

sKTP portal Hints and Tips

Proposals

Section	Para	Hints/Tips
General	Edit	This enables a User to enter relevant information and data in all fields, within a particular Section. (If 'Edit' is not selected, you are unable to enter any information). If Edit is not available first check that you have permission for this or if another user has already completed and submitted the Section
	Cancel	Removes information entered in a Section prior to the last Save
	Save	Save can be selected at any time to allow the user to exit and return later to add more information.
	Submit	Only select the 'Submit' button when you are sure all information is correct. Once 'submitted' you are not able to further amend or edit the information. It is recommended that you do not attempt to 'Submit' the Section/s of a proposal until both partners agree. You will not be permitted to edit further once the 'Submit' button has been pressed.
	Text/Character Limits	Please limit character text to that described in the following Section. Text boxes will reduce in size (shrink fit) when information is saved. Partnerships must reduce the amount of text to fit these limits. Do not simply cut and paste from the hard copy of the form without checking that key information is lost
Summary	Company User	Always click ' Link User to Proposal ' after each person has been added and then press ' Save '. This will then link the correct person to that Proposal and they will be provided with a user name and password. It is possible to change the company person.
	Company Name	Please use upper and lower case when entering the name of the company. Where appropriate please do not use Ltd (insert Limited)

	KB User	It is not possible to change the KB User once the proposal has been created.
	RAE	Please use the Times Higher Table to record the GPA for the RAE 2008. If not graded insert 0.00. Do not leave blank.
	Withdraw a Proposal	Users that appear in the Summary Section are permitted to withdraw a proposal at any stage. Please ensure the check box is ticked i.e. 'check if you would like to withdraw the form' then select 'Withdraw Proposal' and enter the appropriate reasons why.
Proposal	1.4	After each entry, always enter number of weeks of full time effort. Please note you are not permitted to insert part weeks. If necessary please combine small amounts of effort to make a full week. If you insert a task please add text to both the task and the deliverable. Do not enter large time buckets. Each task and deliverable has a 270 character limit. Minimum number of weeks should be 10 Maximum number of full time weeks allowed is 40.
	1.13.1	Always enter capital 'X' or numbers as appropriate.
Company	2.6	You need only enter first 2 digits of the Primary Standard Industrial Classification code. Please use the SIC for 2003. (This will enable a list view of the relevant codes before selecting and entering the data).
	Section 2 – Primary Information	All fields must be completed in this Section before pressing Save otherwise the information will be lost. Do not move on to the section below until this has been completed.
	Section 2 – Supplementary Information 2.9.1	You must complete data in at least the first column i.e. Latest Period , which are all mandatory fields. Complete each row before moving on to another period. Information for other years is optional. Negative values may be entered, eg -123456 but leave no spaces. If no figures are available DO NOT INSERT NA insert 0.
Contacts	3.1 – 3.7	When entering <i>Work telephone numbers</i> , please do not include any spaces. If existing phone numbers are not editable please ignore and submit without.
		These are free text sections, so please take great care when entering contact information, in particular the email addresses - it is this information that is used to make contact with

		each of the users. If you get the email address wrong and re-enter this can create duplicate users.
		At the end of each section you must click ' Add this Info ' button - you will then see a red warning reminding you to 'Save' that section. You must click ' Add this Info ' at each stage and then ' Save '. (If you subsequently make any changes to these sections, you must again click 'Add this info' and 'Save' (to capture latest information) before you 'Submit'. Failure to work in this order may well result in you losing information.
Budget	4.1	Columns B, C & D are populated from values entered in the Proposal (section 1.4) and Company (section 2.7) and cannot be overwritten. The grant is calculated from whichever is the lower figure in column A or column B.
	4.3	Joint Commitment Statement – the tick box should be checked. Note: when viewing the JCS document you will need to go to the 'Attachments' section.
Attachments	Current Attachments	Document/s can be uploaded or removed at any time and will appear here in support of a Proposal.
	Proposal Documents	Will automatically list the 'JCS' Joint Commitment Statement and the Grant Offer Letter. The auto-generated versions will not be used for Industrial Mathematics shorter KTPs, so the IMKTN dedicated versions will need to be attached as Current Attachments.

If you have any further queries about how the on-line processes work or need help to understand what the next steps are to take, please contact the Shorter KTP Implementation Manager, Martin Webb on 01793 442980 or email martin.webb@tsb.gov.uk.