Submitting a Grant Application through the Joint Electronic Submission (JE-S) System

For the Research Councils: PPARC, BBSRC, NERC & EPSRC
CREATING AN ACCOUNT
Click Create Account
Accept the terms and conditions and press submit

If you do not accept the terms and conditions you cannot use the Je-S system.
Enter your details

Choose a Username and Password

Click “Select” to search for your Organisation

Click “Select” to search for your Department
Example: Searching and Selecting

Je-S Department Search

Please specify a part of the department name to search for. Click on the any part of a row to select that department onto the form.

Example Screen: After clicking “Select Department” and searching for all departments starting with “camb”
Challenge Responses
Please provide 3 prompt and response pairs. These are required as part of a security measure to help ensure that only you may gain access to your account.

If you have trouble remembering your password and fail to login three times in succession, the system will lock your account. You will consequently receive an e-mail containing a URL. Visit this URL to activate the re-authentication process. The system will randomly select 2 of the prompts you have provided. If you provide the correct responses, the system will ask you to reset your password and password hint.

Example prompt/response pairs are:

**Prompt 1:** Favourite food
**Response:** cheese

**Prompt 2:** First pet
**Response:** Spike

Please do not use these examples. It is important that the responses you use cannot be easily determined by others.

If you access other Web sites that use prompts and responses, you may prefer to use different pairs for Je-S. The prompts and responses are stored in encrypted format in Je-S but may be used by the Je-S Helpdesk to authenticate you if you make contact by telephone.

Please Enter 3 Prompt & Response Pairs

<table>
<thead>
<tr>
<th>Prompt</th>
<th>Response</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Type of Account

Select three prompt & response pairs. Example: Dog/Cat, Sun/Moon, Night/Day

If you lock your account by using an incorrect password, you will be asked to provide 2 of the above pairs in order to re-access the account. How the pairs are structured is your own choice.
If you are a P.I./Co-I/Researcher Co-I you must tick the box to “Create a Registered Account”

Otherwise do not tick any of the boxes and this will allocate an unregistered account. An unregistered account allows you to create an application and makes your details available on the searchable Je-S database.

Click “Update”
You will be returned to the log-in screen.

Je-S HelpDesk will now request confirmation with RSD that you are eligible for a registered account. Confirmation can take up to three days to be processed by both Je-S and RSD.

When confirmation is complete, you will receive an email from Je-S with your User Id and Password. You can now log-in and begin your application.

In order to submit your completed Je-S application, RSD still requires an RSD-1a/PFACT and a **three working day turnaround time**.
LOGGING IN FIRST TIME
Confirming Personal Details

Click on “My Details”
You MUST tick the box and click “Save” to confirm your details.

If you do not confirm your details, any application on which you are named as a Co-I/P.I./ Researcher Co-I will receive an error message upon submission and will NOT be able to submit.
SUMMARY SCREEN:
Other Functions
Changing your Password

From Document Summary screen, Click “Login Details”

Change password details as appropriate and click “Update”

After a set time period, the system will also automatically prompt you at log-in to change your password

You can also access/edit your Challenge Responses from this screen
Changing Personal Details

From Document Summary screen, Click “My Details”

Edit/Add details
This is the same screen you used to confirm your details for “Logging in First Time”
Changing Address Details

From Personal Details screen, click “Address Details”

Click “Add New Address”

Add/Edit details, tick confirmation box, and click “Save”
Changing Department/Organisation Details

From Personal Details screen, click “Registered Details”.

Click “Select” and search new Organisation and/or Department.

The change is not automatic. Je-S will have to verify the change with the central administration of the new department/organisation.
CREATING A GRANT APPLICATION
From Document Summary Screen:
Click “Add New Document”

Select your Council, Document Type, and Scheme from the drop-down lists
Click “Create Document”
Copying an Existing Proposal

To copy a proposal you have already formatted, Select Council, Document Type and Scheme then tick the box for “Copy an Existing Document”.

