1: New Sub-Project Request -GENFUNDS

The purpose of this manual is to explain how to request a New Sub-Project using Agresso Forms. This New Sub-Project Request Form will then follow an Approval workflow dependent on the Cost Class selected on the Form until it then a new Sub-Project is created, or the request is rejected and closed off.

This form will cover the following cost classes:

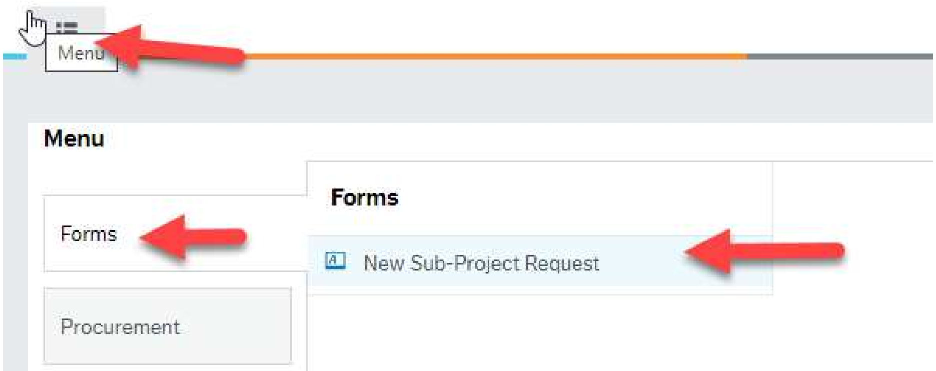
200	Research - Overheads
300	Teaching
400	Teaching - Overheads
401	Open Programme & EFL courses
700	General Funds
702	General Funds - Residences & Hospitality
710	General Funds - Discretionary
711	Donations / Fundraising

Once the New Sub-Project Request Form has created a new Sub-Project an email will automatically be sent to the Form Requestor and Sub-Project Budget Holder making them aware the Sub-Project is available to use.

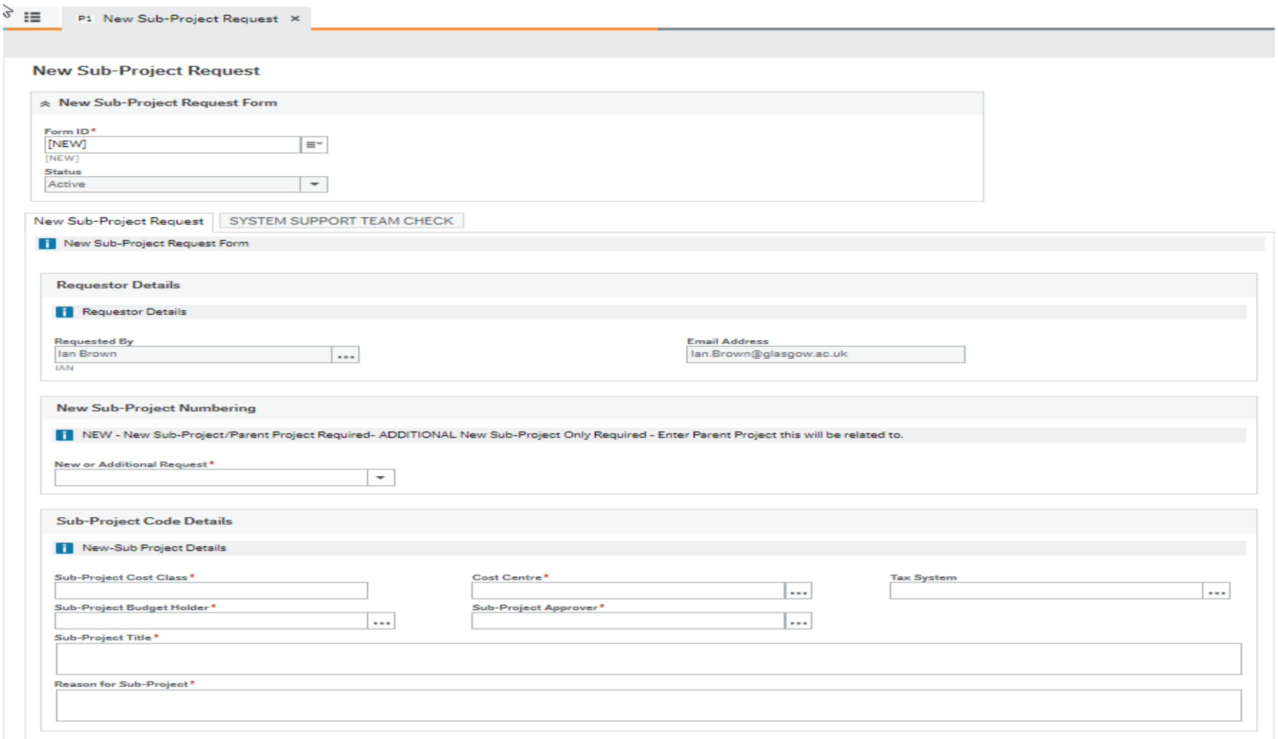
There is also an enquiry that can be used to check the status of the Request as it goes through the workflow process.

