GATE

General Access Tool for HZB User Facility

Handbook - GATE Usertool

Registration, User Account, Proposal Submission,
Proposer, Responsible Experimentalist, Experimentalist,
Prepare Experiment Time, After Experiment Time

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Table of Contents

1 IS A GATE ACCOUNT MANDATORY?

GATE is the online **G**eneral **A**ccess **T**ool to the **E**xperimental infrastructures of the Helmholtz-Zentrum Berlin (HZB). If you want use the HZB infrastructures, you need a GATE account.

1.1 When You Must Register Yourself to GATE?

You must register yourself to get a GATE account to do the following tasks:

- Submit a proposal for experiment time at an experimental infrastructure as a proposer.
- Submit proposals for inhouse research and instrument time as an HZB employee.
- Be co-proposer of a proposal.
- Be member of an experimental team in an HZB experiment to get access as member of the experimental team.
- Prepare experiment time, book guesthouse rooms and apply for funding as responsible experimentalist and member of the experimental team.
- Send reimbursement request if you get funding as member of the experimental team.
- Give feedback after experiment as responsible experimentalist.
- Submit a report as responsible experimentalist.
- Submit publications related to HZB experiments.
- Review proposals as referee.

1.2 Roles and their GATE Tasks

Role	GATE Task
Proposer	Each proposal has one proposer. The tasks are: - Submit the proposal. - Add one or more co-proposer to the proposal. - Appoint one responsible experimentalist. - Upload publications about the experiment. - Submit a proposal review feedback if required. **Note:** If proposers get experiment time for the proposal they must prepare the experiment time. Proposers have the additional role of a responsible experimentalist. Proposers can reassign the role and appoint a co-proposer as responsible experimentalist.
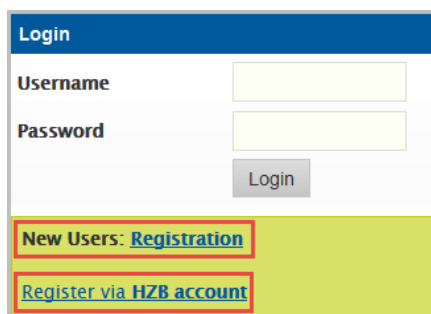
Role	GATE Task
HZB employees as proposer	To do inhouse research or to get instrument time HZB employees must submit a proposal. • Submit proposal for inhouse research and do all the tasks as a proposer. • Submit proposal for instrument time for maintenance, calibration or repair of an instrument.
Co-proposer	The proposer appoints minimum one co-proposer to his proposal. • Can upload publications about the experiment. • Only a co-proposer can be appointed as responsible experimentalist.
Responsible Experimentalist	Each proposal has one responsible experimentalist. The tasks of the responsible experimentalist are: • Give additional safety information. • Organize the experiment. • Nominate the experimental team for each experiment time. • It is not mandatory for the responsible experimentalist to be a member of the experimental team. **Note:** If the responsible experimentalist is member of the experimental team he must add himself to the experimental team to get access to HZB. • Apply for funding. • Ask for guesthouse reservation if necessary. • Submit the report and the feedback after the experiment. • Can upload publications on the experiment.
Experimentalist	The experimental team is one or more persons. Each experimentalist has his own tasks: • Upload the mandatory documents and information for his access to the campus. • Do the mandatory online trainings. • Do the guesthouse reservation if necessary. • Do the reimbursement if necessary.
Referee	• Reviews the proposals.

2 REGISTRATION

GATE is the online **G**eneral **A**ccess **T**ool to the **E**xperimental infrastructures of the Helmholtz-Zentrum Berlin (HZB).

2.1 Registration Process

There are two possibilities to register. One for persons with no HZB account and one for persons with HZB account.

- **New Users: Registration (no HZB account)**
  You have no HZB account. Use this function to register yourself.

- **Register via HZB account**
  You have an HZB account. Use this function to register yourself. After the registration you can log in with the username and password from the HZB account.

Follow this process to get an account for GATE:

1. Open Website: https://www.helmholtz-berlin.de/pubbin/hzbgate.
2. Click on **New Users: Registration** or **Register via HZB-account**. The GATE registration form shows.
3. Complete the registration form. Fields marked with * are mandatory.
4. Press **register**. This saves your data temporarily. A validation email is sent to your email address.
5. Click on the validation link in the email. Make sure that the validation link address is completely marked as a link. Otherwise, copy and paste the validation link manually into the navigation toolbar of your browser.
   Note: You have to do the validation within 24 hours. GATE accounts without validation are removed after 24 hours.
6. Enter your username and password to complete registration.

Instructions and important rules:

- **Username**
  For each GATE account a unique username is necessary. The username is case sensitive.

- **Password**
  The password needs minimum six characters and is case sensitive.

- **Email**
  For each GATE account a unique and correct email address is mandatory. HZB will send all important information to this email address.

- **Status and scientific preferences**
  HZB uses your status and scientific preferences for reports to the European Commission and the Helmholtz Gemeinschaft.

- **Affiliation (employer)**
  GATE includes an affiliation database. You can add an affiliation, if your affiliation is not available.
  Important: Recently added affiliations are only visible for the creator. Only after a successful validation process is the affiliation visible to all users.

- **Department (employer)**
  If your affiliation has no departments choose *none*. You can add a department if your department is not available.
  Important: Recently added departments are only visible for the creator. Only after a successful validation process is the department visible to all users.

2.2 Affiliation not found

If you do not find your affiliation in the registration form you can add a new affiliation.

> **Note**: A recently added affiliation is only visible for the creator. The affiliation is visible to all users only after a successful validation process. HZB will check for double entries in the database.

Follow this process to create a new affiliation:

1. Press **I do not find my affiliation**. The Add Affiliation form shows.
2. Complete the form. Fields marked with * are mandatory.
3. Enter one of the two: **Street** or **PO. Box**.

Affiliation				Affiliation	
Organisation/Institute *	Musterinstitut			Organisation/Institute *	Musterinstitut
Type	Research			Type	Research
Department *	none			Department *	none
Street	Musterstr. 5	OR		Street	
ZIP / City *	12456 / Musterstadt			ZIP / City *	/ Muster
ZIP / PO. Box	/			ZIP / PO. Box	12345 / 987654
Country *	Germany			Country *	Germany

4. Press **submit**. The new affiliation is shown in the registration form.

2.3 Department not found

Usually you select the affiliation first and then the department. In some cases, the department is not on the list.

Follow this process to add a new department:

1. Press **I do not find my department**. The New department for affiliation form comes into view.
2. Complete the form. Fields marked with * are mandatory.
3. Optional: If **Street** and **ZIP** are different from the institute data edit the fields.
4. Press **submit**. The new department is shown in the registration form.

2.4   Privacy and Infomail

Privacy:

This is required according to the General Data Protection Regulation (GDPR). You will appear in other users search results. They can choose you as co-proposer or experimentalist. We recommend you allow the search function.

Infomail:

This is a type of communicative media from the HZB. You get reminders of calls for proposals and user meetings. We recommend you subscribe to infomail.

> **Tip:** You can subscribe and unsubscribe to Privacy and Infomail in your personal section > personal data.

2.5   Acknowledgment

You have to acknowledge the data protection policy and the HZB Rules of Usage. Without this acknowledgment you can not register.

If the data protection and HZB Rules of Usage change, you see a request for acknowledgement again when you login. You have to accept it again to continue working with GATE.

3 LOGIN

If you are registered in GATE you need your username and password to log in.

1. Open Website: https://www.helmholtz-berlin.de/pubbin/hzbgate.

2. Enter your **username** and **password**.

3. Press **Login**. Your personal GATE homepage comes into view.

3.1   Your personal GATE Homepage

When your login has been successful your personal GATE homepage comes into view. The content on your homepage can vary. It depends on your role and the next steps you have to take. GATE guides you through the process and tells you what to do next.
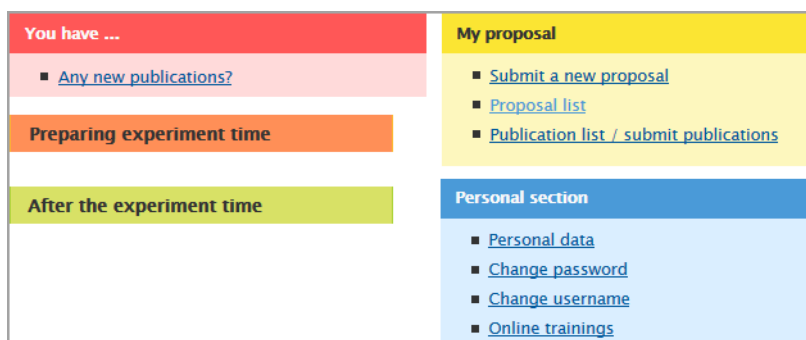
The example above shows the homepage of a user after registration. You see:

- **You have...**
  Reminds you to submit new publications about previous experiments at HZB. This area shows also the next steps to do and all open tasks.

- **Prepare experiment time** and **After the experiment time**
  If your proposal is successful more functions are available.

- **My proposal**
  Here you submit a new proposal and there are links to different lists like proposals, reports and publications.

- **Personal section**
  Here you can change your personal data and go to the online trainings. The online trainings are important for members of the experimental teams.

3.2   Logout

When you have finished your work on GATE please logout. You find the logout function on the left sidebar.

Note: After three hours of inactivity the system logs you off automatically.

3.3   Lost password

Follow this process if you do not remember your password:

1. Open Website: https://www.helmholtz-berlin.de/pubbin/hzbgate.

2. Click on **Lost password**.

3. Enter the email address you have used for registration. You will get a temporary password to this email address. The temporary password is valid for three hours.

4. Open Website: https://www.helmholtz-berlin.de/pubbin/hzbgate.

5. Enter your **username** and your **temporary password**.

6. Press **Login**. The Change password form comes into view.

7. Enter a **new password**.

8. Enter the **new password again**.

9. Press **change password**. The password has changed.

3.4   Lost username

If you do not remember your username follow this process:

1. Open Website: https://www.helmholtz-berlin.de/pubbin/hzbgate.

2. Click on **Lost username**.

3. Enter the email address you have used for registration. You will get an email with your username.

4. Open Website: https://www.helmholtz-berlin.de/pubbin/hzbgate.

5. Enter your **username** and your **password**.

6. Press **Login**. Your personal GATE homepage comes into view.

4 YOUR PERSONAL SECTION

In the personal section you can change your personal data, password and username. If you are member of an experimental team you can also go to the online trainings.

4.1 Edit Personal Data

You can change your personal data in your GATE account. For example if your department or affiliation has changed.

> **Note:** To change username and password use the links provided on your personal GATE homepage.

Follow this process to change your personal data:

1. Login to your personal GATE homepage.
2. In the **Personal section** click on **Personal data**. The Personal data form comes into view.
3. Press **Edit personal data**.
4. Enter your changes.
   Note: You cannot change the place of birth. If a change is necessary, contact the GATE manager.
5. Press **save**. The changes to your GATE account are saved.

4.2 Change your family name

You can change your family name in the personal data section.

> **Note for HZB employees**: Change your family name and your new mail address in your GATE account too.

Follow this process to change your family name:

1. Login to your personal GATE homepage.
2. In the **Personal section** click on **Personal data**. The Personal data form comes into view.
3. Press **Edit personal**.
4. Enter your new **Family name**.
5. Enter your **Birth name**.
6. Enter your new **complete name as written in your passport / identity card**.
7. Press **save**. The new family name is saved in your GATE account.

4.3   Change password

The password for your GATE account does not expire. You can change your password.

Follow this process to change your password:

1.   Login to your personal GATE homepage.

2.   In the **Personal section** click on **Change password**. The Change password form comes into view.

3.   Enter a **New Password**.

4.   Enter the **New Password (again)**.

5.   Press **Change password**. The password has changed.

4.4   Change username

You need a username to login to GATE.

Follow this process to change the username:

1.   Login to your personal GATE homepage.

2.   In the **Personal section** click on **Change username**. The Change username form comes into view.

3.   Enter a **New Username**.

4.   Press **Change username**. The username has changed.

4.5 Online trainings - Requirement for HZB facilities

HZB offers several online trainings which are mandatory for experimentalists at HZB facilities. When you complete the training and the test was successful, you get a certificate. The certificate is valid for one year. When you start the training, you must finish it. The necessary time for training and test varies between ten minutes and one hour.

