Principal Investigator - Setting up a Project Application

Step 1: Click on ‘Add new’

Step 2: Select ‘Project Application’

- Click on ‘Project Application’
Step 3: Select ‘RS’ or ‘KIE’ depending on application type

Step 4: Complete all relevant data fields

- Click on ‘Save’, for the Project Application ID to be populated
- Fill out the specified fields in the ‘Set up application’ section. REMEMBER - all mandatory fields are marked with a red asterisk

Basic Project Information *

Before completing this form, please click on the ‘Save’ button at the bottom of this page in order to generate a Project Application ID.

Project Application ID:

Project App ID will automatically populate when saved.

Type of project application:
RS (Research Services)
Change

Project title: *

Project acronym:

Brief description: ^
If you do not know the answers to some of the questions and they are not mandatory, leave blank. RS or KIE will be able to review the information you have provided and will fill in the blank fields.
These ‘Ethics & Governance’ questions are mandatory. They are the same questions as those on the original ‘Internal Approval’ form.

If the ‘Funder and Scheme’, ‘External Collaborator’ or the ‘Project Partner’ you require are not within their lists then

- Select ‘Other – to be added’ and specify the item in the box If ‘Other – to be added’. RS or KIE will then add these to the system for future use.
If you feel your project would benefit from IS support, answer ‘yes’ to this question. If you are not sure, please follow the URL to the IS support site.

**IS support requirement** *

Does your project require IS support?

Clicking ‘yes’ confirms that your proposed research might benefit from Library and/or IT support within the Information Services department. IS will contact you to discuss your requirements and provide advice for your application funding bid.

To view IS research support webpage, please follow this link: [http://www.kent.ac.uk/is/researchsupport/index.html](http://www.kent.ac.uk/is/researchsupport/index.html)

**Do you need support from IS?** *

No

Please add details of IS requirements below:

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**RS/KIE support contact(s)**

Please select RS/KIE support contacts. If you are not sure who to select, follow the URL below the ‘Notes’ field.

For RS contacts only. Please select the relevant people from both the Funding and Contracts team.

<table>
<thead>
<tr>
<th>Name</th>
<th>Email</th>
<th>Organisation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lingley, Brian</td>
<td><a href="mailto:B.Lingley@kent.ac.uk">B.Lingley@kent.ac.uk</a></td>
<td>Research Services (Vice Chancellor’s Section-Research)</td>
</tr>
<tr>
<td>Benstead, Jane</td>
<td><a href="mailto:J.Benstead@kent.ac.uk">J.Benstead@kent.ac.uk</a></td>
<td>Research Services (Vice Chancellor’s Section-Research)</td>
</tr>
<tr>
<td>Godfrey, Sarah</td>
<td><a href="mailto:S.H.Godfrey@kent.ac.uk">S.H.Godfrey@kent.ac.uk</a></td>
<td>Research Services (Vice Chancellor’s Section-Research)</td>
</tr>
</tbody>
</table>

Notes:

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To view RS and KIE support contacts, please click below: [http://www.kent.ac.uk/researchservices/krlmsn/rs-kie-contacts.html](http://www.kent.ac.uk/researchservices/krlmsn/rs-kie-contacts.html)

**REMEMBER**: Please remember to upload the latest version of the application in the Document section.

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**REMEMBER** - you can attach your project application and any documents by navigating to the ‘Documents’ section:

<table>
<thead>
<tr>
<th>Set up application *</th>
<th>RS update</th>
<th>Peer Review</th>
<th>PI approval</th>
<th>Col approval</th>
</tr>
</thead>
<tbody>
<tr>
<td>School approval</td>
<td>RS approval</td>
<td>University approval</td>
<td>Funder decision</td>
<td>Ideas &amp; Themes</td>
</tr>
<tr>
<td>Tasks</td>
<td><strong>Documents</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Step 5 a) Save as ‘DRAFT’ status

- Click on ‘Save’ to save the application in ‘Draft’ status. **NOTE** – The Co-I(s), HOS, DOR or SAM will not be able to view the application. You can see the status in the top right hand corner.

Step 5 b) Save as ‘OPEN’ status

Once the status changes from ‘DRAFT’ to ‘OPEN’, the Co-I(s), HOS, DOR, SAM and the selected RS/KIE support contacts will be able to view your application.
- Click on ‘Save & close’ (Save as) to update the status from ‘Draft’ to ‘Open’.

**NOTE** - Once your application has been updated to ‘Open’ status you can still continue to make changes and add more information in the ‘Set up Application’ section.
Step 6: Update the status to ‘FOR RS / KIE UPDATE’

When you have completed the ‘Set up Application’ (i.e. filled out all the fields that you are able to) section then

- Click on ‘Save & close’ to update the status to ‘For RS / KIE Update’. Once move the application to status RS/KIE update, the selected RS/KIE support staff will be notified by an email generated by the system.

You can enter a comment here if required. The comments can be viewed on the status log.

Select ‘For RS / KIE Update’ and click on ‘Done’.

**NOTE** – Updating the status to ‘For RS / KIE Update’ enables the application to be passed to RS or KIE for costing, pricing and review.
Key points:

- This application is used only for external funding and only used by the University of Kent staff
- Project Application ID is automatically generated upon saving the Project Application
- All mandatory fields need to be filled before status can be moved from ‘DRAFT to ‘OPEN’
- The PI (Principal Investigator) name is automatically populated on the login
- Selecting CoI(s) (Co-Investigator(s)), External Collaborator(s) or Project Partner(s) name by:
  - Clicking the plus icon
  - Typing the name and hitting the search icon
  - Clicking on A-Z icon (note there are a number of pages)
  (The ‘Funder and Scheme relation’ consists of a tree search mechanism). If none of these above are already in the system, select ‘Other to be added’ and specify the name in the ‘Other to be added’ field
- The Attribution in % is NOT the time spent on the project and this field should add up to 100% (note there is no data validation on the attribute %)
- If you select ‘YES’ for ‘IS support’ and move status from ‘DRAFT’ to ‘OPEN’ a FootPrint ticket is generated (for the IT and Library staff attention). If you change your mind and select ‘No’ then another FootPrint ticket is generated informing them that their attention is no longer required
- When status is moved from ‘OPEN’ to ‘RS/KIE UPDATE’ then the selected RS/KIE support contact(s) will be notified by an email

Icons within the application

Select
Search
A-Z selection
Tree view
Expand (click on the ‘expand’ arrow to view Schemes that belong to the specific Funder)
Cancel