FORMS1.1: New Sub-Project Request

1. To access the New Sub-Project Request Form:

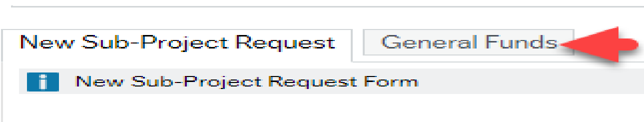


The following screen will appear:



The red star * indicates the required fields that must be entered when completing the Form

2. Depending on the Cost Class entered on the form other Tabs of the Form will need to be completed.



3. Dependent on the data entered in certain fields the Form will dynamically update other fields/Tabs with details.

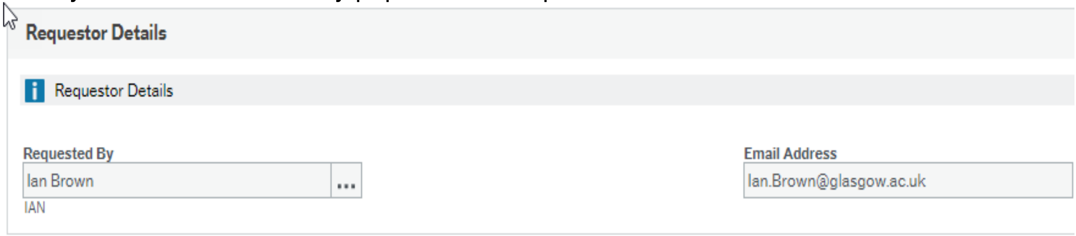
FORMS1.1.2: New Sub-Project Request Details

1. Form ID: This appears once all the Form details have been entered and the Form has been saved.

2. Status: This will show the Status of the Requisition

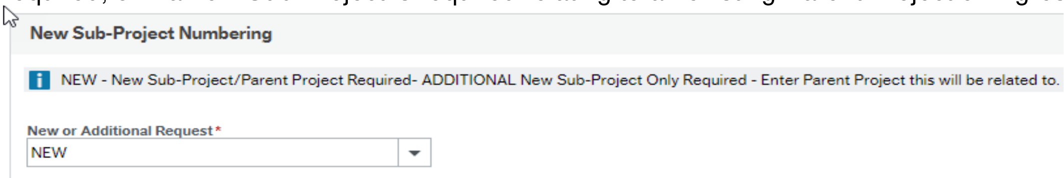
   - Active – The Form can be entered
   - Closed – The Form data cannot be updated.

