Completing the X5 Costing

X5 is the University’s research costing, pricing and approval system used to cost and price externally funded research projects according to Full Economic Costs (FEC) methodology. X5 allows users to calculate the research project’s FEC and to adjust the price according to the relevant sponsor’s requirements. For further detailed X5 information please refer to the section on ‘X5 Research Costing and Pricing System’.

You will need to input figures from X5 into your Je-S application form, so please bear in mind the following general pointers:

- Funder inflation is automatically set to 0% in X5 for all Research Councils.
- All Research Councils meet 80% of a project’s costs. The X5 ‘Price’ tab will automatically default-in the correct applicable ‘Actual %’ based on the specific funder scheme selected during Project set up.
- Where Research Councils allow the inclusion of studentships in grant proposals they fund fees and bursaries at 100%. Please use the X5 ‘Students’ tab to cost studentships, selecting the ‘Exceptions’ funder budget heading. The figure of 100% will then auto-default in to the ‘Actual %’ field against these costs under the ‘Price’ tab.
- For guidance on costing equipment please see the X5 costings and grant applications checklist (equipment and survey costs), as found on our Research Councils and Equipment Funding page.
- The ESRC encourage international Co-Investigators on proposals and will fund 100% of justified international costs. Please include any salary costs in X5 as a specific line item on the ‘Non-Staff’ tab under the ‘Other Directly incurred’ funder budget heading. Associated staff travel/subsistence costs should also be clearly identified as a line item on the ‘Non-staff’ tab under the ‘Travel and Subsistence’ funder budget heading. You will then need to amend the ‘Actual %’ to 100% against each line item on the ‘Price’ template page. Further information can be found on the ESRC website.

Inputting the X5 Figures into Je-S

- For Directly Allocated (DA) staff costs in the Je-S form, the ‘Rate of Salary Pool/banding’ field should be populated with the X5 ‘£/per annum’ figure, which can be found under the ‘DA staff’ tab -> ‘Breakdown by person’ sub-tab, and then by clicking on the staff member’s name to reveal the ‘Band salary’ field.
- The Je-S form field for ‘Contracted working week as a % of full time work’ relates to the Pls/Co-Is contract of employment (i.e., full time = 100%, part time = the relevant pro-rata % of full time). It does not relate to the % of time the person intends to spend working on the project; this is covered elsewhere.
- Directly Incurred (DI) staff costs must be charged as actuals and be supported by an auditable record. For staff not dedicated to a project (i.e., who are less than 100%) this necessitates the use of timesheets. Departments should therefore consider whether charging such staff under DA costs is more appropriate.
- To populate the DI staff costs fields in Je-S, the figures should be taken from X5, as these take into account local implementation of factors such as Oxford pension schemes and increment dates.
- The Je-S ‘Scale’ field should be populated with the National Spine Point (NSP) figure (for e.g., grade 7.1 = NSP 29), which can be found under the ‘DI staff’ tab -> ‘Breakdown by person’ sub-tab, and then by clicking on the staff name to reveal the ‘NSP’ field. (N.B.: NSP is not available for Clinical grades.)
- The ‘Increment Date’ is 1 October for all academic/research posts and for support staff on grades 6 - 10, and 1 August for clerical and technical posts on grades 1 - 5. (N.B.: to be entitled to receive an increment in the year they were appointed the staff member must have been in post for at least three months. For each post the increment date can be seen in the Increments pop-up.)
- For DI staff costs in Je-S, the ‘Basic Starting Salary’ and ‘Superannuation & NI’ fields should be populated with the starting figures. These X5 costs can be found under the ‘DI staff’ tab -> ‘Person by year’ sub-tab, and then by clicking on ‘Year 1’ to reveal the relevant fields.