



Instructions for TAS ERP User: Bid Reviewers

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Introduction

TAS Hub maintains a pool of bid reviewers who broadly represent the research community they serve and contain a spread of knowledge and expertise covering the full breadth of TAS' remit. For more details see [TAS Hub Reviewer Guidelines](#)

The administration team capture some details about you when creating your ERPNext account and/or registering you as a TAS Reviewer. This may have included your institution, research keywords, short biography (optional), and experience in bid reviewing. TAS Hub may periodically request you to review and update these details if necessary.

The TAS Hub Research Committee reviews bids and identifies potential reviewers who are considered suitable to review the bid, and believed not to have research interest conflicts. This may involve reviewer and bid keyword matching for some programmes.

All stages of bid review are done within TAS Hub's online system, ERPNext. These instructions cover access to the ERPNext system, updating your reviewer details, and the process of bid review request and completing a bid review.

User instructions are available at the ERPNext home page (<https://erpnext.tas.ac.uk/>).



Welcome to the TAS ERP Platform

For more information about the TAS programme, please check www.tas.ac.uk or contact us at contact@tas.ac.uk.

You will need a TAS ERP user account to submit a bid to one of the TAS calls.

Registration and New Users:

Pump Priming Programme: You need to [pre-register](#) to submit a bid for any of the Pump Priming Calls. 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.

Other Programmes (e.g., Consolidator, Agile): If you do not have a TAS ERP account please contact eroteam@tas.ac.uk

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

Click on the Login Button on the Right hand Corner of the page to Login

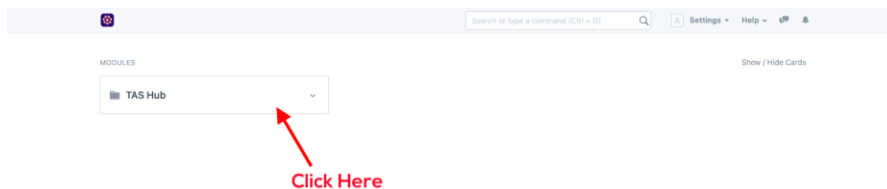
If you have any issues accessing the system, please contact opsteam@tas.ac.uk

Login to ERPNext

1. Click on the “Login” link on the home landing page (see above), or enter the following URL or click on the following Link <http://erpnext.tas.ac.uk/login#login>
2. Sign-in using your credentials

Navigating within ERPNext

1. After login, users are presented with the Desk View. Navigate through the desk view to the menu of user options by clicking on the TAS Hub Card



The options presented depend upon user role, permissions, and activity in the system.

TAS Hub

Collaborators <ul style="list-style-type: none">My Network	Research Programmes <ul style="list-style-type: none">My Agile BidsMy Pump Priming Bids
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Research Keywords & Summary Bio

Upon joining the TAS Hub Review Pool, a reviewer will be requested via email to provide details on their research keywords, summary bio (optional) and reviewing experience via ERPNext. Also, in advance of a call reviewers receive a heads-up email, which will prompt reviewers to review and update these details if appropriate.

These details are essential to the research bid – reviewer matching and allocation process. For calls that are internally focused on the Hub and/or Nodes (e.g., Agile, Consolidator) the Research Committee will draw upon these details in allocating reviewers. For larger UK wide calls (e.g., Pump Priming) a matching algorithm is used as part of the reviewer allocation process. However, the set of details will be used to review proposed bid review allocations, determine allocations where there are insufficient matches, and inform options to improve allocations

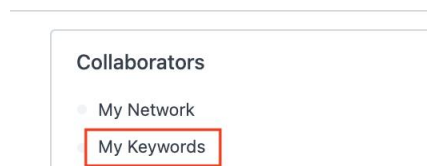
TAS Hub has established a taxonomy of keywords covering a number categories relevant to the TAS research programme. Both research project bids and bid reviewers pre-select their keywords from this common list. This is critical a priori requirement.