> **Important**: As a member of an experimental team you must sign the certificate and send it per email to Helmholtz-Zentrum Berlin.

Follow this process to get the certificates for entrance to HZB facilities:

1. Login to your personal GATE homepage.
2. In the **Personal section** click on **Online trainings**.
    Note - HZB employees: For HZB employees the link leads to the HZB intranet. Please use your web password to log in.
3. Press button **start training**. A second tab in your browser opens.
4. Follow the training procedure.
5. Do the test. If you pass the test, you will get an email with the attached certificate.
6. Print the certificate.
7. Sign the certificate.
8. Scan the signed certificate and send it to the email address you get with the email.

4.6 Disable/Delete your GATE account

You can disable your GATE account or request the deletion of your GATE account. If you request for deletion your GATE account and all your personal data in GATE will be deleted. The GATE manager has to process your deletion request manually. Before deletion your account will be disabled first.

> **Important**: After deletion a reactivation of your GATE account is not possible.

4.7 Permission to Transmit Personal Data to KFS

This affects and is visible only for German citizens or persons who work for a German affiliation.

The main task of the KFS (Committee Research with Synchrotron Radiation) is the promotion of the research with synchrotron radiation in Germany.

If you give permission, HZB will send the following personal data to KFS:

- title
- full name
- email address
- affiliation name and address

The information status is displayed at the bottom of your personal GATE homepage. You can change the permission at any time.

5 PROPOSAL SUBMISSION

GATE is the HZB software that manages the full proposal process. A GATE account is mandatory to submit a proposal. In this chapter you will get all information necessary for the proposal submission in GATE.

For technical descriptions and details about facilities go to the HZB homepage.

5.1 Overview: Submission Process

Step	Actions and requirements
Submit proposal	Add a new proposal. When it is completed, submit the proposal to HZB. After submission, you cannot change the proposal. **Note:** If changes are necessary, contact the GATE manager.
Decision process	During the decision process, you have nothing to do in GATE. You get the result per email. After the decision, you see more information about your proposal in GATE.
Result	**No experiment time (proposal rejected)** For some facilities you see referee comments in the proposal info. **Experiment time allocated** You are now the responsible experimentalist for this proposal. Open the proposal info to read the preparing experiment time information. For some facilities you see referee comments. Prepare the experiment time in GATE (see "Responsible Experimentalist" on page 35).

5.2 Checklist - Edit and Submit New Proposal

The proposal form is different for each HZB research facility. The proposal form has different pages. The three major parts are:

- General Proposal Data

- Technical requirements

- Previous results (reports and publications)

| Proposal form page	Rules
Choose the HZB research facility	- Start page to create the proposal form. Is only seen once. - For each HZB research facility the proposal form is different. You cannot change the HZB research facility after "start submission". In this case you must create a new proposal.
General Proposal Data	- You must edit all mandatory fields to come into the next step. - Scientific case and results expected. For some proposals this document is necessary. You can upload it later also if it is mandatory. It is a DIN A4 PDF. The maximum number of pages depends on the HZB research facility.
Co-proposer	- Only a co-proposer can have the role of a responsible experimentalist. - For each co-proposer a GATE account is mandatory. - You can add co-proposers. - Add the co-proposers before you submit the proposal. - You need to add a co-proposer after proposal submission? Contact the GATE manager.
Technical requirements	- One technical requirement is mandatory for all proposals. - The other requests depend on the HZB research facilities. Additional functions or forms you get for some facilities: - Upload an experimental plan for each technical requirement. - Add more than one technical requirement. - Add Sample. - Add more than one sample.

Proposal form page	Rules
Prev. results	• Previous results are publications and reports about previous HZB experiments. They can influence the ranking of the proposal. You link to: • Reports on earlier HZB experiments - maximum 2 years old. • Publications about HZB experiments - maximum 3 years old.
Submit	• If a deadline for the proposal submission is given, you cannot submit proposals later. • You can only submit complete proposals. • If you submit a proposal, you cannot change it. **Note:** If it is necessary to make changes, contact the GATE manager.

5.3 Submit a New Proposal

A GATE account is mandatory to add a new proposal. You add a new proposal on your personal GATE homepage.

Follow this process to add a new proposal:

1. Open your personal GATE homepage.

2. Click on **Submit a new proposal** in section **My proposal**. A page with the HZB research facilities comes into view.

3. Choose the HZB research facility and click on **start submission** for it. The facility proposal form comes into view.
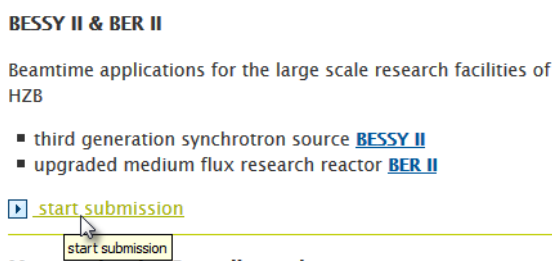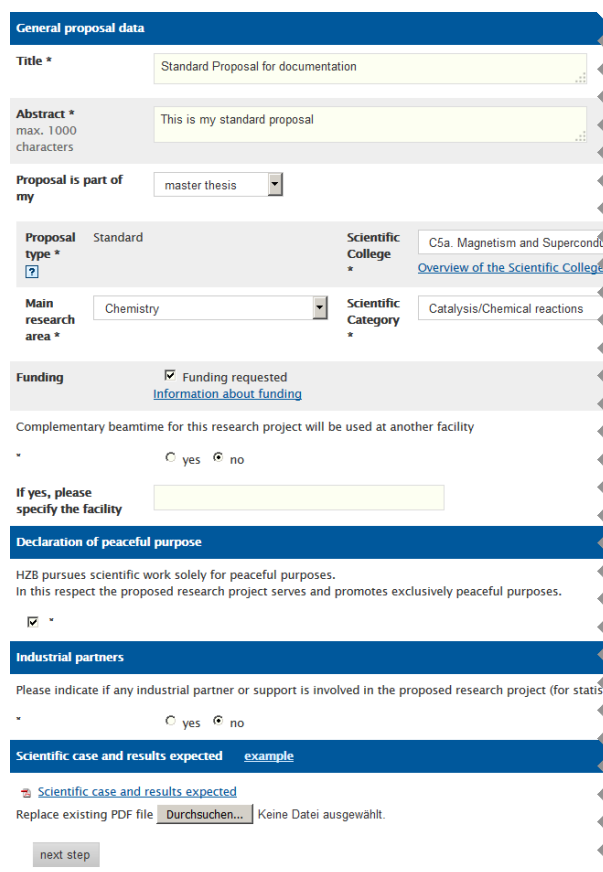

4. Complete the **general proposal data**.

5. Click on **next step**. The other forms come into view.

6. Complete all forms.

7. Submit proposal. After submission, you cannot change the proposal.
   Note: If changes are necessary, contact the GATE manager.
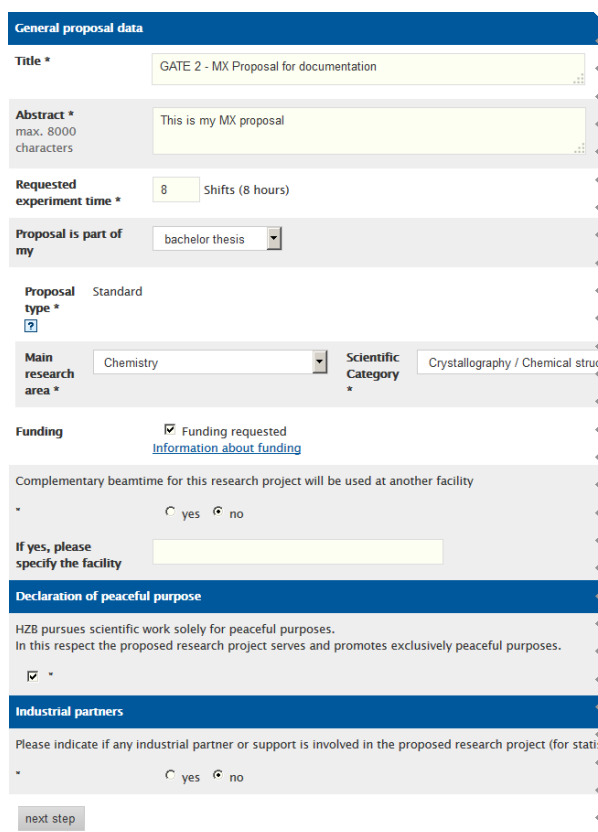
5.4   General Proposal Data

In the first page of the proposal, you insert the general proposal data. You must edit all mandatory fields to move to the next step.

5.4.1   Overview: General Proposal Data

The general proposal data form includes the general information on the proposal and is different for each HZB research facility.

General proposal data	
Title *	Standard Proposal for documentation
Abstract * max. 1000 characters	This is my standard proposal
Proposal is part of my	master thesis
Proposal type * ?	Standard
Scientific College *	C5a. Magnetism and Supercondu... Overview of the Scientific College
Main research area *	Chemistry
Scientific Category *	Catalysis/Chemical reactions
Funding	☑ Funding requested Information about funding

Complementary beamtime for this research project will be used at another facility

* ○ yes ⦿ no

If yes, please specify the facility

Declaration of peaceful purpose

HZB pursues scientific work solely for peaceful purposes.
In this respect the proposed research project serves and promotes exclusively peaceful purposes.

☑ *

Industrial partners

Please indicate if any industrial partner or support is involved in the proposed research project (for statis...

* ○ yes ⦿ no

Scientific case and results expected   **example**

📄 Scientific case and results expected
Replace existing PDF file [Durchsuchen...] Keine Datei ausgewählt.

[next step]

General proposal data	
Title *	GATE 2 - MX Proposal for documentation
Abstract * max. 8000 characters	This is my MX proposal
Requested experiment time *	8 Shifts (8 hours)
Proposal is part of my	bachelor thesis
Proposal type * ?	Standard
Main research area *	Chemistry
Scientific Category *	Crystallography / Chemical struct...
Funding	☑ Funding requested Information about funding

Complementary beamtime for this research project will be used at another facility

* ○ yes ⦿ no

If yes, please specify the facility

Declaration of peaceful purpose

HZB pursues scientific work solely for peaceful purposes.
In this respect the proposed research project serves and promotes exclusively peaceful purposes.

☑ *

Industrial partners

Please indicate if any industrial partner or support is involved in the proposed research project (for statis...

* ○ yes ⦿ no

[next step]

Example 1: No experimental time could be requested. You have to select the "scientific college" and upload a "scientific case and results expected" as PDF.

Example 2: You must insert the requested experiment time. But for this facility the "scientific college" and the "scientific case and result expected" are not necessary.

Notes to the form

- **Asterisk ***
  Fields and boxes marked with asterisks are mandatory.

- **Abstract**
  Tell the aim of the proposal. The abstract is the first information for the referees.

- **Proposal is part of my...**
  Select the appropriate, if your experiment is part of a thesis work.

- **Requested experiment time**
  For some facilities you must insert your requested experiment time.

- **Proposal type**
  External proposers and HZB proposers see different proposal types.
  If more information is necessary, click on **?**.

- **Scientific College** (optional)
  For some HZB research facilities you must select the scientific college. The HZB
  Scientific Selection Panel is organised in different Scientific Colleges. Select the
  scientific college that fits best to your proposal.
  For more information, click on **Overview of the Scientific Colleges**.

- **Main research area and Scientific Category:**
  Important for HZB statistics.

- **Funding**
  Not all groups are eligible for funding.
  For more information, click on **Information about funding**.

- **Scientific case and results expected** (optional)
  For some HZB research facilities it is necessary to upload a "scientific case and results
  expected". You can upload it later also if it is mandatory.

5.4.2 Scientific Case and Expected Results

For some HZB research facilities a scientific case and information about the expected results are necessary. The file scientific case and results expected belongs to the general proposal data.

The scientific case has the following requirements:

- Written in English.

- File format is unencrypted PDF.

- Page size is A4 paper.

- A maximum number of pages is specified.

The length, the file format and the maximum number of pages are checked during the upload.

In the scientific case, the following topics should be addressed:

- **Scientific context**
  You should give a clear account of the aims of the experiment. Set it in a broader scientific context. Keep in mind that not all readers of the scientific case are experts in the field.

- **Expected results**
  Give a short discription of the results you expect.

- **Publications**
  List the five most important publications in this field of science, in order to show that you are aware of the work of others.

- **Choice of specific instrument/station**
  Give reasons for your choice of instrument. Justify why it is necessary to use this particular instrument and why HZB is important.

- **Preliminary work**
  If possible, give results of preliminary work carried out in conjunction of your proposed experiment and to demonstrate sample quality.
  Example: NMR or light scattering experiments.

Upload the file to the general proposal data form.

Before you submit the proposal, you must upload a file. To change an uploaded file, upload a different file.

No file is uploaded

Scientific case and results expected	example
PDF file (maximum 2 pages) * Browse... No file selected.	

File is uploaded and proposal is saved

Scientific case and results expected	example
📄 Scientific case and results expected	
Replace existing PDF file Browse... No file selected.	

5.5 Add Co-Proposer

For each proposal, you can add co-proposers. Only a co-proposer can have the role of a responsible experimentalist.
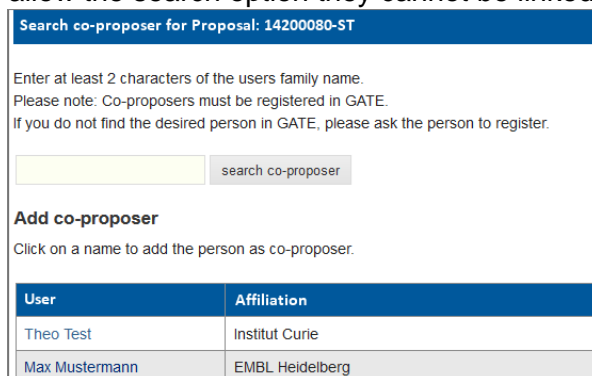
- For each co-proposer a GATE account is mandatory.

- You can add co-proposers.

- Add the co-proposers before you submit the proposal.
  Note: If you want to add a co-proposer after you submitted the proposal, contact the GATE manager.

Follow this process to add a co-proposer:
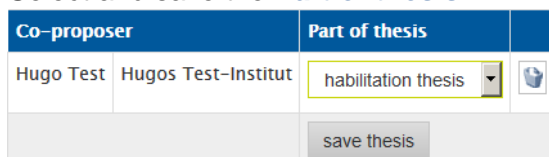
1. Select an **unsubmitted proposal**. The general data page of the proposal comes into view.

   Edit proposal: 191-00520-ST

   General proposal data > Co-proposer > Technical requirements * > Prev. results > Submit

General proposal data	
Title *	Yet another test proposal

2. Click on **Co-proposer**. The co-proposer page comes into view.

3. Press **Search co-proposer**. A secondary window with a search form comes into view.

4. Insert minimum two characters of the family name.

5. Press **search co-proposer**. GATE starts a search on the family name. A list of GATE users comes into view if the user allows the search option in GATE. If the users do not allow the search option they cannot be linked to your proposal.

   Search co-proposer for Proposal: 14200080-ST

   Enter at least 2 characters of the users family name.
   Please note: Co-proposers must be registered in GATE.
   If you do not find the desired person in GATE, please ask the person to register.

   [   ] search co-proposer

   Add co-proposer
   Click on a name to add the person as co-proposer.

User	Affiliation
Theo Test	Institut Curie
Max Mustermann	EMBL Heidelberg

6. Click on the username. The GATE user is linked as co-proposer to your proposal.

7. Select and save the **Part of thesis**.

Co-proposer		Part of thesis	
Hugo Test	Hugos Test-Institut	habilitation thesis ▾	🗑
		save thesis	

8. Add more co-proposers or close the window.

> **Note:** To delete a co-proposer click on the trash icon.

5.6 Technical Requirements

Information about the methods, experimental stations and experimental techniques for the HZB research facilities are available on the HZB homepage.

5.6.1 Rules for Technical Requirements

The technical requirements summarize your measurement procedure. Basic information for the technical requirement is one facility, instrument or method. To edit the technical requirements, follow these rules:
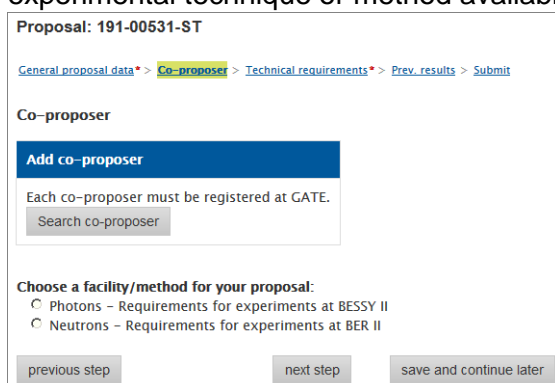
- The technical requirements depend on the selected HZB research facility.

- The technical requirements form is different for each HZB research facility, method, experimental station, experimental technique and proposal type.

- The technical requirements form has more than one page.

- To switch to the next page, you must complete mandatory fields on the current page.

- For some HZB research facilities you must add a sample. Please specify the sample as accurate as possible.

- For some HZB research facilities you can add more than one sample. Please specify all samples as accurate as possible.

- If more than one facility, method, experimental station or experimental technique is necessary, you must add technical requirements for each of them.

5.6.2 Edit Technical Requirements

After you added the co-proposers, you add the technical requirements to your experiment. The technical requirements form depends on the facility or method you select.

Follow this process to add technical requirements:

1. You see the Co-Proposer page for a new proposal.

2. Optional: **Choose a facility/method for your proposal**.
   Note: You see this option if there is more than one facility, experimental station, experimental technique or method available.

3. Click on **next step**. The technical requirements form comes into view. The form is different for each facility or method.

4. Specify the experimental conditions.

5. Optional: Upload a detailed experimental plan for your measurements.
   Note: If you see this option the experimental plan is mandatory.

6. Optional: Specify the sample that you will measure.
   Note: Not for all HZB research facilities a sample is necessary. In some cases you can add more than one sample.

Next steps:

- More than one sample possible: Add more samples for the facility.
  After you finished the first sample description you can add additional samples. This is necessary, if you have one more sample or class of sample to measure (see "Add More Samples" on page 26).

- More than one technical requirement possible: Add more technical requirements.
  The number of technical requirements is fixed. If the maximum is reached you do not see the **add** or **add technical requirement** button (see "Add More Technical Requirements" on page 27).

5.6.3 Add More Samples

In some cases you can add more samples to the technical parts.

> **Note:** After you submitted the proposal, you cannot add a sample.

Follow this process to add more samples to a technical part of a new proposal:

1. Open the proposal.
2. Click on **Technical requirements** above the form. The **Technical requirements** come into view.

Edit proposal: 191-00520-ST

General proposal data > Co-proposer > Technical requirements > Prev. results > Submit

Technical requirements

Facility	Equipment	Samples		
1.1-P	Optics Beamline Reflectometer	Dokutest		
		➕ add sample		

3. Click on **add sample**. The sample description comes into view.
4. Complete the form.

> **Tip - delete sample:** Use the trash icon near by the sample name to delete the sample.

5.6.4 Add More Technical Requirements

The maximum number of technical requirements is fixed. If the maximum is reached you do not see the **add** or **add technical requirement** button.

Add technical requirements to measure different technical conditions for a facility or method.

Follow this process to add more technical requirements

Click on **Technical requirements** above the form. The **Technical requirements** comes into view. Some HZB research facilities have one facility or method and others have more.

One facility

1. Click on **add technical requirement**. The technical requirements form comes into view.

2. Edit the technical requirements.

More than one facility

1. Select the **facility** and click on **add.** The technical requirements form comes into view.

2. Edit the technical requirements.

5.7 Previous Results about HZB experiments

Previous Results are important for your proposal. Previous results are:

- Reports on earlier HZB experiments - maximum 2 years old.

- Publications about HZB experiments - maximum 3 years old.

The previous results page has two parts.

Reports

Reports			
Reports linked to proposal			
📄 MX-191-00044-CR	Test Proposal MX	Full report (April 19, 2018)	🗑
Reports available in GATE as previous result			
☐	📄 MX-191-00039-ST	Test Proposal MX	Progress report (April 19, 2018)
add marked reports			

The list shows all reports for your GATE proposals. To link the report to the proposal, activate the checkbox and press **add marked reports**.
In the example above, you see two reports. One is linked to the new proposal.

> **Note**: The trash icon deletes only the link, not the report.

Publications

Example 1: No publication found and linked in GATE

Publications
No publications linked to proposal
No publications found in GATE.
▶ Enter new publications

In this example, no publications were found in GATE and no publication is linked to the proposal. **Enter new publications** leads you to switch to the publication upload (see "Publishing Results from HZB Experiments" on page 66).

Example 2: Publications available

Publications linked to proposal	
Kennedy, K; Schroeder, T; Shaw, M; Haynes, D; Lewis, S; Bentley, C; Paxman, C; Carter, S; Brando, VE; Bartkow, M; Hearn, L; Mueller, JF: Long term monitoring of photosystem II herbicides - Correlation with remotely sensed freshwater extent to monitor changes in the quality of water entering the Great Barrier Reef, Australia , MARINE POLLUTION BULLETIN 65 (2012), p. 292-305 doi:10.1016/j.marpolbul.2011.10.029	🗑
Greywe, D; Kreutz, J; Banduhn, N; Krauledat, M; Scheel, J; Schroeder, KR; Wolf, T; Reisinger, K: Applicability and robustness of the hen's egg test for analysis of micronucleus induction (HET-MN): Results from an inter-laboratory trial , MUTATION RESEARCH-GENETIC TOXICOLOGY AND ENVIRONMENTAL MUTAGENESIS 747 (2012), p. 118-134 doi:10.1016/j.mrgentox.2012.04.012	🗑

Publications available in GATE as previous result	
☐	Latinwo, Folarin; Schroeder, Charles M: Nonequilibrium Work Relations for Polymer Dynamics in Dilute Solutions , Macromolecules 46 (2013), p. 8345-8355 doi:10.1021/ma400961s
☐	Santoro, Carlo; Stadlhofer, Astrid; Hacker, Viktor; Squadrito, Gaetano; Schroeder, Uwe; Li, Baikun: Activated carbon nanofibers (ACNF) as cathode for single chamber microbial fuel cells (SCMFCs) , JOURNAL OF POWER SOURCES 243 (2013), p. 499-507 doi:10.1016/j.jpowsour.2013.06.061
☐	Schulze, Ryan J; Weller, Shaun G; Schroeder, Barbara; Krueger, Eugene W; Chi, Susan; Casey, Carol A; McNiven, Mark A: Lipid droplet breakdown requires Dynamin 2 for vesiculation of autolysosomal tubules in hepatocytes , JOURNAL OF CELL BIOLOGY 203 (2013), p. 315-326 doi:10.1083/jcb.201306140
☐	Wacker, I; Schroeder, R R.: Array tomography , JOURNAL OF MICROSCOPY 252 (2013), p. 93-99 doi:10.1111/jmi.12087
add marked publications	

The list of "Publications available in GATE as previous result" shows publications from the proposer and the co-proposer of the proposal. To link one or more publications to the proposal, activate the checkbox and press **add marked publications**.

In this example, two publications are linked to the proposal. Click on the trash icon to delete the link.

5.8   Complete Proposal Submission
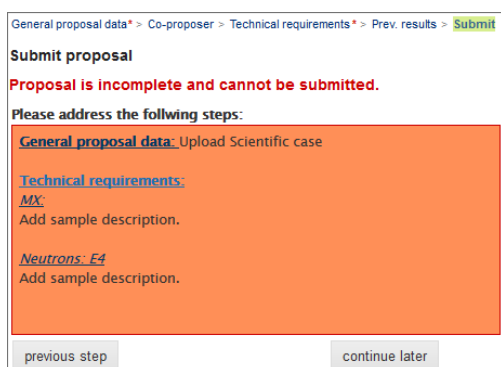
You can only submit complete proposals.

5.8.1   Overview: Proposal submission page

You can use the links above to open the proposal submission page.

Submission not possible

The red colour shows that the proposal is not completed. You can see which part is not completed.

Click on a link to navigate to the part that is not completed.
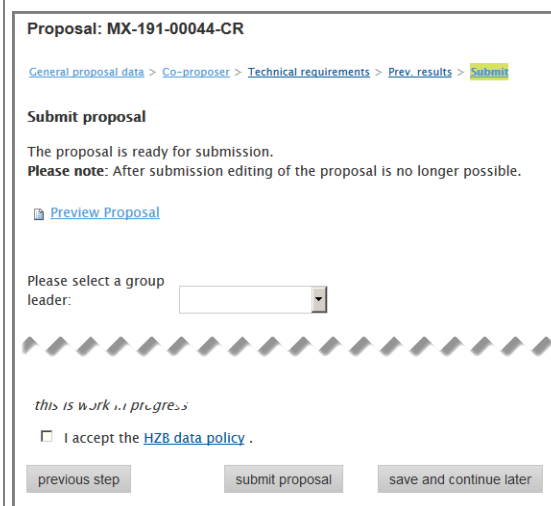

Submission possible

The submission page is different for different HZB research facilities. You have to accept the HZB data policy before submission and in some cases select a group leader.

> **Note:** Check the proposal with the **Preview proposal** before you submit it.

Preview as PDF	Preview as HTML and group leader selection

5.8.2 Submit Proposal

If you have inserted all mandatory information, you can submit the proposal.

> **Note:** Before you submit a proposal, you can check it. The **Preview proposal** summarizes the complete proposal information.

1. Open the proposal.
2. Click on **submit** at the links on top of the page.
3. Check the proposal.
4. Navigate to the submission page.
5. Select a group leader, if you see the pull-down menu **select a group leader**.
6. Activate **I accept the HZB data policy**.
7. Press **submit proposal**. The proposal is fixed and prepared for the decision process.
   Note: If it is necessary to change the proposal, contact the GATE manager.

6 FOLLOW UP AND CONTINUATION SUBMISSION

Follow Up and Continuation allows to continue a previous experiment. Follow Up is only possible for BESSY II and EMIL proposal. Continuation is only possible for MX proposal.

6.1 Follow Up (only BESSY II and EMIL)

A Follow Up proposal allows you to continue a previous project.

> **Note:** At least one experiment at BESSY II of this previous project must be completed.

If you want to use Follow Up for your beamtime application in GATE, you must

- submit a new proposal
- enter the number of the former proposal to which your application refers to
- give a short justification for the Follow Up and highlight the difference to the former proposal
- upload the corresponding experimental report in the previous results section (see section 5.7)

Follow Up Proposal (NEW FEATURE!)

Information: The Follow Up Proposal gives you the opportunity to continue a previous proposal. Please klick here LINK for more information.

This proposal is a Follow Up to the former proposal [   ] - [   ]

For example: 212 - 00001 (YYR - NNNNN with YY = year, R = round, NNNNN = Proposal number)

PLEASE NOTE: To apply for a "Follow Up" it is mandatory to upload the **Report** of the former proposal.

Please give a short justification for this "Follow Up" and highlight the differences to the

former proposal
max. 2000 characters

6.2   Why can I not submit a Follow Up of my proposal?

In some cases you can not submit a Follow Up of the proposal.

Reasons why you can not submit a Follow Up:

- Follow Up is not allowed for the HZB research facility your proposal is for.

- The necessary experimental report is not added.

6.3   Submit Continuation (only MX)

On the proposal list, you can do the continuation submission. If continuation submission is possible, you see **submit continuation** in the **Action** column.

Proposal	Action	Title
MX–191–00043 EF 🔢 HTML	submit continuation	Documentation MX Proposal
MX–191–00039 ST 🔢 HTML	submit Full report	Other

Submit continuation is only possible for HZB research facility MX. It means:

- GATE makes a copy of the proposal and gives it a new number. On the proposal info and on the proposal file you see both the new proposal name and the reference to the old one

- You can edit some proposal data.

- There are some empty fields you must edit.

- Submit continuation does not guarantee experiment time.

- When requested, you must submit a report for the previous experiment time.

Submit continuation is not possible:

- When you do not see submit continuation on the proposal list.

Follow this process to do submit continuation:

1. Open your personal GATE homepage.

2. Click on **Proposal list** in section **My proposal**. The proposal list comes into view. In the column **Action** you see **submit continuation**, if it is possible.

3. Click on **submit continuation**. GATE creates a copy of the proposal that you can edit. The proposal has a new name and is marked with **C**.

Edit proposal: MX-192-00058-ST/C

General proposal data * > Co-proposer > Technical requirements > Prev. results > Submit

4. **General proposal data:** Edit the mandatory fields.

5. **Co-Proposer:** Check and edit the Co-Proposer.

6. **Technical requirements:** Check and edit the technical requirements if there are changes.

7. **Prev. results:** Activate the reports and upload publications of previous results.

8. **Submit:** Accept the HZB rules and press **submit proposal**. If necessary the review process starts again.

6.4   Why can I not submit a Continuation of my proposal?

In some cases you can not do a continuation submission of the proposal or technical parts of a proposal.

Reasons why you do not see the submit continuation function on the proposal list:

- Continuation is not allowed for the HZB research facility your proposal is for.

- The necessary report is not added.

- Your proposal is too old. The maximum of days or period for continuation is fixed for each HZB research facility.

- Equipment for all technical parts is not available in the next period.

7 RESPONSIBLE EXPERIMENTALIST

The work described in this chapter must be done by the responsible experimentalist. By default, the proposer has the role of the responsible experimentalist. If he does not accept this role, he can appoint it to a co-proposer. Each proposal has only one responsible experimentalist.

If you have more than on technical requirement in a proposal, you have to prepare the experiment time for each technical requirement. At the proposal info you get all information about your responsibilities and your important next steps.

7.1 Responsibilities of the Responsible Experimentalist

The responsible experimentalist organizes the experiment and is the contact person for the experiment. If you have more than on technical requirement in a proposal, you have to prepare the experiment time for each technical requirement:

Experimental team

- Nominate and register the experimental team.
  Important: You have to nominate yourself, if you are a member of the experimental team.

- Optional: When you change something in the experimental team: Make a change request to inform the user office about the changes.

- Do the guesthouse request for the group.

- Take care that the team members do the mandatory online trainings.

- Take care that the team members have the mandatory requirements, like identity card, GATE account, etc.

Experimental information

- Safety aspects are correct and complete.

- Chemicals (if required) are described correct and complete.

- Samples (if required) are described correct and complete.

After experiment time

- Give feedback for the experiment.

- Submit the report (if required).

- Submit publication about the experiment.
  Important: Ensure that HZB is acknowledged in publications and that involved HZB staff is included as authors in the publication.

7.2 Overview: Preparing Experiment Time as Responsible Experimentalist

As responsible experimentalist, you see all proposals you have to prepare for the experiment time. GATE shows you which tasks you have to do for the experiment time. To prepare the experiment time you must agree with the experiment time policy.

- Nominate the experimental team

- Check safety confirmation

- Add chemicals (depends on the facility)

- Link and add samples (depends on the facility)

Understand the header

```
141-00225        Proposal to do the documentation
ST-2.1-P [i]
🔺 PDF
U41-TXM
15 Nov 2018 07:00
–
15 Nov 2018 19:00
```

- **141-00225 ST-2.1-P**
  Is the proposal name. Click on it to open the proposal info to get more information about responsible experimentalist, financial support, etc. As proposer, you can appoint a responsible experimentalist on the proposal info. Close to the proposal name, you see the proposal title.

- **PDF** or **HTML**
  Opens the proposal with all technical requests.

- **U41-TXM**
  Is the device for the experiment.

- **15. Nov 2018 07:00 - 15. Nov. 2018 19:00**
  The scheduled experiment time for the experiment on device U41-TXM. The time format depends on the facility.

Understand the Task section

For each experiment time, you nominate an experimental team and check the safety conditions. For some facilities you can add chemicals or you must link one or more samples.

- **Open tasks**

Open tasks are marked red. You submit or confirm each task separately.

- **Finished tasks**
  In this example the most tasks are finished. The nomination of the experimental team is still open.

Understand the experimentalists section

After you added the experimentalists and have finished the registration, the experimentalists section comes into view.

Experimentalists	Name	Funding requested	Presence	Guesthouse requested Group request	Online trainings		AWG ?	Radiation protection ?
					Radiation protection (Adlershof)	Safety instructions BESSY II (guests)		
	Marta Musterfrau	yes, special request: only guesthouse	29 Nov 2013 – 30 Nov 2013	no	needed start training	needed start training	not required 0	📄 Radiation protection document update
	Max Mustermann, EMBL Heidelberg, DE	yes, travel refund, accommodation, daily allowance	29 Nov 2013 – 30 Nov 2013		needed	needed	not required 0	Submission needed
	Theo Test, EMBL Heidelberg, DE	refused, You are to old for this funding programm.	29 Nov 2013 – 29 Nov 2013	to be done	needed	valid until 30.07.2015	Submission needed	submitted

The responsible experimentalist added the experimentalists. In the example above you see open (orange background) and finished (green background) tasks. Refused funding requests have also an orange background. The responsible experimentalist has to remember the experimentalists to finish their tasks.

- **Funding request (optional)**
  For Mrs Musterfrau funds are requested, the responsible experimentalist inserts a special request. The funding request for Max Mustermann is approved from HZB, the cell is marked green. The funding request for Theo Test is refused and marked orange.

- **Presence**
  Theo Test's presence is longer than the scheduled experiment time.

- **Guesthouse requested**
  Max Mustermann has requested a place in the guesthouse. When the request is confirmed, the cell is marked green.
  As responsible experimentalist, you can do a group request for all experimentalists with status no.

- **Online trainings**
  Mrs Musterfrau passes the online training for radiation protection. It is marked green. Which online training is required depends on the facility.

- **AWG (optional)**
  These are requirements to visit HZB. Experimentalists from some countries have to upload special documents like identity card and vita.

- **Radiation protection (optional - depends on the facility)**
  For some facilities the experimentalists need to upload a passport for radiation worker or a confirmation letter.

7.3 Overview: Proposal Info

The proposal info shows more details, information and functionality. On your personal GATE homepage you can open the proposal info.

- Section **My proposal**
  Click on **Proposal list** and than click on the proposal name

- Section **Preparing experiment time** (optional)
  Click on **As responsible experimentalist** and than click on the proposal name.

Understand the Header section

As proposer

Proposal-Info: MX-191-00052-CR/UR

HTML

You are: **Proposer**

MX-191-00052-CR/UR	
Title	UR Proposal – MX GATE 2 + Funding
Proposer	Marta Musterfrau
Responsible experimentalist	Marta Musterfrau ▶ appoint responsible experimentalist
Funding	CALIPSOplus: 6 2 people
ET alloc	2018/1: 6 Shifts (8 hours) 2018/2: 6 Shifts (8 hours)
Reports	submit Progress report
Publications	▶ add publication

As responsible experimentalist

Proposal-Info: MX-191-00052-CR/UR

HTML

You are: **Co-proposer**

MX-191-00052-CR/UR	
Title	UR Proposal – MX GATE 2 + Funding
Proposer	Marta Musterfrau
Responsible experimentalist	Maximilian Mustermann, MPI, DE (accepted)
Funding	CALIPSOplus: 6 2 people
ET alloc	2018/1: 6 Shifts (8 hours) 2018/2: 6 Shifts (8 hours)
Reports	submit Progress report
Publications	▶ add publication

You can:

- appoint a responsible experimentalist.
  Note: You can do this once.

- submit reports for some facilities.

- add publications on experiment.
  Note: Visible after your first experiment
  time.

You can:

- submit reports for some facilities.

- add publications on experiment.
  Note: Visible after your first
  experiment time.

Table of contents

Below the header, you see the table of contents from the page. The content depends on your role and your requirements for the proposal. Click on a link and jump directly to the necessary information. If your experiment receives funds, you see also the topic financial support. Read this topic to know all about the conditions!

Understand the Proposal data - preparing experiment time

As responsible experimentalist, you see all information for the experiment time and your open tasks. As proposer you see only the information.

Marta Musterfrau has already nominated the experimental team. In this example the responsible experimentalist Marta Musterfrau is also a member of the experimental team. On the proposal data she can do all the mandatory tasks to visit HZB. She can also do the safety confirmation, add chemicals and samples.

Understand the Proposal data - after experiment time

As responsible experimentalist, you have to give feedback and submit a report for some facilities. You can both do here.

Schedule	Exp. Team				Online trainings		AWG [?]	Radiation protection	Results
23 Apr 2014 03:00 – 27 Apr 2014 11:00 local contact:	Name	Funding requested	Presence	Guesthouse requested Group request	Radiation protection (Adlershof)	Safety instructions BESSY II (guests)			
	Marta Musterfrau	yes, special request: only guesthouse	23 Apr 2014 – 27 Apr 2014	no	valid until 07.10.2014	needed start training	not required 0	Radiation protection document update	submit feedback submit report
	Max Mustermann, EMBL Heidelberg, DE		23 Apr 2014 – 27 Apr 2014	requested 23 Apr 2014 – 27 Apr 2014	needed	needed	not required 0	Submission needed	

7.4 Overview: Proposal List

On the Proposal list you see all your proposals.

Unsubmitted proposal

The table summarizes the unsubmitted proposals.

View before deadline	View after deadline
Unsubmitted proposals	**Unsubmitted proposals**

Proposal	Title	
191–00520 ST	Docutest Proposal for BESSY/BER	
CXR-18-00031 ST	X-Ray Docu	

Proposal	Title	
191-0052 ST	Docutest Proposal for BESSY/BER	
CXR-18-00031 ST	X-Ray Docu	

- Edit proposal
  Click on the pencil icon.

- Delete proposal
  Click on the trash icon.

- Delete proposal
  Click on the trash icon.

Active proposals

The table summarizes all active proposals.

Active proposals						
Proposal	**Action**	**Title**	**Proposer**	**Facility**	**ET alloc.**	**Schedule**
MX–192–00062 ST HTML		Document Proposal	Maximilian Mustermann, MPI, DE	1.1: Test sample		
MX–192–00055 ST HTML		MX Docutest Proposal	Marta Musterfrau, Testinstitut, DE	1.1: Docutest Sample		
MX–191–00052 CR HTML	prepare experiment time submit experiment time feedback	UR Proposal – MX GATE 2 + Funding	Marta Musterfrau, Testinstitut, DE	1.1: Sample 1 for Experiment,	2018/1: 6 Shifts (8 hours) 2018/2: 6 Shifts (8 hours)	May 01, 2018 – May 02, 2018 May 02, 2018 – May 02, 2018 June 27, 2018 – June 27, 2018

It contains important information like proposer, experiment time, facility and schedule. You can open the proposal info. As responsible experimentalist, you see the possible actions:

- prepare experiment time

- submit experiment time feedback

- submit report

- resubmit or submit continuation

Reporting proposals

When all experiments on the proposal are finished, the proposal will be listed as reporting proposal.

Finished proposals

The table summarizes all finished proposals.

7.5   Role Responsible Experimentalist

Per default, the proposer is the responsible experimentalist. The proposer can appoint the co-proposer as responsible experimentalist if he has submit the proposal or later.

The general process to appoint a responsible experimentalist has two steps.

1. Select a co-proposer as responsible experimentalist. The co-proposer gets an email.

2. The proposer gets an email when the co-proposer accepts or rejects.

7.5.1   Important Rules

Rules to appoint a responsible experimentalist

*   The proposer can appoint the role to a co-proposer.
    Note: Is the person you want as responsible experimentalist not a co-proposer? Contact the GATE manager.

*   You can only select one responsible experimentalist for a proposal also if there are different experiment times scheduled.

*   If the responsible experimentalist accepts, you cannot change the responsible experimentalist in GATE again.
    Note: If it is necessary to change, contact the GATE manager.

*   The responsible experimentalist is not allowed to appoint another responsible experimentalist.

Working rules for the responsible experimentalist

*   If you select a responsible experimentalist, you cannot do the open tasks by yourself.

*   The responsible experimentalist has to do all open tasks in GATE.

*   The responsible experimentalist has not to be a member of the experimental team.

*   The responsible experimentalist can reject the appointment.

*   If the responsible experimentalist is at the HZB research facility for the experiment, he must add himself as an experimentalist.

7.5.2 Appoint a Responsible Experimentalist

As the proposer, you can appoint one of the co-proposers as responsible experimentalist.

> **Note:** If you want to change the responsible experimentalist, tell the GATE manager.

Follow this process to select a co-proposer as responsible experimentalist for your allocated proposal:

1. Open your personal GATE homepage.

2. Click on **As responsible experimentalist** in section **Preparing experiment time**.
   Note: If you do not see the link, the proposal is not scheduled but you can select a responsible experimentalist anyway. Click on **Proposal list** in section **My proposal**.

3. Click on the proposal name you want to appoint a responsible experimentalist. The proposal info page comes into view.

Proposal-Info: 191-00506-ST	
📄 **PDF**	
You are: **Proposer**	

191–00506–ST	
Title	Documentation GATE 2 – BESSY II
Proposer	Marta Musterfrau, Testinstitut, DE
Responsible experimentalist	Marta Musterfrau, Testinstitut, DE ▶ appoint responsible experimentalist

4. Click on **appoint responsible experimentalist**. A list of co-proposers comes into view.

Appoint responsible experimentalist for Proposal: 191-00506-ST
Only co–proposers can be appointed as responsible experimentalist.
⦿ Hugo Test, EMBL Heidelberg
appoint

5. Select the co-proposer you want to appoint as the responsible experimentalist.

6. Press **appoint**. The appointed co-proposer receives a confirmation email. The co-proposer can accept or reject the role.
   You get an email when the co-proposer accepts or rejects the appointment. On the proposal info page you see the decision.

Proposal-Info: 191-00506-ST	
📄 **PDF**	
You are: **Proposer**	

191–00506–ST	
Title	Documentation GATE 2 – BESSY II
Proposer	Marta Musterfrau
Responsible experimentalist	Hugo Test, EMBL Heidelberg, DE (accepted)

7.5.3 Accept the Role as Responsible Experimentalist

The proposer can select you as responsible experimentalist. You will get a confirmation email.

Follow this process to accept the role as responsible experimentalist:

1. Click on the link in the confirmation email. The login page comes into view.

2. Login. Your personal GATE homepage comes into view.

   You have ...

   ▪ To accept / reject an appointment as responsible experimentalist
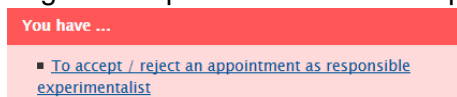
3. Click on **To accept / reject an appointment as responsible experimentalist** in section **You have. ...** The accept/reject webpage comes into view.

4. Choose **accept** or **reject**.

Proposal	Title	Proposer	accept / reject
MX-192-00056 CR/C ⓘ 🔴 PDF	Dokumentation MX Proposal	Marta Musterfrau, Affiliation 2018 (Docu Test), DE	○ accept ○ reject
send			
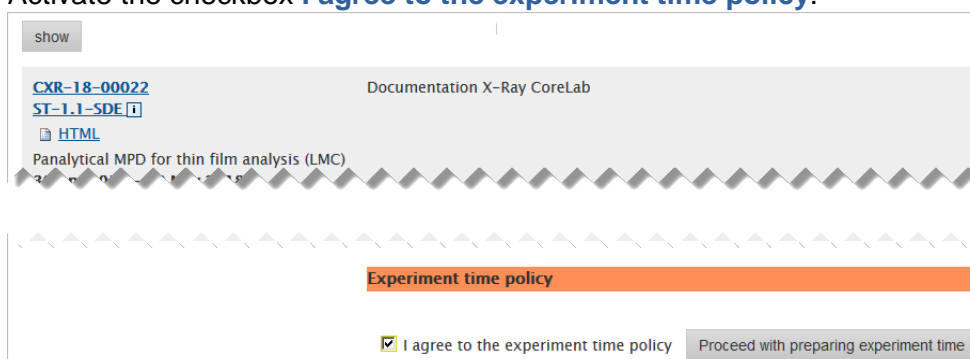
5. Press **send**. The proposer gets an email about your decision.

7.5.4 Agree to the Experiment Time Policy

Before you see the preparing experiment time function you must agree to the experiment time policy of HZB.

Follow this process to agree to the experiment time policy:

1. Open your personal GATE homepage.

2. Click on **As responsible experimentalist** in the **Prepare experiment time** section.

3. Activate the checkbox **I agree to the experiment time policy**.

show	
CXR-18-00022 ST-1.1-SDE ⓘ 📄 HTML Panalytical MPD for thin film analysis (LMC)	Documentation X-Ray CoreLab

   Experiment time policy

   ☑ I agree to the experiment time policy   Proceed with preparing experiment time

4. Click on **Proceed with preparing experiment time**. The preparing experiment time functions come into view.

7.6 Nominate Experimental Team

The experimentalists are the members of the experimental team and do the experiment at HZB. As responsible experimentalist, you have to add all team members. You have to add yourself, if you are a member of the experimental team.

To add experimentalists some conditions are mandatory:

- Before you see the preparing experiment time functions you must agree to the experiment time policy.

- Each experimentalist needs his own GATE account.

- The experiment time is scheduled.

7.6.1 Add Experimentalist and Register Team

As responsible experimentalist, you have to add all experimentalists.

> **Note:** If you click on register team, the register process is finished. After registration you can not change the experimental team in GATE by yourself. Make a change request in GATE and the user office will make the changes (see "Change Request for Experimental Team After Registration" on page 48).

Follow this process to add a new experimentalist to your team:

1. Open your personal GATE homepage.

2. Click on **As responsible experimentalist** in the **Prepare experiment time** section.

3. Click on **Add experimentalists**. The Add experimentalist page comes into view.

4. Type in two or more characters of the experimentalist's family name.

Te	search experimentalist

5. Press **search experimentalist**. A list of related GATE users comes into view.

6. Click on the name of a user.

7. Proof the **Presence**.
    Presence is prefilled with the scheduled experiment time. If additional time before and/or after the experiment time is necessary, you can change the presence.
    Note: The experimentalist can change his presence too.

8. Activate **funding requested**. (optional)
    Note: Only if funding is possible, **funding requested** comes into view.

9. Press **add experimentalist**. The experimentalist is added to the table.
    Note: A maximum number of team members is approved. To increase the number of experimentalists contact the GATE manager.

Add / edit experimentalists for Proposal: 141-00225-ST-2.1-P 15 Nov 2018 - 15 Nov 2018		
Name	**Funding requested (2 people)**	**Presence**
Marta Musterfrau, Testinstitut, DE	☐ special request:	15 Nov 2018 – 15 Nov 2018
Hugo Test, EMBL Heidelberg, DE	☑ special request: only travel cost	14 Nov 2018 – 16 Nov 2018
	save	

finish registration   continue later

Add experimentalist
Enter at least 2 characters of the users family name. Please note: Experimentalists must be registered in GATE. If you do not find the desired person in GATE, please ask the person to register.
[_____]   search experimentalist

10. Press **finish registration**. The experimental team is fixed.

7.6.2 Guesthouse Request for the Group

Each experimentalist can require a guesthouse for the experiment time. Also if the experimentalists do not need a guesthouse they must do the guesthouse request and answer with no. With the group request you can summarize all experimentalist with open guesthouse requests and do the guesthouse requests for them.

The Guesthouse bookings are done on a first come first serve basis. It might take some time until you will get a confirmation.

> **Note:** After you submitted the request, you and the experimentalists can not change the reservation and the billing address in GATE. To change the date or the billing address make a change request (siehe "Change Request for Experimental Team After Registration" auf Seite 48).

Before you start the group request prepare the information:

- Arrival and departure dates of each experimentalist.

- Optional: Different billing address for institute.

- Optional: Different billing address for experimentalist.

Follow this process to request the guesthouse for the group.

1. Open your personal GATE homepage.

2. Click on **As responsible experimentalist** in the **Prepare experiment time** section. You see the table of experimentalists for the experiment time. If there are open guesthouse requests, you see the link **Group request** in the header of the column **Guesthouse requested**.

3. Click on **Group request**. The **Guesthouse - Group request** page comes into view. You see only experimentalists with open guesthouse requests in the form.

- **Reserve a room in the guesthouse?**
  Per default yes is activated.

- **Arrival / Departure**
  Experimentalists can book a room in the guesthouse maximum seven days before experiment time and maximum seven days after experiment time.

- **Different default billing address**
  If it is active, the address is used for all experimentalists without a different experimentalist billing address.

- **Arrival** and **Departure**
  You can insert two time periods for each experimentalist.

- **Different experimentalist billing address**
  You can use a different billing address for each experimentalist.

7.7 Change Request for Experimental Team After Registration

After the registration you can only change the experimental team if you do a change request. The user office will make the changes.

