

Instructions for TAS ERP User: Agile-Integrator Bid Submission

Contents

Introduction	Page 1
Login & Navigating ERPNext	Page 2
Entering data, saving and submitting in ERPNext	Page 3
Conflicts of Interest Declaration (If Applicable)	Page 8
Creating a Bid Submission	Page 10
Support	Page 17

Introduction

This user guide details how to submit a bid to the Agile-Integrator Programme.

Please refer to the programme call page on the TAS Hub website for call details and resources before submitting your proposal.

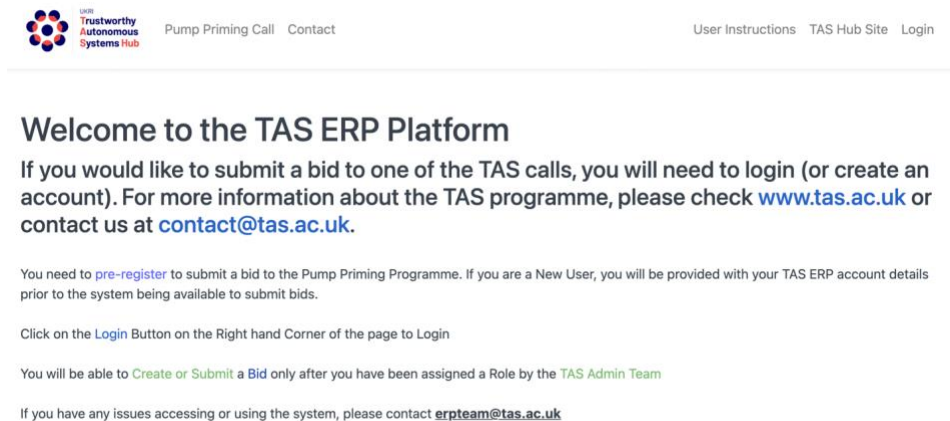
There are two types of research proposal which can be submitted:

1. **Agile Projects** – This applies to **TAS Hub** Co-Is and researcher only
2. **Integrator Projects** – This applies to the **TAS Hub Network** (Hub, Nodes, Responsibility Projects, Pump Priming Projects)

Important: The “Main Contact” is the person from the research team who fulfils the point of contact role in terms of interaction with TAS Hub for the duration of the bid process and project delivery. They are not necessarily the most senior person on the team, and could be a Co-I or Researcher Co-I. To submit a bid requires a user account, and **TAS Hub assumes that the person who submits the bid is the elected “main contact”**. **Any notification emails triggered via ERPNext go to the user account of the person who submitted the bid.** Please be aware of this if considering delegating bid submission to someone other than the main contact.

Login & Navigating ERPNext

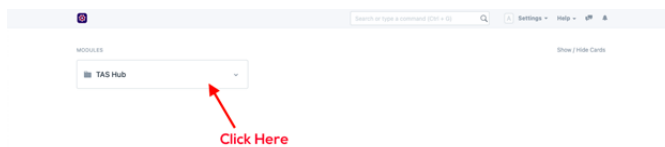
The TAS ERP Home Landing page is accessed from the following link: <https://erpnext.tas.ac.uk/>



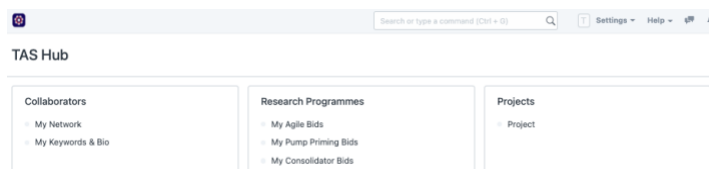
The screenshot shows the TAS ERP Platform landing page. At the top left is the UKRI Trustworthy Autonomous Systems Hub logo. To its right are links for 'Pump Priming Call' and 'Contact'. Further right are links for 'User Instructions', 'TAS Hub Site', and 'Login'. The main heading is 'Welcome to the TAS ERP Platform'. Below this is a paragraph: 'If you would like to submit a bid to one of the TAS calls, you will need to login (or create an account). For more information about the TAS programme, please check www.tas.ac.uk or contact us at contact@tas.ac.uk.' Below this is a paragraph: 'You need to [pre-register](#) to submit a bid to the Pump Priming Programme. If you are a New User, you will be provided with your TAS ERP account details prior to the system being available to submit bids.' Below this is a paragraph: 'Click on the [Login](#) Button on the Right hand Corner of the page to Login'. Below this is a paragraph: 'You will be able to [Create](#) or [Submit](#) a Bid only after you have been assigned a Role by the [TAS Admin Team](#)'. Below this is a paragraph: 'If you have any issues accessing or using the system, please contact erpteam@tas.ac.uk'.