To enter (or update) your details:

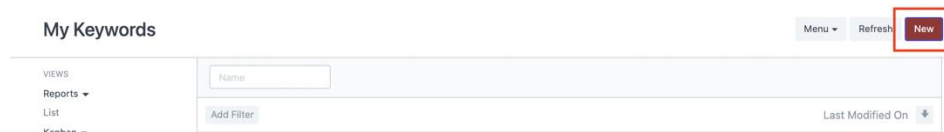
1. Click on the link in your welcome or update email and login; or

Login to ERPNext and select My Keywords link

TAS Hub



2. If a record already exists (a blank record has already been created for you, or you want to update) **click on the record**. If there is no record, click on **New button**.



Your reviewer details form is displayed.

Name

David Maffin

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 Keywords

<input type="checkbox"/>	Keyword
No Data	
Add Row	

Additional Suggested Keywords (Optional)

Short Bio (Optional, 100 Words Max)

Experience Reviewing Research Proposals

Other Experience

Complete each section of the form.

Notes:

- Inclusion of your Short Bio is optional.
- If you were signed-up as a reviewer using the reviewer invitation form, your experience of reviewing research details may have been transferred to the form.

Selection and entry of research keywords should be done as follows:

a) TAS Keywords List

First, click on TAS Keyword List link to open the TAS Keyword Explorer and 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.

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

Additional Suggest

- 5014 | Psychology and Cognitive Sciences
- 501401 | Psychology
- 501402 | Human Factors

[Advanced Search](#)

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

Additional Suggest

- 2010 | Education
- 2011 | Electrical & Electronics
- 2012 | Environment & Climate
- 2013 | Finance & Insurance

[Advanced Search](#)

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 your reviewer profile.

These may be considered during reviewer allocation process (e.g. where initial matching using TAS Keywords List do not provide a good match) 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

Once you have completed the form click on **Save** button

Conflicts of Interest Declaration (If Applicable)

This only applies to TAS Hub Members for the purpose of reviewing bids submitted by TAS Hub researchers (e.g., Agile Programme).

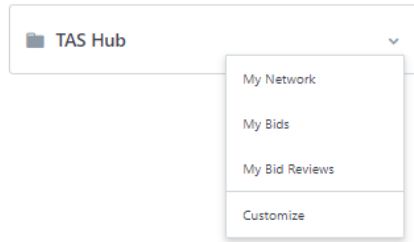
You may previously have reviewed and declared any conflict of interests within the TAS Hub because you submitted a research bid or you have undertaken a bid review. In this case you may wish to review your previous declaration of interests and update accordingly.

If this is the first time you have undertaken a bid review you are required to list your Conflicts of Interest within the TAS Hub. These should also be kept up to-date for future TAS programmes.

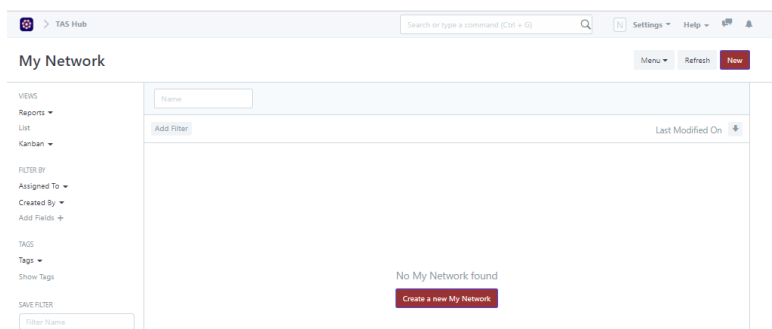
What is a conflict of interest?