3. The system will automatically populate the requestor details and email address:

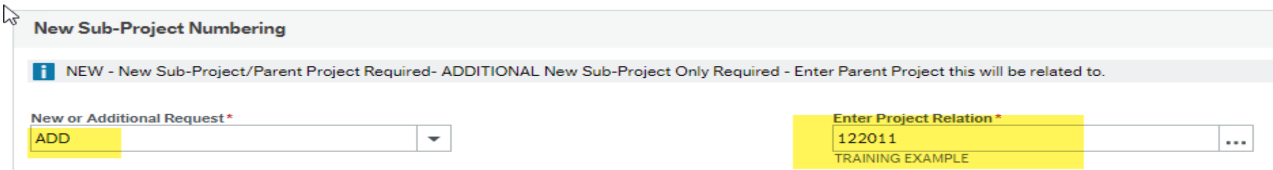


4. New Sub-Project Numbering: Any new Sub-Project number will be determined by the system.

   The Requestor will be able to select if this is a brand new Sub-Project and if Parent Project is also required, or if a new Sub-Project is required relating to an existing Parent Project on Agresso.



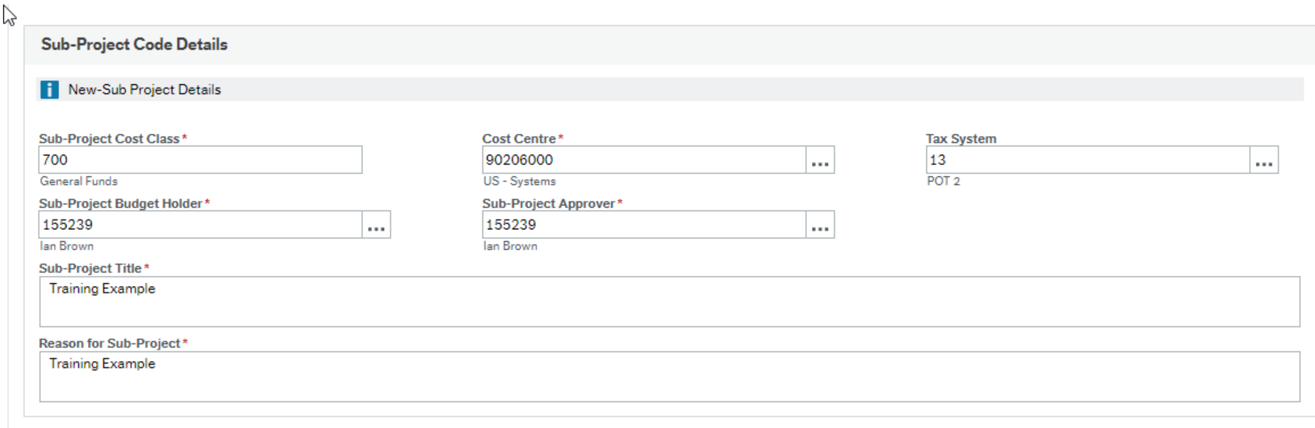
   - NEW – A new Sub-Project and the related Parent Project will be created by Agresso.
   - ADD – A new field will appear to enter the relevant Parent Project that a new Sub-Project will be related to:



5. Sub-Project Cost Class: Enter Cost Class for the New Sub-Project. This Cost Class will drive any further Tabs required to be entered and will also populate other fields within the Form. i.e. Tax System, YTD/LTD.

6. Cost Centre: Enter Cost Centre for the New Sub-Project.

7. Tax System: This field will automatically populate from the Cost Class selected earlier.



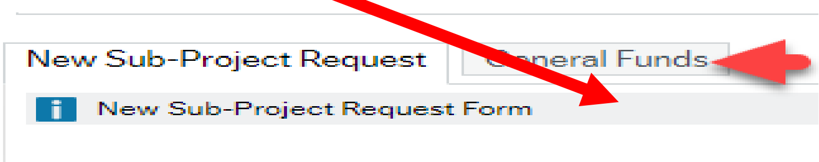
8. Sub-Project Budget Holder: Enter the staff number of the Budget Holder for the New Sub-Project.

