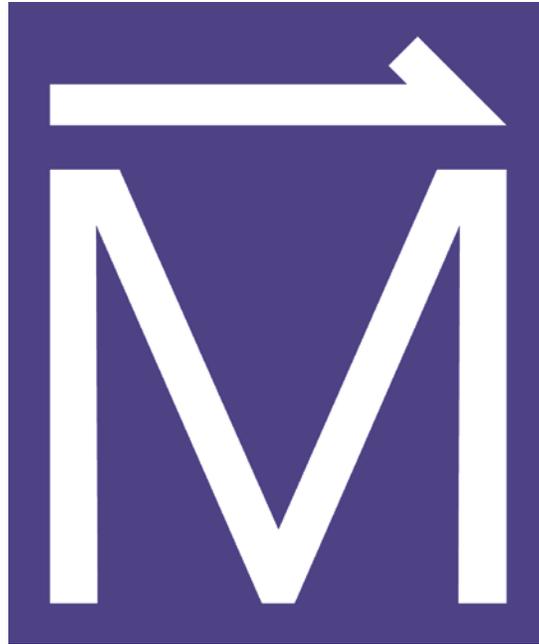# NHMFL User's Program Documentation

AMRIS Proposal & Experiment Workflows

National High Magnetic Field Laboratory

Florida State University

Revised: December 10, 2014

Table of Contents

Objective:

The purpose of this document is to clearly outline the proposal and experiment submission workflows for users, as well as, the governing processes of review, approval, scheduling and recording usage for facility management.

I. Mag-Lab Funded Research

1) Proposal Workflow – Create Proposal (SUBMITTER)

1. Navigate to https://users.magnet.fsu.edu in your browser.
2. "**Log In**" or **"Register"** (if you're a first time user) using the link in the top right-hand corner.
3. After log-in you will be redirected to the **user profile page**.
4. Click **"Create Proposal"** to begin the proposal creation process.
5. Select **"AMRIS – UF (Gainesville)"** from the drop-down menu and a control will appear asking is this research **"Independently Funded?"**.
6. Select **"No"** and the normal proposal workflow is shown.
7. Fill out the Proposal creation form and click "**Create**".

Submit a Proposal	
Choose Facility	AMRIS - UF (Gainesville) ▼
Independently Funded?	No ▼
Billing Code	ML-A Billing Code needs to be assigned ▼
Title	[TEST]
Discipline	Biology, Biochemistry, Biophysics ▼
Principal Investigator	Long, Joanna
Collaborators	Plant, Daniel
Excluded Reviewers	
	Create Cancel Add New Participant

NOTE:

* If you have **NOT** been assigned a billing-code or you **DON'T KNOW** the billing-code you have been assigned leave the default option **"ML-A Billing Code Needs to Be Assigned"** in the Billing Code drop-down menu.

** There is also an **"Add New Participant"** feature that can be used when a PI or Collaborator is not registered in the User's System at the time of proposal submission. A Submitter may use the **"Add New Participant"** feature to partially register a user. This feature aborts the proposal creation or submission workflow and begins User Registration. The new user will be sent an **Activation** e-mail and must respond to participate in the experiment.

* * * **The PI and Collaborators** are added to proposals using an **Auto-Suggest feature** which will return a list of registered users as more letters of the person's first or last name is entered.

For example: Begin entering "Joanna" or "Long" and the results will be:

2) **Proposal Workflow – Submit Proposal (SUBMITTER)**

1. After proposal creation you will be directed to the proposal display page. Here there is a list of **"To Do Tasks".** Complete all tasks on the list.

NOTE:

* **Attach a Proposal File (include Bio-Sketch)** in PDF format via the "**Attach Proposal (PDF)"** link on the Actions bar. The file should contain proposal abstract and bio-sketch information. Browse to the file location and click **"Upload".**

2. Click **"Submit"** on the Actions bar if you do not wish to submit an experiment with your proposal.
3. You will be redirected to the confirmation page.
4. Only if your proposal is a rapid access request, click the check box in the **"Rapid Access Requests"** panel.
5. Review the **NHMFL User Proposal Policy** document and check the checkbox labeled **"I have read the NHMFL User Proposal Policy"**.
6. Click **"Submit"**.

