PROJECT COSTING AND PRICING TOOL FOR RESEARCH APPLICATIONS

HOW DO I …?

How do I change the project dates ?

When a proposal is first saved via the "Add Proposal" box, the PCPT uses the project dates as defaults for sponsor information and staff costs. When sponsors and staff costs are added to a project, the dates entered are validated against the project dates. This means that there is a dependency between the project dates and the dates entered against sponsors and staff costs.

Once sponsors and staff costs have been added to a project, it is likely that attempting to simply alter the project dates will cause the PCPT to generate 'error messages' [*Error: Your proposal has salaries and/or student grants and/or other costs set to finish after the new end date.*].

In order to change the project dates in these circumstances, it is **first** necessary to remove the sponsors and costs. To do this, first delete :-

- any Directly Incurred salary costs and staff appointments that have been made (i.e. access the "Salaries" screen under "Directly Incurred Costs" on the "Proposal Map". Select "Delete Salaries" from the "Proposal Staff List" box and then use the "Delete" button to remove each costing)
- any Directly Allocated salary costs and staff appointments that have been made (i.e. access the "Salaries" screen under "Directly Allocated Costs" on the "Proposal Map". Select "Delete Salaries" from the "Proposal Staff List" box and then use the "Delete" button to remove each costing)
- any sponsors that exist on the proposal (i.e. access the "Sponsors" screen under "Project Information" on the "Proposal Map". Select "Delete Sponsors" from the "Sponsor List" box and then use the "Delete" button to remove each sponsor)
- any Student Maintenance Grants that have been set up (i.e. access the "Student Maintenance Grants" screen under "Directly Incurred Costs" on the "Proposal Map". Select "Delete Grants" from the "Student List" box and then use the "Delete" button to remove each grant)

With the sponsor and costs deleted, it is now possible to change the project dates (i.e. access the "Project Details" screen under "Project Information" on the "Proposal Map". Select "Edit" from the "Modify Project Details" box and then amend the project dates. Click on the "Save" button to save the new dates.

Finally, add back to the sponsor information and the salary costings that were deleted above.

Alternatively, it may be easier to begin with a brand new proposal that will use the new project dates (i.e. click on the "Project List" button followed by "Add" on the "Add Proposal" box). In order to delete the old version, first click on the "Project List" button to navigate to the list of your research proposals, and then on "Delete Proposals" in the "My Research Proposals" box. Finally, click on the blue "Delete" button alongside the appropriate project and select "OK" to delete the project from the database.

How do I add a salary costing ?

In both the Directly Incurred and Directly Allocated sections, adding a salary costing to a proposal is done in 2 stages – firstly by adding the staff appointment, and secondly by adding the cost for that appointment.

To add a salary costing, first navigate to the appropriate "Salaries" screen from the main "Proposal Map". To add the new staff appointment, click on the "Add" button on the "Add Staff" box, then enter the details of the person/post and finally click on the "Save" button. The new staff appointment will then be displayed in the "Proposal Staff List" box.

Secondly, for the new appointment, select the blue "Salary" button on the right of the screen in order to display the "Salary" box. This "Salary" box should be used to enter details of the salary cost (either at an actual, hourly or daily rate). When the details are complete, use the "Save" button to store the details and calculate the cost of the appointment across the period of the proposal.

Note that the first step – setting up the appointment record on the proposal – is automatically done by the PCPT for all the investigators named as having a share of the project. The second step – selecting the salary rate – must still be completed by the user.

Directly Incurred staff costs should normally be calculated on an actual cost basis using the current salary scales contained in the PCPT. Directly Allocated staff costs should normally be calculated on a daily or hourly rate.

How do I add a professor's salary ?

In both the Directly Incurred and Directly Allocated sections, professorial staff costs should be added using the appropriate Daily or Hourly rate and **not** the Actual rate. To do this, firstly click the "Add" button on the "Add Staff" box and then ensure that (1) the "Salary Basis" field is set either to "Hourly" or "Daily" and (2) that the "Staff Type" field is set to "Academic Staff".

Secondly, for the new appointment, select the blue "Salary" button on the right of the "Proposal Staff List" box to display either the "Daily Salary" box or the "Hourly Salary" box. This "Salary" box should be used to enter details of the salary cost. First click the "Edit" button to access the relevant fields and then, for each project year, enter the number of hours or days to be spent on the project and then select the "Professor" grade in the "Daily/Hourly Rate" field. Finally, click on the "Save" button to calculate and store the costs.

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HOW DO I …?

How do I delete a salary cost ?

Deleting a salary cost is done in the same manner for both Directly Incurred and Directly Allocated staff costs.

Firstly, navigate to the appropriate "Salaries" screen from the main "Proposal Map" and then click on the "Delete Salaries" button on the header of the "Proposal Staff List" box. Each staff costing on the proposal is then listed with a blue "Delete" button on the right-hand side of the box. Click the blue "Delete" button against each staff cost that should be removed. When prompted with "*When deleting a salary, all the annual amounts associated with the salary will be deleted as well. Are you sure you want to perform this action?*", click "OK" to delete the salary costing.

How do I add a co-investigator ?

When the original principal investigator is added to a proposal, the PCPT allocates 100% project share to that person.

In order to add a co-investigator to a project where project share already totals to 100%, select "Investigators" from the "Proposal Map" and then click the "Add" button on the "Investigator List" box. The project share of the new co-investigator will default to zero percent (%). Enter the co-investigator's name and the "Principal" flag as "N" and click the "Save" button. This adds the co-investigator to the project. In order to set the correct project share and principal indicators against the investigators, click the "Edit" button on the "Investigator List" box and the relevant details can be amended. It is important to note that the final "Project Share %" **must** total exactly 100% across all investigators. Finally, click the "Save" button" and the changes will be stored.

How do I switch the principal investigator and the co-investigator ?

Navigate to the "Investigator List" box (i.e. select "Investigators" from the "Proposal Map" and then click the "Edit" button on the "Investigator List" box). Then, set the "Principal" flag to "Y" against the principal investigator and set it to "N" against all the co-investigator(s). Finally, click the "Save" button and the changes will be stored.

How do I calculate staff time ?

TRAC/FEC has established a standard number of hours/days/weeks across the HE sector for calculating PI time spent on a project and the associated salary rate.
When inputting staff time into the PCPT, you must bear in mind the following maximum productive hours/days/weeks per annum:

1650 hours per annum
220 days per annum
44 weeks per annum
7.5 hours in a day

So if you wish to record that you are going spend 20% of your time on a project then, using the agreed TRAC/FEC formula, this would be 330 hours per year (or 8.8 weeks).