Select from your list of existing proposals which one you require copied. Note: The application you select MUST be for the same Research Council. For example, you cannot copy a BBSRC proposal for a NERC application.
DOCUMENT MENU
This is the screen from which you will enter details and upload documents for your application. It is the main screen for editing a research proposal document. This screen may look slightly different for different research councils.
Edit Project Details

**Project Details**

**Scheme:** Standard Grant  
**Project Title:**  
**Organisation:**  
**Department:**

**Submitting Organisation**

- **Organisation:**  
- **Department:**  
- **Submitters reference:**

**Project Title**

**Proposal Call**

- **Proposal call:** none

**Start Date and Duration**

- **Start date:** 11 July 2005  
- **Duration:** ______ months

**Note:** If Scheme and/or Call are not selected correctly, the application may not travel to the relevant assessors at the Research Council.

**Reference** can be any combination of numbers or letters you require. When submitted RSD will add to or change “Your Reference” to the internal “RG Number”.

Click “Select Organisation”  
Click “Select Department”

Add all details as appropriate and click “Save”
Edit Investigators

Select type of Investigator to Edit

Click “Add New XXX Investigator”
1. Select P.I. from Je-S Database. P.I./Co-I must have a Registered Account.

2. “Post will outlast project” must say “Yes”. See particular RC guidelines.

3. Enter “Total number of hours” as a portion of 1650 hours p.a. full time.

4. If Directly Incurred, select appropriate pay scale, JNCHЕ or Non-JNCHЕ.
   If Directly Allocated, select “Directly Allocated” instead of pay scale.
1. Example: 2 hpw x 44 wpa x 5 = 440 hours worked over duration of the grant.

2. Enter Salary Rate – Actual or by Banding as per PFACT.

3. “Total Number of Hours to be Charged” should equal hours to be charged to the project. This may not be equal to “Hours Worked”.

4. Click “Calculate”. Form will calculate P.I. cost for whole project.
Example: Co-I Researcher – Directly Incurred

1. Total number hours to be worked should be full or near full time
2. Cost Type should be JNCHE
3. Click “Show Calculator”
Enter details in the drop down/fill in boxes as required i.e. start date, duration, etc.

Click “Calculate”

The lower half of the screen will populate with the appropriate salary figures.

Click “Ok”
Shows summary of calculations. Double-check information is correct. If you need to make corrections, click “Show Calculator”
Objectives, Summary and Beneficiaries: Fill in as per Council guidelines for your scheme/call.

Objectives

Scheme: Standard Grant
Project Title: Je-SIPEC training
Organisation: University of Cambridge  Department: Research Services Division

List the main objectives of the proposed research in order of priority (up to 4000 chars).

Summary

Scheme: Standard Grant
Project Title: Je-SIPEC training
Organisation: University of Cambridge  Department: Research Services Division

Describe the proposed research in simple terms in a way that could be publicised to a general audience (up to 4000 chars).

Beneficiaries

Scheme: Standard Grant
Project Title: Je-SIPEC training
Organisation: University of Cambridge  Department: Research Services Division

Describe who will benefit from the research (up to 4000 chars).

You can also cut and paste text from a Word document into these sections.
Edit Other Support

Click “Add New…..”

Select and Search organisation.

Add support details as appropriate
If the proposal is related to one or more proposals previously submitted to the Council, select “Add new Related Proposals Item”.

Tick the appropriate box and add reference number as requested.
Edit Joint Proposals

Additional options will appear down the list as you answer “Yes” or “No”.

Example: Partner organisation

Click “Get New Reference”. The system will provide the “joint reference” number.

Enter total number of proposals including lead. Click “Save”
Notes: Joint Proposals

• If you are the Lead Organisation you will have to obtain the joint reference as per the example and then notify your partners of the reference so they can include this on their own applications.

• If you are not the Lead Organisation, you will have to obtain the joint reference from your lead partner.

There is no automatic notification to partners of the joint reference.
Edit Resources

Click appropriate category and add necessary costs.

Example: Add Other Directly Incurred Costs

Other Directly Incurred Costs

Scheme: Standard Grant
Project Title: JeS-EC training
Organisation: University of Cambridge  Department: Research Services Division

Description
Amount

Save  Cancel
**Example: Add Equipment**

- **Scheme:** Standard Grant
- **Project Title:** Js-SEC training
- **Organisation:** University of Cambridge  **Department:** Research Services Division

Add details of individual items of equipment dedicated to the project and costing £3000 or more (including VAT). The cumulative value of equipment costing in excess of £50,000 will automatically be added to the ‘Exceptions’ heading in the resources summary table and paid at 100% FEC.