NOTE:

*Next steps for Submitters are listed in section I.6)

3) Proposal Workflow – Open Review Process (REVIEW MANAGER)

1. At this point in the workflow, the **Facility Review Manager** is responsible for starting the review process.
2. Navigate to https://users.magnet.fsu.edu in the browser.
3. **"Log In"** using the link in the top right-hand corner.
4. Click the "**Proposal**" link at the top of the page on the navigation bar to locate the appropriate proposal.
5. To indicate the PI is a "New User" and change the status of the "**Rapid Access**" request, click the **"Manage Proposal"** link on the Actions bar.
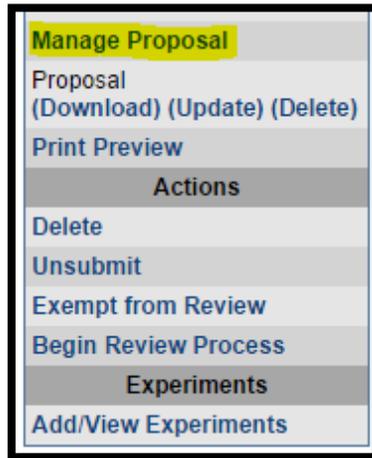
6. To add a new collaborator, click on **"Edit"** and enter the collaborator and click **'Update"**.
7. To begin the review process, click the **"Begin Review Process"** link on the Actions bar.
8. Then set reviewers for the proposal using the **"Set Reviewers"** link on the Actions bar.
9. Select UPRC members or "**Add Additional Reviewers**" and click the "**Set Reviewers**" button, which sends an email notification to those selected reviewers.

NOTE:

*Next steps for Review Manager are listed in section I.5)

4) Proposal Workflow – Review the Proposal (REVIEWERS)

1. Navigate to https://users.magnet.fsu.edu in the browser.
2. **"Log In"** using the link in the top right-hand corner.
3. Click the "**Proposals**" link at the top of the page on the navigation bar.

Contacts | Profile | Proposals | Experiments | Search | scott.prosser@utoronto.ca   Home | Log Out
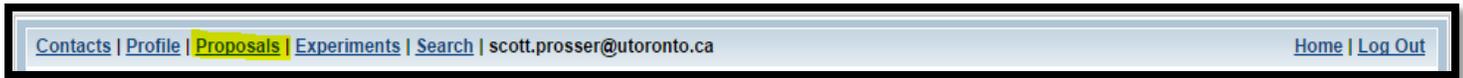
4. You will be redirected to a page with **"My Active Proposals"** as a header at the top.
5. If you are selected as a reviewer for a proposal there will be a **"Proposals Needing My Review"** link. Click this link.
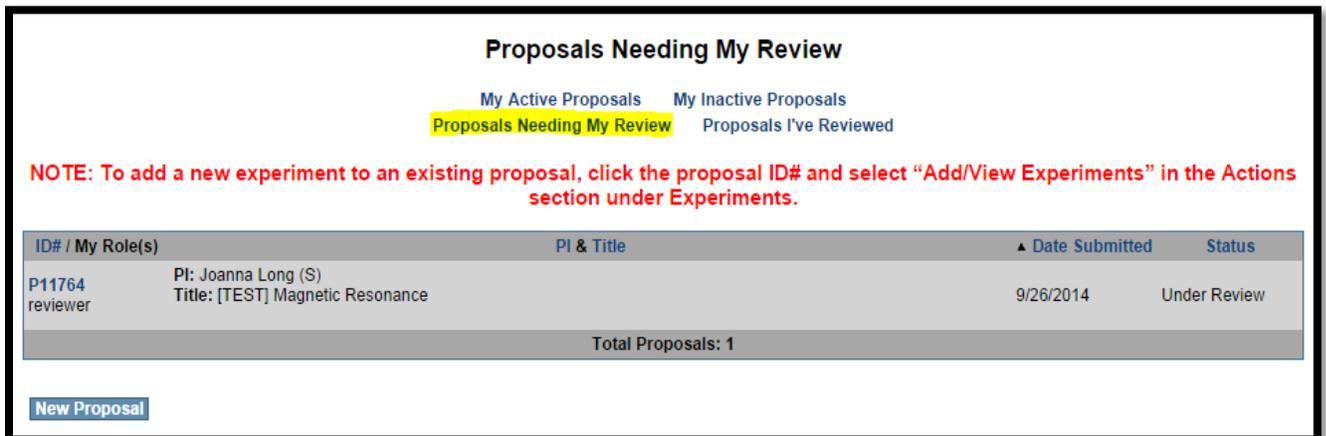
Proposals Needing My Review

My Active Proposals   My Inactive Proposals
Proposals Needing My Review   Proposals I've Reviewed

NOTE: To add a new experiment to an existing proposal, click the proposal ID# and select "Add/View Experiments" in the Actions section under Experiments.

ID# / My Role(s)	PI & Title	▲ Date Submitted	Status
P11764 reviewer	PI: Joanna Long (S) Title: [TEST] Magnetic Resonance	9/26/2014	Under Review
	Total Proposals: 1		

New Proposal

6. Select the appropriate proposal from the listing.
7. On the proposal display page, download the proposal abstract with its bio-sketch for review. After reviewing the document, click the **"Add Review"** link on the Actions bar, follow the instructions, and then click "**Submit** to submit your review. Logout.
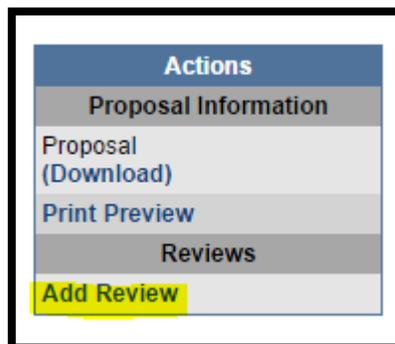
Actions

Proposal Information

Proposal (Download)

Print Preview

Reviews

Add Review

5) Proposal Workflow – Approve the Proposal (REVIEW MANAGER)

1. **After reviews** have been submitted, navigate to https://users.magnet.fsu.edu in the browser.
2. **"Log In"** using the link in the top right-hand corner.
3. Click the "**Proposal**" link at the top of the page on the navigation bar to locate the appropriate proposal.

NOTE:

* If the submitter selects **"ML-A Billing Code Needs to Be Assigned"** as a billing code, the **"Set a Billing Code"** task will appear on the **"Approval Tasks"** list. Click the **"Edit"** link on the Actions bar, select the correct billing code and click the **"Update"** button.
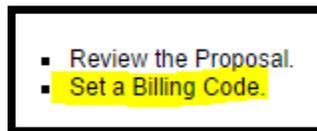
4. Click on **"End Review Process"** on the Action bar of the proposal display page and next click "**Approve**" or "**Decline**" to make a decision about the proposal.

NOTE:

* In the case of a proposal that is Exempt from Review and the submitter, selects **"ML-A Billing Code Needs to Be Assigned"** as a billing code, **"Set a Billing Code"** tasks will appear on the **"Approval Tasks"** list. Use the **"Edit"** link on the Actions bar to **"Update"** the billing code to the correct value before the **"Approve"** or **"Decline"** step can be completed.

6) Experiment Workflow – Create and Submit Experiment (SUBMITTER)

1. **"Log In"** using the link in the top right-hand corner.
2. Click the "**Proposal**" link at the top of the page on the navigation bar to locate the appropriate proposal.
3. Click the **"Add/View Experiments"** link on the Actions bar on the proposal display page.
4. You will be redirected to the **Experiments on Proposal PXXXX** section with a listing of all the experiments related to this proposal.
5. Click the **"Add New Experiment"** button at the bottom of the page.
6. Fill out the form and click **"Create"**.
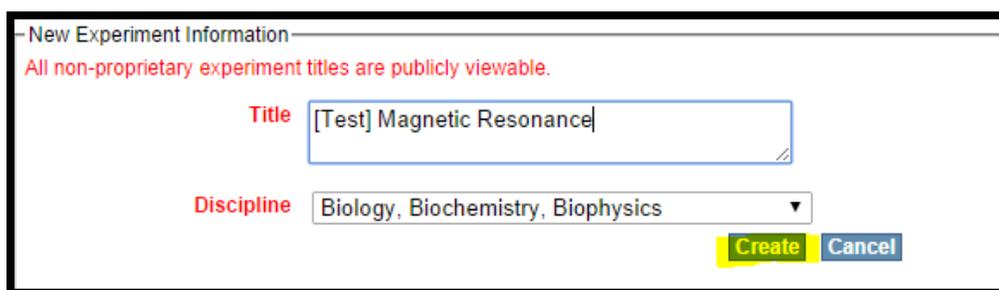
7. Use the **"To Do Tasks"** list and complete the required actions.

