

Instructions for TAS ERP User: Pump Priming Bid Submission

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Introduction

This guide details how to submit a bid to the TAS Hub Pump Priming 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 or contact us at 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.

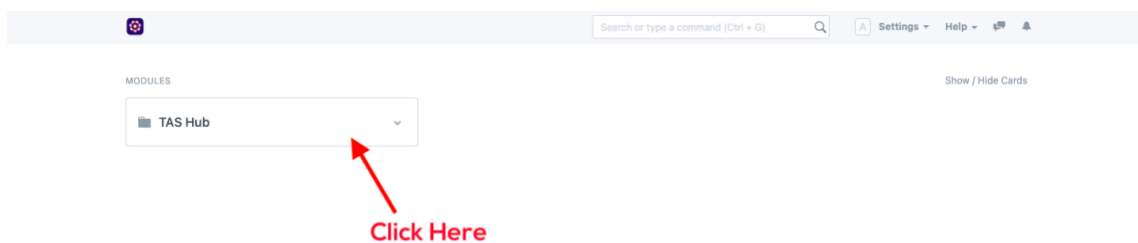
Click on the [Login](#) Button on the Right hand Corner of the page to Login

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

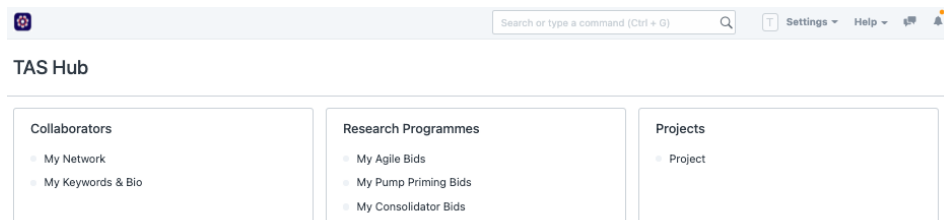
If you have any issues accessing or using the system, please contact erpteam@tas.ac.uk

From this page you can access some useful resources including TAS Website, current programme call 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.



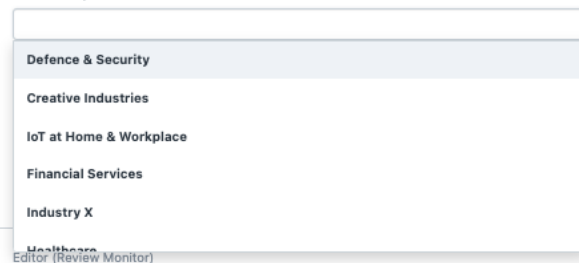
Entering Data, Saving and Submitting in ERPNext

Entering Data

There are several different types of data fields:

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

TAS Industry Sector



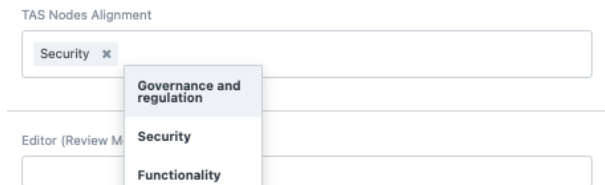
Editor (Review Monitor)

TAS Industry Sector



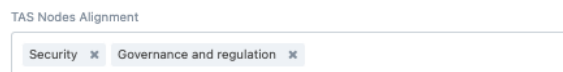
- Drop-down lists (multi choice selection)

TAS Nodes Alignment



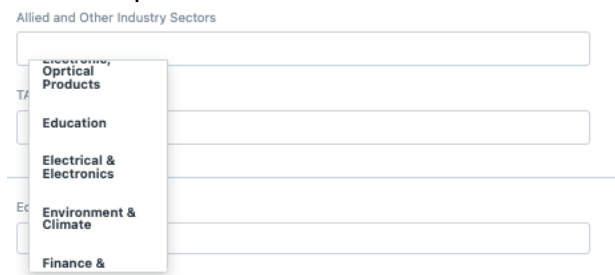
Editor (Review Monitor)

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					
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	

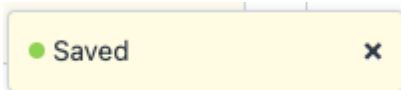
Saving and Submitting

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

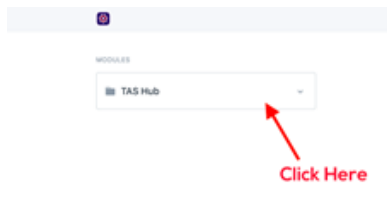


Permanently Submit TAS-BID-00090?