As we're a relatively small community we need to take a pragmatic approach: having worked together (e.g., published) recently constitutes a conflict, whereas being at the same institution probably does not. For more information, see for example the ACM SIGCHI policy <https://sigchi.org/about/sigchi-policies/conflict-of-interest-policy/>

1. Login
2. Select the drop down menu in the TAS Hub "card" and select My Network



3. Click on Create a new My Network or New (top right)



To declare all your Conflicts of Interest within TAS Hub Network including Researchers and Industry Partners

- Click on Add Row to add a Conflict of Interest
- Click in Known Contact field and select from list or scroll to search for full listings
- Add details of your association the adjacent field
- To delete a conflict select the radio box left of the row entry and then select Delete (appears next to Add Row)
- Save once additions and updates completed

New My Network 3 ● Not Saved Save

Name

Please declare all your Known Associates within TAS Hub Network including Researchers and Industry Partners

My Network:

<input type="checkbox"/>	Known Contact	Describe your Association
No Data		

Add Row

Bid Review Request

The TAS Admin team will create reviewer requests and the systems generates an email to each selected reviewer.

If requested to review a bid, an email will be sent to you from ERPNext in the following format.

Dear {{ reviewer }},

We are contacting you as an expert in an area of research related to a proposal the TAS Hub have received and are considering for funding under its Pump Priming Programme. We hope that you will therefore be able to provide constructive comments on the proposal listed below.

Bid Name: {{ bid.bid_name }}
Bid Summary: {{ bid.bid_summary }}
Lead Contact: {{ lead_contact }}
Lead University: {{ lead_university }}
Research Team: {{ research_team }}

The due date for the bid review will be 12th March 2021

Please note that proposals are succinct, and a review should not take longer than an hour. We try to do the best match we can to your area of expertise. However, we are trying to build a diverse and multi-disciplinary community, so in assessing this request, also consider that important evaluation criteria for TAS are the essential multidisciplinary contribution, as well as the overall approach, engagement in TAS Hub, project management, alignment to TAS vision and principles, EDI and RRI, role of project partners.

If you have been asked to review more than one bid, and are unable to review all requests, please accept the bids you can review

Kindly Accept or Reject the Invitation by clicking on the relevant Link.

To Accept click {{ accept_link }} .

To Reject: if you're unable, please click {{ reject_link }} , or If there is conflict of interest, please click {{ coi_link }}.

If you accept this invitation, a further email will be sent providing details to complete the bid review.

It will include the bid summary for your information.

You can respond to the request as follow:

- Accept
- Reject
 - Unable to review (i.e. decline)
 - Declare a conflict of interest.

1. Click on the appropriate link.

This will update the request status in the system and inform the Admin team.

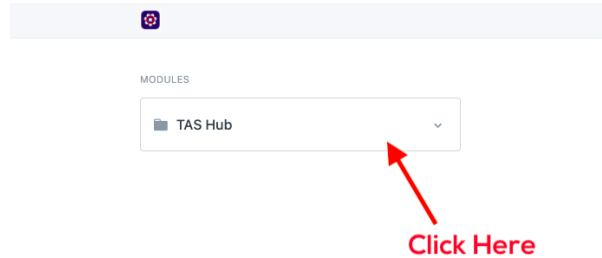
You will receive an acknowledgement web message

If you **reject** the invitation, you may be asked to select a reason – This will inform TAS Ops Team whether to allocate an alternative bid.

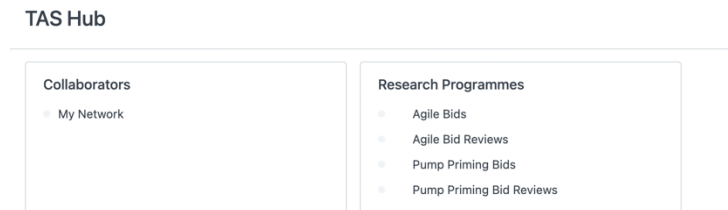
If you **accept** the request, you'll receive a instructions email c/w direct link to the bid review. You can now logon to the system and undertake the bid review.

Completing a Bid Review

1. Login
2. Click on the TAS Hub Card



3. Click on the Bid Reviews option for the relevant programme (e.g. Pump Priming Bid Reviews)



Your list of bid reviews will be shown in the table. The status of each review (Draft, Submitted) including the review deadline is shown.