From this page you can access some useful resources including TAS Website, Research Programme web page, Contact TAS, user guidelines, and login page.

1. Click on the Login link top right of the landing page, or enter the following URL or click on the following Link <http://erpnext.tas.ac.uk/login#login>
2. Sign-in using your TAS ERP credentials
3. Click on TAS Hub card



The options presented depend upon user role, permissions, and activity in the system.



Entering Data, Saving and Submitting in ERPNext

Entering Data

There are several different types of data fields:

- Free text fields
- Drop-down lists (single choice selection)

TAS Industry Sector

Defence & Security

Creative Industries

IoT at Home & Workplace

Financial Services

Industry X

Editor (Review Monitor)

TAS Industry Sector

Creative Industries

- Drop-down lists (multi choice selection)

TAS Nodes Alignment

Security ✕

Editor (Review Monitor)

Governance and regulation

Security

Functionality

TAS Nodes Alignment

Security ✕ Governance and regulation ✕

Some drop-down lists are scrollable and searchable:

Allied and Other Industry Sectors

Electronics, Optical Products

Education

Electrical & Electronics

Environment & Climate

Finance &

Click on advanced search to see the full list

Allied and Other Industry Sectors

Oil & Gas (Upstream & Downstream)

Pharmaceuticals

+ Create a new Other Industry Sector

Q Advanced Search

Select Other Industry Sector Close Search

Beginning with

You can use wildcard %

Aerospace

Automotive

Biomedical

Biotechnology

Construction

Mechanical

Military Vehicles

Oil & Gas (Upstream & Downstream)

Pharmaceuticals

More

To find an option either:

- Scroll the list and click More to extend the list; or
- Start typing, or enter, a word.

Select Other Industry Sector Close Search

Beginning with

Bio

You can use wildcard %



- Then hit Enter or click on **Search**

Select Other Industry Sector

Close

Search

Beginning with

Bio

You can use wildcard %

Biomedical

Biotechnology

- Tables

To add an entry line click on **Add Row**

Non TAS Hub

<input type="checkbox"/>	Name	Organisation	Email	Role	TAS Node Member	
No Data						
Add Row						

Complete the fields as appropriate

Non TAS Hub

<input type="checkbox"/>	Name	Organisation	Email	Role	TAS Node Member	
<input type="checkbox"/>	1	David Maffin	University of Southampton	Email	Co Investigator	<input type="checkbox"/>
Add Row						

NOTE: EMAIL NOT REQUIRED FOR INDUSTRIAL PARTNERS

- Co Investigator
- Researcher Co-Investigator
- Research Fellow
- Partner-Academic
- Partner-Industrial

To remove a row, click on the tick box and then click Delete.

Non TAS Hub

<input type="checkbox"/>	Name
<input checked="" type="checkbox"/>	1 David Maffin
Delete Add Row	

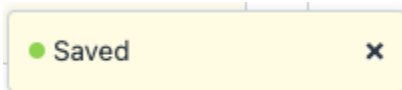
Saving and Submitting

It is recommended that you click outside of any text field before saving.

You should **Save** the Bid once you have completed the essential highlighted fields.



Upon saving a small icon is temporarily displayed (lower right of screen)



You can check if the form has saved the first time you save by closing it. The bid will appear in the Agile Bids list at draft status.

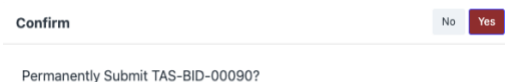
It is **recommended you save routinely to avoid loss of work** (e.g., due to a browser problem).

