

# Instructions for TAS ERP User: Consolidator Bid Submission

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## 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/>



## Welcome to the TAS ERP Platform

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](http://www.tas.ac.uk) or contact us at [contact@tas.ac.uk](mailto:contact@tas.ac.uk).

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.

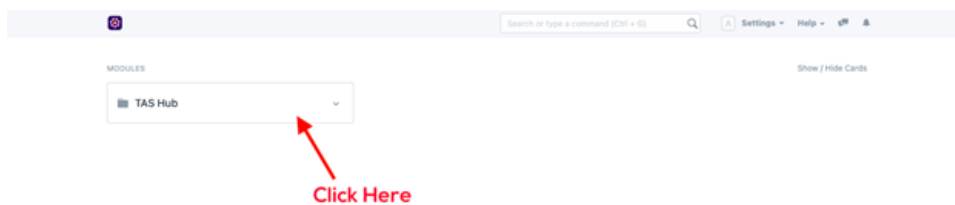
Click on the [Login](#) Button on the Right hand Corner of the page to Login

You will be able to [Create or Submit a Bid](#) only after you have been assigned a Role by the [TAS Admin Team](#)

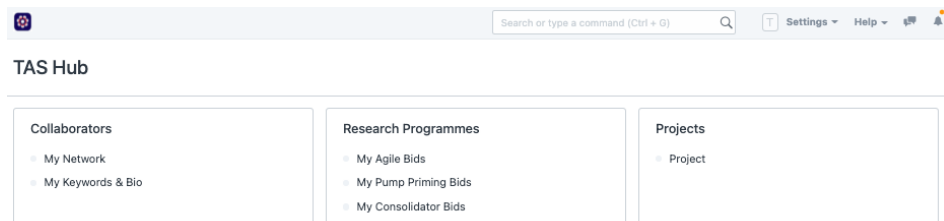
If you have any issues accessing or using the system, please contact [erpteam@tas.ac.uk](mailto:erpteam@tas.ac.uk)

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.



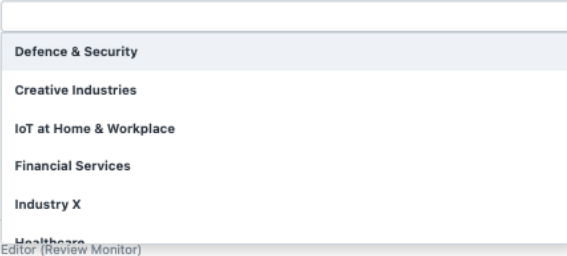
# Entering Data, Saving and Submitting in ERPNext

## Entering Data

There are several different types of data fields:

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

TAS Industry Sector




Editor (Review Monitor)

TAS Industry Sector




- Drop-down lists (multi choice selection)


TAS Nodes Alignment



Editor (Review Monitor)

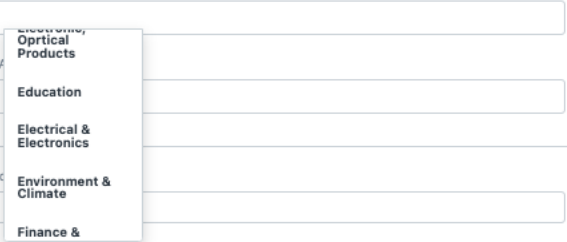


TAS Nodes Alignment



Some drop-down lists are scrollable and searchable:

Allied and Other Industry Sectors



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

You can use wildcard %

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

**Select Other Industry Sector** Close Search

---

Beginning with

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					
<span>Add Row</span>					

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"/>
<span>Add Row</span>					

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
<span>Delete</span> <span>Add Row</span>	

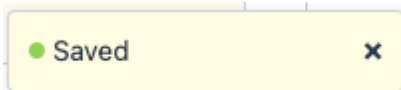
## Saving and Submitting

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

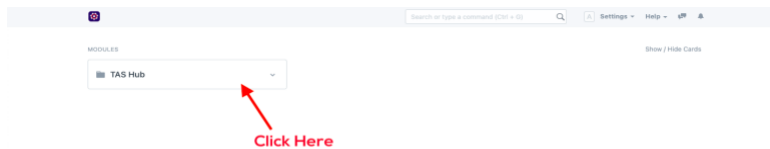


Permanently Submit TAS-BID-00090?

