SYNTHESYS
Synthesis of systematic resources

TAF Administrators' Guide

N.B. -See 'SYNTHESYS TAF Administrator's Site' document for how to manage the SYNTHESYS online database at each stage.

URLs:

Administrator sites:
SYNTHESYS 3: http://application.synthesys.info/synthesys3/SynthAdmin/
SYNTHESYS 2: http://application.synthesys.info/synthesys2/SynthAdmin/
SYNTHESYS 1: http://application.synthesys.info/synthesys1/SynthAdmin/

Application sites:
SYNTHESYS 3: http://application.synthesys.info/synthesys3/application.jsp
SYNTHESYS 2: http://application.synthesys.info/synthesys2/application.jsp
SYNTHESYS 1: http://application.synthesys.info/synthesys1/application.jsp

Supporter site:
http://application.synthesys.info/synthesys3/support.jsp

Host site:
http://application.synthesys.info/synthesys3/SynthAdmin/host/

Scorers site:
http://application.synthesys.info/synthesys3/SynthAdmin/score/

If you are unsure of your login details enter your password here:
http://application.synthesys.info/synthesys3/login/remind.jsp

During the Call

Promotion

- Contact internal scientists/curators and ask them to promote within their working groups and conferences they attend.
- User in-country connections (Universities, research organisations, taxonomic mailing lists etc)
- Send emails, posters, flyers (NHMMT provide these)

Frequent enquiries from Users:
- The Supporter cannot be someone from within the Institution that they are applying for Access to
- Supporters must submit (and finalise) their statements before the deadline via the website (i.e. Not an email attachment to TAF Admin)
- A separate supporting statement must be received for each application if a User is applying to more than one TAF

Process requests

- See 'Host Guidelines' documents and send to all potential Hosts.
- Assist applicants who need to find a Host.
- Respond efficiently to potential applicants (especially near the deadline).
- Get Hosts to comment on any applications submitted in advance of the deadline.
- Chase non-submitted applications and encourage submission
- Follow up submitted applications that are missing support statements

Once the Call has closed

We will NOT accept any late submissions or late Supporting Statements.

What to do on the site:
- Check the application is eligible -
  - Applicants must be working or living in an eligible country (see website for full list – please note new Countries are eligible in FP7)
  - Applicants can **not** be based in the country of the TAF they are applying to visit
  - Their supporting statement can **not** be written by someone from within the TAF they are applying to visit, but can be from an institution outside the TAF, but within the Country the applicant is applying to
  - Students can **not** be Working Group Leaders, this should be their supervisor
- If eligible, press the '*declare eligible*' button
- If ineligible, reject the applicant, explaining the reasons for their ineligibility.

Host Validation

- Click '*send for host validation*'
- Select the host from the drop down email list.
- If the host is not on the list press '*add a Host user account*'. Add details then return to the previous step.
- If you attempt to add a host account and get an error message telling you that they already exist email synthesys@nhm.ac.uk and they will update the User to a Host.
- The host will be sent an email telling them that they have application to validate and will provide a link to the site.
- The host site: http://application.synthesys.info/synthesys3/SynthAdmin/host/
- If the host has forgotten their password tell them to use the password reminder on the log in page. Super Admin cannot access, or change people's passwords.
- If you need to change the host, change the details on 'Facility Information' page. The new Host will not receive an automated email, so you will have to send them details of the web link, where they will be able to access and validate the application.
- Send the Host the 'Host guide' – link on Access pages of Consortium Site

Scoring

To assign Scorers to your USP
- On the Admin Home page select '*Selection Panel*' from the drop down menu. Then press '*list these users*'.
- Enter the Scorers name into the box and press '*search for users to add to panel*'

- The search results will appear at the bottom of the page. Check the User that you wish to add to your panel and press '*add selected user to panel'.*
- If your panellist is new to SYNTHESYS you will have to manually add their details (using the '*add new User*' button) and send them details of their password and user name.

Scorers and scoring
- The Scorers do NOT get sent an automated email from SYNTHESYS.
- TAF Admins must email the scorers the link to the website and score deadline.
- The scorer site: http://application.synthesys.info/synthesys3/SynthAdmin/score/
- There are links on Access pages of Consortium Site to the 'Scorers Guide' to the site, Scoring guidance and ERA. These should all be sent to your scorers.
- All questions will be scored out of 10, and then weighted by the system to give a score out of 100.
- There are two totals columns on the 'Score Summary' page. The first is the total of the actual scores (out of 60) and the second is the total once the scores have been moderated to include the weighting (out of 100).
- The Score out of 100 should be used to rank proposals.
- Scorers can print their scores and comments.

A common problem is scorers signing in and not being able to see any applications to score. Possible solutions:
- Check they are logging in to the correct page (not Host or User page)
- If they sit on more than one USP they may have to select the TAF they wish to score from a drop down menu.
- Check that they are logging in with the correct email address. Many of the regular panelists have more than one email registered on the site
- If these fail, ask the Scorer for their password and send the details to synthesys@nhm.ac.uk.

Post scoring

- You can export all the score data by pressing '*Export to CSV*'. This can easily be converted into an Excel file.
- If Scorers do not finalise their scores, then the application will remain as 'Scoring' rather than 'Scored'. You will not be able to accept application with this status. You can either get the Scorer to finalise their scores or contact synthesys@nhm.ac.uk who can finalise on their behalf.

USP

- The USP must consist of a 50:50 mix of internal and external members.
- If you have more than one institution in your TAF, you only require one Panelist from each institution.
- Panel members should represent all disciplines for which you have received applications. Try to avoid duplicating specialists.
- External members can be from within the host country, so long as they are not from a TAF institution.

- If you are stuck for Panel Members contact the NHM Team and we can advise you on experienced panellists from other Call.
- Please use the template Excel document that will be provided by NHMMT to record your USP decisions.

N.B. All results, including completed USP template document and applicant feedback comments, must be sent to NHMMT for verification *before* being sent to the applicants.

Applicant Feedback

You can enter an explanation for this on the 'Feedback Comments' of the 'Comments' page. These comments will then be included on the bottom of the acceptance email. This is where you must enter reasons for rejected applications and reduced awards, or any general or TAF-specific information you wish to communicate to successful applicants.

Acceptance:

- All Users should plan to start and complete their visit by the end of the following calendar year after being accepted. (N.B. An exception to this is Call 4 whereby applicants will need to complete their visits before the end of the contract in August 2017 (exact date tbc).)
- If you plan to accept an applicant but award a reduced number of User Days compared to the amount requested, the USP must clearly explain why the project duration is being reduced and specify which elements of the project are being affected. (Consult the named Host/Facility Manager if necessary).
- Any amendment to the number of User Days must be updated on both the 'Project Details' and 'Resource Needs' webpage of the application **before** the acceptance is sent out.
- The feedback comments must include the USP's reasons for any reduction and a request for the applicant to confirm via email that they can complete the project as outlined in their application within the reduced timeframe. These communications should be stored in the User's project file.

Rejection:

- All unsuccessful applicants should receive clear and constructive feedback, based on the USP comments and discussions, as to why the proposal is being rejected. Where possible, specific elements of the proposal that could be improved should be highlighted with brief suggestions of how to make such improvements.
- Applicants should only be explicitly encouraged to reapply in the following Call if the USP is able to identify the specific element(s) of the proposal that lead to the rejection, the improvement of which would significantly enhance the overall quality of the application.

Evaluation and Dissemination

- Encourage Users to complete evaluation

- Use the '*Evaluation Reminder*' button to remind Users to complete their evaluation. NB. At present this is just an automated email. Soon you will be able to add comments to the email before it is sent.
- Gather data on User outputs. Please encourage users to enter details of their outputs online. Details of how to do this are below

- If application is in 'Visiting' status, but the evaluation is complete, then the applicant has not finalised the evaluation. You will need to contact the User to finalise it. (Please note that if no output has been entered the evaluation can not be finalised.)
- Please respond to any negative evaluation comments and cc to the NHM Team.
- Please alert all Users that they must also complete the confidential questionnaire for the European Commission which can be found at: http://cordis.europa.eu/fp7/capacities/questionnaire_en.html

Reporting
- Ensure that the database is kept up to date, and that all visit dates and durations are correct on both the 'Project Details' and 'Resource Needs' pages.

Queries:

Please send any queries to the NHM Management Team: synthesys@nhm.ac.uk