If you have saved work, the button changes to a submit button. If you enter or amend any form content then it changes back to a save button.

To submit your bid, click on the Submit button



You are then asked to confirm



If you have not completed all mandatory fields you will get an advisory message listing the item(s) required.

Conflicts of Interest Declaration (If Applicable)

This only applies to TAS Hub Members (at University of Nottingham, University of Southampton and King’s College London) for the purpose of submitting bids that are to be reviewed by TAS Hub researchers in the Agile Programme.

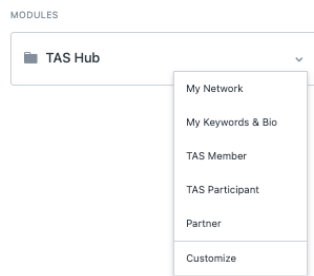
For your first bid submission you are required to list your Conflicts of Interest within the TAS Hub. These should also be kept up to-date for future TAS programmes.

What is a conflict of interest?

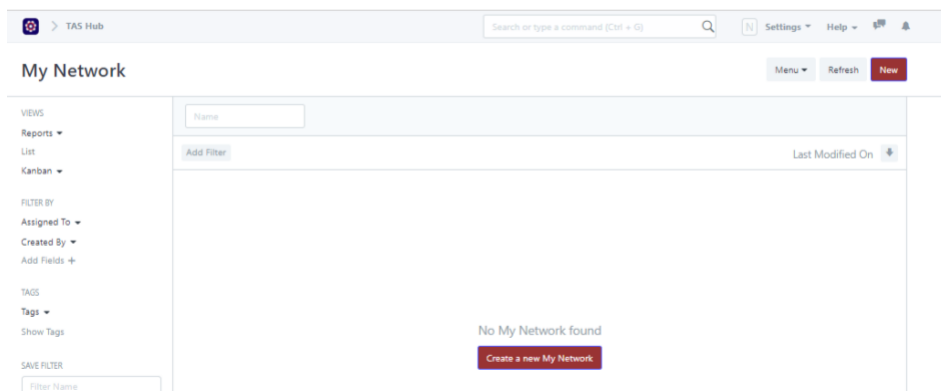
As we’re a relatively small community we need to take a pragmatic approach: having worked together (e.g., published) recently constitutes a conflict, whereas being at the same institution probably does not. For more information, see for example the ACM SIGCHI policy

<https://sigchi.org/about/sigchi-policies/conflict-of-interest-policy/>

1. Login
2. Select the drop down menu in the TAS Hub “card” and select My Network



3. Click on Create a new My Network or New (top right)



4. To declare all your Conflicts of Interest within TAS Hub Network including Researchers and Industry Partners

- Click on Add Row to add a Conflict of Interest
- Click in Known Contact field and select from list or scroll to search for full listings
- Add details of your association the adjacent field

- To delete a conflict select the radio box left of the row entry and then select Delete (appears next to Add Row)

- Save once additions and updates completed

Not Saved Save

Name

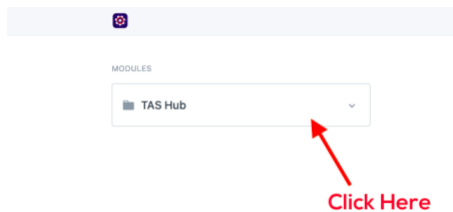
Please declare all your Known Associates within TAS Hub Network including Researchers and Industry Partners

My Network

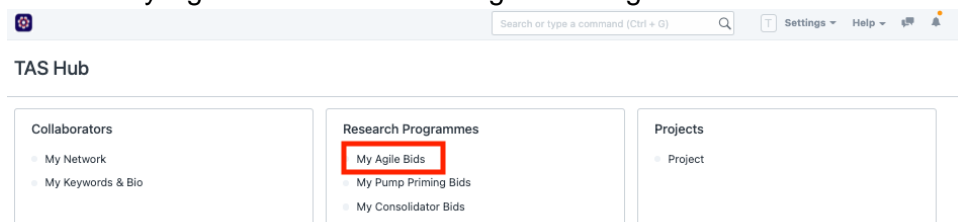
<input type="checkbox"/>	Known Contact	Describe your Association	
No Data			
<input type="button" value="Add Row"/>			

