Instructions for TAS ERP User: New Accounts, System Access & Navigation

Introduction

Submitting a bid or undertaking a bid review requires an account in ERPNext with the necessary role permissions assigned.

New user accounts are created in one of two ways:
1. New user details are captured as part of pre-registration to submit a bid for a programme, or initiatives to sign-up as a TAS reviewer. TAS Hub's administration team then bulk create new user accounts.
2. New user accounts are created on an ad-hoc basis by TAS Hub's administration team. Instances include new staff and researchers appointed within the Hub, setup of individual reviewers outside of the bulk sign-up initiatives, and an individual from the TAS network requesting an account.

Note: An option for individuals to sign-up directly via ERPNext has been removed.
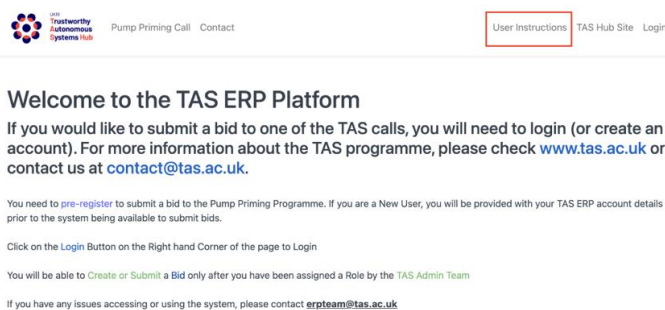
Individual Sign-up for ERPNext Account

To request an ERPNext account submit an email request to erpteam@tas.ac.uk.

Include the following information: Full name, institution, and email address

User Guidelines

A set of user instructions are available for each user activity (e.g. Bid Submission, Bid Review). Go to the ERPNext home page (https://erpnext.tas.ac.uk/) and select using the menu bar link.

You can also access some useful resources including TAS Hub Website, current programme call page, contact TAS, and login page.

System Access

New User (accessing ERPNext for the first time)

1. Once your account is created you will receive an email including username and temporary password. If you have not received this please check your email spam folders. For technical assistance contact **erpteam@tas.ac.uk**

2. **Login to the system**
   a. 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
   b. Sign-in using your TAS ERP credentials

3. **Change your password**
   a. Select Settings and then My Settings
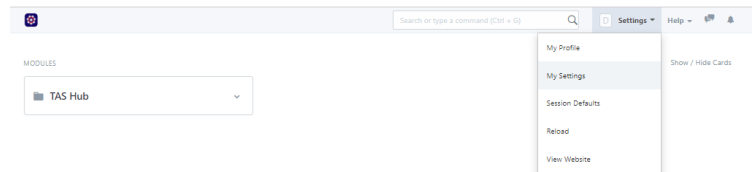
   b. Scroll down to change password section
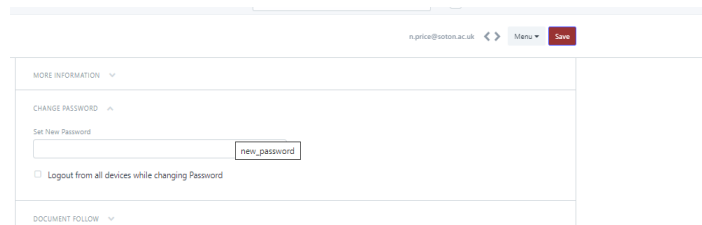
   c. Enter new password and Save the form

4. Please wait for TAS Admin to process your setup and assign you an appropriate Role Profile. Once a Role is Assigned, you will receive an email, after which you can Submit A Bid and/or complete a Bid Review.

Existing User Login

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

Changes to Account Details

You can change your password (see System Access section above)

If you have forgotten your password
1. Go to the login page (see above)
2. Click on "Forgot Password", enter your email address and click on Reset Password.
3. You will receive an email. Follow the instructions to reset.

If you need to update account details e.g. email address, amend name, please email to **erpteam@tas.ac.uk**

Navigating within ERPNext
1. **Desk View:** Users can navigate through the desk (homescreen). Click on the TAS Hub card to access your list of user functions.
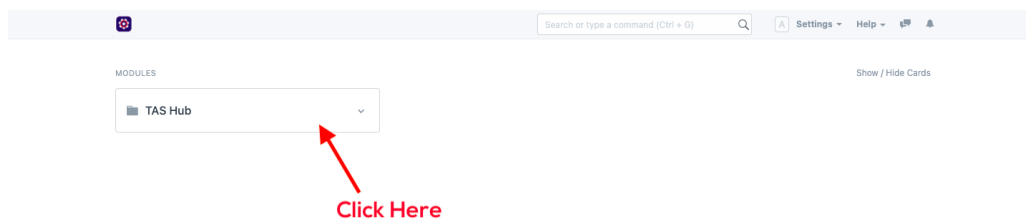
2. You will be presented with a your user dashboard. The content may vary depending on your user role profile and use of the system. For example, if you are a reviewer and have an assigned bid then, in addition to "My Bid" options you will see "My Reviews" options.
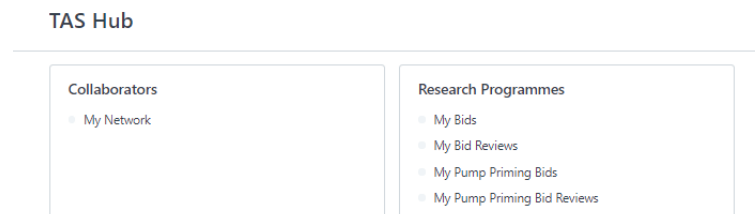
Support
Please email **erpteam@tas.ac.uk** for any account or technical issues in using the system.

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

Specific enquiries about an active programme call: **opsteam@tas.ac.uk**