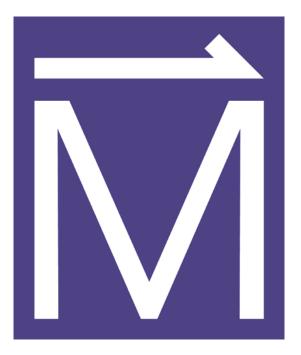
NHMFL User's Program Documentation

DC Field, EMR, HBT, ICR, NMR, Pulsed Field Facilities Proposal & Experiment Workflows



National High Magnetic Field Laboratory

Florida State University

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Table of Contents

Ι.	SUBMITTER	
1)	Proposal Workflow – Create Proposal and FIRST Experiment	1
2)	Proposal and Experiment Workflow – Submit Proposal and Experiment	5
3)	Experiment Workflow – Duplicate Experiment	. 6
п	REVIEW MANAGER	
	Proposal Workflow – Open Review Process	7
	Proposal and Experiment Workflow – Approve the Proposal and Experiment	
2)	Proposal and experiment worknow – Approve the Proposal and experiment	. 9
	REVIEWER (UPRC Members)	
1)	Proposal Workflow – Review the Proposal	12
	FACILITY COORDINATOR (if applicable)	
1)	Experiment Workflow – Review Experiment	13
	FACILITY DIRECTOR & FACILITY MANAGER	
1)	Experiment Workflow – Scheduling & Usage	14
	PENDIX – USER PROGRAM WORKFLOW	10
AP	PENDIA – USER PRUGRAIVI WURKFLUW	12

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. <u>SUBMITTER</u>

1) Proposal Workflow – Create Proposal and FIRST Experiment

- 1. Navigate to <u>https://users.magnet.fsu.edu</u> 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. Choose applicable Facility from the drop-down menu
- 6. Fill out the Proposal creation form and click "Create".

Submit a Proposal				
Choose Facility	EMR - FSU (Tallahassee)			
Title		*		
Discipline	Biology, Biochemistry, Biophysics	-		
Principal Investigator				
Collaborators				
		_		
	I	_		
Excluded Reviewers				
	Create Cancel Add New Participant			

NOTE:

* 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 "Tony" or "Heinz" and the results will be:

Submit a Proposa	al	٦.	Submit a Propos	al	٦
Choose Facility	EMR - FSU (Tallahassee)		Choose Facility	EMR - FSU (Tallahassee)	
Title	test	*	Title	test	
Discipline	Biology, Biochemistry, Biophysics	-	Discipline	Biology, Biochemistry, Biophysics	•
Principal Investigator	tony		Principal Investigator	hei	1
Collaborators	Tonyushkin, Alexey		Collaborators	Heiman, Don	1
	McFadden, Tony			Boenig, Heinrich	
	McFadden, Tony			Heim, Kyle	
	Dennis, Tony			Heinz, Tony	
	Heinz, Tony				1
		- 1			
		_			
Excluded Reviewers		<u>^</u>	Excluded Reviewers		
		~		· · · · · · · · · · · · · · · · · · ·	1
	Create Cancel Add New Participant	_		Create Cancel Add New Participant	

7. 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.

Title: Facility: Discipline: Status: Excluded Reviewers:	test EMR Biology, Biochemistry, Biophysics New	Actions Proposal Information Edit Attach Proposal (PDF) Print Preview		
	Proposal Participants			
Role	Name(s)	Delete		
Submitter	Tony Heinz (S)	Experiments		
PI	Tony Heinz (S)	Add/View Experiments		
Collaborator(s)				
To Do Tasks Attach a Proposal File (including Bio-Sketch) Add an Experiment				

- 8. Attach a Proposal File 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".
- 9. Click the **"Add/View Experiments"** link on the Actions bar on the proposal display page.
- 10.You will be redirected to the **Experiments on Proposal PXXXX** section with a listing of all the experiments related to this proposal.
- 11. Click the **"Add New Experiment"** button at the bottom of the page.
- 12.Fill out the form and click "Create".