9. Sub-Project Approver: Enter the staff number of the Approver for financial processes for the New Sub-Project.

10. Sub-Project Title: Enter the title of the New Sub-Project. (100 Characters max)

11. Reason for Sub-Project: Enter the Reason required to open a New Sub-Project.

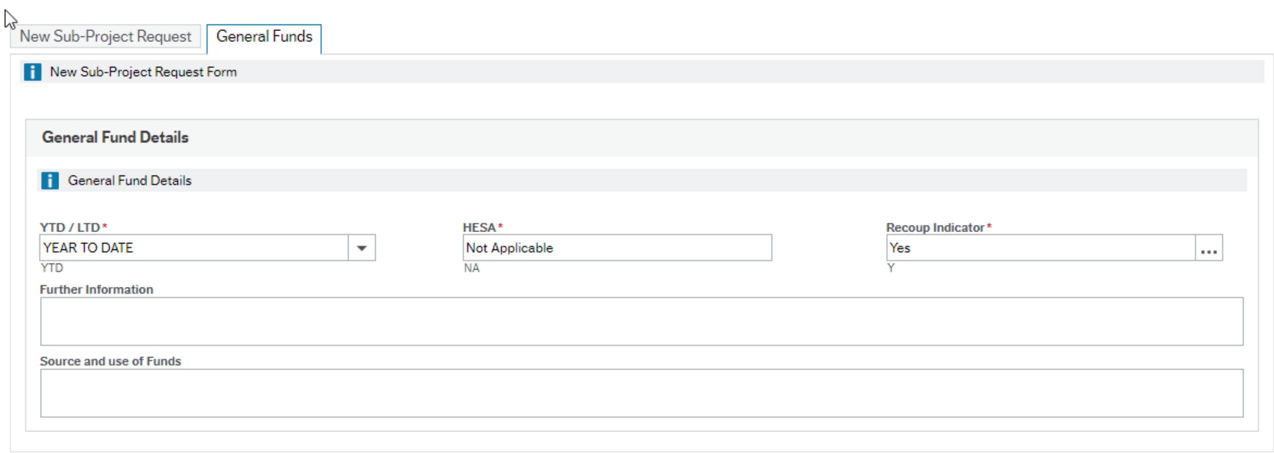
12. Depending on the Cost Class entered you will be required to enter more Mandatory information.



FORMS1.2: General Funds Tab

This Tab will be populated when the following cost classes have been selected:

120	Research - Donations
200	Research - Overheads
300	Teaching
400	Teaching - Overheads
401	Open Programme & EFL courses
700	General Funds
702	General Funds - Residences & Hospitality
710	General Funds - Discretionary
711	Donations / Fundraising



1. YTD/LTD (Year to Date or Life to Date): This field will automatically populate from the Cost Class selected earlier.

2. HESA (Higher Education Statistics Agency): This field will automatically populate from the Cost Class selected earlier.

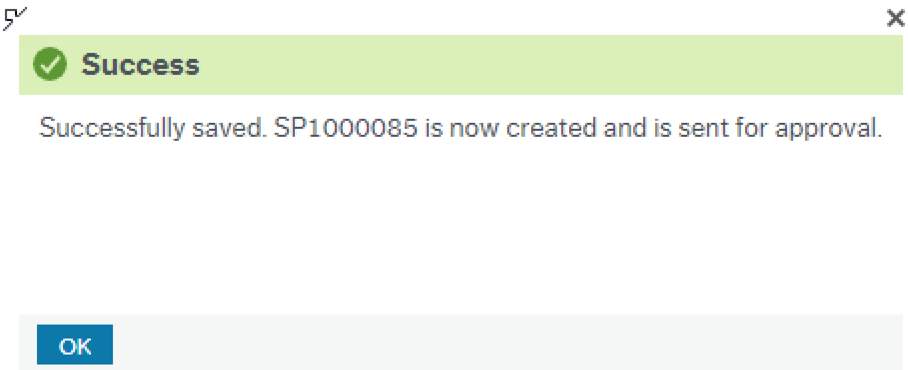
3. Recoup Indicator (This will indicate if the Sub-Project can be used for the Salary Recoup Process): This field will automatically populate from the Cost Class selected earlier.

4. Further Information: If Further details are required regarding this New Sub-Project Request this should be entered within this field.

