VIDATUM

Universiteit Leiden

Projects Module Manual

# 1. CONTENTS

# 1. Management of externally funded research projects

**This manual contains the instructions for getting started in Vidatum with the project setup and live project phase. The manual is a living document and will continue to be supplemented based on feedback from colleagues and after release of new functionalities in the system.**

## Project types

Management of externally funded research projects is performed in Vidatum. This includes all projects that fall under:

1. Governance funding OCW (A10 - eerste geldstroom **Zwaartekracht** (LEI coordinator))
2. Governance funding OCW-NWO/KNAW (B - tweede geldstroom)
3. Third Party funding other projects (C – derde geldstroom overig)
4. Third Party funding NL charities projects (D- collectebusfondsen)
5. Third Party funding EU projects (E - derde geldstroom EU)

All other (internal) projects are managed in the ERP system.

## Interdisciplinary projects

Projects that are part of an interdisciplinary project are registered as subprojects with a separate interdisciplinary project code in Vidatum. Using an interdisciplinary code allows the project data regarding budgets, actuals and commitments to be consolidated in reports. Specific instructions on data capture for interdisciplinary projects is included with the appropriate sections.

## Roles in system

The following roles are distinguished in the system:
1 system roles
2 project team roles
3 approval roles

**1 System roles**
These roles indicate rights to access system components and the ability to modify data at the specified level.

**User**
Standard access to the system and with this role the user has the ability to start a new project in the system.

**System administrator**
This role allows central management of the system.

**Unit administrator**
This role allows decentralized management of the system.

**2 Project team roles**
These roles are defined for each project and are explained under section 5 project setup, project team.

**Project Controller**
Only the project controller role can add and modify budgets to projects .The project controller is also the only one who can submit a project in the project setup phase and after an amendment in the live project phase. Other project controllers should be assigned to the project to adjust budgets as well.

**3 Approver roles**
These roles reflect who must give approval before a project moves to the next project phase. Approver roles are defined at the faculty/institute level.

**Institute Management**
Manager responsible for operations of institute and this person must approve release of project

**Key control**
Key control role must be different from project controller and can also be more than 1, both of which then get the chance to approve the project. Key control can also be divided between institutes.

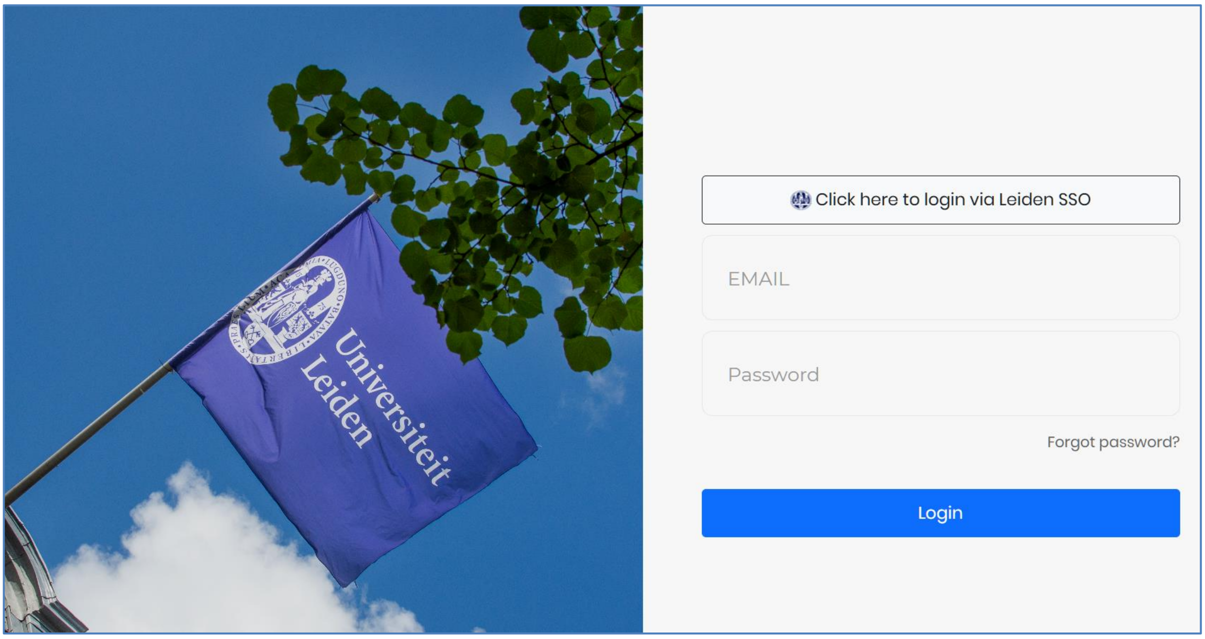
***Please note that there is no system check available in the system yet whether the four-eye principle is met!***

# 2. Getting started in Vidatum

The link to Vidatum is: https://researchprojects.universiteitleiden.nl.

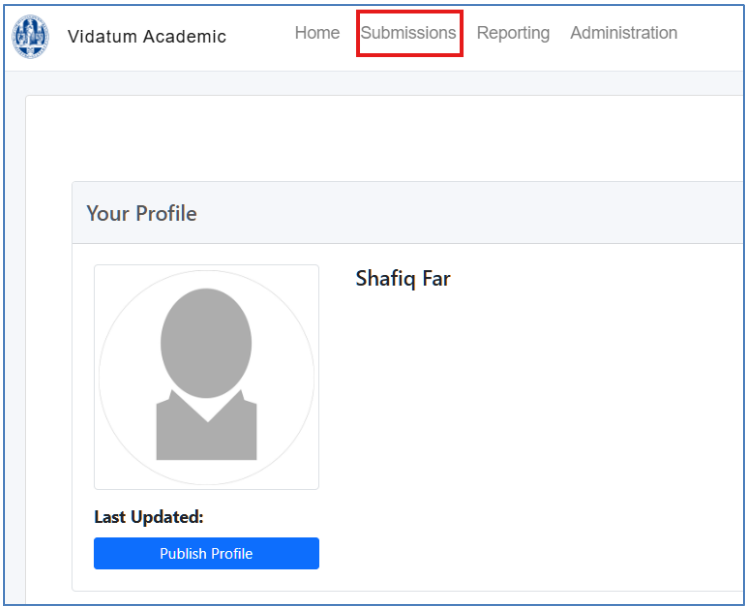
Users can log in with their University accounts by clicking on the "Click Here To Login via Leiden SSO" link and keying in their username and password on the login screen.

Alternatively, external users can log in using the e-mail and password fields provided.




## Getting to the projects module

Upon logging in, the user will be brought to the home page. From there, click on the "Submissions" button on the navigation bar as highlighted.



The projects module is divided into 4 different phases:

1. Intent to submit
2. Proposal
3. Project Setup
4. Live Project

Phases 1 and 2 are related to the Pre-Award and phases 3 and 4 to the Post-Award.

## Creating a Projects application

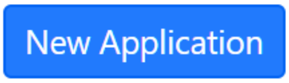
A projects application can start at the “Intent to Submit”, “Proposal” or the “Project Setup” stage. Users will have to specify a short project title for the submission:

**Short project title*:** this title is shown on the main screen of submissions and includes the following information:

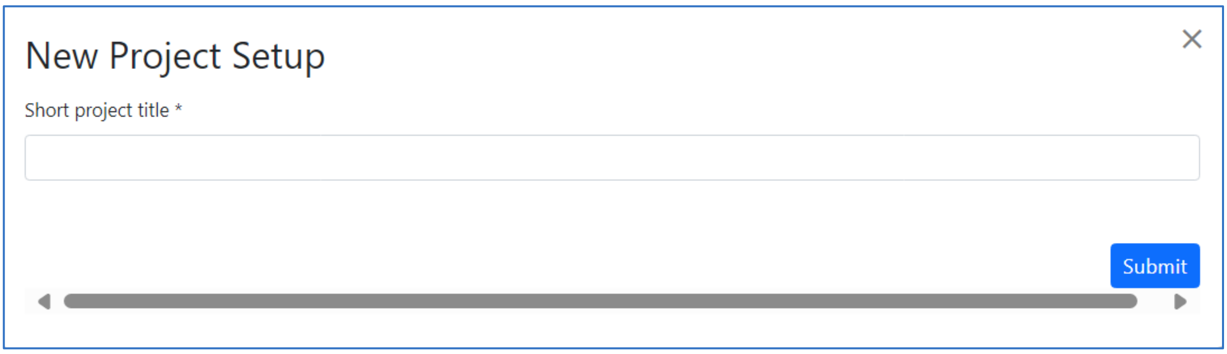
1. Short name institute
2. Short name funder and Funding program (if applicable)
3. Acronym/reference funder
4. Name of Principal Investigator

Example: LACDR EU H2020 RiskHunt3r Water**. Please note: this description will be used in ERP system.**

**Stage 1:**




**Stage 2:**



# 3. Intent to submit

The work instruction for the intent to submit phase will be added after completion of Pre-award epic.

# 4. Proposal

The work instruction for the Proposal phase will be added after completion of Pre-award epic.

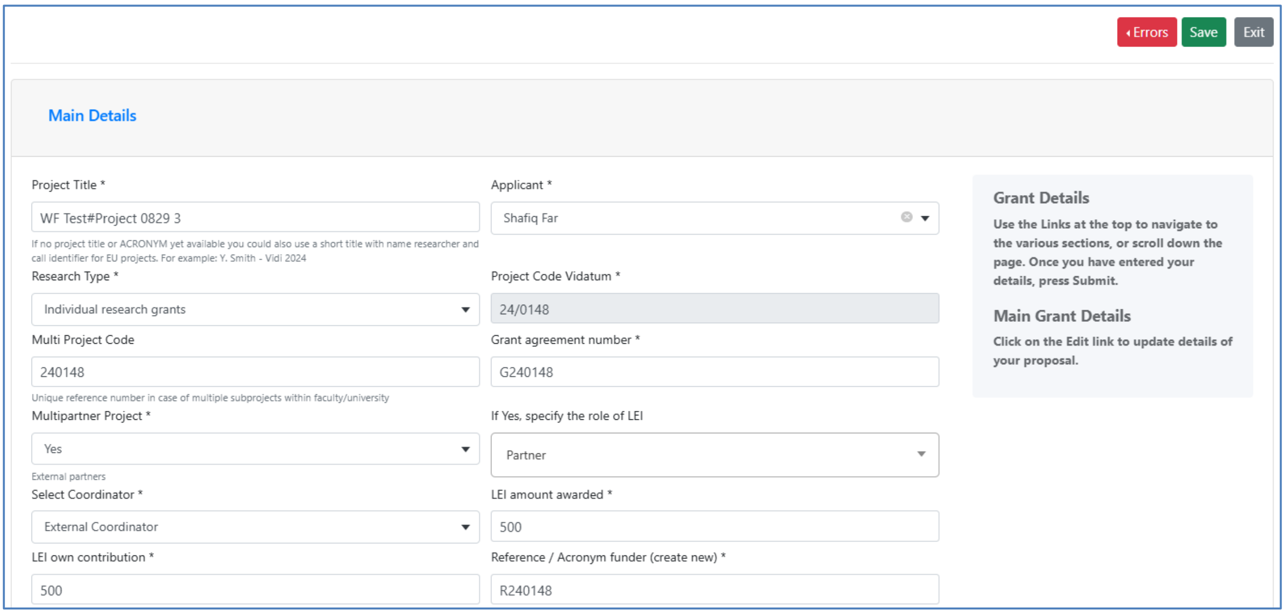
# 5. Project Setup

**Before getting started in the project setup phase, it is important to know which ERP order number(s) should be used for the project concerned.**

**The following conditions are applicable in the project setup phase to be able to submit a project for approval. After approval the project enters the live project phase:**

1. Include required master project data;
2. At least one funder must be assigned;
3. Grant allocation must be assigned;
4. Principal Investigator and Project Controller must be assigned to the Project team. Only a Project Controller is able to submit a project at this stage;
5. Budget must be added. In case the final budget is not yet fully known but a budget code needs to be available, then a project management task should be added to make sure the remaining budget details are included at a later stage;
6. Attachments: award letter/contract and clarification of selected VAT code (is VAT charged or not charged to the funder) are attached to the project file in Vidatum.

The Project Setup form is split into different sections and additional fields may appear depending on the information that the user has filled out. If a data field is marked with * than data is required for submission of the project.



# Main details

The basic details of the project are recorded under main details. These are the following fields:

**Short project title*:** this title is shown on the main screen of submissions and includes the following information:

5. Short name institute
6. Short name funder and Funding program (if applicable)
7. Acronym/reference funder
8. Name of Principal Investigator

Example: LACDR EU H2020 RiskHunt3r Water**. Please note: this description will be used in ERP system.**
**Full project title*:** full title of project proposal submitted to funder.

**Applicant***: The employee who enters proposal/project setup of the externally funded research grant, usually the Project Leader.

**Research type*:** Type of grant applicable to the project. A distinction is made between the following types of subsidy:

- **Individual research grants =** research grant awarded to an individual researcher (e.g. NWO Talentprogramme, ERC and MSCA EF);
- **Prizes =** research grant awarded as a prize to an individual researcher or group of researchers (e.g. SPINOZA);
- **Collaborative research =** grant to carry out research project in which researchers from different (internal) institutions/companies/organizations work together as partners, with one partner acting as coordinator (e.g. Horizon Europe pillar 2 project);
- **Collaborative research co-investment required =** grant to carry out research project in which researchers from different (internal) institutions/companies/organizations work together as partners, with one partner acting as coordinator and in which partners are obliged to contribute financially (e.g. NWO KIC);
- **Valorisation grants and tenders =** grant to carry out valorisation activities, such as setting up a company or performing implementation activities for ministries and NGOs (e.g. TTW Take-off, Horizon Europe pillar 3 EIC project);
- **Research training grants =** grants with main purpose to train researchers, but that also include research activities (e.g. MSCA DN);
- **Grants for supporting activities for research =** grants for networking, infrastructure, capacity building, dissemination activities, etc.;
- **Research for companies =** research fully sponsored by companies, e.g. contract research or unrestricted research grant.

**Project Code Vidatum*:** Project number automatically generated by Vidatum.

**Interdisciplinary project code**: If the project is part of an interdisciplinary collaboration project, the project code Vidatum of the internal LEI coordinator is displayed here for the purpose of data consolidation.

**Multipartner Project*:** The project is carried out by a single party or by cooperation between several parties. Indicate Yes/No.

**If Yes, specify the role of LEI:** If yes has been selected in data field multipartner project, then the role of the institute where the project is carried out is coordinator or partner.

**Select Coordinator*:** If partner option has been selected for role of LEI in multipartner project, this data field must be included which partner has the coordinator role. *Only **'external coordinator'** option available for now. Method of recording partner data to be determined in pre-award epic implementation project Vidatum.*

**Grant agreement number*:** Contract (file) number under which the project is registered with the funder.

**LEI amount awarded*:** Total grant amount awarded to Leiden University.

**LEI own contribution*:** Total amount to be contributed by Leiden University.

**Whole project amount awarded*:** Total grant awarded for the entire research project including awards to partners. Only visible in case for 'Multipartner project' yes has been selected.

**Start date corresponding to the contract*:** Start date of the project according to the funding contract.

**End date corresponding to the contract*:** End date of the project according to the funding contract.

**Date of grant awarded*:** Date of award of the externally funded research grant/commissioned research.

**External audit report required?*:** In the case of accountability, an auditor's report/report of findings must be submitted by an external auditor to the funder. Indicate Yes/No.

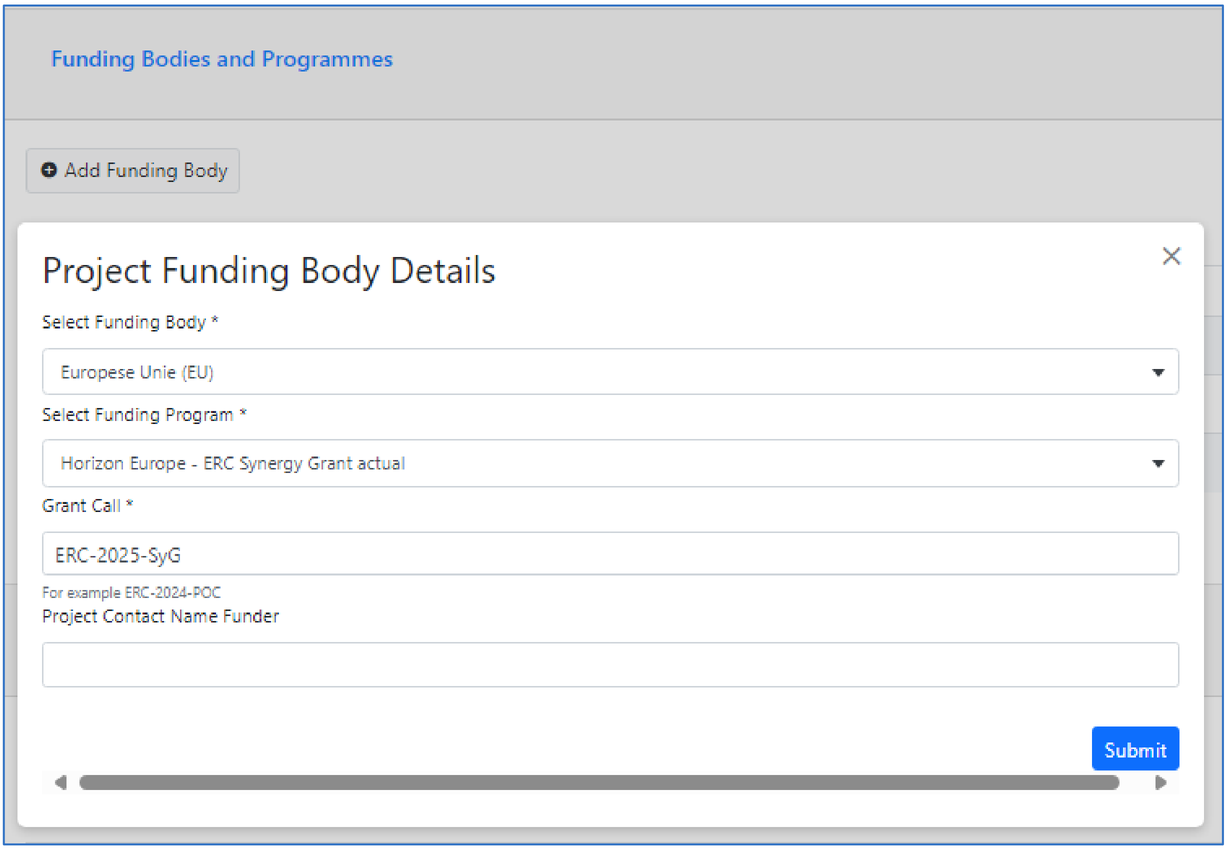
**Number of external audit reports*:** The number of audit reports/reports of findings by an external auditor that must be submitted to the funder in case yes has been selected in data field external audit report required.

**Is time registration required?*:** The grant conditions stipulate that a time registration must be kept by project staff for the project. If so, all project staff members must register their hours in full, i.e. for the full appointment at Leiden University. Indicate Yes/No.

**Abstract:** Short description of the project proposal.

## Funding bodies and programmes

The data capture of funder and funding program are recorded under funding bodies and programmes. It is possible to add multiple funders with multiple budgets within one project. In case a funding body/program is not included in the list, please send for addition of funding body/funding program an email request to BB/FIN Coordinator Project Support.




**Select Funding Body:** Select the funding body that provides the research grant or commissions the research.

**Select Funding Program:** Program under which the grant was provided by the grant provider. If the subsidy programme does not apply to the subsidy provider, a choice must be made between a subsidy or commissioned research.

**Grant Call*:** enter the grant call number of the grant provider here (optional). For example, ERC-2024-POC or Veni SGW 2024. Required for NWO and EU projects. In case grant call for other projects is not applicable fill out NA.

**Project contact name Funder:** Name of the contact person at the grant provider.

Based on the selected funding body and funding program, background information on the associated activity code, subactivity code and result determination code is forwarded to the ERP system for registration of project master data. This information is necessary for proper recording of entries in the ERP system and for reporting purposes.

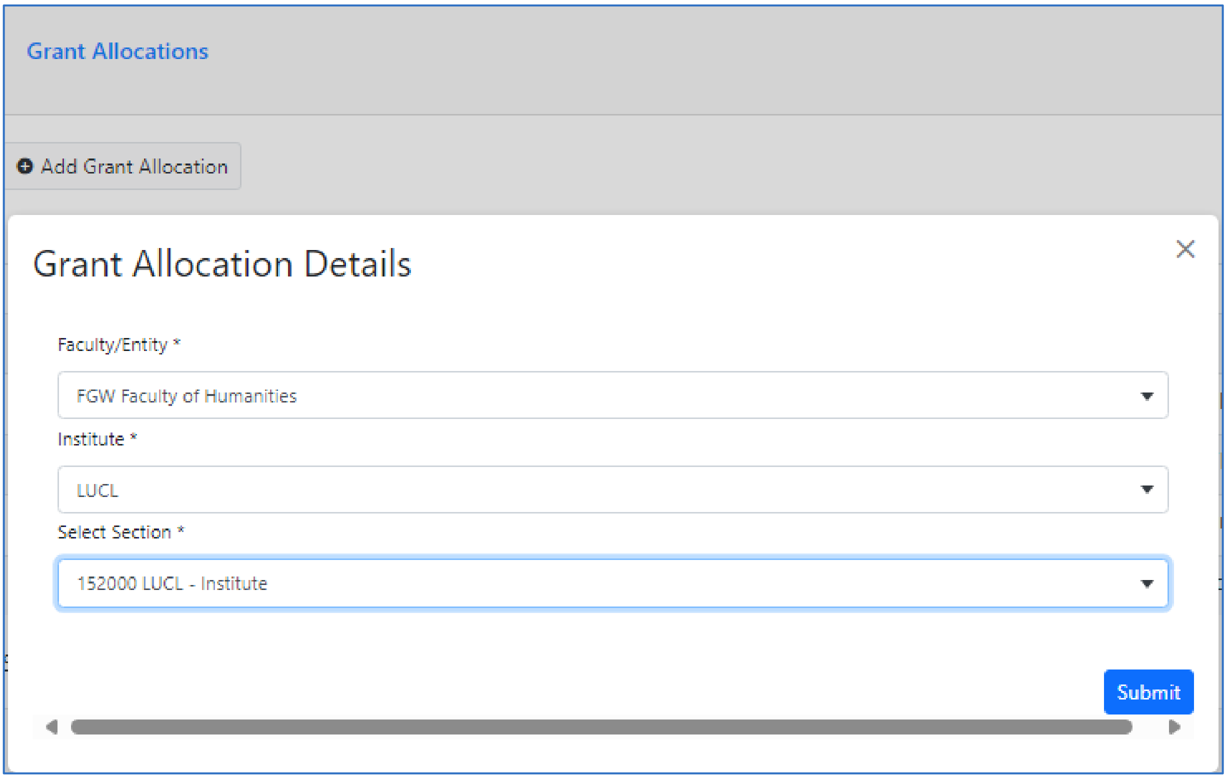
## Grant Allocation

In order to assign the project to the appropriate organizational unit, the following information must be recorded:

**Faculty/Entity*:** Faculty or Entity (such as interfaculty institute or expertise centre) where the externally funded research will be conducted.

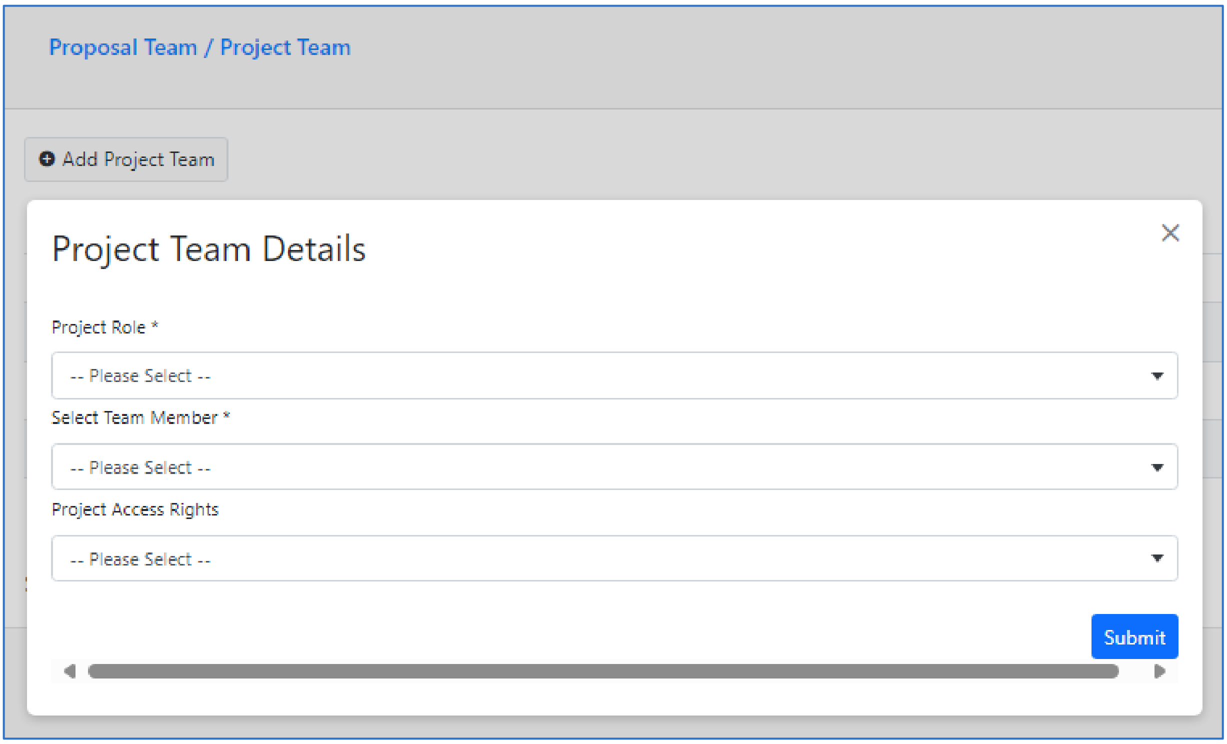
**Institute*:** Institute within the Faculty or unit where the externally funded research will be conducted.

**Section/ department/research group*:** Section/department/research group where the externally funded research will be conducted. If not applicable, 'null' will be entered here.



# Project team

The project team is assembled here.




The following data capture must be recorded:

**Select Team Member:** From the HR staff list, the employee who has a task in the execution of the project is selected. If the PI is not already part of LEI staff, please select institute manager of institute where project will be implemented.

**Project role: a choice is made from the different roles within the project team. In any case, a PI and project controller must be added to the project team in order to submit the project.**

A distinction is made between the following project team roles:

- **Principal Investigator**: principal investigator and ultimately responsible for conducting research incl. management
- **Co-Investigator**: second investigator who is responsible for conducting the study in addition to being the head of research
- **Project Controller**: supports the principal investigator in the financial management of the research project. The Project Controller must always have ‘edit’ rights in order to add budgets.
- **Research Support**: supports the principal investigator in managing the research project (i.e. Project Manager, Grant Advisor, Research Support Officer).

- **Project staff member**: executes project tasks within the project team.
- **Budget holder:** approver role with regard to spending the budget.
- **Activity holder**: approver role with regard to spending the budget.

**Project Access Rights**: for each project team member, it is indicated which access rights to the project data apply. A distinction is made between:

- Only project data can be read;
- Modification of project data possible;
- No access to project data.

# Budget

Before the option 'add new budget' is visible the project controller must be added to the proposal/project team with role project controller and project access rights 'edit'. Then first save the proposal/project and then the button 'add new budget' becomes visible in the overview.

**Please make sure you have added the following data to the project before you add a new budget:**

1. **Funding body**
2. **Grant allocation**
3. **Project team members: principal investigator, activity holder and budget holder**

**It is possible to establish multiple budgets for a project with different funders. A budget is then established per funder and all external budgets are summarized in the main screen under 'funding summary'.**

**Instructions regarding foreign currencies will follow.**


***The budget template is selected in master field 'type*':***

1. ***Standard (Other)***

   Budget calculation based on T1

   From funder calculation based on T1, T2, T6 (according to selected applicable tariff group)

   ***Important notice regarding T6: Surcharges (T6-T1) are shown under Overheads***

2. ***NWO salary table***

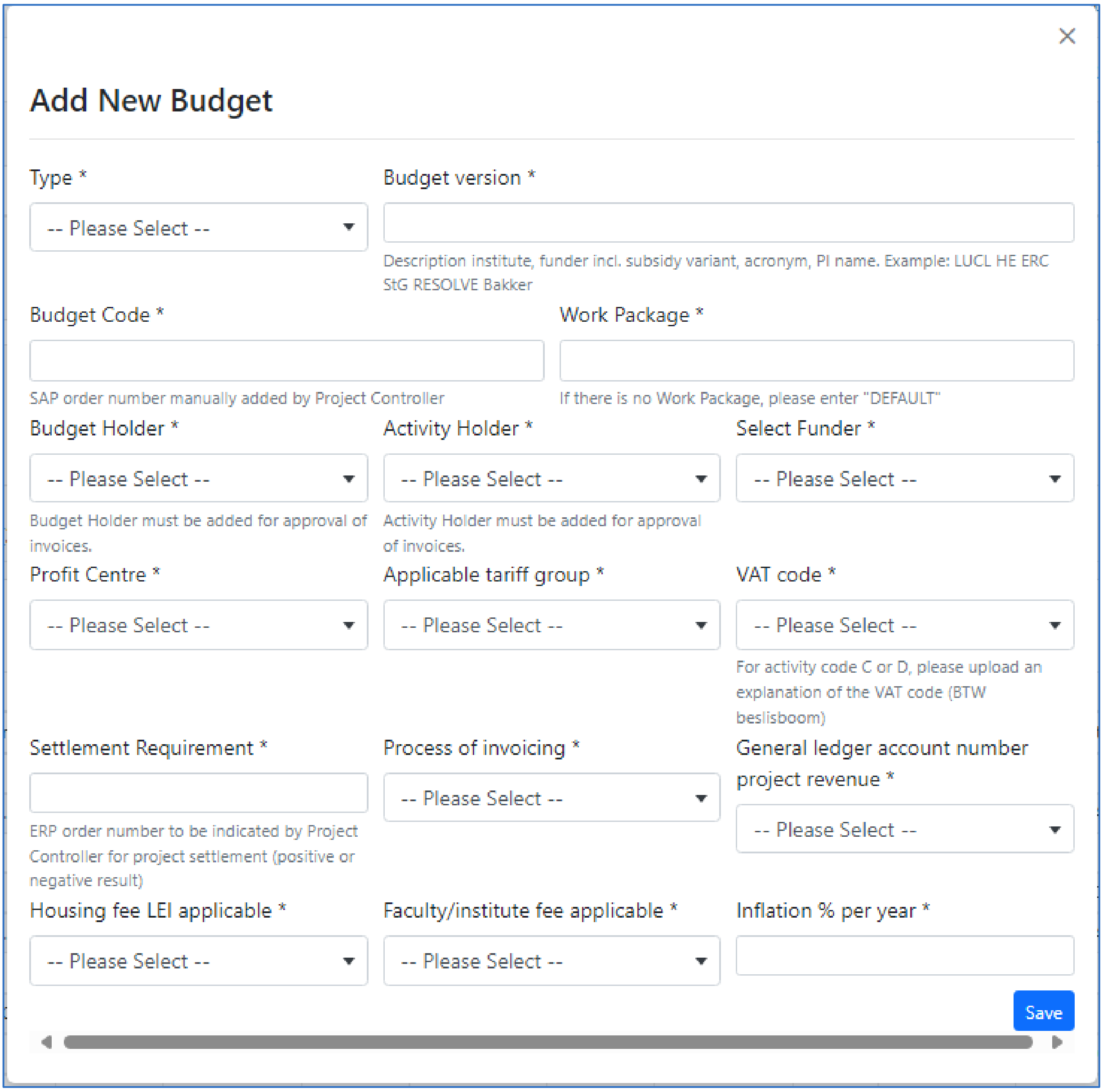
   Budget calculation based on T1

   From funder calculation based on NWO salary table

***3. EU***

Budget calculation based on T1

From funder calculation based on T1




The following other data fields must be filled out:

- **Budget version*:** Several budget versions can be stored. please indicate here which budget version number is concerned.
- **Budget Code*:** ERP order number on which the actuals costs will be booked and commitments will be registered. This is where the SAP order number is entered, which is manually added by the Project Controller. The Project Controller must determine which SAP order number is sequential in the range, following the system that gives the following representation of the positions:

digit 1 and 2 (faculty, for a example FGGA 12)

digit 3 and 4 (institute, for example Institute of Public Administration 60)

digit 5 and 6 (section/part/research group (optional), for example Institute Office Public Administration 00)

digit 7 (type of cash flow, for example NWW project 7)

digits 8, 9 and 10 (sequential number in the range, for example 0001)

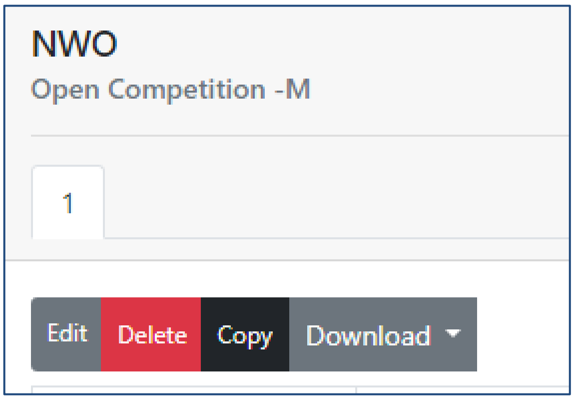
Budget code / ERP order number (SAP): 1206007001

- **Work Package*:** Work package number if applicable, otherwise 'default' can be entered here. Also enter 'default' if multiple work packages within project, but one budget applies. ***Instructions for timekeeping to be determined.***
- **Budget holder:** Select the budget holder who needs to approve the payment of invoices.
- **Activity holder:** Select the activity holder who needs to approve the payment of invoices.
- **Select Funder:** Select the funding body that provides the research grant or commissions the research.
- **Profit Centre:** Select the profit centre of the organisational unit where the externally funded research will be conducted.
- **Applicable tariff group:** choose the applicable tariff group for the budget calculation: options T1, T2, T6
- **VAT code:** select the applicable VAT code (see instructions Guidelines VAT):
    - G grant / VAT not applicable
    - G (commercial) assignment / VAT exemption or VAT fiscal unit
    - L (commercial) assignment / VAT delivery low rate 9%
    - N (commercial) assignment / VAT exemption certificate 0%
    - H (commercial) assigment / VAT delivery high rate 21%
- **Settlement requirement:** By closing the project, the positive or negative project result after running work in progress (OHW) in SAP will be booked to the specified SAP number. This number must be an SAP order number in the first funding flow or third funding flow without work in progress (OHW) code (cannot be a work in progress (OHW) order number). Only one closing order can be linked to the project. If multiple settlement orders apply, the transfers to the other settlement orders must be made from the linked closing order number.
- **Process of invoicing:** Select whether the grant will be provided by the sponsor on the basis of direct payment tranches or whether Leiden University will have to send a sales invoice in order to receive the external research benefits from the funder.
- **General ledger account number project revenue:** General ledger account number to which the research income should be booked in SAP. This is related to the type of financing/funder and a distinction is made between the following ledger account numbers:
    - 831140 KNAW contributions
    - 831160 Contributions NWO and NWO-affiliated institute
    - 831175 National authorities