TAS Hub

Search or type a command (Ctrl + G)

Settings Help

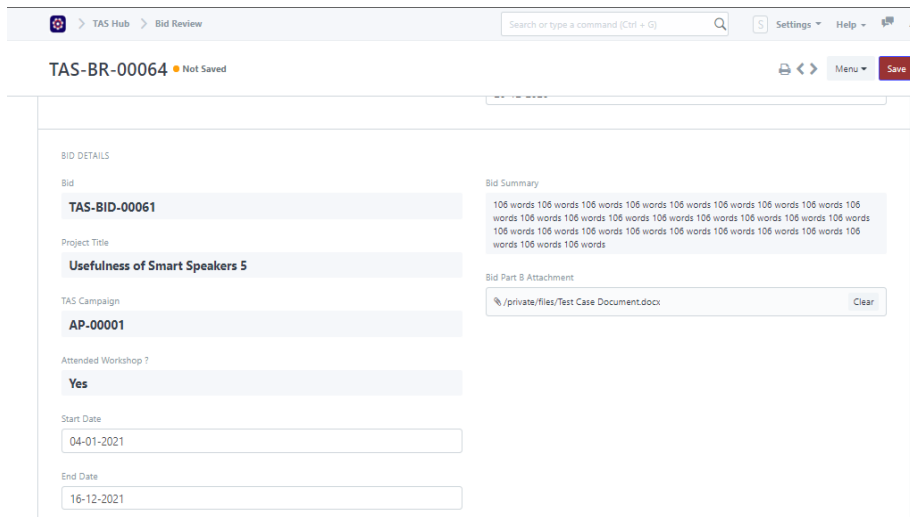
Bid Review

Menu Refresh New

Views	Name	Status	Review Deadline	Bid		Last Modified On
Reports	Add Filter					
List	Last Modified On					
Kanban	<input type="checkbox"/> Name					4 of 4
FILTER BY	<input type="checkbox"/> TAS-BR-00064	Draft	20-12-2020	TAS-BID-00061	TAS-BR-00064	23 h 0
Assigned To	<input type="checkbox"/> TAS-BR-00063	Submitted	22-01-2021	TAS-BID-00056	TAS-BR-00063	1 d 0
Created By	<input type="checkbox"/> TAS-BR-00062	Draft	31-12-2020	TAS-BID-00054	TAS-BR-00062	1 d 0
Add Fields	<input type="checkbox"/> TAS-BR-00061	Draft	31-12-2020	TAS-BID-00051	TAS-BR-00061	1 d 0
TAGS						
Tags						
Show Tags						
SAVE FILTER						

- Click on a bid review name to open the bid review form.

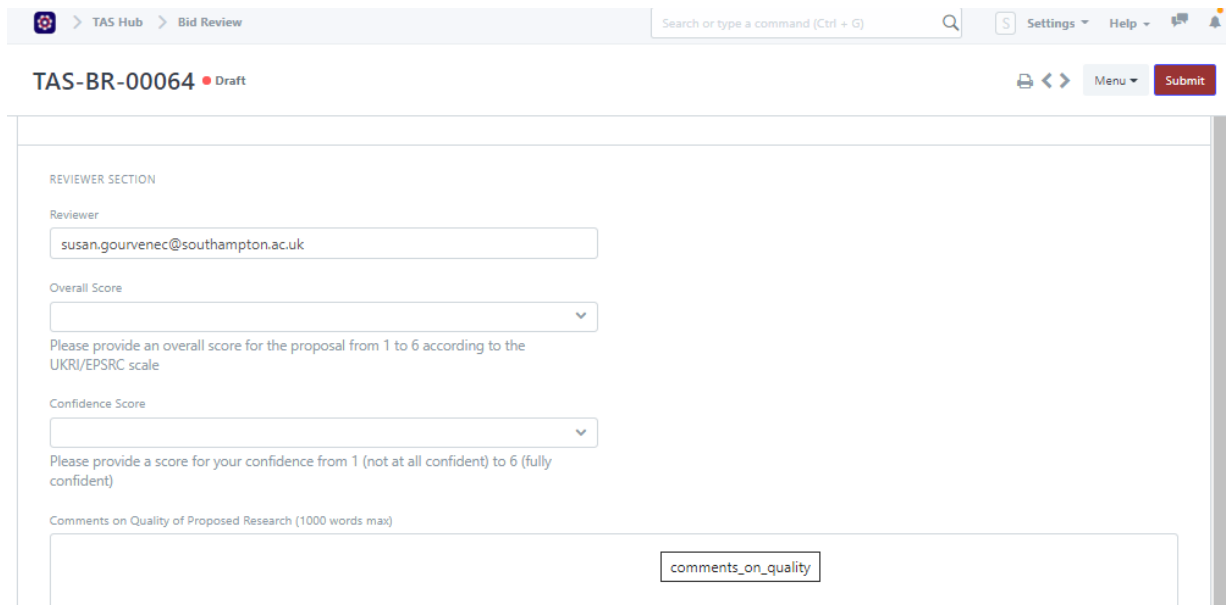
The top of the form presents the form shows the bid review details, including the bid summary and the bid document (e.g. Bid Submission Part B)