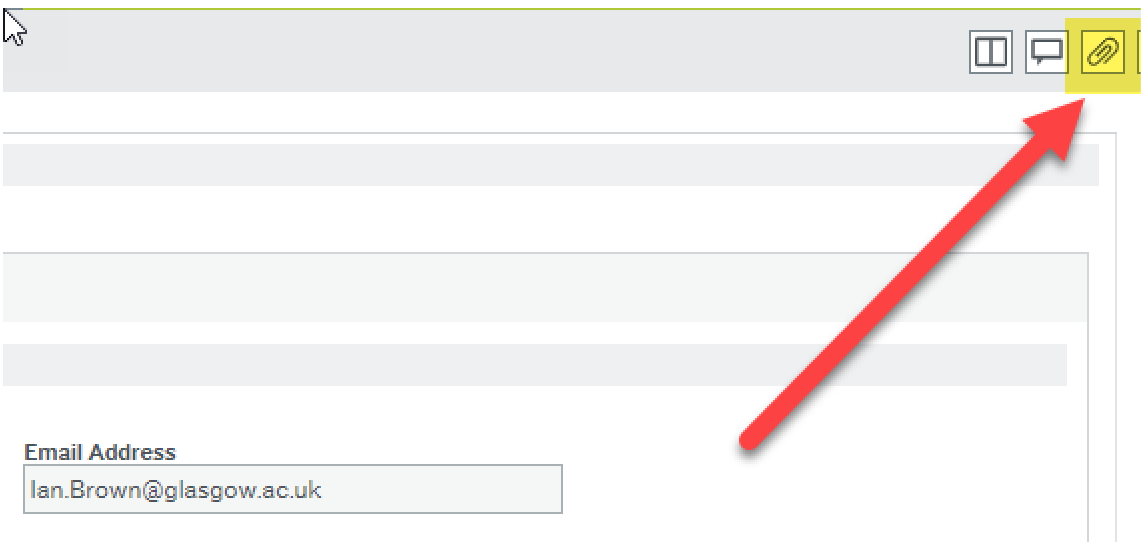
5. Source and use of Funds: Where Applicable to this New Sub-Project Request any information regarding the Source and use of Funds should be entered within this field.

6. Once all the details and the Mandatory fields have been completed the form can be Submitted for Approval by clicking on the following button:

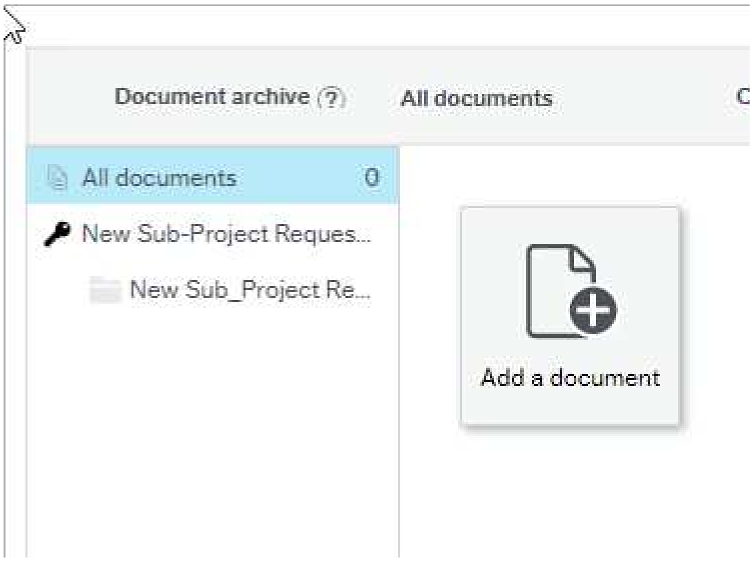
This will then show the Form ID number and confirm the Form has been created and sent for approval



7. If any documents are needed to be added to the form this should be done after the Form has been created and then by clicking the following icon  :



This will give them the option to add a document:



And the user can upload and Save the document to be added: