

Worktribe Pre-Award Process

Bid Development

What	Who
<p>Create your project, ensuring appropriate project tags are used.</p> <p>Ensure University of York is entered on the Partners tab in your Project, and any other Partner that will be part of the contract.</p> <p>Ensure intellectual effort is recorded on the Split tab.</p> <p>Ensure that the Risk Checklist has been completed.</p>	<p>Principal Investigator (PI) or Department Research Facilitator or Administrator.</p>
<p>Make the Ethics Declaration on Worktribe.</p>	<p>The PI only.</p>



Processes that happen outside of Worktribe

Peer review (on applications over £20k) happens outside Worktribe.

Financial approval required for: applications with over £1m in income (Pro Vice Chancellor Research approval), match funding is required, or capital equipment is being purchased.

Departments should follow existing



Submit your application for approval (by clicking the submit button).

The PI or Department Research Facilitator.



Bid Approval

Approvers will receive an email with a link to the application, and be asked to approve or not approve the proposal.

Approver 1: the Department Research Facilitator

Approver 2: the Head of Department (or in some cases the Chair of the Dept. Research Committee).

Approver 3: Research Grants Office.

Worktribe Pre-Award Process

Bid Submission

What

Submit the application.

Mark the application as submitted in Worktribe and move the project to Bid Awaiting Response.

Who

Dependent on the funder—could be the Department or the Research Grants Office.

Research Grants Office only.



Bid Awaiting Response

A project record will be created in Agresso (the Finance Systems). The Research Grants Office should perform the necessary checks that information has successfully passed from Worktribe to Agresso.

Research Grants Office only.

When the PI hears the outcome of the application they should notify the Research Grants Office who then mark the application as successful, unsuccessful, or return the application to Bid Development (in the case of outline proposals or when an application needs reworking).

PI and Research Grants Office.

Worktribe Post Award Process

Award Setup and Project Set Up

What

Enter the awarded budget into Worktribe and Agresso.
Move the project to Project Setup in Worktribe and wait for the research project to start.

If Ethical Review was required, ensure the relevant Ethical Review Committee approval documentation has been uploaded to the Documents tab in the Worktribe project.

Who

Research Grants Office only.

PIs or Department Research Facilitator.



Project Live

The project has started. The Actuals tab in Worktribe will be visible and populated with actual spends and purchase orders commitments.

Download transaction level financial reporting (from the Worktribe Actuals tab) or Agresso.

The PI, Department Research Facilitator, and Research Grants Office can see the Actuals tab on a project.

Department Research Facilitator, Research Grants Office or Management Accountants.



Budget Adjustments

Proposed virements, supplements, nil-cost extensions, etc.

Make changes to the budget in Worktribe and Agresso.

The Department should work with the Research Grants Office.

Research Grants Office only.



Closing a Project

Marking a project as complete and closing it in Worktribe and Agresso.

Research Grants Office only.