8. After completing the items on the **"To Do Tasks"** list, click the **"Submit"** button on the Actions bar.

NOTE:

* **Independently-funded** experiments are NOT required to read the **NHMFL User Proposal Policy** before submitting**.**

9. You will be redirected to the confirmation page. Follow instructions and check **"I have read the NHMFL User Proposal Policy",** and click the **"Submit"** at the bottom of the page and logout.

Prepare to Submit

Please review the NHMFL User Proposal Policy before submitting your proposal and experiment.

☑ I have read the NHMFL User Proposal Policy

Submit   Back

7) Experiment Workflow – Duplicate Experiment (SUBMITTER)

NOTE:

* After an experiment has been submitted, the **Duplicate Experiment** feature becomes available. This feature allows the submitter to duplicate experiments for a streamlined creation and submission process. Click the **"Duplicate"** button to begin a new experiment based on the information in the current experiment with a status of "New".
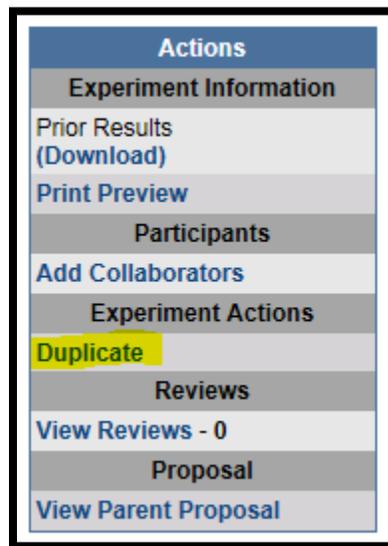
8) Experiment Workflow – Begin Review Experiment (FACILITY DIRECTOR/ FACILITY MANAGER) IF APPLICABLE

1. Navigate to https://users.magnet.fsu.edu in the browser.
2. **"Log In"** using the link in the top right-hand corner.
3. Click the **"Experiment"** link at the top of the page on the navigation bar to locate the appropriate experiment.
4. If applicable, click the **"Begin Review Process"** link on the Actions bar of the experiment display page and **"Set Reviewers"** using the Actions bar on the right.

NOTE:

* In the case of an experiment that is Exempt from Review, skip steps #4-5 and instead click the link labeled **"Exempt from Review"** on the actions bar.

9) Experiment Workflow – Review and Approve Experiment (FACILITY DIRECTOR/ FACILITY MANAGER)

1. Navigate to https://users.magnet.fsu.edu in the browser.
2. **"Log In"** using the link in the top right-hand corner.
3. Click the "**Experiments**" link at the top of the page on the navigation bar.

Contacts | Management | Profile | Proposals | Experiments | Search | flowers@magnet.fsu.edu   Home | Log Out

4. You will be redirected to a page with **"My Active Experiments"** as a header at the top. If you are selected as a reviewer for an experiment there will be an **"Experiments Needing My Review"** link. Click this link.

Experiments Needing My Review

My Active Experiments   My Inactive Experiments
Experiments Needing My Review

NOTE: To quickly add another experiment to an existing proposal, click the ID# of a submitted experiment and select "Duplicate" in the Actions section under Experiment Actions.

ID# / My Role(s)	PI & Title	▲ Date Submitted	Status
P11764-E001-AMRIS reviewer	PI: Joanna Long (S) Title: [TEST] Magnetic Resonance Proposal Title: [TEST] Magnetic Resonance	10/15/2014	UnderReview
	Total Experiments: 1		

5. Select the appropriate experiment from the listing.
6. On the experiment display page click the **"Add Review"** link on the Actions bar.

7. Click the link and follow instructions to "**Submit**" a review.
8. Click "**End Review Process"** and next, click either "**Approve"** or
   "Decline" on the Actions bar to the right.
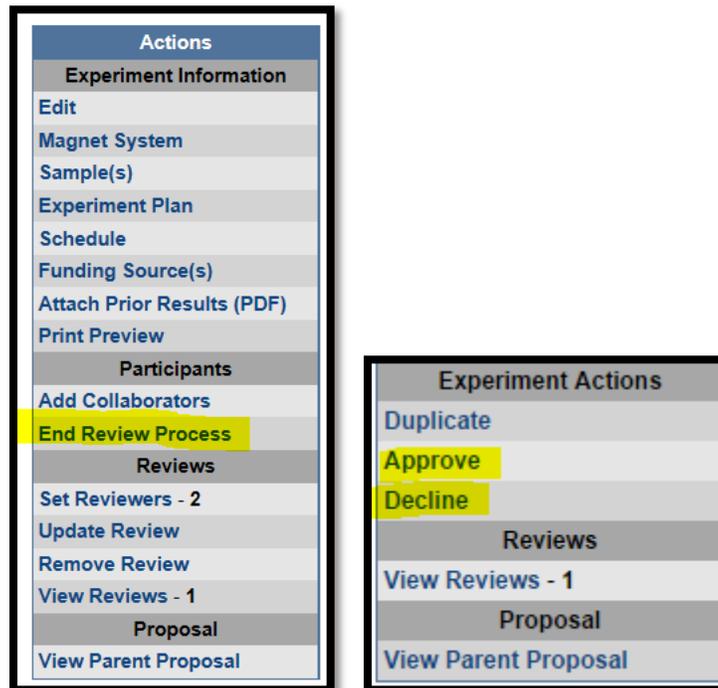
NOTE:

* Independently-funded experiments are NOT required to complete this step.

9. You will be redirected to the experiment approval or disapproval page. Choose your decision consideration from the option provided.

10) Experiment Workflow – Scheduling & Usage (FACILITY DIRECTOR/ FACILITY MANAGER)

NOTE:

* If the experiment was approved, a **"Schedule and Usage"** link will appear on the Actions bar.
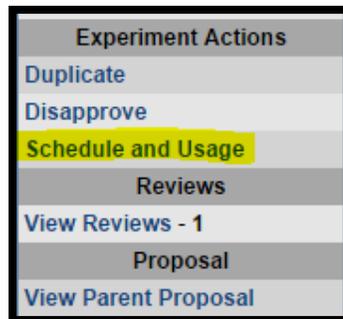
1. Click **"Schedule and Usage"** on the action bar and you will be redirected to the Schedule and Usage page.
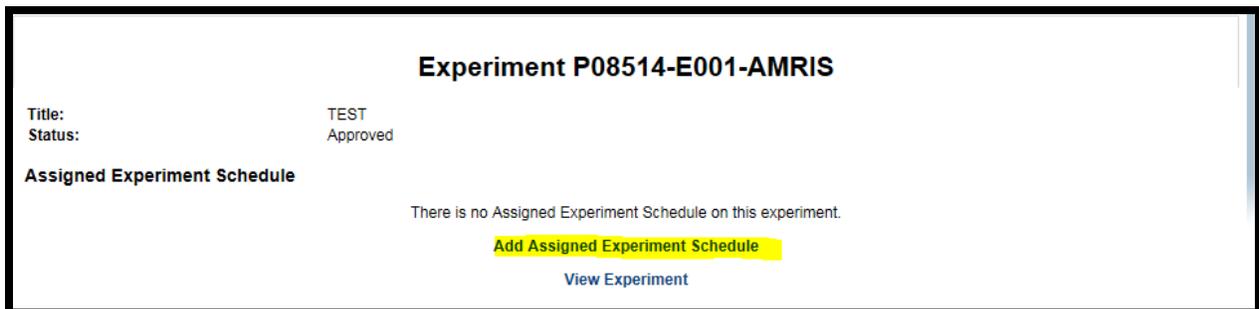
2. Click **"Add Assigned Experiment Schedule"** to complete the form and **"Save"** an experiment schedule.
3. After adding the assigned schedule you will be redirected to the experiment display page.
4. Logout.