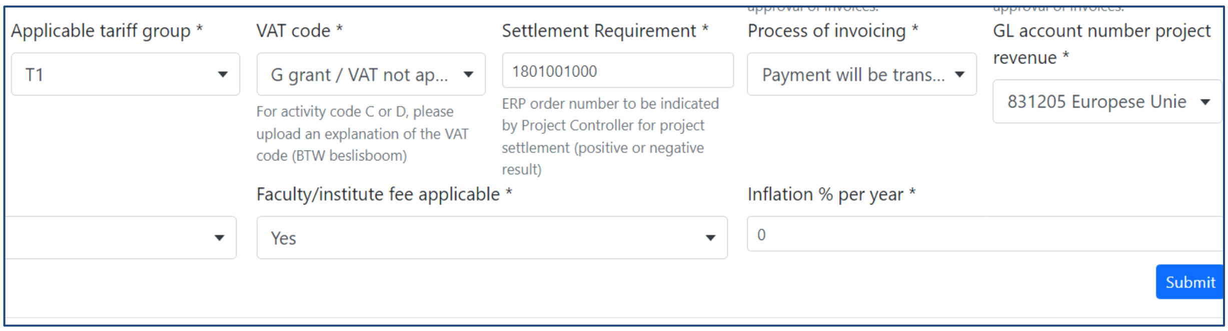
- 831185 Non-Profit Organizations
- 831190 Companies
- 831205 European Union
- 831206 International organisation other than the European Union

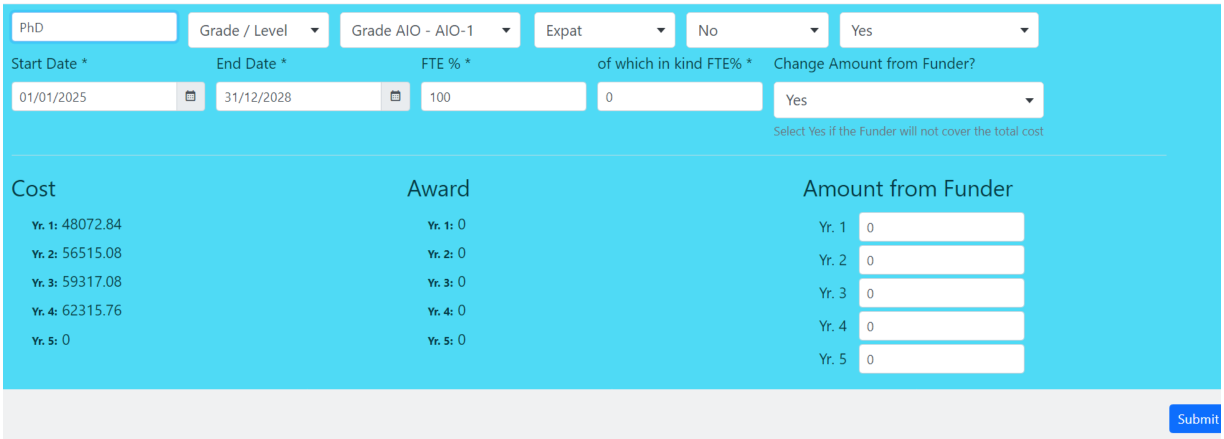
- **Housing fee LEI applicable:** On the basis of the number of FTEs working on 3rd funding flow research projects (both EU and other), a contribution for housing is paid to central office, whereby the applicable amount is determined for each faculty/institute (see budget manual, provided to Controllers). From 2024, in addition to the payment for academic staff (WP), the contribution will also apply to non-academic staff (OBP). There is a temporary exemption until 2028 for ongoing projects. If yes is selected, the calculation will automatically become visible under indirect costs as soon as staff costs are added.
- **Faculty/institute fee applicable:** For a number of faculties, an internal faculty/institute contribution is calculated for research projects. If yes is selected, the calculation for this is automatically made and visible under indirect costs.
- **Inflation % per year:** the indicated percentage will be calculated as of the end of the included tariff list: **The current Leiden University tariff list incl. 1% CAO indexation as of 1/1/2025 is included in Vidatum. This tariff list ends on 31/7/2025, so inflation percentage will be calculated as of 1/8/2025.**
  **Within Leiden University a minimum of 5% inflation is included in the budget calculations.**

Once all mandatory fields have been completed and saved, the budget format is created. Drawing up the project budget is possible by selecting the ‘edit’ button.




**In case one of the main budget data fields have been changed (for example the tariff group) you will need to enter the button “’’submit” AND also enter the button “submit” for all staff costs rows that already have been included in the budget to make the calculations.**




**Internal budget is shown in column ‘budget’ and external budget is shown in column 'From Funder’.**

**Staff costs**

Staff costs are calculated based on the number of FTEs the employee will be working on the project (and not the number of hours).

**To add staff costs select ‘staff cost’, select the applicable role and press button Add.**
**Then you are able to enter the specific data fields for the staff role.**

The following data fields must be filled out:

- **Description*:** freely fillable field in which explanation of staff budget row can be included.
- **Based on*:** select ‘Person’ in case of LEI staff member. Select ‘Grade/Level’ in case of new staff member.
- **Select Person***: in case Person has been selected for datafield ‘based on’, include surname of LEI staff member.
- **Select rate***: in case Grade/Level has been selected for datafield ‘based on’, select applicable salary scale in case Grade/Level has been selected.

- **External level*** (NWO Salary table budget template only): For NWO an extra staff role selection is needed for the calculation of the correct salary table amounts.
- **Staff type***: Local is regular staff and Expat is staff with 30% facility.
- **Transition payment?***: the transition compensation is calculated as follows:

  1/3 monthly gross salary per full-time year (part-time pro rata)

  Example calculation:

  Employee is budgeted full-time on research project from 01-07-2024 to 31-12-2024

  Salary costs (excluding transition compensation): EUR 30,000

Budget tool calculation:
Step 1: calculation cost per full-time month ==> 30,000/6 = 5,000
Step 2: Multiplied by 0.333 ==> 5,000 * 0.333 = 1,665
This would be the transition allowance for a full-time year.
Step 3: Because this employee worked for half a year, the transition compensation for that half year is determined at 1,665*(6/12) = 832.50
Step 4: The total salary cost for 2024 are 30,000 + 832.50 = 30,832.50

Please note this calculation is made only on the project appointment. all other appointments are excluded from this calculation

- **Annual Salary Step Increase?***: calculation is based on the seniority date applicable to the employee already employed by LEI. For the new employee, it is calculated from the date of appointment to the project. The increase will be calculated with effect one year after the date indicated.
- **Start date***: start date of the intended appointment on the project.
- **End date*:** end date of the intended appointment on the project.
- **FTE %***: must be entered in **percentages**. For instance, 1 FTE is included as 100.
- **Of which in kind FTE%***: must be entered in percentages. In case LEI pays 20% of the salary costs for the staff role than fill in: FTE % 100 and FTE % in kind 20.
- **Change amount from funder**: From funder can be override manually. If you select yes and add no amounts than the system will show 0 in column from funder**. Make sure you fill in amounts for all project years because the override is applicable to the whole project.**

**Specific attention points:**

- When a new staff costs row is added please make sure to select the **correct role**. It is not possible to change this field when a staff cost row has been added. You will need to delete the row and add a new staff cost row then.
- *If the start date of the project is changed and this means a change for the calculation of the staff cost per role then a new row must be added. The old staff cost row should be deleted then.*
- Should the number of FTEs of an employee change during the project duration then separate staff cost rows must be added.

- If a surcharge is calculated when using tariff group 6, the calculation can be overruled by setting 'change amount from funder' to yes and manually adding the external rate including tariff group 6 plus surcharges.
- Manual staff costs (for example 'GOA' costs) can be added by selecting 'staff' and 'Staff cost adjustment'.

**In case data fields for staff costs row have been changed make sure you enter button "Submit" in order to have an automatic calculation of the cost made.**

**Material costs**

**To add material costs select the applicable material cost two times and press button Add.**
**Then you are able to enter the specific data fields for the material costs.**

**Item Name*:** self-added short name for material costs.
**Item Description**: description of material costs.
**Override Funding Amount? (Y/N):** From funder can be override manually. If you select yes and add no amounts than the system will show 0 in column from funder**. Make sure you fill in amounts for all project years because the override is applicable to the whole project.**

Fill in COST per project year and if override funding amount has been selected than fill in the amount from funder per project year.

**Specific attention points:**

- Change amount from funder can be override manually. If you select yes and add no amounts than the system will show 0 in column from funder.
- When a new material costs row is added please make sure to select the **correct material**. It is not possible to change this field when a material cost row has been added. You will need to delete the row and add a new material cost row then.

**Indirect costs**
For indirect costs calculations are made automatically and it is also possible to add manual calculations if needed.

**Overheads**

- Overhead for EU budget template will be calculated automatically (25% on staff costs and material costs (the latter excluding subcontracting and H2020 internally invoiced goods and services).
- Overhead for T6 calculations are shown here. The surcharges are calculated based on the included staff roles (T6 – T2).

- Manual overhead costs can be added by selecting ‘overheads’ and ‘overhead adjustment’.

**Housing fee**

- Housing fee: this central housing fee is applicable to academic as well as non-academic staff assigned to third flow of funds (see LEI budget manual provided to Controllers) for current information regarding the charging of these costs from central and exceptions.
- Housing fee will be automatically calculated for the selected staff roles in case in main budget data field ‘Housing fee LEI applicable’ YES has been selected. This calculation is only displayed when the fee is applicable according to the selected grant allocation. Otherwise, 0 is displayed here (even if you enter yes).
- If the cost is not settled directly on the project but through a faculty/institute fee then a manual line will need to be added to correct this cost. This is possible by selecting ‘Faculty/Institute fee’ and ‘Faculty fee Adjustment’.

**Faculty/Institute fee**

- Faculty/Institute fee will be automatically calculated for the included staff roles in case in main budget data field ‘Faculty/institute fee applicable’ YES has been selected. This calculation is only displayed when the fee is applicable according to the selected grant allocation. Otherwise, 0 is displayed here (even if you enter yes).
- Manual faculty/institute fees can be added by selecting ‘Faculty/institute fee’ and ‘Faculty Fee Adjustment’.
- For the Faculty of Archaeology there are extra internal instructions available regarding the calculation of the faculty fee.

**Income**

Income is split into external income and internal income.

**External income**

- Funder income/Autogenerated is automatically calculated as a result of all project costs included in column From funder. This funder income amount will be shown in column budget as well as in column from funder for row external income.
- Co-Funder income needs to be manually adjusted. In that case the calculation for the funder income will be as follows: total costs from funder (external budget) -/- co-funding 3rd party

**Internal income**

**Negative amounts at internal income section indicate a positive result for Leiden University.**

- **Automatic matching cash/Autogenerated**: is automatically calculated and shows the difference between total material costs shown in column from funder budget minus total material costs shown in column budget.
- **Automatic matching in kind staff/Autogenerated**: is automatically calculated and shows the difference between total staff costs shown in column from funder budget minus total staff costs shown in column budget.
- **Automatic Income Correction/Autogenerated**: is automatically as follows: Project costs - (external income (funder income + Co-funding 3rd party) + Automatic Matching In kind Staff + Automatic Matching Cash)
- Manually entering internal income is possible by selecting **Internal income** and **Manual matching Cash**.

To return to the main screen of the project select button '**Return to applications'**.

**Overview budget and funding summary**

- The main screen shows an overview of the budget totals.
- In case several budgets have been added with multiple funders an extra summary of all budgets will be shown in the main screen.