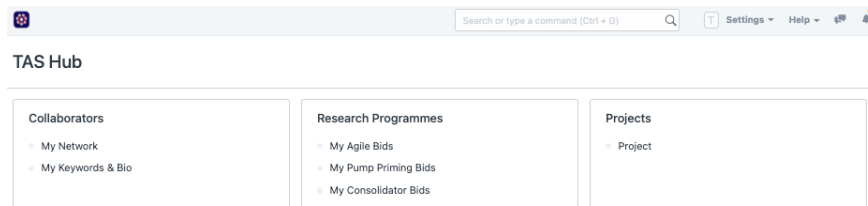
If you have not completed all mandatory fields you will get an advisory message listing the item(s) required.

Creating a Bid Submission

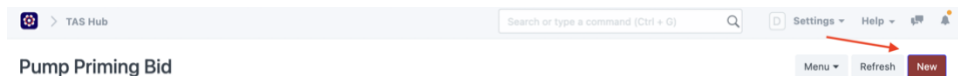
1. Login to ERP
2. Click on TAS Hub card



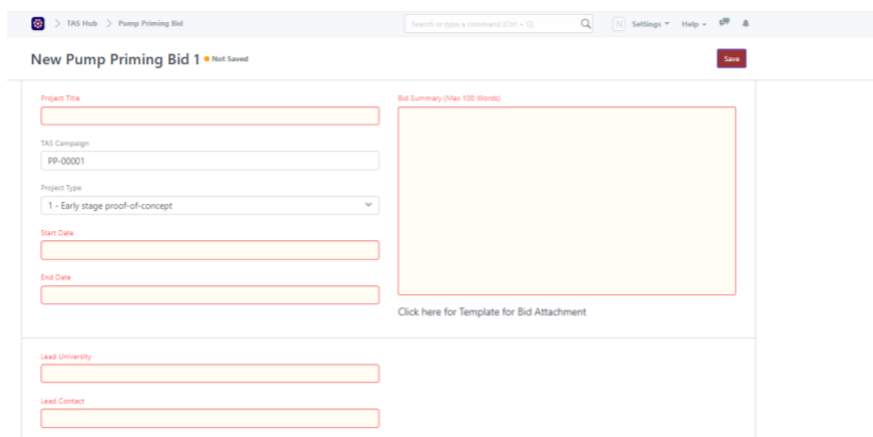
3. Click on My Pump Priming Bids (listed under Research Programmes)



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.

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 of 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 consider and 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		5014 Psychology and Cognitive Sciences	
		501401 Psychology	
		501402 Human Factors	
		Q Advanced Search	

Additional Suggest

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
<input type="checkbox"/>	2009 Cyber Security
<input type="checkbox"/>	2010 Education
<input type="checkbox"/>	2011 Electrical & Electronics
<input type="checkbox"/>	2012 Environment & Climate
<input type="checkbox"/>	2013 Finance & Insurance
<input type="checkbox"/>	Advanced Search

Additional Suggested Keywords

keyword

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)

Assistive Technologies, Neurosciences, Data Provenance

7. Project Team Section

Click on the Add Row button and complete name, email and select role details for each member of the team. Click in the TAS Node Member column to indicate those who are Named as Members of the TAS Nodes.

Note: If you have a TAS Hub Named Co-I Contact they should be excluded from the project team unless they have a wider role as an active Co-I or Academic Partner.

PROJECT TEAM

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

NOTE:

- EXCLUDE TAS HUB CO-I CONTACT UNLESS THEY HAVE A WIDER ROLE AS A CO-I OR ACADEMIC PARTNER
- EMAIL NOT REQUIRED FOR INDUSTRIAL PARTNERS

Lead University

Main Contact

TAS Hub CoI Contact

TAS Hub Partners

8. Financial Information section

Directly Incurred			
<input type="checkbox"/>	Category	100% FEC	80% FEC
<input type="checkbox"/>	1 Staff	£ 0.00	£ 0.00
<input type="checkbox"/>	2 Travel and Subsistence	£ 0.00	£ 0.00
<input type="checkbox"/>	3 Other Costs	£ 0.00	£ 0.00
<input type="checkbox"/>	4 Sub-total	£ 0.00	£ 0.00

Directly Allocated			
<input type="checkbox"/>	Category	100% FEC	80% FEC
<input type="checkbox"/>	1 Investigators	£ 0.00	£ 0.00
<input type="checkbox"/>	2 Estates	£ 0.00	£ 0.00
<input type="checkbox"/>	3 Other Directly Allocated	£ 0.00	£ 0.00
<input type="checkbox"/>	4 Sub-total	£ 0.00	£ 0.00

Indirect Cost (80%)

Total (80% FEC)

This is the summary financial information provided in the proposal document

Note: the sub total and total fields are calculated.

To enter data click on the row, enter the data, and click on Insert Below.

Editing Row #1 ▲

Category

100% FEC

80% FEC

☰ - Ctrl + Up, Ctrl + Down, ESC Insert Below

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, OpsTeam 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