II. Independently-Funded Research

1) Workflow – Create FIRST Experiment (SUBMITTER)

1. Navigate to https://users.magnet.fsu.edu in your browser.
2. "**Log In**" or **"Register"** (first time users) using the link in the top right-hand corner.
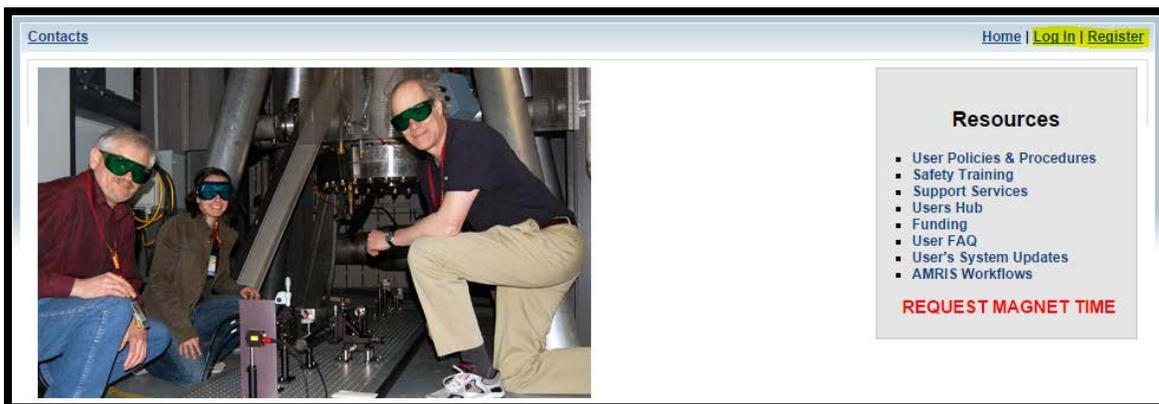
3. After log in you will be redirected to the **user profile page**.
4. Click **"Create Proposal"** to navigate to the proposal creation page.

5. Select **"AMRIS – UF (Gainesville)"** as the facility in the drop-down list and a control will appear asking is this research **"Independently Funded?"**
6. Select **"Yes"** and the PI and the **"Create New Experiment"** button will appear and the proposal process is bypassed.
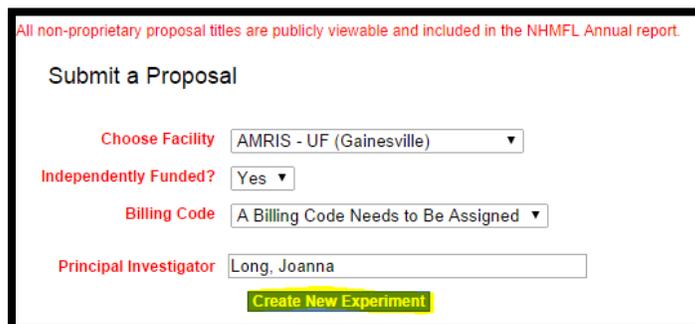
7. You will be redirected to the **experiment workflow** and may "**Submit**" your first experiment for review.

NOTE:

* For **Experiment creation and submission workflows** see section I.6.

2) Workflow – Create ADDITIONAL Experiment (SUBMITTER)

1. Navigate to https://users.magnet.fsu.edu in the browser.
2. **"Log In"** using the link in the top right-hand corner.
3. Click the "**Experiments**" link at the top of the page on the navigation bar.

Contacts | Management | Profile | Proposals | Experiments | Search | flowers@magnet.fsu.edu   Home | Log Out

5. You will be redirected to a page with **"My Active Experiments"** as a header at the top. Select the appropriate experiment from the listing.
6. Click the **"Duplicate"** button to begin a new experiment based on the information in the current experiment with a status of "New".

Actions
Experiment Information
Print Preview
Participants
Add Collaborators
Experiment Actions
Duplicate
Reviews
View Reviews - 0
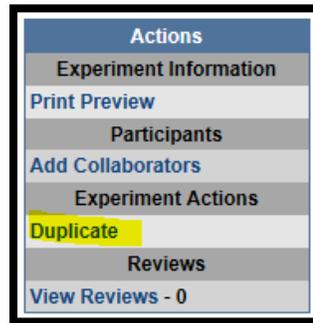
NOTE:

*Next steps are listed in section I.7)

3) Experiment Workflow – Open Review Process (FACILITY DIRECTOR/ FACILITY MANAGER)

1. Navigate to https://users.magnet.fsu.edu in the browser.
2. **"Log In"** using the link in the top right-hand corner.
3. Click the **"Experiment"** link at the top of the page on the navigation bar to locate the appropriate experiment.

NOTE:

* If the submitter chooses **"A Billing Code Needs to Be Assigned"** for an independently-funded scenario, Facility Director/Facility Manager are responsible for setting the correct billing code during the experiment approval process.