**Budget versions**

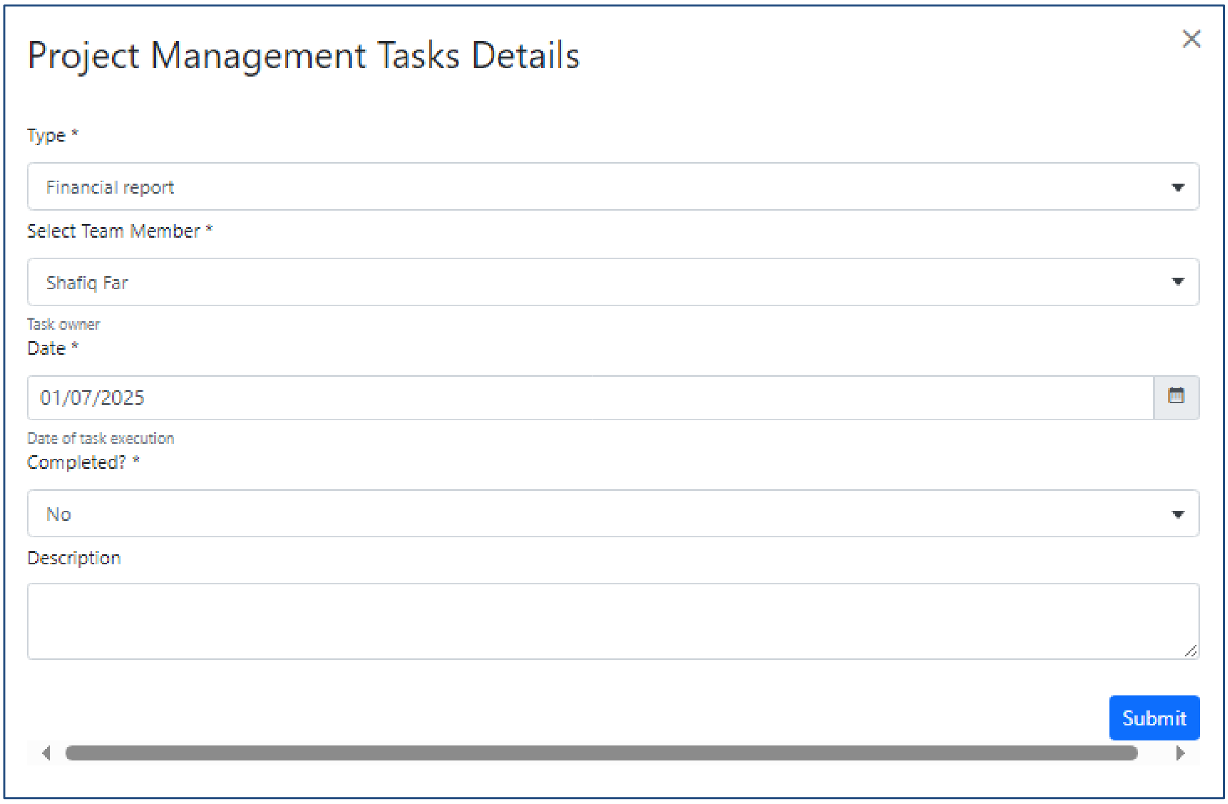
it is possible to add multiple budget versions to a project. A copy of the current budget can be made by selecting option 'copy'. Then indicate in the popup window what name the budget version should have (e.g. version 2) and whether the forecast is applicable (i.e. actuals must be taken into account).

Budget export

Only possible by budget and not at total level.

Instructions will follow.

# Project Management tasks


Project Management Tasks Details

Type *

Financial report

Select Team Member *

Shafiq Far

Task owner

Date *

01/07/2025

Date of task execution

Completed? *

No

Description

Submit

When managing an externally funded research project, there are several tasks that need to be performed. the system provides the ability to record, monitor and complete these tasks.

This includes tasks such as (datafield ‘Type*’)

- Accountant
- Invoice/tranche
- Other
- Scientific report
- Financial report
- Reporting Period

In case we are the coordinator in a project then a project management task can be established for transferring the tranches to the partners.

The project management tasks can be assigned to a single project team member (datafield ‘team member’). The assigned tasks will be visible to the project team member in a task overview on the homepage of Vidatum. if several project team members are to take on a task, these will have to be defined for each project team member.

Depending on which type of task is involved, the following data are recorded:

**Invoice Amount*** = in case invoice/tranche has been selected than capture the invoice amount.

**End date*** = deadline date of project management task.

**Reporting Period (e.g. RP1, RP2)*** = period to which the report relates (shown if reporting period has been selected at datafield type).

**Date*** = date of task execution.

**Completed?*** = indicate whether task has been completed Yes/No.

**Description** = short description of the task.

## Attachments

In Vidatum, the project file is recorded. Depending on which documentation applies to the project, the following documents are stored in section 'attachments':

01 - Proposal

02 - Funding contracts

03 - Amendments, changes, and extensions

04 - Personnel

05 - Other costs (e.g. best value for money)

06 - Reporting

07 - Correspondence external

08 - Correspondence internal

10 - Other

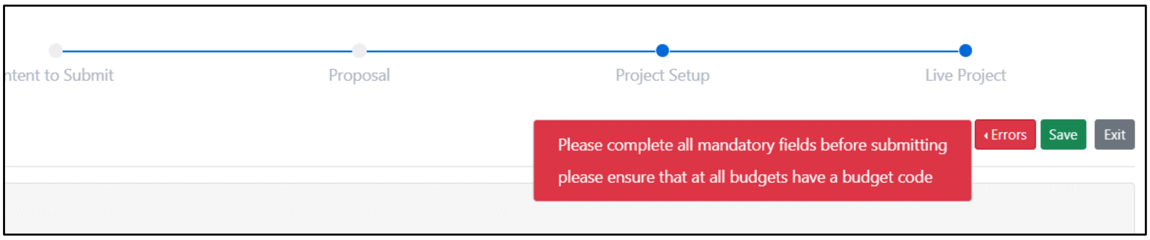
Instructions will follow.

## Comments

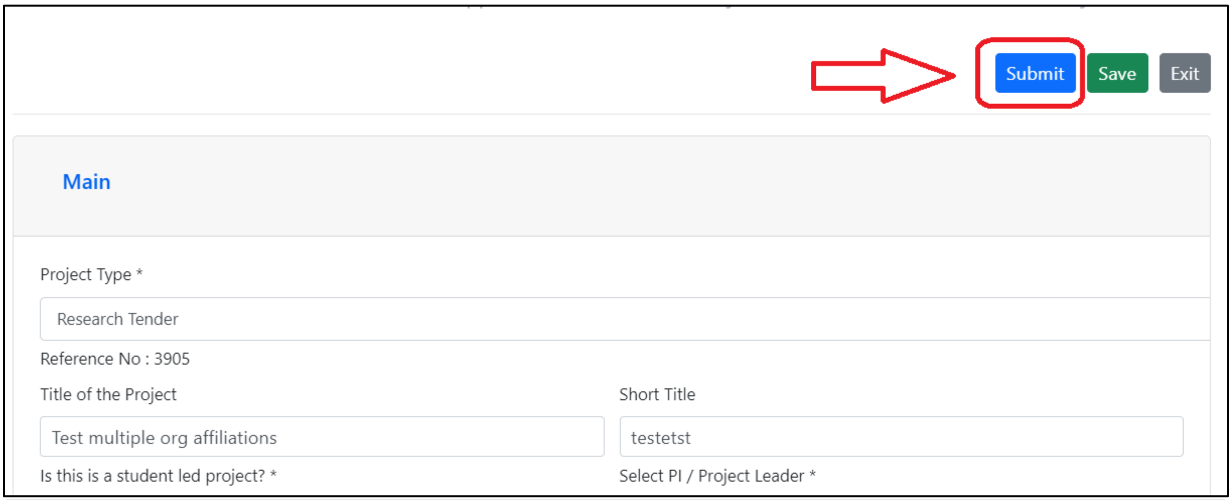
It is possible to add comments to a project. Comments entered by approvers during project approval/rejection are also shown here.

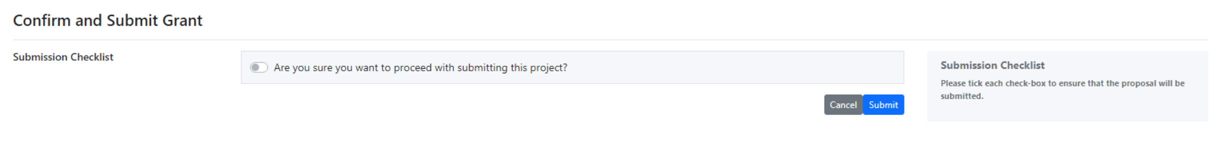
# Project submission and workflow

The red **"Errors"** button on the top righthand side of the page, will act as a guide for users and will show outstanding fields or documents needed to complete the submission.

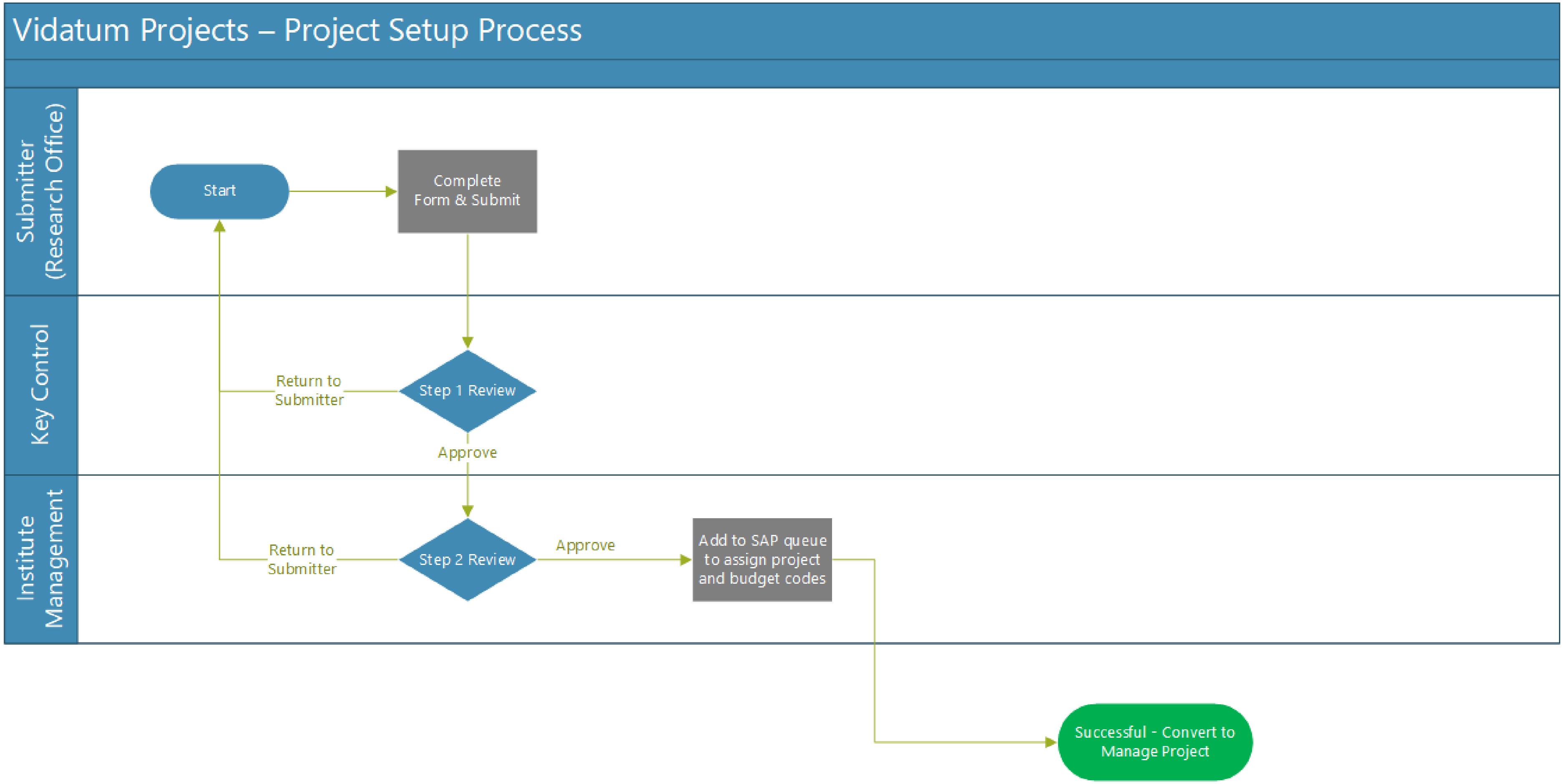



When all mandatory fields and Sections have been completed, the red **"Errors"** button will turn into a blue **"Submit"** button. This has now noted you have completed the application and it is ready for you to press the blue **"Submit"** button. As shown with the red arrow on the screenshot. You can now press the blue **"Submit"** button for the application to go through the approval process in the workflow.