Creating a Bid Submission

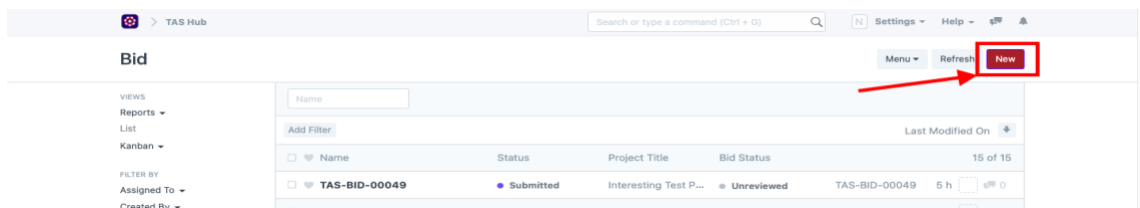
1. Login to ERP
2. Click on TAS Hub card



3. Click on My Agile Bids to create an Agile or Integrator Bid



4. Create a New Bid



5. All fields in the bid form highlighted in **Red Border** are Mandatory fields and need to be completed and **saved** to create the draft proposal.

Project Title

TAS Campaign

AP-00002

Project Type

Agile Project (Hub Only)

Attended Workshops ?

Start Date

End Date

Bid Summary

Select Project Type: Agile (Hub Only) or Integrator (TAS Network) before continuing to complete the form.

The form layout and content changes depending on the project type.

Note: The TAS Campaign defaults to the current call and does not need changing

PROJECT TEAM

TAS HUB (REGISTERED MEMBERS)

Co Investigators

Researcher Co-Investigator

Researchers

TAS Hub Partners

Non TAS Hub

<input type="checkbox"/>	Name	Organisation	Email	Role	TAS Node Member
No Data					
Add Row					

NOTE: EMAIL NOT REQUIRED FOR INDUSTRIAL PARTNERS

Lead University

Main Contact

Once saved, the bid proposal template link and proposal document upload link become visible below the bid summary field.

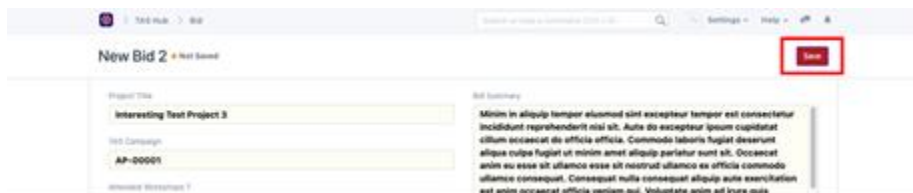
Bid Attachment

[Attach](#)

Attach a PDF, Word or Text File

[Click here for Template for Bid Attachment](#)

Note: As you continue, you can **Save** the Bid as you enter information and return to complete later



It is recommended that you Save routinely.

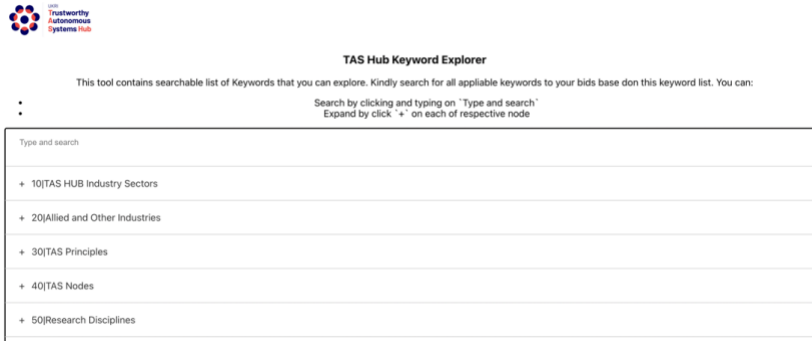
If you navigate to Agile-Integrator Bids you'll see your bid listed with **“Draft” status**

6. Project Keywords

Important: TAS Hub uses keyword matching as part of the process of allocating bid reviewers to pump priming proposals. A taxonomy of keywords has been defined for a number categories relevant to the TAS research programme. TAS Hub bid reviewers pre-select their relevant keywords. When proposals are submitted keywords also need to be selected for the bid proposal.

a) TAS Keywords List

First, click on TAS Keyword List link to open the TAS Keyword Explorer to review the full list of TAS keywords.