4. In order to approve, click on **"View Parent Proposal"** to first set a Billing Code.

Title:	TEST
Facility:	AMRIS
Discipline:	Biology, Biochemistry, Biophysics
Status:	Submitted
Proposal Billing Code:	A Billing Code Needs to Be Assigned
Date Submitted:	12/10/2014
Proposal:	[Independently-funded Research Proposal]

Experiment Participants	
Role	Name(s)
Submitter	Anke Toth (O)
PI	Akash Gunjan (S)
Collaborator(s)	

Approval Tasks

- Proposal: Set a Billing Code.

Actions
Experiment Information
Edit
Magnet System
Sample(s)
Experiment Plan
Schedule
Attach Prior Results (PDF)
Print Preview
Participants
Add Collaborators
Experiment Actions
Exempt From Review
Begin Review Process
Decline
Reviews
Set Reviewers - 0
Add Review
View Reviews - 0
Proposal
View Parent Proposal

5. Click **"Edit"** on the actions bar to update the Billing-Code with the correct value.
6. Go back to **"Add/View Experiments"**.
7. If applicable, **"Set Reviewers"** using the Actions bar on the right.

NOTE:

* In the case of an experiment that is Exempt from Review, skip steps #4-5 and instead click the link labeled **"Exempt from Review"** on the actions bar.

4) Experiment Workflow – Review and Approve Experiment (FACILITY DIRECTOR/ FACILITY MANAGER)

1. Navigate to https://users.magnet.fsu.edu in the browser.
2. **"Log In"** using the link in the top right-hand corner.
3. Click the "**Experiments**" link at the top of the page on the navigation bar.

Contacts | Management | Profile | Proposals | Experiments | Search | flowers@magnet.fsu.edu   Home | Log Out

4. You will be redirected to a page with **"My Active Experiments"** as a header at the top. If you are selected as a reviewer for an experiment there will be an **"Experiments Needing My Review"** link. Click this link.

Experiments Needing My Review

My Active Experiments   My Inactive Experiments
Experiments Needing My Review

NOTE: To quickly add another experiment to an existing proposal, click the ID# of a submitted experiment and select "Duplicate" in the Actions section under Experiment Actions.

ID# / My Role(s)	PI & Title	▲ Date Submitted	Status
P11764-E001-AMRIS reviewer	PI: Joanna Long (S) Title: [TEST] Magnetic Resonance Proposal Title: [TEST] Magnetic Resonance	10/15/2014	UnderReview
	Total Experiments: 1		

5. Select the appropriate experiment from the listing.

6. On the experiment display page there is an **"Add Review"** link on the Actions bar.

7. Click the link and follow instructions to "**Submit**" a review.
8. Next, click either "**Approve**" or **"Decline"** on the Actions bar to the right.
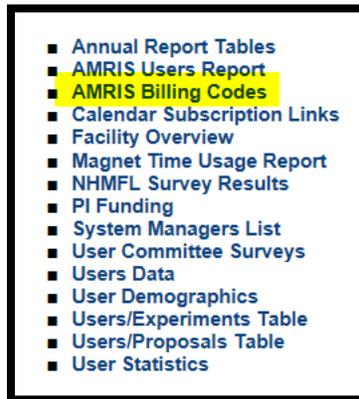9. Logout.

NOTE:

* Reference the experiment schedule and usage see section I.10)

III. Managing Billing-Codes – (FACILITY DIRECTOR/ FACILITY MANAGER)

1. Navigate to https://users.magnet.fsu.edu in the browser.
2. **"Log In"** using the link in the top right-hand corner.
3. Click on the **"Management"** tab on the navigation bar at the top.

Contacts | **Management** | Profile | Proposals | Experiments | Search |

4. Look for AMRIS Billing Codes and click the link.

- Annual Report Tables
- AMRIS Users Report
- **AMRIS Billing Codes**
- Calendar Subscription Links
- Facility Overview
- Magnet Time Usage Report
- NHMFL Survey Results
- PI Funding
- System Managers List
- User Committee Surveys
- Users Data
- User Demographics
- Users/Experiments Table
- Users/Proposals Table
- User Statistics

5. A list of billing codes is shown. At the bottom click **"New Billing Code"**.

New Billing Code

Return to Administration

6. When creating a new billing code, use **"ML-"** without spaces and with capital letters for MagLab Funded research.
7. Click **"Create"**.
8. Click on a specific code to Activate, Inactivate, or Delete the code.