## Workflow – Project Setup

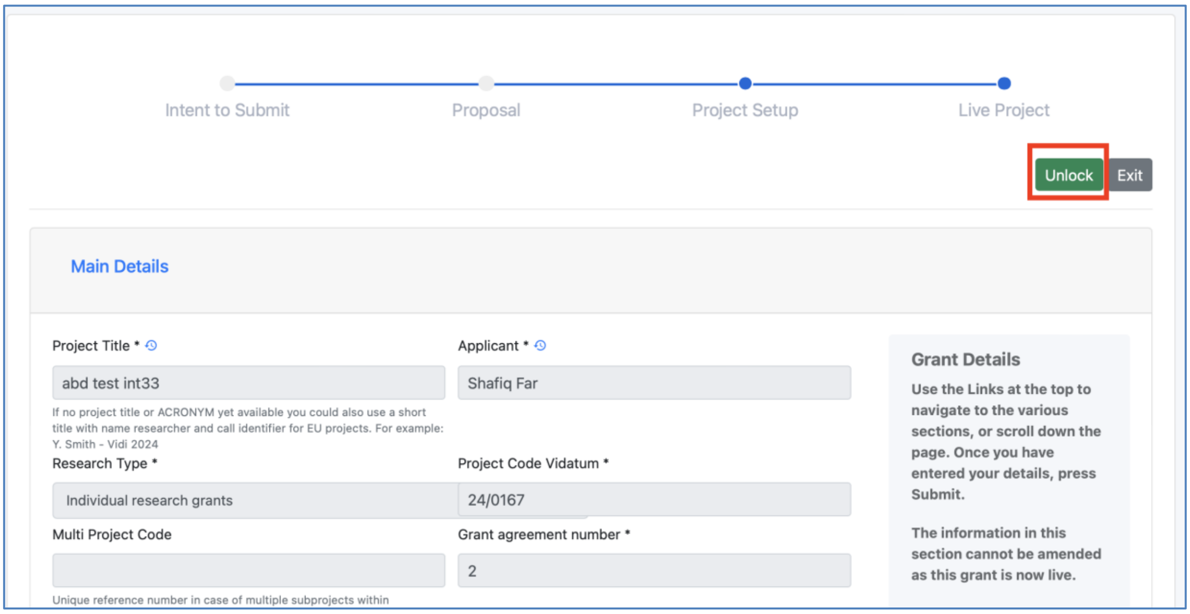


# 6. Live Project

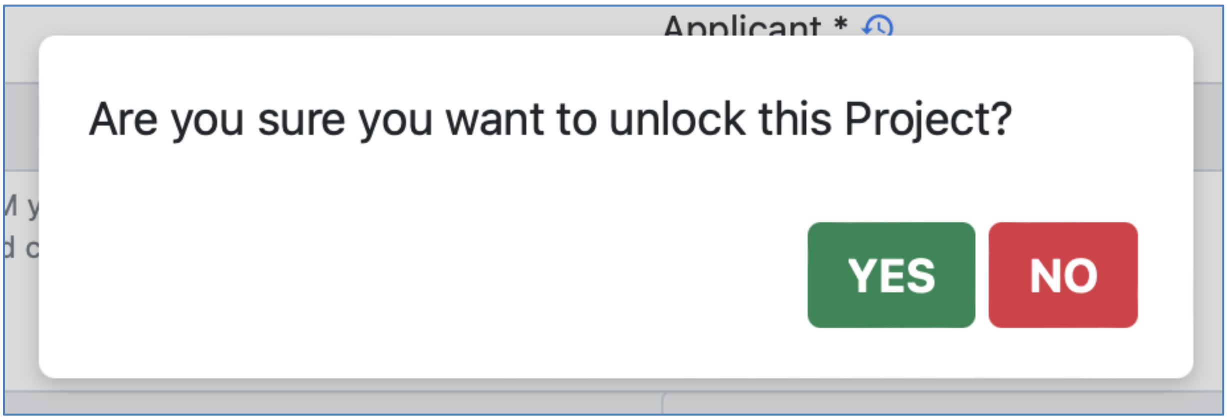
If you want to retrieve or change data from a current project, select the '**Live Project'** option at the main screen '**Submissions**'.

## Amending Live Project

When a submission at the Project Setup stage is approved, it is then upgraded to a Live Project and the user will only be able to make an amendment to the submission if it is unlocked and then put through workflow.

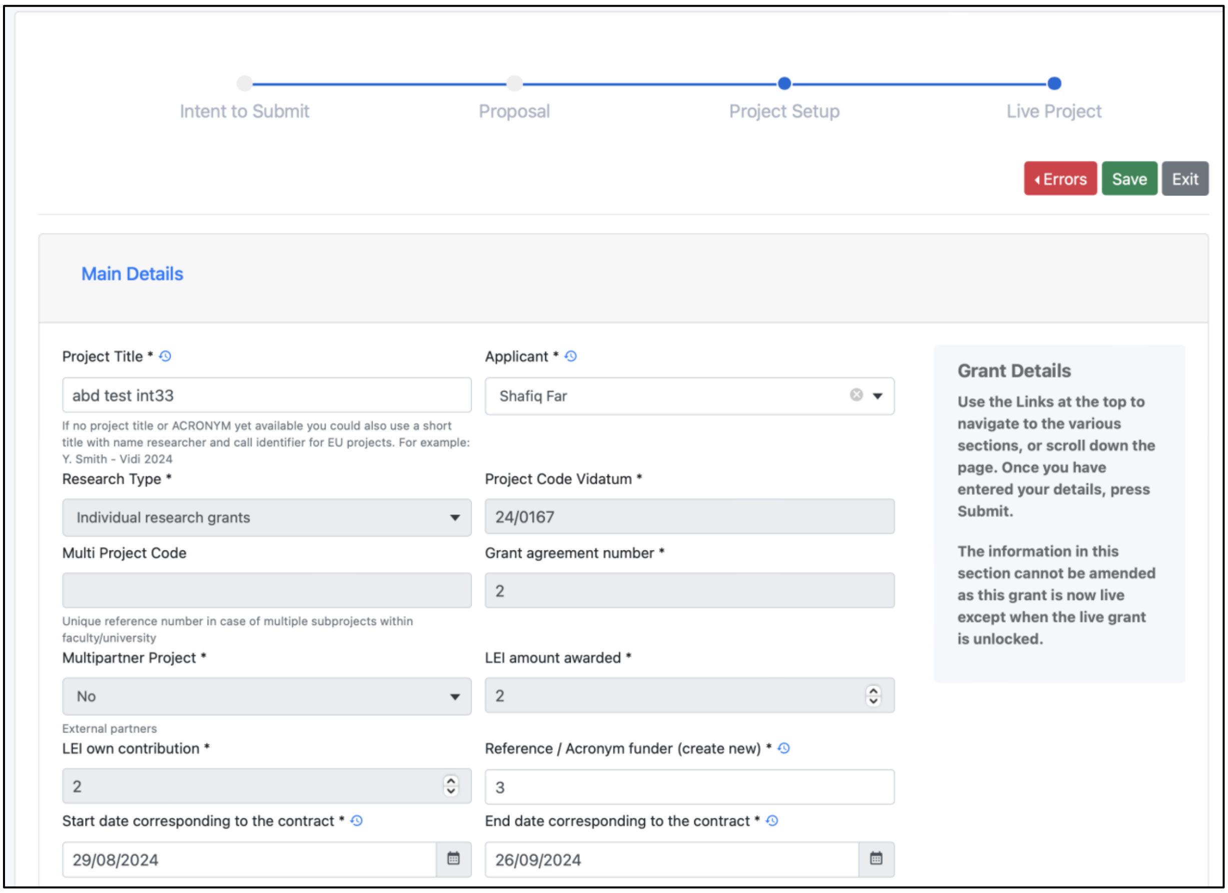



To do this, view the project and click on the "Unlock" button. This will bring up a dialogue menu and the users can confirm the unlock.




Clicking on "Yes" will allow the user to make amendments to some parts of the application. There are other fields that will not be editable and they are will be greyed out.

Even if no change is made the status will remain on under amendment until it regains the live status after approval in workflow.




The user will be subject to the same validation rules with the “Errors” button guiding the user on what to fill.

**Note: Please ensure to click the “Save” button to re-run the validator to ensure accuracy of what needs to be filled out.**

When this is done, the user will be prompted to confirm their submission. The submission will go through the same approval workflow as in the Project Setup phase.

# Budget report

Once a project has entered the Live Project phase, a budget report option is available in the system.

**Manage actuals**

Instructions will follow.

**Forecast**

Instructions will follow.

The budget report includes the following data (daily data exchange with ERP system):

1. **Internal budget =** calculation of expected project expenditures/revenues taking into account internal remittances and/or contributions.
2. **Funder budget =** calculation of expected project expenditures/revenues according to final submitted budget approved by funder.
3. **Actuals** = actual costs incurred (based on data from ERP system).
4. **Commitments** = obligations recorded in the ERP system (staff related as well as material related). Important note: staff commitments are displayed only for renewals recorded in the ERP system.
5. **Remaining** = internal budget minus actuals and commitments.

Download to Excel

Confidential - For Internal Use Only
Project ID: 4096

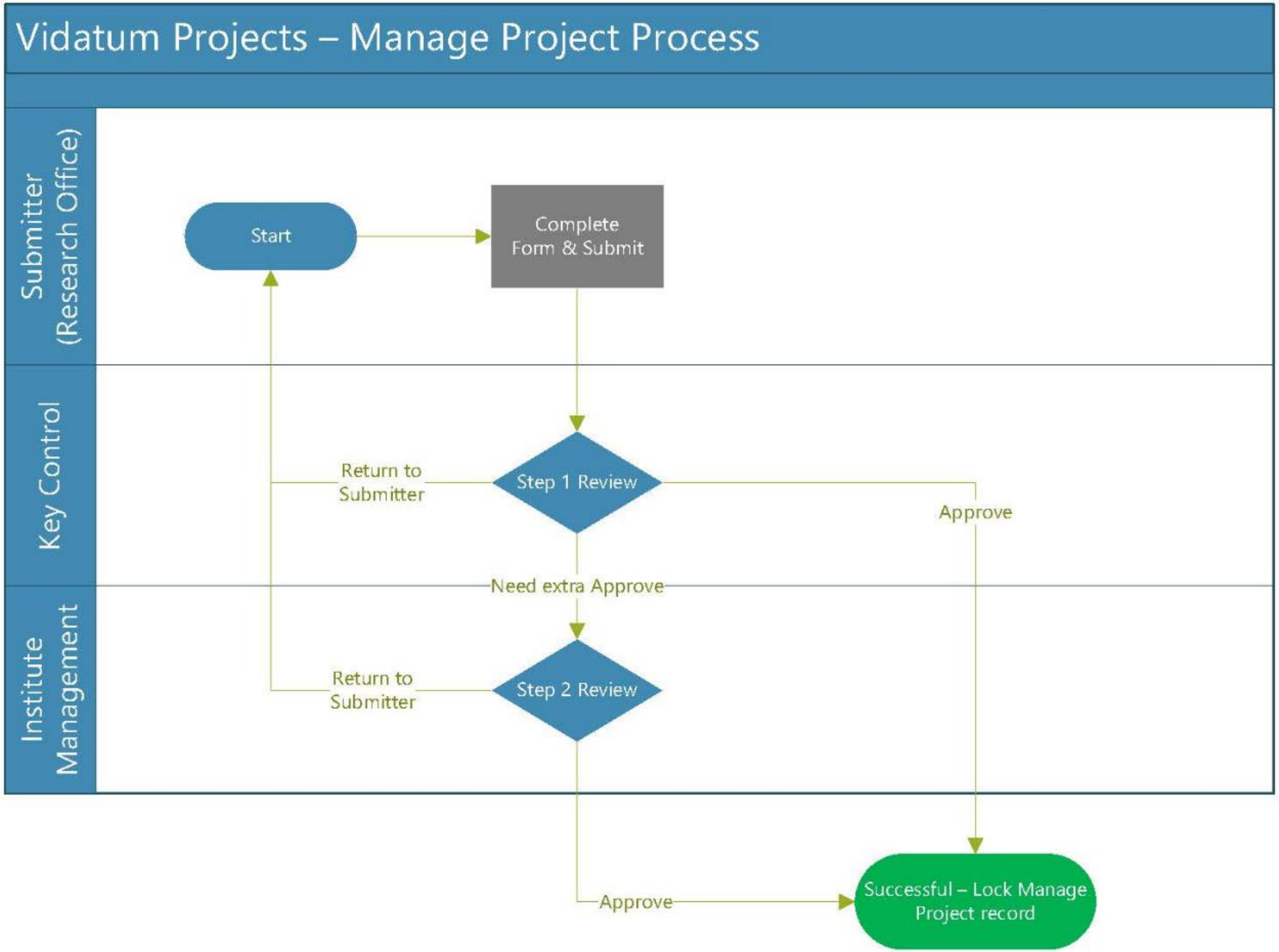
Project Budget Report - budget type STANDARD

