science | innovation | technology

Quick-Start Manual

To support the Users of the Portal to rapidly establish, maintain an on-line account and submit a proposal to MOD.

MINISTRY OF DEFENCE

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INTRODUCTION

1. This Quick-Start Manual supports users of innovative.ideas.mod.uk who have innovative ideas and wish to submit one or more proposals to MOD.
2. This Quick-Start Manual makes reference to other manuals that are located on innovative.ideas.mod.uk and http://www.science.mod.uk/engagement/the_portal.aspx, and these are:
   - **a.** **Account Manual**. This explains how users of innovative.ideas.mod.uk who have innovative ideas can submit one or more Proposals to MOD.
   - b. **User's Manual.** This explains how individual users maintain secure access to the account and how support is offered to individuals when using the Portal.
   - c. **Application Manual.** This explains how opportunities are: generated from scratch or from an Invitation to Tender; converted into a proposal; tracked through the assessment process and, when necessary, archived.
   - d. **Technology Application Guidelines.** This is an overview of the overall acquisition process, the application information structures and tasks that support technology innovation and application.
3. The instructions in this Quick-Start Manual are relevant to **Single-user enterprise accounts** and **Multiple-user enterprise accounts**.
4. Users should not rely on this quick guide alone but should become familiar with the full information on how to use the Portal provided in the above manuals.

QUICK-START GUIDE

1. This Quick-Start guide aims to provide a quick introduction to the key steps to accessing the Portal, choosing and opening an account, developing an Opportunity and submitting a Proposal. Users should not rely on this quick guide alone but should become familiar with the full information on how to use the Portal provided in the manuals, found at http://www.science.mod.uk/engagement/the_portal.aspx or innovative.ideas.mod.uk.

Accessing the Portal

2. Access the Portal through http://www.science.mod.uk/engagement/the_portal.aspx. To log in to the Portal select the '**Log In'** button on this page.

Opening an Account

3. The Account Manual provides full information on opening an account http://www.science.mod.uk/engagement/documents/260909defenceportalaccountmanual.pdf

4. The key steps include:

STEP 0 To open an account, you will need to decide whether you need a **Single User Account** or a **Multi User Account**. A Single User Account is designed for individuals, a Multi User Account is designed for companies who want multiple users to have access to the Portal.

Single User Account Registration

(See Account Manual - Page 7)

STEP 1 Select **Log In** on the Portal webpage.

STEP 2 Select '**Create New Account'** and enter your E-mail address (User Name) twice. Select **Next**.

STEP 3 Select **'This account will be used by me and there will be no other users'**

STEP 4 Select the box to agree with the declaration. Select '**NEXT'**.

STEP 5 Enter your address and contact details. Select '**FINISH'**

Registration is complete – you will now be sent a system generated password. On receipt of the password you should carry out the following:

STEP 6 Select **Log In** on the Portal webpage.

STEP 7 Enter your e-mail address.

STEP 8 Enter the system generated password (Hint - copy and paste the password from the e-mail).

STEP 9 You will only see the 'User Tasks' area. – To gain access to the portal areas you first action is to change the password.

STEP 10 Select **'Change Password'**, follow the instructions and input your own password.

STEP 11 You now have full user access to the Portal.

Multi User Account Registration

(See Account Manual - Page 7)

STEP 1 Select **Log In** on the Portal webpage.

STEP 2 Select '**Create New Account'** and enter your E-mail address (User Name) twice. Select **Next**.

STEP 3 Select **'The account will be used within my organisation and may have multiple users'.**

STEP 4 When requested to contact the CDE to verify details, e-mail MOD with the following details at science@mod.uk:

E-mail subject heading: "Multi-user Account Request"
Your name
Your e-mail address (same as in Step 2)
Your enterprise (company/university) name
Your postal address
Your phone number

STEP 5 On receipt of approval to proceed with multi-user registration, repeat steps 1 to 3.

STEP 6 Select the box to agree with the declaration. Select '**NEXT'**.

STEP 7 Enter your address and contact details. Select '**FINISH'**

Registration is complete – you will now be sent a system generated password. On receipt of the password you should carry out the following:

STEP 8 Select **Log In** on the Portal webpage.

STEP 9 Enter your e-mail address.

STEP 10 Enter the system generated password (Hint - copy and paste the password from the e-mail).

STEP 11 You will only see the 'User Tasks' area. – To gain access to the portal areas you first action is to change the password.

STEP 12 Select **'Change Password'**, follow the instructions and input your own password.

STEP 13 You now have full user access to the Portal.

Account Manual Hints

- If you need to amend the contact or address details of your company refer to the Account Manual - Page 10 or Page 14 - Edit Enterprise Details.

- For Multiple User Accounts - If you wish to amend or invite other users to access the Portal refer to the Account Manual Page 17 – Enterprise Account Personnel.

- For Multiple User Accounts - When setting up account roles refer to the Account Manual Page 25 – this describes the account role permissions that you can use to set up your Teams to work on your proposals.

Your Opportunity/Proposal

5. The Technology Application Reference Manual (TARM) provides full information on how to generate an Opportunity and submit a Proposal. The TARM can be found at http://www.science.mod.uk/engagement/documents/applicationmanual.pdf

6. It should be noted that your **proposal** is known as an **opportunity** when you are developing it in the Portal, it becomes a proposal when it has been submitted to the MOD.

7. The key steps include:

STEP 1 Select the **Opportunities** link in the My Applications task area to input your new opportunity

STEP 2 Select the **Create New Opportunity** button to create a new opportunity (TARM - Page 12). The **Create Opportunity from an ITT** button should not be used unless you intend to submit a proposal in response to an Invitation to

Tender (ITT) (also known as a call). If you intend to submit an unsolicited proposal you should select the **Create New Opportunity** button.

STEP 3 Enter a 'title' and 'description' (TARM - Page 16);

- Begin the title with the title of the ITT / call when submitting a proposal in response to an ITT / call. This information can be found in the applicable ITT/ call document.
- Capture the essence of your opportunity within the 'title' and 'description'; avoid using pet names and your own acronyms.
- The 'title' and 'description' can be amended at any stage (TARM Page 17 – Para 49).

STEP 4 Select **Create** - you will be returned to the **My Applications** page and will see the opportunity 'title' and 'description' that you have entered. Your opportunity will now have a unique ref number, use this when contacting MOD.

Developing your Opportunity

(See TARM - Page 19)

STEP 5 Select **Opportunities** in the **My Applications** task area

STEP 6 Identify the opportunity you wish to work on and under the **Tasks** column select **Edit.** This opens the **Manage Opportunity** page.

Manage your Opportunity

(See TARM – Page 21)

STEP 7 Input the data applicable to your technology/innovation.

- When providing information in the Military, Inventory and Supply tabs it is possible to select from a number of options and/or sub-options to describe your technology/innovation. **The selection of these options/sub-options is optional – use where they add value or to stimulate thinking on what to include.** Where you do not wish to use the options and/or sub options it is acceptable to leave the option as 'Any' and input your data into the description box.
- Your Proposal will be scored using the MOD Performance Assessment Framework (on the www.science.mod.uk) and it is recommended that you consider this when developing an Opportunity.

- If you add a file attachment it is recommended that you ensure the key points of the attachment are included in the related options/sub options box.
- Attachments must be Microsoft Word 97 to 2003 compatible – 1MB maximum file size.
- Commercial Information – All requested information should be completed

WARNING: A Proposal submitted with incomplete Commercial Information will be rejected.

STEP 8 '**Publish**' your completed **Opportunity** to a pdf prior to its submission as a **Proposal**.

- When you select Draft or Final the **Publish** button becomes active.
- When you select **Publish,** you will return to the Opportunities Stage View. You will see **Awaiting Publication**, in the Published Status column.
- **Awaiting Publication** should change to **Published** after a few minutes. If it does not then refresh the page by selecting the Home tab and then select the Opportunities tab.
- When an opportunity indicates **Published** in the 'Published Status' column of the Opportunities Stage view, it has been converted to a pdf document. (TARM Page 21/22).
- Before viewing the Opportunity as a pdf document confirm the following:
  - Ref column - The Ref number has been underlined.
  - Status column – Final or Draft.
  - Published Status – Published.
- Select the underlined Ref number to view the pdf document.
- Assessors will review your proposal in pdf format – it is therefore recommended that you view your Opportunity in this format before submitting it.

STEP 9 Submit your Opportunity.

- Before you can submit your opportunity you must select Final and Publish in the **Manage Opportunity** Stage view. From the Opportunities Stage view you must then ensure your opportunity is showing as:
  - Status column – Final.
  - Published Status column – Published.
  - Task column - Submit
  - Select the Submit button in the Task column. (TARM Page 36).
- Agree Terms and Conditions then select the Submit button

Tracking your Proposal

STEP 10 Track the progress of your Proposal through the **Proposal** Tab. If you cannot see your Proposal in the **Proposal** Tab, select the **Archives** Tab to track progress.

Hints

- Never exit the **Manage Opportunity** page by using the browser's Back button. (TARM Page 21/22).
- Select the **Save** button at regular intervals when developing your Opportunity. (TARM Page 21/22).
- Your Opportunity can be Reset to Draft if you wish to return to the **Manage Opportunities** page to amend your Opportunity after selecting Draft or Final and Publish.
- You must ensure that you are satisfied that your Opportunity is complete before it is submitted to the MOD. After it has been submitted it will be checked for completeness and if it is rejected it cannot be submitted again under the same proposal reference number.
- If you are not able to submit or reset to draft – check your permissions.