7.7.1 Change Experimentalist, Presence and Guesthouse after Team Registration

After the registration of the experimental team you must do a change request if you will change the experimental team. The user office will get the change request and make the changes. The following change requests are possible:

- Change a registered experimentalist.
- Change presence for registered experimentalists.
- Change guesthouse presence and billing information for registered experimentalists.
- Add a new guesthouse request for registered experimentalists.
- Add another experimentalist.

How the change request process works

1. Send a change request in GATE.
2. The user office will get an email with the information.
3. The user office will make the changes.
4. You see the changes in GATE.
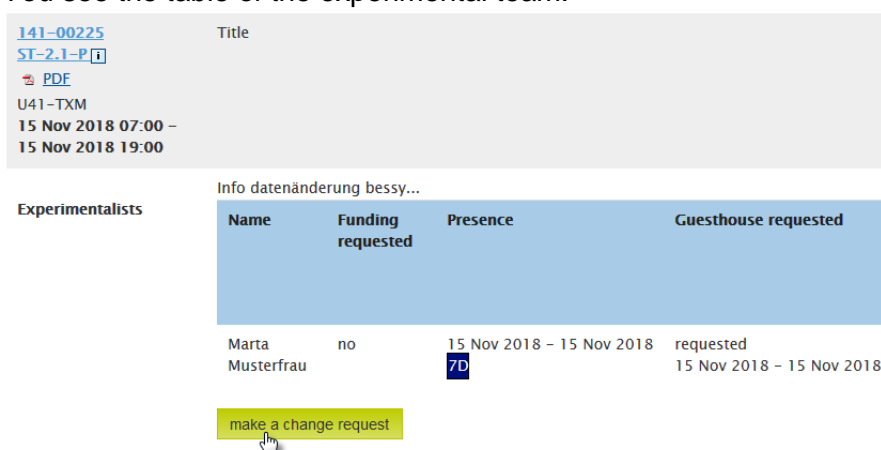
7.7.2 Change Request for the Experimental Team

After the registration you can do a change request for the experimental team in GATE.

> **Important:** If you submit the change request you do not see the changes in the experimentalist table immediately. The user office receives your change request and makes the changes. At this time you see it in the experimentalist table.

Follow this process to do a change request:

1. Open your personal GATE homepage.

2. Click on **As responsible experimentalist** in the **Preparing experiment time** section. You see the table of the experimental team.

3. Press **make a change request**. The change request page comes into view.

4. Make your changes.

5. Optional: Give a **comment** about the changes.

6. Press **next**. The check change request page comes into view. Your changes are marked red.

7. Press **submit request** if the changes are correct. You and the user office will receive an email. You do not see the changes on the experimentalist table immediately.

8. The user office will make the changes. At this time you see the changes on the experimentalist table.

Understand the change request form

TEST – GATE – Marta Musterfrau

Preparing experiment time as responsible experimentalist

Make a change request

Proposal: 141–00225–ST–2.1–P
15 Nov 2018 07:00 – 15 Nov 2018 19:00

Name	Presence	Guesthouse
Marta Musterfrau change experimentalist ☐ delete	15.11.2018 – 15.11.2018	15.11.2018 – 15.11.2018 Guesthouse request? ○ no ● yes 15.11.2018 – 15.11.2018 **Billing address** Affiliation 2018 (Docu Test) Documentation GATE Teststraße 4 Teststadt Germany ▾ Add guesthouse request? ● no ○ yes
Hugo Test delete	30.04.2018 – 10.05.2018	
new experimentalist		
new experimentalist		

Comment:

I need a second experimentalist to do the test. Hugo Test also needs a guesthouse if it is possible.

[next]
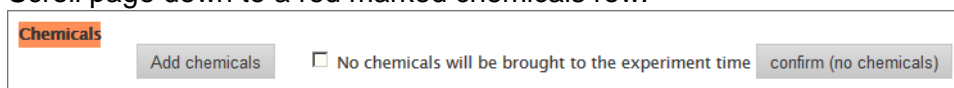
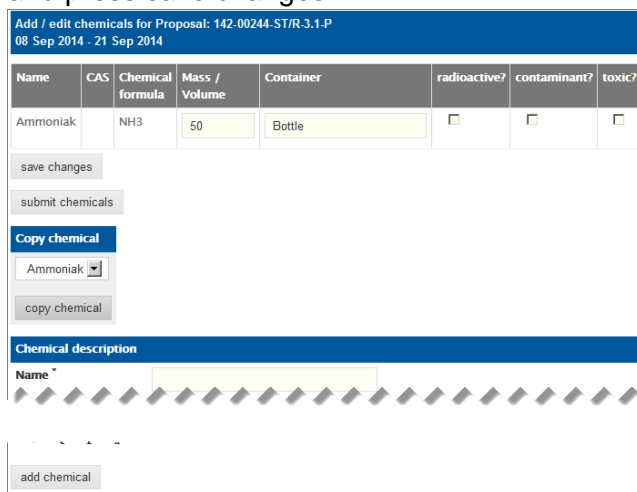| What you will do?	How it works
Replace a registered experimentalist.	1. Press **change experimentalist** 2. Select a new experimentalist. The experimentalist must have a GATE account.
Delete a registered experimentalist.	1. Activate the checkbox **delete**.
Change the presence of a registered experimentalist.	1. Change the presence. 2. Change the guesthouse presence.
Add an additional guesthouse presence for a registered experimentalist	1. Activate **Add guesthouse request**. You see more form elements. 2. Complete the additional form.
Add a new experimentalist	1. Click on **new experimentalist**. 2. Select the new experimentalist. The experimentalist must have a GATE account. **Note:** You can only insert the presence for the new experimentalist. Give more information in the comment field.

7.8 Add Chemicals

For some HZB research facilities chemicals are necessary. As responsible experimentalist, you can add necessary chemicals for your experiment. If no chemicals are necessary, you have to declare this.

Follow this process to add chemicals:

1. Click on **As responsible experimentalist** in section **Preparing experiment time**. The preparing experiment time page comes into view.

2. Scroll page down to a red marked chemicals row.

3. Press **Add chemicals**. The **Add / edit chemicals** page comes into view.

4. Type in the **Chemical descriptions**.
    Note: The type of description depends on the facility.

5. Press **add chemical**. The chemical is added to the chemical list.
    Note: You can change some information directly on the list. Change the information and press save changes.

6. Press **submit chemicals**. This finalizes the add chemicals section. No other chemicals can be added.
    Note: When it is necessary to add more chemicals, contact the GATE manager.
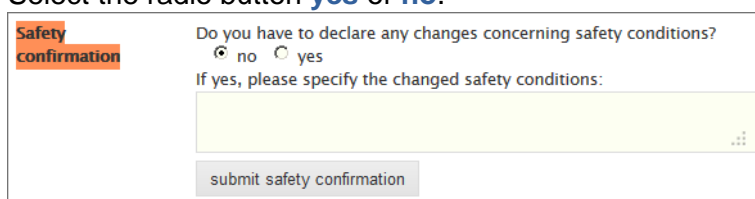
Notes to some functions

- **Asterisk ***
  Boxes marked with asterisks are mandatory.

- **Copy chemical**
  A copy from a chemical of a previous experiment time is copied to this experiment time.

- **save changes**
  Press save changes when you changed the chemical description. Otherwise, you loose your input.

7.9 Proof Safety Confirmation

As responsible experimentalist, you proof the safety confirmation of the proposal. You have to proof the safety confirmation for your experiment time.

Follow this process to inform about the safety confirmation.

1. Click on **As responsible experimentalist** in section **Preparing experiment time**. The preparing experiment time as responsible experimentalist page comes into view.

2. Open the proposal file and check the safety conditions. The file opens in a secondary window or tab.

3. Close the proposal file tab or window. The list preparing experiment time as responsible experimentalist comes into view.

4. Scroll to the proposal section you want to specify the safety confirmation.

5. Select the radio button **yes** or **no**.

6. In case of **yes**, describe the new safety conditions.

7. Press **submit safety confirmation**. The safety confirmation is saved. You cannot change the safety confirmation anymore.

7.10 Link Samples and Add Samples

For some HZB research facilities it is necessary to specify the samples for experiment time. The samples are described in the proposal. As responsible experimentalist you can also add a new sample by preparing the experiment time.

Link a Sample to experiment time

1. Click on **As responsible experimentalist** in section **Preparing experiment time**. The preparing experiment time page comes into view.

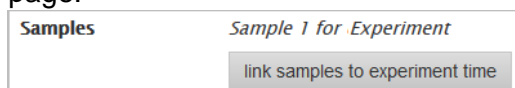2. Scroll to the experiment time where you need to link a sample.
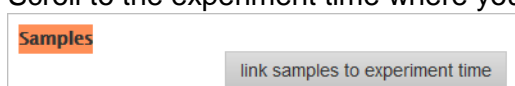
3. Press button **link samples to experiment time**. A secondary window with a list of all proposal samples comes into view.

4. Activate the checkbox for the sample.

5. Press **link marked samples to experiment time**. The sample is shown on top of the window and linked to the experiment time.
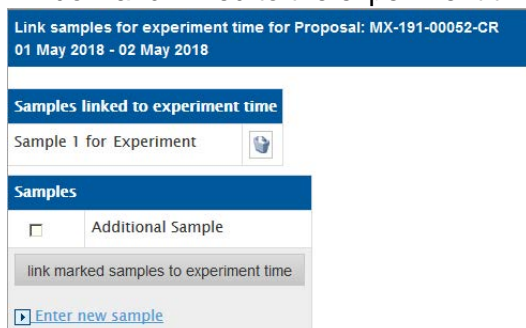

    Note: A click on the trash icon removes the sample from the experiment time.

6. Close the window. You can see your linked samples on the preparing experiment time page.

Add a new sample

1. Click on **As responsible experimentalist** in section **Preparing experiment time**. The preparing experiment time as responsible experimentalist page comes into view.

2. Scroll to the experiment time where you need to add a sample.
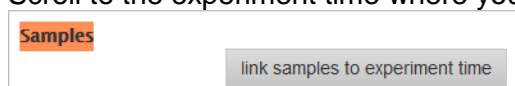
3. Press button **link samples to experiment time**.

4. Click **Enter new sample**. The Enter new sample page comes into view.

5. Type in the **Sample description**.

6. Press **save sample description**.
    Note: In case you missed some entries, you will be informed.

7. Press **Link sample to the experiment time**.

8 EXPERIMENTAL TEAM MEMBER

As member of experimental team, GATE helps you to fulfil all conditions for your stay at Helmholtz-Zentrum Berlin.

What you have to do depends on:

- Facilities for experiment
- Nationality

8.1 Overview: Preparing Experiment Time as Experimentalist

In GATE you can see your open and finished tasks that can be:

- Book guesthouse
- Change presence
- Start required online trainings
- Upload documents like identity card, curriculum vitae, radiation protection document, etc.

Understand the header

- **141-00225 ST-2.1-P**
  Is the proposal name. Click it to open the proposal info to get more information about responsible experimentalist, financial support, etc. Near by the proposal name, you see the proposal title.

- **PDF / HTML**
  Opens the proposal file with all technical requests.

- **U41-TXM**
  Is the device for the experiment.

- **Date**
  The scheduled experiment time for the experiment on device U41-TXM. The time format depends on the facility.

Understand the table

Experimentalists	Name	Funding requested	Presence	Guesthouse requested	Online trainings		AWG ?	Radiation protection
					Radiation protection (Adlershof)	Safety instructions BESSY II (guests)		
	Marta Musterfrau	yes, special request: only guesthouse	23 Apr 2014 – 27 Apr 2014	no	valid until 07.10.2014	needed	not required 0	submitted
	Max Mustermann, EMBL Heidelberg, DE	yes, travel refund, accommodation, daily allowance	23 Apr 2014 – 27 Apr 2014	requested 23 Apr 2014 – 27 Apr 2014	needed	needed	not required 0	Submission needed
	Theo Test, EMBL Heidelberg, DE	refused, You are to old for this funding programm.	23. Apr 2014 - 28 Apr 2014	confirmed 23 Apr 2014 – 28 Apr 2014	needed start training	needed start training	Submission needed submit AWG documents	Radiation protection document update

This is the view of experimentalist Theo Test. He sees also the information for all members of his experimentalist team.