| | | | |
|---|---|---|---|
| Project | 24/0056 Project K | Budget Code | 1801008000 |
| Principal Investigator | Shafiq Far | Funding Body | Gemeente Den Haag |
| Start / End Date | 01/01/2025 - 31/12/2029 | Funding Program | (Commercial) Assignment |

| | Details | | | | Internal Budget | Funder Budget | Actuals | Commitments | Remaining |
|---|---|---|---|---|---|---|---|---|---|
| **Staff Costs** | **Description** | **FTE %** | **Start Date** | **End Date** | | | | | |
| PhD | 1 trans no | 100 | 01-JAN-25 | 31-DEC-28 | 226,220.76 | 231,876.28 | .00 | .00 | 226,220.76 |
| PostDoc | 1 trans no | 100 | 01-JAN-25 | 31-DEC-28 | 325,063.68 | 333,190.27 | .00 | .00 | 325,063.68 |
| Total Staff | | | | | 551,284.44 | 565,066.55 | .00 | .00 | 551,284.44 |
| **Material Costs** | **Description** | | | | | | | | |
| Equipment | | | | | 100,000.00 | 60,000.00 | .00 | .00 | 100,000.00 |
| Total Material Costs | | | | | 100,000.00 | 60,000.00 | .00 | .00 | 100,000.00 |
| Total Direct Costs | | | | | 651,284.44 | 625,066.55 | .00 | .00 | 651,284.44 |
| **Indirect Costs** | | | | | | | | | |
| Overheads | Autogenerated | | | | .00 | 360,000.00 | .00 | .00 | .00 |
| Housing Fee | Autogenerated | | | | 44,000.00 | .00 | .00 | .00 | 44,000.00 |
| Faculty / Institute Fee | Autogenerated | | | | 161,886.65 | .00 | .00 | .00 | 161,886.65 |
| Total Indirect | | | | | 205,886.65 | 360,000.00 | .00 | .00 | 205,886.65 |
| Total Project Costs | | | | | 857,171.09 | 985,066.55 | .00 | .00 | 857,171.09 |
| **Income** | | | | | | | | | |
| External Income | Autogenerated | | | | 985,066.55 | 985,066.55 | .00 | .00 | 985,066.55 |
| Internal Income | Autogenerated | | | | 127,895.46- | .00 | .00 | .00 | 127,895.46- |
| Total Income | | | | | 857,171.09 | 985,066.55 | .00 | .00 | 857,171.09 |

# Closing project

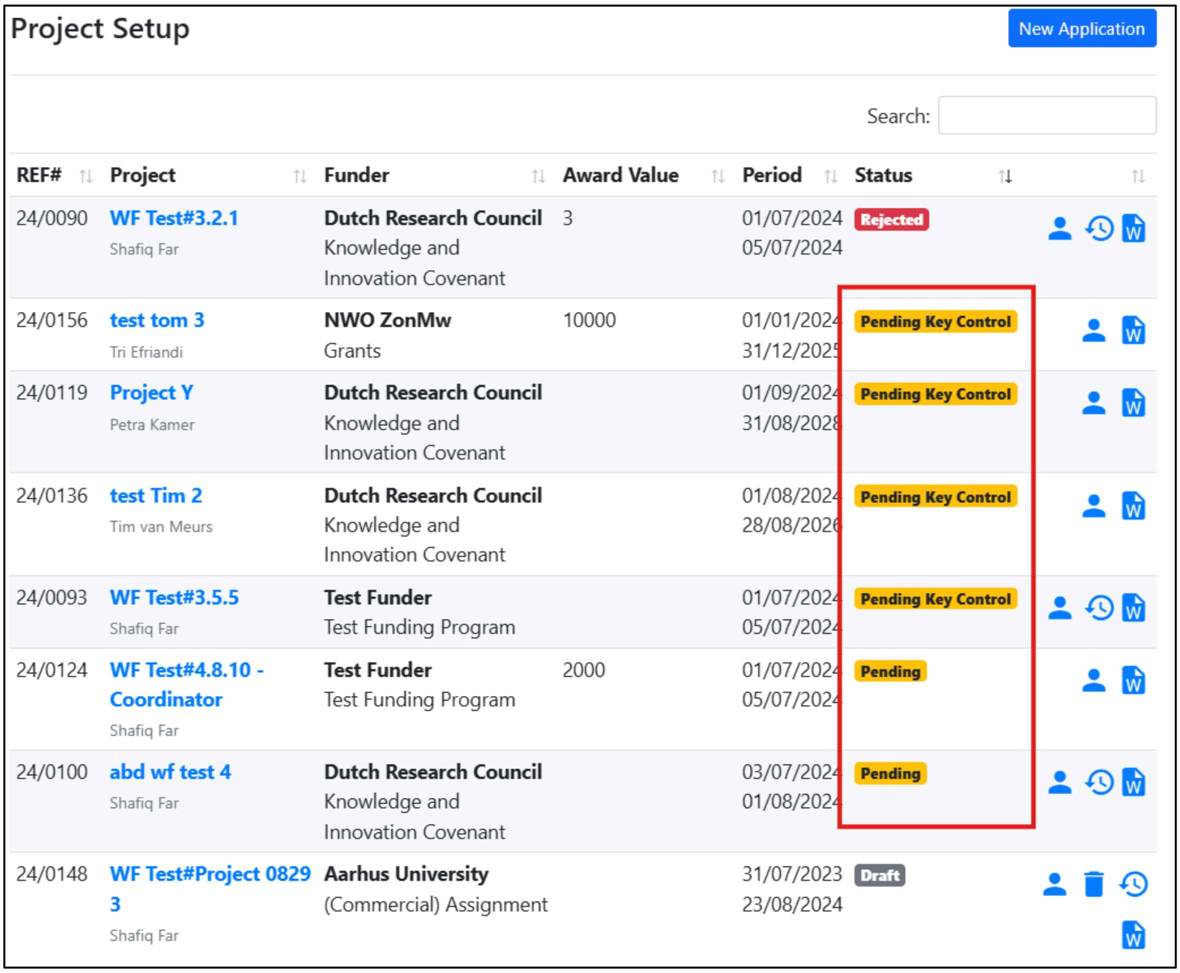
Instructions will follow.


Vidatum Projects – Manage Project Process
Submitter (Research Office)
Key Control
Institute Management
Start
Complete Form & Submit
Return to Submitter
Step 1 Review
Approve
Need extra Approve
Return to Submitter
Step 2 Review
Approve
Successful – Lock Manage Project record

# 7. Project Approval

When a user submits their application, it can be seen in their relevant sections, e.g. Intents will be in the Intents page, and Project Activations will be in the Project Activations page. This page will list all their previous submissions and they will be able to view them in a read-only format. As shown on the below screenshot with the red circle.

The statuses will correspond to the stage of the workflow the Projects submission is at.



Project Setup

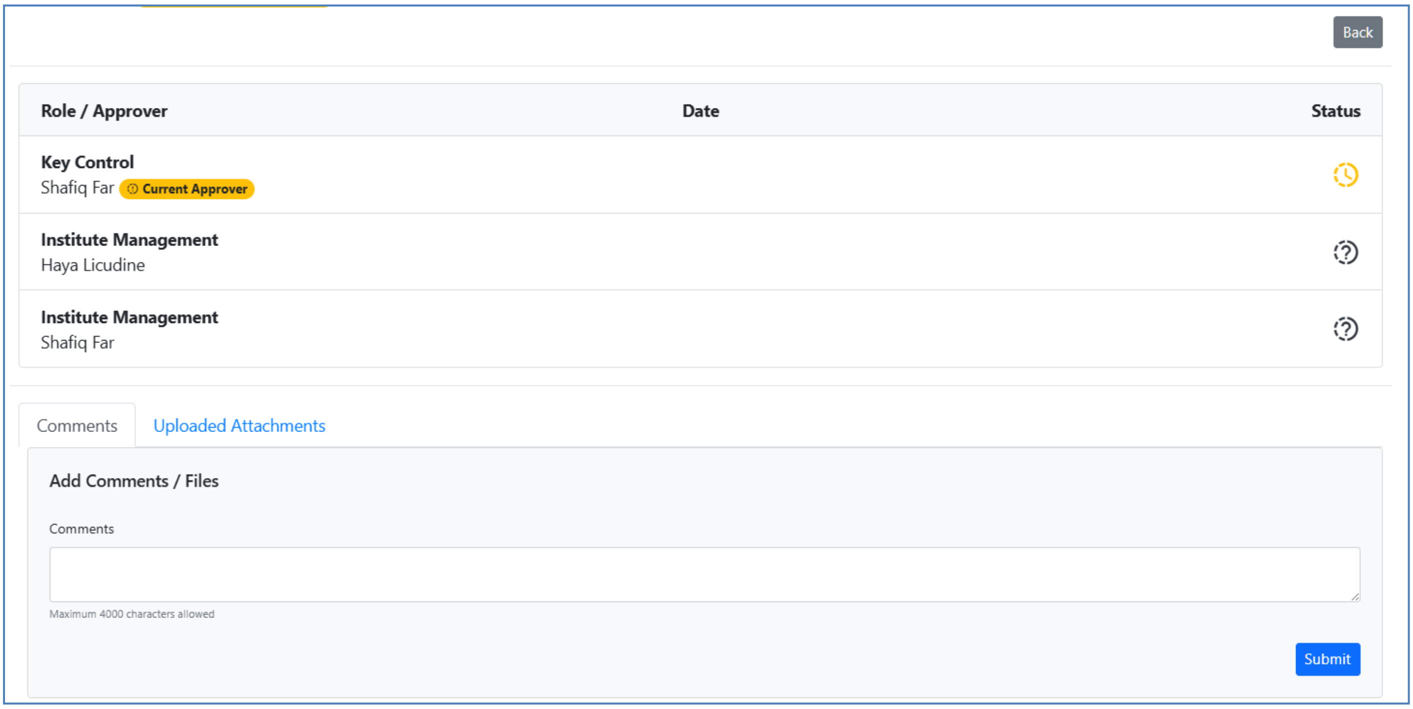
New Application

Search:

| REF# | Project | Funder | Award Value | Period | Status |
|---|---|---|---|---|---|
| 24/0090 | **WF Test#3.2.1** Shafiq Far | **Dutch Research Council** Knowledge and Innovation Covenant | 3 | 01/07/2024 05/07/2024 | Rejected |
| 24/0156 | **test tom 3** Tri Efriandi | **NWO ZonMw** Grants | 10000 | 01/01/2024 31/12/2025 | Pending Key Control |
| 24/0119 | **Project Y** Petra Kamer | **Dutch Research Council** Knowledge and Innovation Covenant | | 01/09/2024 31/08/2028 | Pending Key Control |
| 24/0136 | **test Tim 2** Tim van Meurs | **Dutch Research Council** Knowledge and Innovation Covenant | | 01/08/2024 28/08/2026 | Pending Key Control |
| 24/0093 | **WF Test#3.5.5** Shafiq Far | **Test Funder** Test Funding Program | | 01/07/2024 05/07/2024 | Pending Key Control |
| 24/0124 | **WF Test#4.8.10 - Coordinator** Shafiq Far | **Test Funder** Test Funding Program | 2000 | 01/07/2024 05/07/2024 | Pending |
| 24/0100 | **abd wf test 4** Shafiq Far | **Dutch Research Council** Knowledge and Innovation Covenant | | 03/07/2024 01/08/2024 | Pending |
| 24/0148 | **WF Test#Project 0829 3** Shafiq Far | **Aarhus University** (Commercial) Assignment | | 31/07/2023 23/08/2024 | Draft |

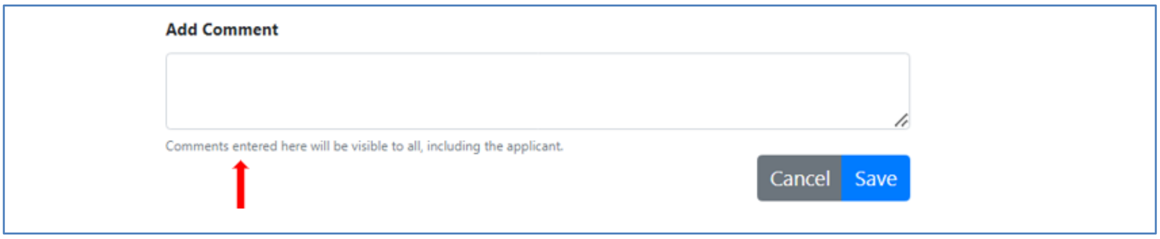
Clicking on the person profile "" button will allow the user to view which stage of approval the application is on. As shown on the below screenshot with the red arrow.