**Click “Add New Equipment”**

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supercomputer</td>
<td>150,000</td>
</tr>
</tbody>
</table>

Add details. Include VAT on EU purchased equipment
Edit Estate Rates/Indirect Costs

Select “Edit Indirect Costs” or “Edit Estates Costs”

Enter Estate/Indirect Cost as calculated by PFACT
### Classification of Proposal

<table>
<thead>
<tr>
<th>Scheme:</th>
<th>Standard Grant</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Title:</td>
<td>Je-S IEC training</td>
</tr>
<tr>
<td>Organisation:</td>
<td>University of Cambridge</td>
</tr>
<tr>
<td>Department:</td>
<td>Research Services Division</td>
</tr>
</tbody>
</table>

### Nominated Referees

Enter the details of up to 4 referees whom NERC may approach for assessment of this research proposal.

**Add New Referee**

<table>
<thead>
<tr>
<th>Referee Name</th>
<th>Organisation or Address</th>
<th>Department or Town</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- There are no items to show.

### Project Partners

Enter details of partners in the project and their contributions to the research. These can be added from the menu.

**Add New Project Partners Item**

<table>
<thead>
<tr>
<th>Partner Organisation</th>
<th>Contact Name</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- There are no items to show.

### Note

For “Other Support”, “Project Partners”, and “Referees” if your “Select” search fails, you will then be given the option to “Add New Organisation/Partner”
Example: Searching and Selecting: Adding Information Manually

If “Select” search fails, some data screens will give you the option to “Add New xxxxx” and input information manually.

Data Screens that allow this option include “Edit Other Support”, “Edit Project Partners”, and “Edit Referees”

Note: This option will not appear until the search has failed.
This is a read-only screen which is populated automatically from the other data screens: staff/resources. It shows the fEC and the RC contribution at 80%.
Adding Attachments

Click “Edit Attachments”
Click “Add New Attachment”

Click “Browse” and navigate to the appropriate file/s on your system. Note the types of files accepted. Once uploaded all files are converted to PDF files. You will need Adobe Acrobat in order to read the files again once uploaded.

You must type a description

You must select a document type either “Case for Support” or “Other”. “Other” may be support letters, cover letters, quotations etc.
STAFF
1. Tick the circle next to “Name” if your researcher is in the Je-S database. Tick the circle next to “Post Identifier” if the post is unnamed or not in the database.

2. If your post is a JNCHE (Joint Negotiating Committee for Higher Education) post, tick the “JNCHE Scale” box.

   If your post is a non-JNCHE post, leave the box unticked.

3. Click “Show Calculator”
Example: JNCHE post

**Staff Post Calculator - Joint Staff**

<table>
<thead>
<tr>
<th>Post Start Date</th>
<th>1 August 2006</th>
</tr>
</thead>
<tbody>
<tr>
<td>Duration / Fulltime Percentage</td>
<td>60 Months 100%</td>
</tr>
<tr>
<td>Staff Type</td>
<td>Researcher</td>
</tr>
<tr>
<td>Discretionary Points</td>
<td></td>
</tr>
<tr>
<td>London Wght / Grade / Spine Pt</td>
<td>PA1A 6</td>
</tr>
<tr>
<td>Increment Date</td>
<td>1 August 2007</td>
</tr>
<tr>
<td>Total Other Allowances</td>
<td>0</td>
</tr>
</tbody>
</table>

**Calculated Staff Costs**

<table>
<thead>
<tr>
<th>Spine Point</th>
<th>Start Date</th>
<th>End Date</th>
<th>No of Days</th>
<th>Annual Salary (£)</th>
<th>Amount (£)</th>
</tr>
</thead>
<tbody>
<tr>
<td>6</td>
<td>Tuesday, August 01, 2006</td>
<td>Tuesday, July 31, 2007</td>
<td>366</td>
<td>26,219.00</td>
<td>26,219.00</td>
</tr>
<tr>
<td>7</td>
<td>Wednesday, August 01, 2007</td>
<td>Thursday, July 31, 2008</td>
<td>366</td>
<td>27,200.00</td>
<td>27,200.00</td>
</tr>
<tr>
<td>8</td>
<td>Friday, August 01, 2009</td>
<td>Friday, July 31, 2009</td>
<td>366</td>
<td>28,688.00</td>
<td>28,688.00</td>
</tr>
<tr>
<td>9</td>
<td>Saturday, August 01, 2009</td>
<td>Saturday, July 31, 2010</td>
<td>366</td>
<td>30,140.00</td>
<td>30,140.00</td>
</tr>
<tr>
<td>10</td>
<td>Sunday, August 01, 2010</td>
<td>Sunday, July 31, 2011</td>
<td>366</td>
<td>31,223.00</td>
<td>31,223.00</td>
</tr>
</tbody>
</table>

Enter details in the drop down/fill in boxes as required i.e. start date, duration, etc.