Billing Code: CANDELARIO-001
Is Active: True

Delete

Inactivate

Return to Billing Codes List

Proposal Workflow

Register/Login

↓

Create Proposal

↓

Independently-Funded?

◆ —**Yes**→

No
↓

Submit Proposal

Exempt From Review? ◆ →**Yes**
↓ **No**

Review Proposal

↓

Decline ← ◆

Approve
↓

Experiment Workflow
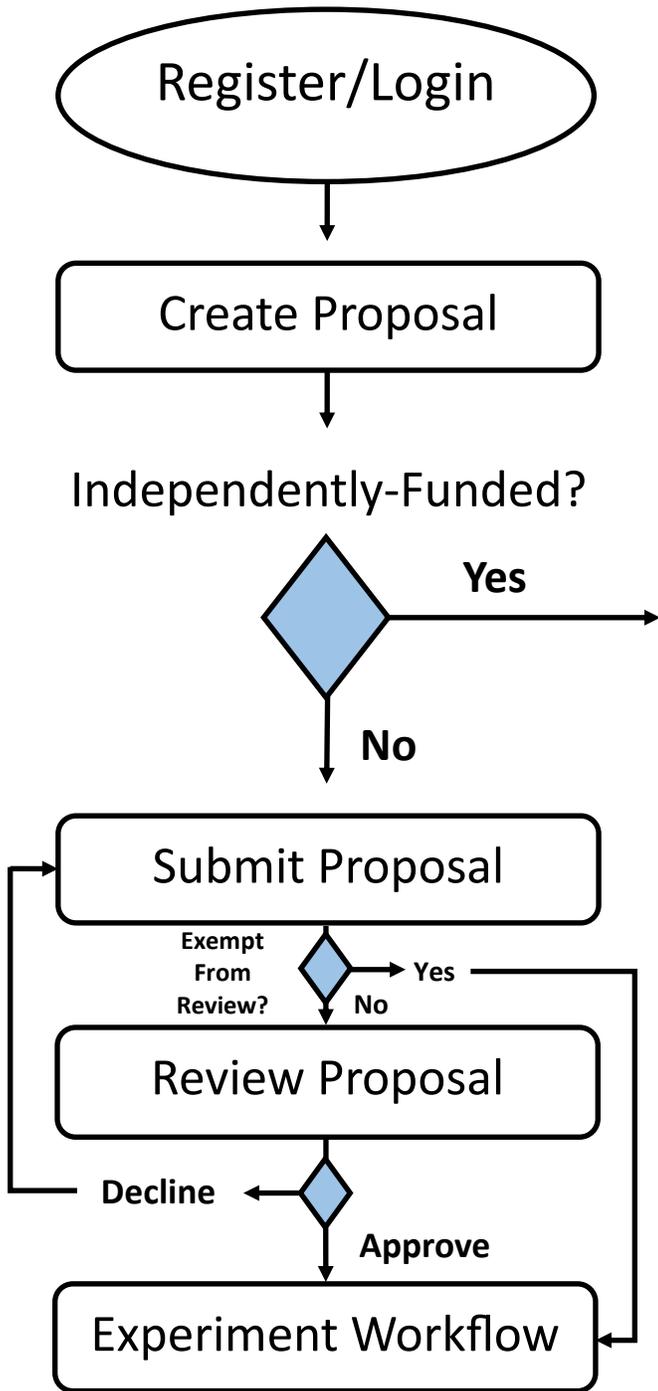
***(Not pictured in either workflow): In the event a proposal or experiment is declined, Facility Management is given the option to Reconsider.

*** For certain facilities, during submission of a proposal for NSF-funded research a first experiment must be submitted along with the proposal.

*** After an experiment is submitted it may be duplicated and edited to reduce entry time for the next experiment submission.

Appendix:
AMRIS User Program Workflow

Experiment Workflow

Create Experiment

↓

Submit Experiment

Exempt From Review? ◆ →**Yes**
↓ **No**

Review Experiment

↓

Decline ← ◆

Approve
↓

Schedule Experiment

Safety Training ◆ →**Yes**→ Training
↓ **No**

Perform Experiment

↓

Record Usage

↓

Complete