Example of reviewing preview:

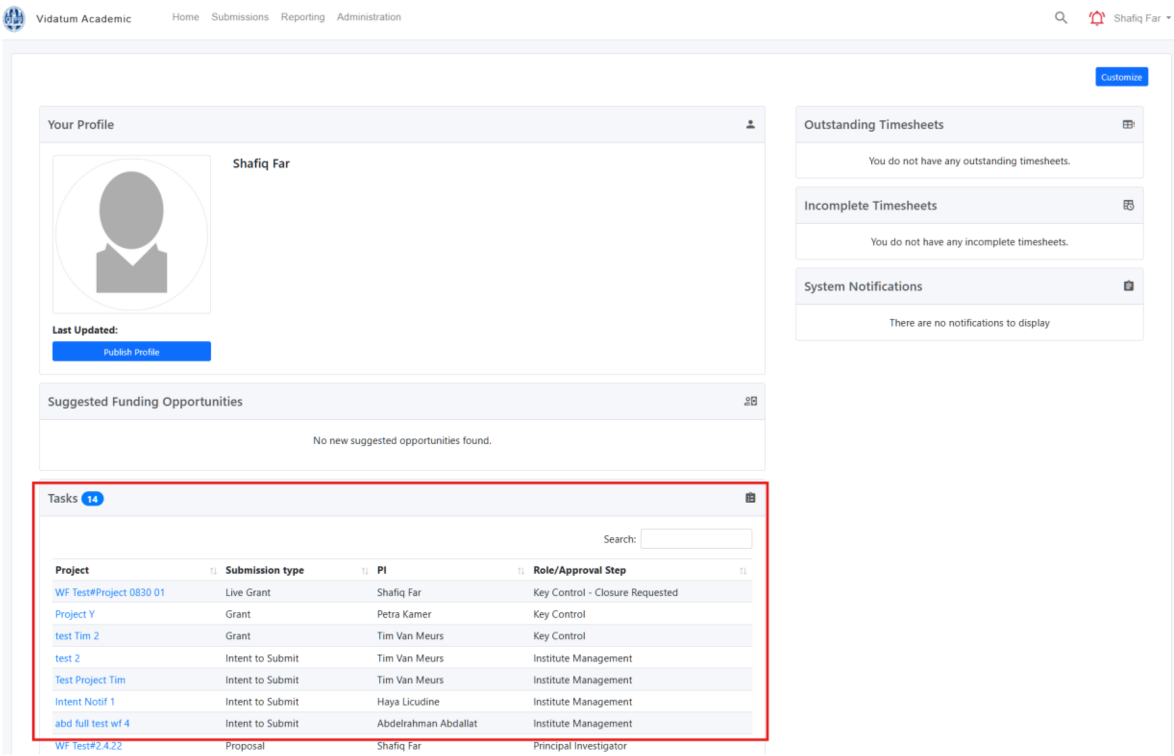



**Comment Boxes**

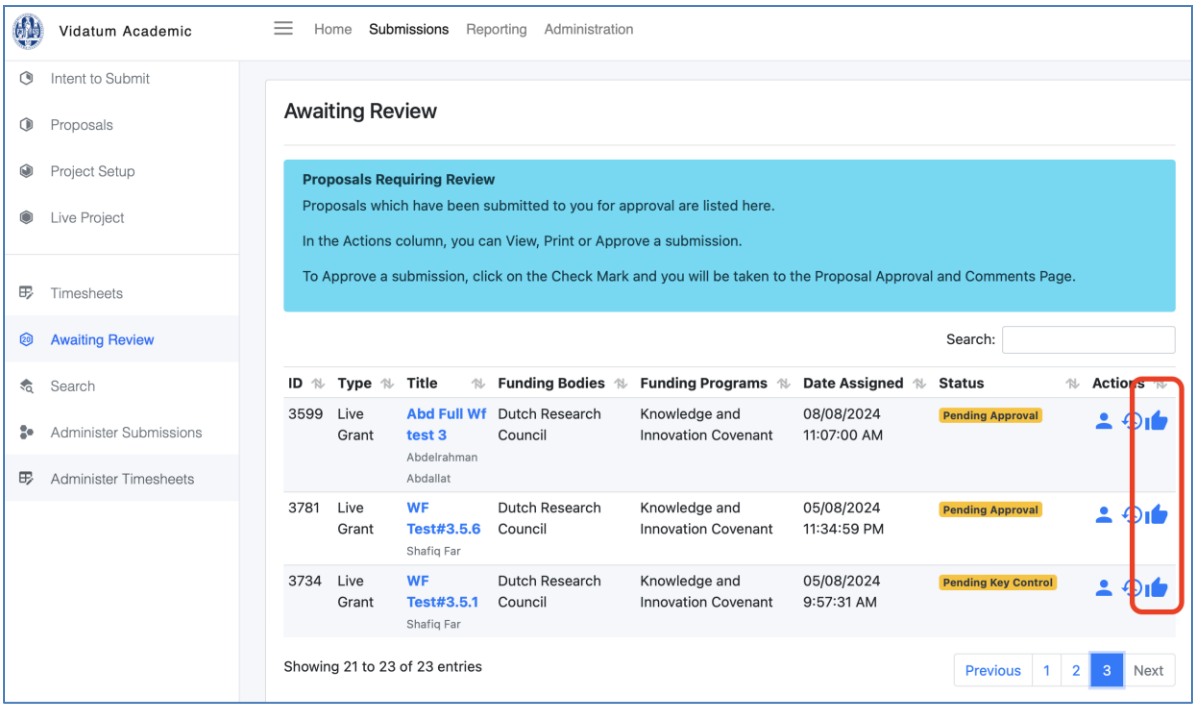
Please note the importance to read all captions below each comment box as it states 'Comments entered here will be visible to all, including the applicant'. Please ensure not to enter any information/comments into the box that you **do not** want the applicant to see. As shown on the below screenshot with the red arrow.



When a Projects Submission requires approval, the approver will receive a notification in their **"Notifications and Tasks"** panel on their home page. As shown on the below screenshot with the red arrow.



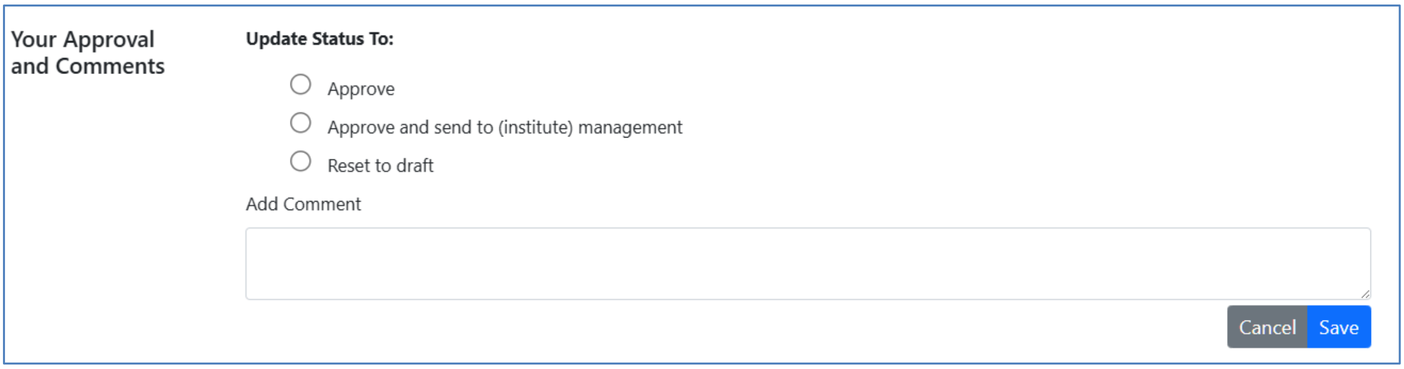

Alternatively, an Approver can view items awaiting review by navigating to the **"Submission"** button at the top of the page and clicking on the **"Awaiting Review"**. The Approver can view the Projects Submission in Read-Only mode and clicking on the **"Approve hand 👍"** button will start the approval process. As shown on the below screenshot with the red arrows.



When the user clicks on the **"Approve"** button, they will be brought to a new page. Depending on the approval step and different users will see different actions.

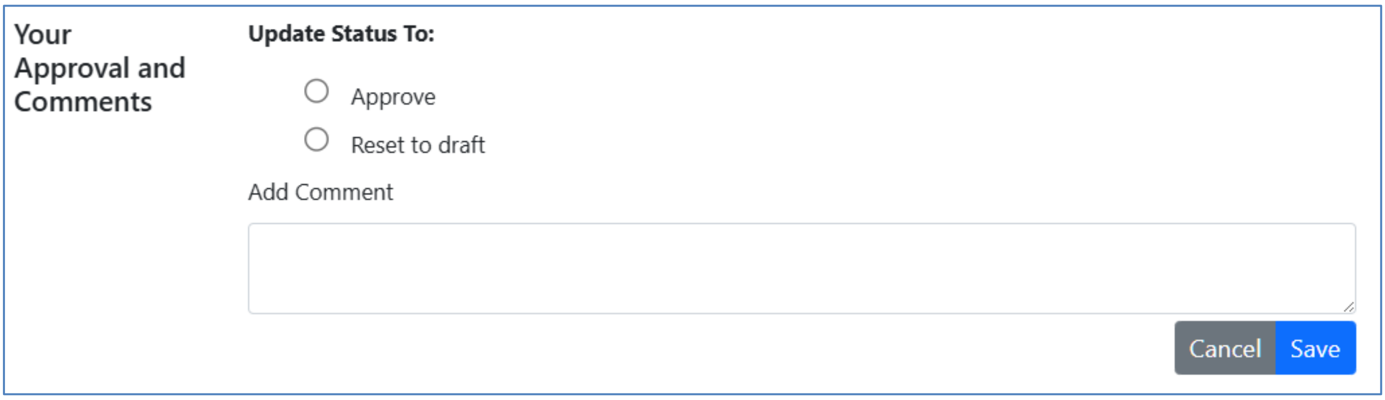
**Key Control Step Actions**

- Approve
- Approve and send to (institute) management
- Reset to Draft. Always include a comment to indicate what changes are needed.




**Institute Management Actions**

- Approve
- Reset to Draft. Always include a comment to indicate what changes are needed.




**Uploading a document**

Please make sure to select the document you would like to attach, then press the blue 'upload' button before continuing with the application. This is to avoid unsaved worked or attachments.

1. Attach desired documentation
2. Press the blue Upload button
3. Continue with application