Click “Calculate”

The lower half of the screen will populate with the appropriate salary figures.

Click “Ok”
Example: Completed JNCHES post summary screen

If you need to make amendments or changes click “Show Calculator” to return to the post data screen.
Example: Non-JNCHES post data screen

There is no automatic calculation on this screen.

Fill in all details AS PER THE RSD-1a or PFACT.

Click “OK”
Example: Completed Non-JNCHES post summary screen

Check details against RSD-1a/PFACT.

If you need to make amendments or changes click “Show Calculator” to return to the post data screen.
### Question: Do I use JNCHES or Non-JNCHES?

<table>
<thead>
<tr>
<th>Use JNCHES</th>
<th>Use Non-JNCHES</th>
</tr>
</thead>
<tbody>
<tr>
<td>RA1A posts up to national spine point 13</td>
<td>RA1A posts over national spine point 13 (discretionary)</td>
</tr>
<tr>
<td>RA1B posts up to national spine point 6</td>
<td>RA1B posts over national spine point 6 (discretionary)</td>
</tr>
<tr>
<td>SRA (RA2A) posts</td>
<td>All Technicians</td>
</tr>
<tr>
<td>(tick the “discretionary points” box on the staff data screen if you need to include discretionary points)</td>
<td>All Computer Officers</td>
</tr>
<tr>
<td></td>
<td>All Clerical/Administrative staff</td>
</tr>
<tr>
<td></td>
<td>All Clinical Staff</td>
</tr>
<tr>
<td></td>
<td>All Nurses</td>
</tr>
</tbody>
</table>

### Important Points for the JNCHES data screen:
- The “Effective Date of Scale” will fill in automatically to the date you have filled in the information. You cannot change this date.
- The increment date for unnamed researchers is the anniversary of their start date.
- For named researchers already employed at Cambridge, please be sure you have checked their increment date with Personnel or your Departmental Administrator.

### Important Points for the Non-JNCHES data screen:
- The “Effective Date of Scale” does not fill in automatically. This is the latest date of the national pay award. If you don’t know the effective date of scale it is a yellow box on the RSD-1a staff pages titled “effective date of salary”.
- The increment date for technicians is always the October following the post start date providing the post starts by 1 July. (must be in post at least 3 months to receive an increment)
- The increment date for Clerical staff is always the July following the post start date providing the post starts by 1 April. (3 month provision)
- The increment date for Nurses/Clinical staff is always the April following the post start date providing the post starts by 1 January. (3 month provision).
VALIDATION & SUBMISSION
Once completed, you can check that your application meets the electronic system’s requirements by clicking “Validate Document”
Example: Validation Failure

Clicking “Validate Document” will split the screen. Validation Errors will show at the bottom of the screen.

“Errors” must be corrected before you are permitted to submit.

“Warnings” are just for information and submission is still allowed if you wish to ignore the warning.
Participant has not “saved” personal details. See “Logging In First Time”.

Please ensure that all Co-I/P.I/ Researcher Co-Investigators in your application have saved their personal details in the last 12 months or you will NOT be able to submit. There is nothing RSD can do to assist with this error and Je-S HelpDesk is not guaranteed to be able to correct this.
Click “Submit Document”. It will ask you to confirm “Ok” or “Cancel”.

Upon successful submission, an email acknowledgement is sent to all parties involved in the production, approval, and submission of the application.

Reminder: “Submitting” sends the application to RSD or your Head of Department, NOT to the Research Council.
### Note: Submission Process

<table>
<thead>
<tr>
<th>One-stage approval</th>
<th>Two-stage approval</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Status:</strong></td>
<td><strong>Status:</strong></td>
</tr>
<tr>
<td>Owner (P.I)</td>
<td>Owner (P.I)</td>
</tr>
<tr>
<td>Submitter (RSD)</td>
<td>Approver (Head of Department)</td>
</tr>
<tr>
<td>Submitter (RSD)</td>
<td>Approver (Head of Department)</td>
</tr>
<tr>
<td>Proposal is sent to:</td>
<td>Proposal is sent to:</td>
</tr>
<tr>
<td>Research Councils</td>
<td>Submitter (RSD)</td>
</tr>
<tr>
<td></td>
<td>Research Councils</td>
</tr>
</tbody>
</table>

Please check with your departmental administrator to find out if your application will follow the One-Stage or Two-Stage Approval process.