The screenshot shows a web browser window with the URL 'TAS Hub > Bid Review'. The page title is 'TAS-BR-00064' with a 'Not Saved' indicator. The form is titled 'BID DETAILS' and contains the following fields:

- Bid:** TAS-BID-00061
- Project Title:** Usefulness of Smart Speakers 5
- TAS Campaign:** AP-00001
- Attended Workshop?:** Yes
- Start Date:** 04-01-2021
- End Date:** 16-12-2021
- Bid Summary:** A placeholder text consisting of multiple lines of '106 words'.
- Bid Part B Attachment:** /private/files/Test Case Document.docx (with a 'Clear' button)

Scrolling Down the form is the Bid Review section



The screenshot shows the 'REVIEWER SECTION' of the bid review form. It includes the following fields:

- Reviewer:** susan.gourvenec@southampton.ac.uk
- Overall Score:** A dropdown menu with a downward arrow. Below it is the instruction: 'Please provide an overall score for the proposal from 1 to 6 according to the UKRI/EPSC scale'.
- Confidence Score:** A dropdown menu with a downward arrow. Below it is the instruction: 'Please provide a score for your confidence from 1 (not at all confident) to 6 (fully confident)'.
- Comments on Quality of Proposed Research (1000 words max):** A large text area with a placeholder label 'comments_on_quality'.

This includes the scoring drop-down fields (for Overall Rating and Confidence Rating). Also, comment fields for evaluation criteria: for example, Quality of the Proposed Research, Project Management, Commitment to RRI & TAS Principles, Fit to TAS Hub Vision & Impact, Project Partners. **NOTE: There are word limits on these text fields**

The bid form includes guidance notes for each of the review criteria comment fields, including the differing emphases in the evaluation criteria for different programmes and project types.

For more information on TAS vision and principles see the following links to TAS website:

- Guiding Principles: <https://bit.ly/3tnYwIV>
- Responsible Research & innovation: <https://bit.ly/2MtKHC2>
- Grand Challenges: <https://bit.ly/3cFDxFp>
- Nodes: <https://bit.ly/3cvU270>

5. Comments for Authors (Pump Priming Programme Only)

TAS Hub provides generic feedback post award announcement to all teams that submit proposals to Pump Priming Programme. These are also shared with the wider research community ahead of subsequent calls.

Proposal authors also value feedback on their specific proposals. Reviewers are requested to provide summary comments that can be shared anonymously.

Comments to Authors (500 Words Max)

Please provide comments for sharing with the team that submitted the proposal.

6. Saving and Submit

As you progress completion of the bid you can click **Save** button (top right) to return later.

Once you have completed the review click on **Submit** button (top right)

If you return to My Reviews list the status of the bid review will have changed to submitted.

Support

Please email erpteam@tas.ac.uk if you have 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