- **Funding request (optional)**
  For all experimentalists funding is requested. For Marta Musterfrau the request is still open. For Max Mustermann the request is confirmed and marked green. The request of Theo Test is refused and marked orange.

- **Presence**
  You can edit the presence and book the guesthouse even if the responsible experimentalist did not request the guesthouse for you. Theo Test has done the reservation for the guesthouse and the User Office has confirmed. His presence is longer than the scheduled experiment time.

- **Start trainings**
  Theo Test has to do both tests. He can start the trainings immediately. Mrs Musterfrau passes the test for radiation protection. It is marked green. Which tests are required depends on the facility and the devices.

- **AWG (optional)**
  These are requirements to visit HZB. Experimentalists from some countries have to upload special documents like identity card and curriculum vitae to visit HZB.

- **Radiation protection (optional)**
  Theo Test already uploaded a document. He can update the document. You can also update the radiation protection documents on your personal GATE homepage at the personal data.

8.2 Answer Guesthouse Request - Book Guesthouse

The HZB has a guesthouse where you can sleep during your time at HZB. You can book the guesthouse for your allocated experiment time.

Also if you do not need a guesthouse you must do the guesthouse request and answer with no. The responsible experimentalist can do it for all team members with a group request.

> **Note:** After you submitted the request, you can not change the reservation and the billing address on GATE. To change the date or the billing address contact the user office.

Follow this process to book the guesthouse:

1. Open your personal GATE homepage.

2. Click on **As member of the experimental team** in the **Prepare experiment time** section. The preparing experiment time page comes into view.

Name	Funding requested	Presence	Guesthouse requested
Max Mustermann, EMBL Heidelberg, DE	yes, accommodation, daily allowance	07 Jul 2014 – 27 Jul 2014	no

3. Click on the **date** or **no**. The page to submit time of stay and request guesthouse reservation comes into view.
   Note: The time of stay is the experiment time period. You can extend the time of stay a maximum of seven days before and after the experiment time period.

4. Complete the form.

5. Proof the billing address. The address is used for the guesthouse bill. The address of institute is default. If you need another billing address insert it.

6. Press **submit time of stay / request reservation of guesthouse**. The preparing experiment time page comes into view. The reservation and time of stay is sent to the user office.

7. If the reservation is fixed, you will get an email from the user office. At the column **Guesthouse requested** on the prepare experiment time page you see **confirmed**.

8.3   Mandatory Online Trainings

On the preparing experiment time page you see which trainings are mandatory and how long the certificate of the training is valid.

Name	Funding requested	Presence	Guesthouse requested	Online trainings		AWG [?]	Radiation protection
				Radiation protection (Adlershof)	Safety instructions BESSY II (guests)		
Marta Musterfrau	yes, special request: only guesthouse	23 Apr 2014 – 27 Apr 2014 ✎	no ✎	valid until 07.10.2014	needed start training	not required 0	📄 Radiation protection document update ✎

If an online training is mandatory, you see a start button on the preparing experiment time page. You can also start the online training on your personal GATE homepage at the **Personal section**.

More information on Online Training (see "Online trainings - Requirement for entrance to HZB facilities" on page 15).

8.4 Upload AWG Documents

Experimentalists from some countries have to submit AWG documents like visa, curriculum vitae, etc. as PDF. If you are affected you see the task on the preparing experiment time page.
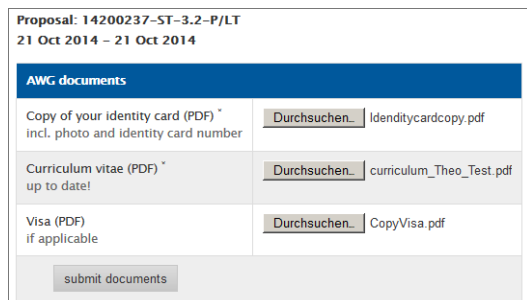
Follow this process if you are affected:

1. Open your personal GATE homepage.

2. Click on **As member of the experimental team** in the **Preparing experiment time** section. The preparing experiment time page comes into view.

3. Click on **submit AWG documents** in column AWG.
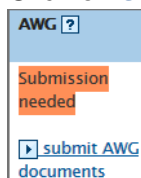
4. Search all required documents.
    Note: Fields marked with an asterisk are mandatory. After you have submitted you cannot submit further AWG documents via GATE for this experimental period.

5. Press **submit documents**. The documents are submitted.

> **Note**: Contact the user office if it is necessary to submit further AWG documents.
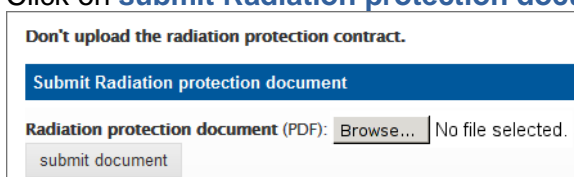
8.5   Upload Radiation Protection Document

For some HZB research facilities you must upload a radiation document. If it is needed you see the function.

There are two types of documents. Some countries have radiation protection passports. For other countries a confirmation letter is mandatory.

Follow this process to upload a radiation protection document:

1.   In section **Preparing experiment time** click on **As member of the experimental team**. The preparing experiment time page comes into view.

2.   Click on **submit Radiation protection document** in column Radiation protection.

> **Don't upload the radiation protection contract.**
>
> **Submit Radiation protection document**
>
> **Radiation protection document** (PDF): Browse... No file selected.
> submit document

3.   Search the required document.

4.   Press **submit document**.

Note: You can update this document as often as you want. The update function is also available on your personal GATE homepage. You find it on the personal data page.

8.6 Travel Reimbursement

Some proposals get funding which will be divided between the experimentalists.

> **Note**: Some funders request for user data. According to the General Data Protection Regulation (GDPR) you have to allow the data transfer.

As a member of an experimental team you see the funding information on the preparing experiment time page. You find more information about funding on the proposal-info at the topic financial support.

Experimentalists	Name	Funding requested	Precence
	Max Mustermann,	yes, You get travel Costs and accomodation.	29 April 2013 - 05 May 2013

After the experiment time the travel reimbursement link comes into view.

After the experiment time
- Travel reimbursement

The claim on travel reimbursement depends on:

- Funding is accepted by HZB.
  Look on the preparing experiment time page. When the funding information is marked green, the request is accepted by HZB.

- The travel reimbursement form is printed and signed by the experimentalist.

- The travel reimbursement form and the original bills for the eligible costs are sent to HZB.
  Travel costs, accommodation and/or daily allowance.

- The feedback and the required report are completed in GATE.

Follow this process to submit the travel reimbursement.

1. Click on **Travel Reimbursement** in the **After experiment time** section. The travel reimbursement page comes into view. For each experiment time you see a link to the reimbursement form.

   You can generate your reimbursement form for the following experiment times:
   - 132-00081-ST-2.2-P (29 Apr 2013 – 05 May 2013) travel refund, accomodation, You get travel costs and accomodation.   reimbursement form
   - 132-00081-ST-2.2-P (13 May 2013 – 20 May 2013) accommodation, You get accomodation.

   Note: Next to the date you see which costs are eligible.
   The reimbursement for the first experiment time is done. You see the additional link to the PDF **reimbursement form**.

2. Click on the proposal link. The reimbursement form comes into view.

3. Complete the form.
   Note: Fields and boxes marked with asterisks * are mandatory.

4. Press **save**. The link **reimbursement form** comes into view.

5. Click on **reimbursement form**. The PDF opens in a secondary window or tab.

6. Proof and print the PDF.

7. Sign the printed page.

8. Send the printed page and all bills to the user office.

9 AFTER EXPERIMENT TIME

For some HZB research facilities you have some tasks after the experiment time.

Responsible experimentalist

- Submit a Feedback (immediately).

- Submit the report

Proposer / Co-Proposer / Experimentalist

- Submit publications on the experiment.

9.1 Submit Experiment Time Feedback

After experiment time the responsible experimentalist can submit a feedback on the experiment. As default the feedback will be sent to the GATE manager and the local contact. You can deny the transfer to the local contact.

Follow this process to submit your feedback:

1. In section **After the experiment time** click on **Submit experiment time feedback**. The submit feedback page comes into view.

2. Choose an **experiment time for submitting a feedback**.

3. Press **choose**. A form comes into view.

4. Complete the form.

5. Activate **deny transfer**, if the local contact should not see the feedback.

6. Press **submit feedback**.

9.2 Submit Experimental Report

As responsible experimentalist, you have to submit the report for the experiment, if required.

1. Directly after the experiment time:
    Submit your objectives and achievements of the experiment.

2. When you have first results:
    Submit a first result PDF (maximum two pages).

> **Note:** After you submitted the first result PDF, you cannot change the report.

Objectives and Achievements

Follow this process to submit the report:

1.   In section **After the experiment time** click on **Submit report**. The submit report page comes into view.

2. Read the information on top of the page.

3. Choose the proposal with the experiment time for **submit experimental report**. The submit report page comes into view.

4. Optional: If you had more than one experiment periods for your proposal you see the periods. You can mark the periods and do one report for all.

> **Submit report**
>
> **Experimental report for proposal 132–00023–IT–1.1–MX** i
>
> **Experiment time: 17 May 2013 – 17 May 2013**
>
> Mark all experiment times you want to give this report:
> ☑ 132–00023–IT–1.1–MX (19 Jul 2013 – 20 Jul 2013)
>
> next

5. Click on **next**. The report form comes into view.

6. Choose **Used experiment time**, if the experiment time was changed during the experiment.

7. Type in your **Objectives**.
    Note: As default the proposal abstract is inserted.

8. Type in your **Achievements / difficulties**.
    Note: If the used experiment time was changed, give a reason.

9. Optional: Upload your first result PDF.

10. Activate the permission to see the report.

> If you give permission for the **beamline/station/instrument scientist to see your report**, please tick here:
>
> ○ not public   ● allow transfer to local contact   ○ public report (visible in web)
>
> submit report

11. Click on **submit report**.

Edit report - Upload First Result PDF later

Follow this process to submit the first result PDF:

1. In section **My proposal** click on **Report list**. The report list comes into view.

Report list

Proposal	Beamtime	Report
141-00225-ST-2.1-P [i]	October 08, 2013 – October 08, 2013	🔴 PDF (Musterfrau, October 18, 2013) edit / complete report ✎

2. Click on **edit / complete report**. The report form comes into view.

3. Press **search** and upload your first result PDF.

4. Press **submit report**. The experimental report is complete. You cannot change the report again. To read the report click on the report link in the report list.

Report list

Proposal	Beamtime	Report
141-00225-ST-2.1-P [i]	October 08, 2013 – October 08, 2013	🔴 PDF (Musterfrau, October 18, 2013)

9.3   Submit Progress Reports (only for MX experiments)

As responsible experimentalist, you have to submit the progress report for the experiment, if required.

Follow this process to submit the report:

1. In section **After the experiment time** click on **Submit report**. The submit report page comes into view.

2. Read the information on top of the page.

3. Chose the proposal with the experiment time for **submit progress report**. The submit report page comes into view.

4. Choose **Shifts used**, if the experiment time was changed during the experiment

5. Choose the **Project leader** and type a comment if necessary.

6. Type in the **Number of PDBs** you used.

7. Type in your **Summary of results**.

8. Type in your **Beamline performance and suggestions for future developments**.

9. Add the **Publications based on the proposal you are reporting on**.

10. Optional: Upload your result PDF.

11. Activate the permission to see the report.

> If you give permission for the **beamline/station/instrument scientist to see your report**, please tick here:
>
> ○ not public ◉ allow transfer to local contact ○ public report (visible in web)
>
> submit report

12. Click on **save report**. You can change the report and submit later.

13. Click on **submit report**. The report is sent and you can not change the report.

9.4 Submit Other Reports

For some HZB research facilities another report is needed. As responsible experimentalist, you have to submit all reports you see in the report list.

After the experiment time:

Submit other report. Which type you must send is fixed from GATE.

When you have publications based on proposal: Submit the publications.

Follow this process to submit the report:

1. Open your personal GATE homepage.

2. Click on **Submit report** in section **After the experiment time**. The submit report page comes into view.

3. Choose the proposal for the report submission. The submit report page comes into view.

4. Choose **Used experiment time**, if the experiment time was changed during the experiment.

5. Fill in the form.

6. Activate the permission to see the report.

> If you give permission for the **beamline/station/instrument scientist to see your report,** please tick here:
>
> ○ not public   ● allow transfer to local contact   ○ public report (visible in web)
>
> submit report

7. Click on **save report**. You can change the report and submit later.

8. Click on **submit report.** The report is sent and you can not change the report.

9.5 Make reports available to other users

As responsible experimentalist, you can make reports available for other users.