Remember, RSD still requires an RSD-1a/PFACT and three working day turnaround time from receipt of RSD-1a/PFACT and application submission.
DOCUMENT MENU:
Other Functions
Click “Create Document for Printing”
You can select to receive the document by email either as a PDF or as a Word attachment.

Or you can view the document on-line as a PDF or word document.

For either option, open the application and Print as normal once you have received/viewed the document.
Document Status shows your current level of access rights to the document i.e Edit, Read-Only
To allow other users (besides Co-Investigators) to view/edit the document, select “User Access Privileges”. You can then “Select” someone or add a “temporary user” using their email address.
Document History

To display status of the document throughout the stages of the process Click “Show Document History”.

<< Back to current documents
Hiding an Application

Click “Hide Document”.

Please note the “Hide Document” option will only appear if you are the OWNER of the application.

A document that is hidden then becomes READ-ONLY. To edit the document again select “Unhide Document”.

Click “Back to current documents”
Deleting an Application

Click “Delete Document”

Please note the “Delete Document” option will only appear if you have EDIT privileges on the application.
Click “Transfer Document Ownership”

On the next screen “Select” search the person to whom you wish to transfer. Then click “Transfer Ownership”
PROBLEMS/NOTES
Problem: Application is “Locked” and none of the shared users with edit privileges can edit anything.

Reason 1: Someone is already in the application and is using it.

Reason 2: The last person to access the application did not log out properly. If you leave the application by clicking the “X” (close) button on the window, instead of clicking “Log-Out”, the application can often become locked.

Solution 2: The person who locked the form needs to log back in, access the application, and click “Log-Out” properly. The application should now be accessible again.

If the person who locked the application is unavailable or the above solution does not work, the JeS HelpDesk should be able to unlock it.
If your department has selected to be an “Approver” please ensure that your Head of Department (or applicable delegated administrator) will be available to approve your application electronically.

“Help” function pops up directly to the section that you are in. Also, it contains research council specific Help for relevant sections. Full Help is available at the log-in screen under “System Help”.

Give shared access to your departmental administrator so they will be able to view and assist with your application.

If you are using an application as a template only or are not intending to submit, please use the “Hide” function so that the application is not visible on the central system. “Hide” renders the document read-only.

Je-S System Tutorials are available at the log-in screen under “Tutorials”.
FELLOWSHIPS
Creating an Account

Complete entry of personal details etc. as per normal grant application
Instead of ticking “Create a registered account”, tick “Be a fellowship applicant”. This will complete the registration without attaching the Fellow permanently to University of Cambridge under Je-S.

Click “Update”
The Fellow will shortly receive an email to activate/access the new account.
Fellowship – Document Menu

Example – EPSRC Fellowship document menu
If the Fellow is submitting a Research Grant with an EPSRC Fellowship, he/she will need to obtain a joint reference number from the research grant application. See Joint Proposal Instructions page 28.

The joint reference number must then be entered into the Fellowship application.
Head of Department Statement

Select/Search Head of Department. This automatically gives the HoD access to the Fellowship application via email in order to complete the necessary support statement.

Please note the Head of Department Statement is NOT confidential. The applicant will be able to access and read the statement.
If there are no active calls for Fellowship proposals, you will not be able to create an application.

Fellowships are currently available only for EPSRC, PPARC, NERC, AHRC & ESRC. BBSRC Fellowships will be available sometime in 2005.

Fellowship applications still require an RSD-1a/PFACT and three working days processing time.
Contacts and Links

- JeS HelpDesk
  JE-SHelp@rcuk.ac.uk
  T: 01793 444164
  Staffed Monday to Friday 9am-5pm

- JeS log-in Homepage
  https://je-s.rcuk.ac.uk/eforms/secure/Login.asp

  Research Services Home Page
  www.rsd.cam.ac.uk

  University of Cambridge fEC page
  http://www.admin.cam.ac.uk/univ/fec/