TAS Hub Keyword Explorer

This tool contains searchable list of Keywords that you can explore. Kindly search for all applicable keywords to your bids base don this keyword list. You can:

- Search by clicking and typing on "Type and search"
- Expand by click "+" on each of respective node

Type and search
+ 10 TAS HUB Industry Sectors
+ 20 Allied and Other Industries
+ 30 TAS Principles
+ 40 TAS Nodes
+ 50 Research Disciplines

The keywords list can be explored by expanding / contracting the keyword category sections (recommended)

- + 40|TAS Nodes
- 50|Research Disciplines
 - 5001|Research Disciplines|Mathematical Sciences
 - 5002|Research Disciplines|Physical Sciences
 - + 5003|Research Disciplines|Earth Sciences
 - + 5004|Research Disciplines|Environmental Sciences
 - 5005|Research Disciplines|Biological Sciences
 - + 5006|Research Disciplines|Information & Computing Sciences
 - 5007|Research Disciplines|Engineering
 - 500701|Research Disciplines|Engineering|Aerospace Engineering
 - 500702|Research Disciplines|Engineering|Automotive Engineering
 - 500703|Research Disciplines|Engineering|Biomedical Engineering

Alternatively, you can enter a word into the search field

mechanical

2019|Allied and Other Industries|Mechanical

500712|Research Disciplines|Engineering|Mechanical Engineering

Some sections include level 1 and level 2 keywords. If you choose a level 2 key word (e.g., Mechanical Engineering) then the level 1 keyword (e.g., Engineering) is automatically assumed.

It is important to note down the 4 or 6-digit codes and keywords to be submitted.

Note: Limit on number of keywords applies: This is stated in the ERPNext bid form.

Second, add the chosen keywords into the ERPNext bid form table

TAS Keywords List
Important: Project keywords will be matched to those of reviewers during the reviewer allocation process. Please review the keywords under each category of the TAS keywords List (see link) and identify those most relevant to the proposal.

Add relevant keywords to the table. The keyword field is dynamically searchable and will list relevant keywords as you enter information. It is recommended you search using the numeric code for the keyword category or specific keyword. Alternatively, you can select the "Advanced Search Option" and scroll up/down the keyword list.*

Research Keyword (Select upto 10 Keywords)

<input type="checkbox"/>	Keyword
<input type="checkbox"/>	1 Keyword

[Add Row](#)

Click on Add Row and click in the keywords entry field. The keyword field is dynamically searchable and will list relevant keywords as you enter information. It is recommended you search using the numeric code for the keyword category or the specific keyword.

Research Keyword (Select upto 10 Keywords)

<input type="checkbox"/>	Keyword
<input type="checkbox"/>	1 5014

[Add Row](#)

Additional Suggest

- 501401 | Psychology
- 501402 | Human Factors

[Q Advanced Search](#)

Alternatively, you can select the "Advanced Search Option" and scroll up/down the keyword list.

Research Keyword (Select upto 10 Keywords)

<input type="checkbox"/>	Keyword
<input type="checkbox"/>	1 Keyword

[Add Row](#)

Additional Suggest

- 2010 | Education
- 2011 | Electrical & Electronics
- 2012 | Environment & Climate
- 2013 | Finance & Insurance

[Q Advanced Search](#)

Select the keyword. Repeat until you have added all relevant key words have been selected.

b) Additional Selected Keywords (Optional)

Additional keywords can be proposed to supplement those of the TAS Keywords List. For example, to better capture more specific aspects of the project, applications, research disciplines, and so on.