Click on **Proposal list** in section **My proposal**. The proposal list comes into view.

1. Click on the proposal name to open proposal info.

2. Click on **Give other users access to reports** to search for users who should get access to reports of your proposal.

3. Type in two or more characters of the users family name.

4. Press **search user**. A list of related GATE users comes into view.

5. Click on a name to give the person the right to see the reports of this proposal.

6. To take back the right to see the reports of this proposal click on the trash icon.

As user you can see this report in the section **My proposal**. Click on **Report list**. All reports come into view and can be linked to your proposal.

10 PUBLISHING RESULTS FROM HZB EXPERIMENTS

As proposer, co-proposer and experimentalist, you should submit all publications on HZB experiments to GATE. You link the submitted publications to the facility and the proposal.

10.1 Publication rules on HZB experiments

There are some rules for publications:

- Submit only publications on HZB experiments in GATE.

- Ensure that HZB is acknowledged in publications.
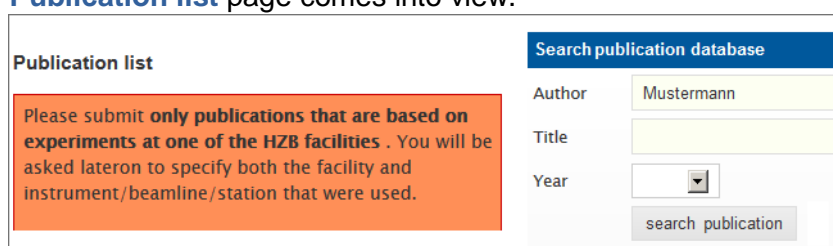
- Include involved HZB staff authors in the publication.

10.2 Submit Publication with Search

As proposer, co-proposer or experimentalist, you can submit publications on the experiment. Before you add a new publication, search the GATE publication database perhaps another person submitted the publication.

> **Note**: Have a look on the publication policy on the proposal-info page.

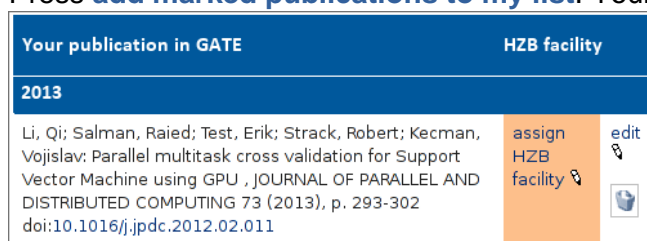Follow this process to submit your publication with GATE search:

1. Open your personal GATE Homepage.

2. Click on **Publication list / Submit publications** in section **My proposal**. The **Publication list** page comes into view.

3. Type in a search string.

4. Press **search publication**. The search results come into view.

5. Mark all publications you will add.

6. Press **add marked publications to my list**. Your publications list comes into view.

7. Click on **assign HZB facility**. The edit publication form comes into view.

8. Scroll down to the **Utilized HZB equipment** section.

9. Activate your used HZB equipment.

10. Optional: Choose a **proposal**.

11. Press **save**. The publication is on your publications list in GATE.

12. Press **add marked publications to my list**. You see the publication on your GATE publication list.

Your publication in GATE	HZB facility	
Vivoli, Mirella; Angelucci, Francesco; Ilari, Andrea; Morea, Veronica; Angelaccio, Sebastiana; di Salvo, Martino Luigi; Contestabile, Roberto: Role of a Conserved Active Site Cation-pi Interaction in Escherichia coli Serine Hydroxymethyltransferase , Biochemistry 48 (2009), p. 12034-12046 doi:10.1021/bi901568b	BESSY II: 7T-MPW-MAGS/SAXS	edit 🖉 🗑

Note - No Edit Pencil: You can not edit the publication. If a change is necessary contact the GATE manager.

Note - delete: To delete the publication from your GATE publication list use the trash icon.

10.3 Submit Publication

As proposer, co-proposer and experimentalist you can submit publications on the experiment. Before you submit a new publication search for the publication perhaps another person has submitted the publication.

> **Note**: Have a look on the publication policy on the proposal-info page.

Follow this process to submit your publications:

1. Open your personal GATE Homepage.

2. Click on **Publication list** in section **My proposal**. The **Publication list** page comes into view.

3. Click on **enter the publication data here**. The Add publication form comes into view.

4. Complete the **Publication** section.

5. Complete the **Scientific publication** section.

6. Complete the **Utilized HZB equipment** section. In the example it is BER II on instrument PANDA.

Utilized HZB equipment *

for multiple choices hold CTRL-button
If you accidentally checked the wrong instrument, you can uncheck it when you hold CTRL-button and click on it again.

3-Axis Spectrometer
 V2
 PANDA
 E1
Diffraction

☐ **BER II** Instruments

Colloid Lab

Laboratories:

Proposal

Overview list ❓

7. Optional: Select up to four **Proposals** your publication based on.

8. Upload a **publisher version** as pdf.

9. Press **save**. The publication is on your publications list in GATE.

11 MX SCHEDULING

The responsible experimentalist has to schedule the MX experiment time for MX proposal.
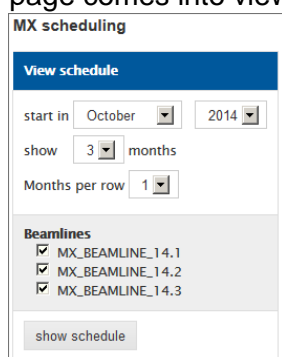
- The minimum is one shift.
- One shift has 8 hours.
- You can schedule only the morning shift.
- You can only schedule 7 days in advance.
- Add your allocated shifts to the MX schedule.

11.1 Open the MX Calendar

If you have to schedule MX experiment time, you see the MX scheduling in the preparing experiment time section.

Follow this process to open the MX scheduling:

1. Open your personal GATE homepage.

2. In section **Preparing experiment time** click on **MX Calendar**. The MX scheduling page comes into view.

MX scheduling

View schedule

start in October ▾ 2014 ▾

show 3 ▾ months

Months per row 1 ▾

Beamlines
☑ MX_BEAMLINE_14.1
☑ MX_BEAMLINE_14.2
☑ MX_BEAMLINE_14.3

show schedule

3. Adjust the period you have in mind for the experiment.

4. Activate the beamlines you want to see in the schedule.

5. Press **show schedule**. The MX schedule comes into view.

11.2 Overview: MX Calendar

There are three MX beamlines available for the experiments. Each schedule has three shifts - night, morning, late. Each shift has 8 hours. BESSY has different operation modes that are marked in the schedule. The MX beamlines operate in multi bunch mode only. You see the explanation about the colors and modes on top of the calendar.

	Access - no beam		Multi bunch user shift		Scheduled		ID/beamline Commissioning		Machine Studies		Maintenance shut down		beam scrubbing		Non-MX mode

Beamtime		2013 / 2
Month		October
Week		40 *	41	42 *	43	44
operation-mode		MC	MB	MB	MB	MB
Day		1 2 3 4 5 6	7 8 9 10 11 12 13	14 15 16 17 18 19 20	21 22 23 24 25 26 27	28 29 30 31
MX_BEAMLINE_14.1	Night 01:00					
	Morning 09:00					
	Late 17:00					
MX_BEAMLINE_14.2	Night 02:00					
	Morning 10:00					
	Late 18:00					
MX_BEAMLINE_14.3	Night 03:00					
	Morning 11:00					
	Late 19:00					

Symbol	Explanation
✚	Experiment time available. Click on a plus to add experiment time.
!*	Your experiment time is not prepared. You have added experiment time but there are still open tasks. Click on the field to show the open tasks.
*	Your experiment time is prepared. The experimental team, safety confirmation, chemicals and sample information are fixed.
	Scheduled experiment time of another proposer

11.3 Schedule MX Experiment Time

As responsible experimentalist, you have to schedule the allocated MX experiment time for your experiment.

Follow this process to schedule your MX experiment time:

1. Open the MX scheduling for the appointment period and the beamline. The MX schedule comes into view.

2. Click on a plus symbol. A list of all your MX proposals with remaining experiment time comes into view.

3. Click on a proposal name. The schedule details come into view.

    Note: Click on the proposal name opens the proposal file at a new tab or window.

4. Adjust the number of **Shifts** you want to schedule. Default is one shift.

5. Activate the **Equipment** you need.

6. Press **save appointment**. Your experiment time is scheduled. An information window comes into view. You see the open tasks and you can change the appointment.

7. Click on **complete preparing experiment time**. The preparing experiment time page comes into view. You must agree to the experiment time policy before you see the preparing experiment time functions.
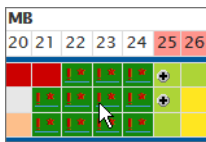
11.4 Change MX Experiment Time

As responsible experimentalist, you must schedule the allocated MX experiment time for your experiment. Sometimes you need to change the appointment.

> **Note:** You can reduce or extend existing appointments.

Follow this process to change the appointment:

1. Open the MX scheduling for the appointment period and the beamline. The MX schedule comes into view.


2. Click on the appointment. The schedule details come into view. It is a new window.

3. Adjust the number of **Shifts** you want to change. In the example the experiment time extends for two shifts.
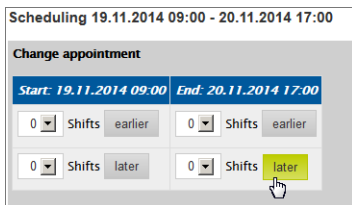
Note: If a later or earlier shift is not possible, you do not see the affected shifts area.

4. Press the button **earlier** or **later** to the adjusted **Shifts**. The appointment on the schedule changes immediately. The schedule details are still open. You can change other shifts.
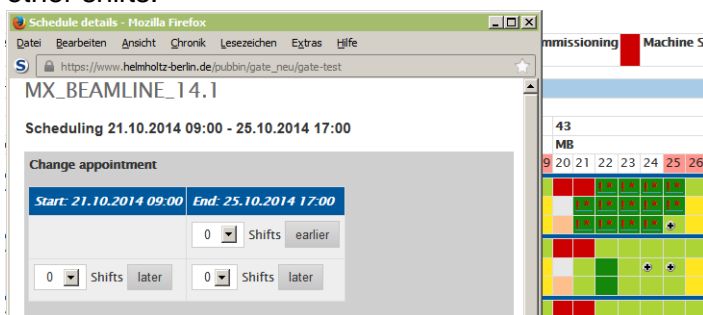
5. Click on **Close window** if the appointment is correct.

11.5 Request Cancelation of MX Experiment Time

You can not delete an appointment in the MX scheduling by yourself. If you want delete an appointment you do a request of cancelation.
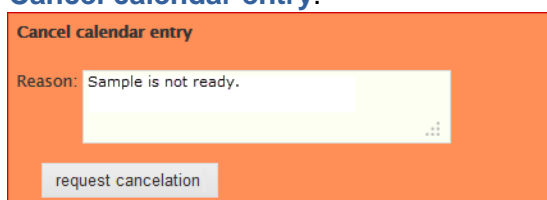
> **Note:** If you do a request of cancelation, the whole appointment period will be canceled.

Follow this process to cancel MX experiment time:

1. Open the MX scheduling for the appointment period and the beamline. The MX scheduling comes into view.
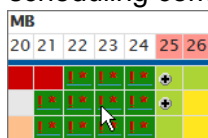
2. Click on the shift of the experiment time period you will cancel. The scheduling details come into view. On top you see the experiment time period. At the bottom you see the **Cancel calendar entry**.

3. Type in the **Reason** for the cancelation.

4. Press **request cancelation**. The reason is fixed and the MX manager must delete the date.

5. Click on **close window**. The MX calendar comes into view.

> **Note:** You will get an email from the MX manager when your experiment time is canceled. Then you can schedule a new experiment time.

11.6 Additional Maintenance of MX Experiment Time Required

Sometimes there are technical problems with the equipment. An additional maintenance for the equipment is necessary. The MX manager schedules this maintenance period. If the maintenance period has an overlap with your experiment time, your appointment will be canceled. In this case, you receive an email from the MX manager and you must schedule the experiment time again.