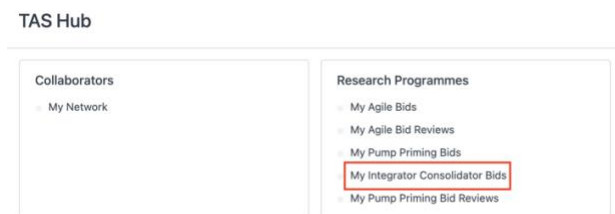
If you have not completed all mandatory fields you will get an advisory message listing the item(s) required.

# Creating a Bid Submission

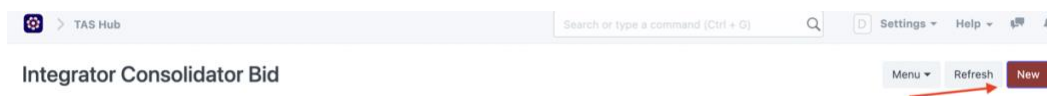
1. Login to ERP
2. Click on TAS Hub card



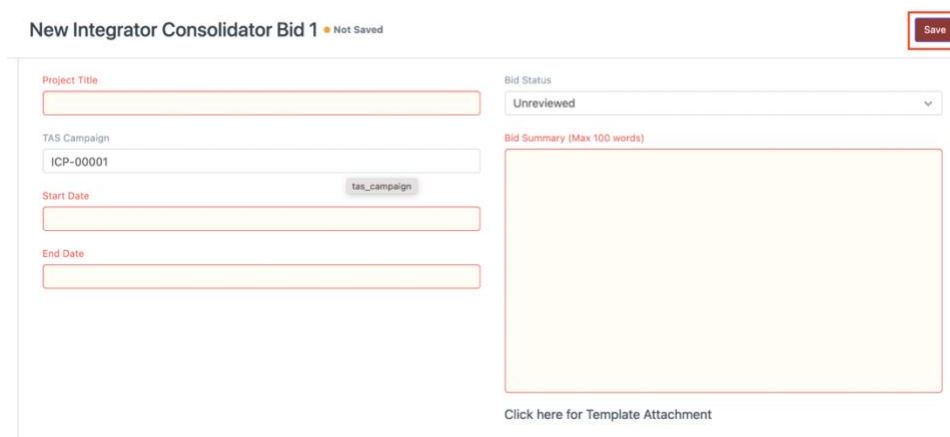
3. Click on My Integrator Consolidator Bids (listed under Research Programmes)



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.



New Integrator Consolidator Bid 1 Not Saved Save

Project Title

TAS Campaign  tas\_campaign

Start Date

End Date

Bid Status

Bid Summary (Max 100 words)

[Click here for Template Attachment](#)

TAS HUB (REGISTERED MEMBERS)

Co Investigators

Researcher Co Investigator

Researchers

TAS Hub Partners

Non TAS Hub Participants

<input type="checkbox"/>	Name	Organisation	Email
No I			
<input type="button" value="Add Row"/>			

Note: Email not required for Industrial Partners

Lead University

Main Contact

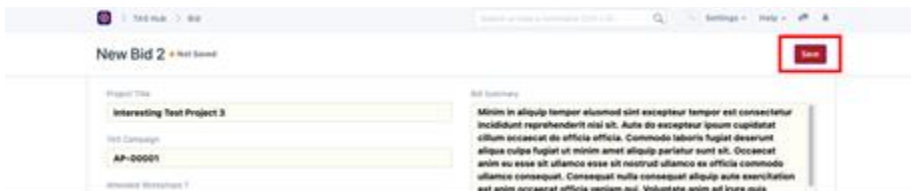
Once saved, the bid proposal template link and proposal document upload link become visible below the bid summary field.

Bid Attachment

Attach 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 Team Details:

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

🔍 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

## 7. Financial & Resources Details

Consumables and travel expenses should be itemised in the table.

FINANCIAL & RESOURCE INFORMATION

Consumables and Travel Expenses

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

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

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

Node 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](mailto: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](mailto: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](mailto:erpteam@tas.ac.uk) for any account or technical issues in using the system.

General enquiries about TAS HUB: [contact@tas.ac.uk](mailto:contact@tas.ac.uk)

Specific enquiries about a programme call: [opsteam@tas.ac.uk](mailto:opsteam@tas.ac.uk)