These may be considered during reviewer allocation process (e.g. where initial matching using TAS Keywords List do not provide a good match); for subsequent analysis and reporting of the call; and when reviewing and updating the TAS Hub Keyword List.

Add keywords to the free text field using comma separation.

Additional Suggested Keywords (Optional)

7. Project Team Section

First enter TAS Hub Registered Members.

PROJECT TEAM

TAS HUB (REGISTERED MEMBERS)

Co Investigators

Researcher Co-Investigator

Researchers

TAS Hub Partners

These fields are multiple select. Click in a field to see a list of relevant names. Find team members either by scrolling the list - **click on Advanced Search to scroll the full list** - or start typing a name, and click to select.

Co Investigators

- Luca Viganò
- Tim Underwood
- Joseph Early
- + Create a new Contact
- Q Advanced Search

Second enter Non TAS Hub members of the team in the table

Click Add Row to add a new team member, complete their details, and Identify in last column if they a named member of a TAS Node (e.g., PI, Co-I, Partner, etc.)

Non TAS Hub Participants

<input type="checkbox"/>	Name	Organisation	Email	Role	TAS Node Member
No Data					
Add Row					

Note: Email not required for Industrial Partners

Lead University

Main Contact

8. Financial Section

The financial section is different for the Agile Projects and Integrator Projects:

A) Agile Projects (Hub Only)

FINANCIAL INFORMATION

Consumables and Travel Expenses

<input type="checkbox"/>	Expense Type	Description	Amount
No Data			
Add Row			

Total Consumables and Travel Cost

TAS Hub PDRA Allocation

<input type="checkbox"/>	Member Name	Institution	%FTE	Start Date	End Date
No Data					
Add Row					

Non TAS Hub Staff Allocation

<input type="checkbox"/>	Member Name	Institution	%FTE	Start Date	End Date	Cost (80%IEC)
No Data						
Add Row						

Total Staff Cost

B) Integrator Projects (TAS Network)

FINANCIAL INFORMATION

Consumables and Travel Expenses

<input type="checkbox"/>	Expense Type	Description	Amount
No Data			
Add Row			

Total Consumables and Travel Cost

TAS Hub PDRA Allocation

<input type="checkbox"/>	Member Name	Institution	%FTE	Start Date	End Date
No Data					
Add Row					

Non TAS Hub PDRA Allocation

<input type="checkbox"/>	Member Name	Institution	%FTE	Start Date	End Date
No Data					
Add Row					

Node PI Confirmation

Tick to confirm Node PI(s) have confirmed their Node(s) participation and allocation of resources in this proposal via email to opsteam@tas.ac.uk

Important: Node PIs are required to have confirmed their Node's participation and allocation of resources in this proposal via email to opsteam@tas.ac.uk. This should be confirmed by clicking the confirmation box.

9. Alignment to Hub & Nodes

These fields should be completed where relevant to the bid. Click in each field to select from the list of options. Some fields are multi-select (e.g., Grand Challenges Alignment)

Note: For long lists (e.g., Allied & Other Industry Sectors) use "Advanced Search" option to scroll full list

ALIGNMENT TO HUB & NODES (SELECT ONLY RELEVANT ITEMS)

Grand Challenges Alignment

TAS Priority Areas

TAS Industry Sector

Allied and Other Industry Sectors

TAS Nodes Alignment

10. Upload the proposal document using the upload link below the bid summary. Word or PDF are acceptable file formats.

The Proposal template can be downloaded from the link in the bid form or the link on the programme call page on the TAS Hub website

11. Once you enter all the details along with the attachment files, click the “**Save**” button. You are then able click the button to “**Submit**” the bid and then confirm.

A notification window will advise if there are uncompleted mandatory fields

Note: If you navigate to My Bids you’ll see your bid listed with updated status “Submitted”

12. Once you Submit the Bid, Editors will send the Bid for Review and you will be notified when the Review process is completed

Support

Please email erpsteam@tas.ac.uk for any account or technical issues in using the system.

General enquiries about TAS HUB: contact@tas.ac.uk

Specific enquiries about a programme call: opsteam@tas.ac.uk