Instructions for TAS ERP User: Consolidator Bid Submission

Contents

Introduction

This user guide details how to submit a bid to the Consolidator Programme.

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/

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
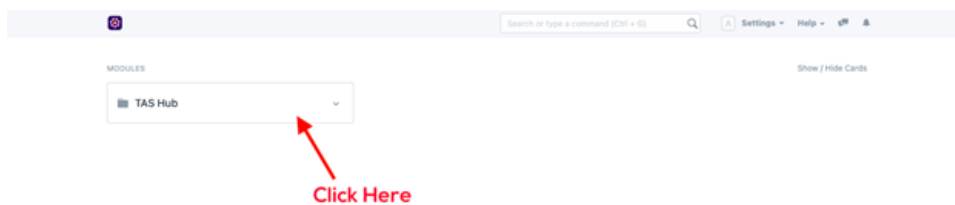
The options presented depend upon user role, permissions, and activity in the system.
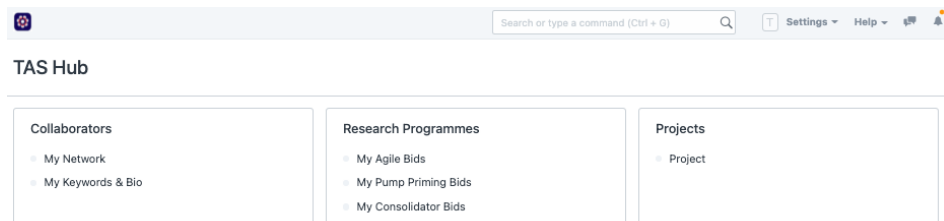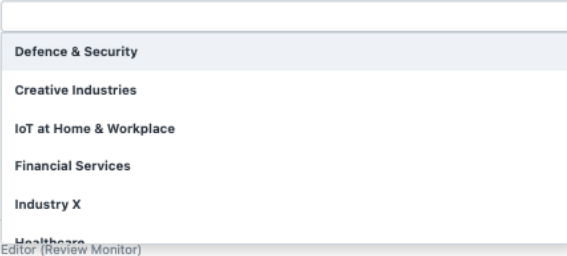
Entering Data, Saving and Submitting in ERPNext

Entering Data

There are several different types of data fields:

- Free text fields

- Drop-down lists (single choice selection)

- Drop-down lists (multi choice selection)
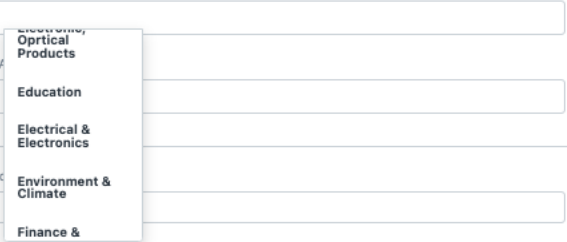
Some drop-down lists are scrollable and searchable:

Click on advanced search to see the full list

To find an option either:
- Scroll the list and click More to extend the list; or
- Start typing, or enter, a word.

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

- Tables

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

Compete the fields as appropriate

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

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.

Save

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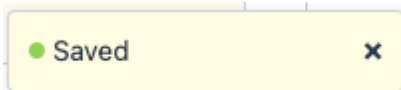
● Saved   ✕

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

🖨 ‹ › Menu ▾ Submit

You are then asked to confirm

Confirm   No Yes

Permanently Submit TAS-BID-00090?

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

Creating a Bid Submission

1. Login to ERP
2. Click on TAS Hub card
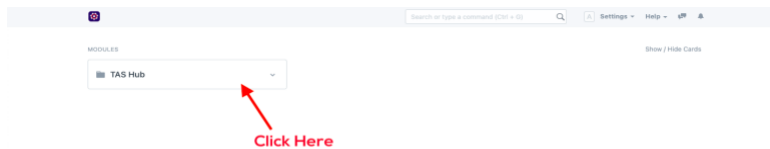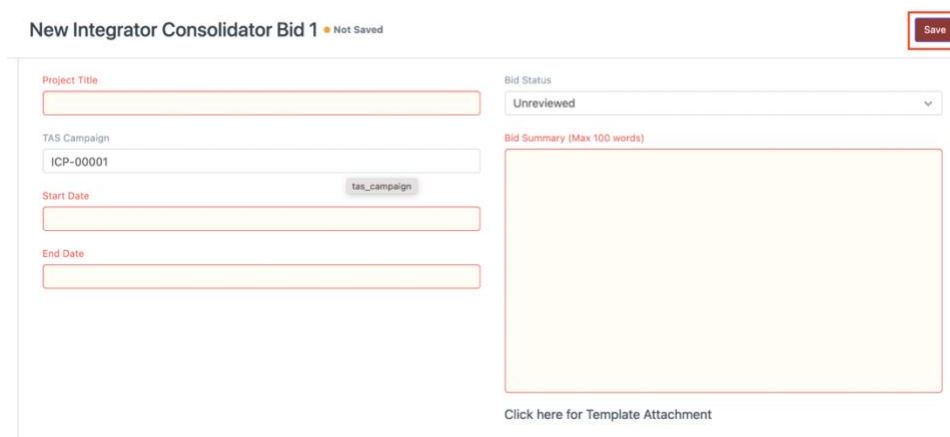
3. Click on My Integrator Consolidator Bids (listed under Research Programmes)
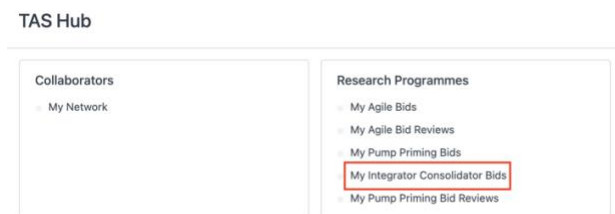
4. Create a New Bid
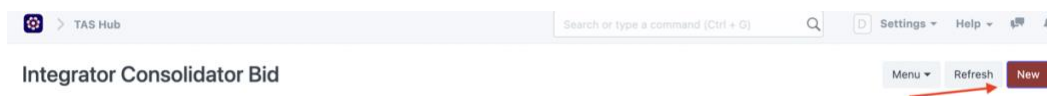
5. All fields in the bid form highlighted in **Red Border** are Mandatory fields and need to be completed and **saved** to create the draft proposal.

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

Note: As you continue, you can **Save** the Bid as you enter information and return to complete later
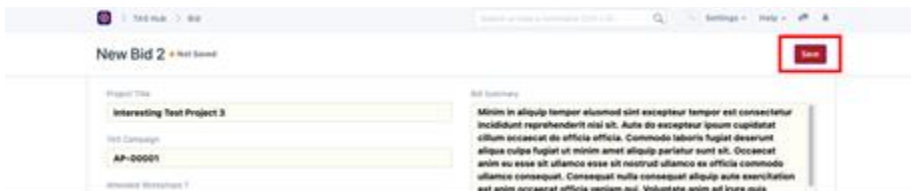
It is recommended that you Save routinely.

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

6. Project Team Details:

First enter TAS Hub Registered Members.

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.

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.)

7. Financial & Resources Details

Consumables and travel expenses should be itemised in the table.

Resource requests should only include Directly Incurred costs for TAS Hub and Node researchers (e.g., PDRAs)

These need to be identified, including their % allocation and duration.

TAS Hub PDRA Allocation

☐	Member Name	Institution	%FTE	Start Date	End Date	
			No Data			

Add Row

Node PDRA Allocation

☐	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**.**

8. Alignment to TAS 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

9. 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

10. 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"

11. 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 **erpteam@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**