- New Experiment Information All non-proprietary experiment titles are publicly viewable.					
Title	[Test] Magnetic Resonance	*			
Discipline	Biology, Biochemistry, Biophysics	Create Cancel			

13.Use the **"To Do Tasks"** list and complete the required actions.



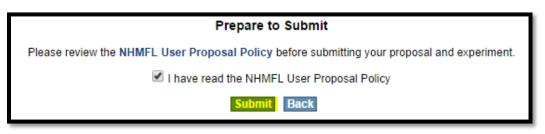
14.After completing the items on the **"To Do Tasks"** list, proceed with steps listed in next section I. 2.

2) Proposal and Experiment Workflow – Submit Proposal and FIRST Experiment

1. Click the "Submit" button on the Actions bar.



- 2. You will be redirected to the confirmation page.
- 3. Only if your proposal is a rapid access request, click the check box in the "Rapid Access Requests" panel.
- 4. Review the NHMFL User Proposal Policy document and check the checkbox labeled "I have read the NHMFL User Proposal Policy".
- 5. Click "Submit".



3) Experiment Workflow – Duplicate Experiment

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".



NOTE:

*Next steps are listed in section I.2.

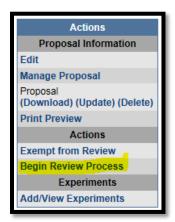
II. <u>REVIEW MANAGER</u>

1) Proposal Workflow – Open Review Process

- 1. At this point in the workflow, the **Facility Review Manager** is responsible for starting the review process.
- 2. Navigate to <u>https://users.magnet.fsu.edu</u> 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 newly 'Submitted' 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.

Actions
Proposal Information
Edit
Manage Proposal
Proposal (Download) (Update) (Delete)
Print Preview
Actions
Exempt from Review
Begin Review Process
Experiments
Add/View Experiments

- 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:

* In case the proposal should be exempted from review, click the link labeled "Exempt from Review" on the actions bar instead.

2) Proposal and Experiment Workflow – Approve the Proposal and Experiment

- 1. After proposal reviews have been submitted, navigate to <u>https://users.magnet.fsu.edu</u> 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.
- 4. Click "End Review Process" and next, enter a note about the review process.

Actions			
Proposal Information			
Edit			
Manage Proposal			
Proposal (Download) (Update) (Delete)			
Print Preview			
Actions			
End Review Process			
Experiments			
Add/View Experiments			
Reviews			
Set Reviewers - 0			
Update Review			
Remove Review			
View Reviews - 0			

- 5. Click the "Add/View Experiments" on the Actions bar.
- 6. Then set reviewers for the experiment using the **"Set Reviewers"** link on the Actions bar (if applicable).
- 7. Next, "Approve" or "Decline" experiment.

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

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

Indicate below the reasons that influenced your decision in APPROVING this experiment. This information will be kept confidential and not communicated to the PI.				
Considerations that increased	d prioritization of this experiment: (For Internal Use Only)			
	 PI is an early career researcher (<7 years since receipt of PhD) PI is from an underrepresented group PI is from an institution serving underrepresented populations PI is a first-time principal investigator PI has not received magnet time recently, i.e. during the previous scheduling period. PI has used past magnet time effectively. Other 			
	d prioritization of this experiment: (For Internal Use Only)			
	 Previous high-quality data collected by the PI at the NHMFL has not been published in a timely manner Compelling evidence that the requested experimental technique is not likely to yield high quality data based on PI's prior results or discussions with the PI. Other 			
Additional Comments	Approve Cancel			

Decline Experiment							
The following text will be emailed to the PI.							
Considerations that increase	Indicate below the reasons that influenced your decision in DECLINING this experiment. This information will be kept confidential and not communicated to the PI. Considerations that increased prioritization of this experiment: (For Internal Use Only)						
	PI is an early career researcher (<7 years since receipt of PhD) PI is from an underrepresented group PI is from an institution serving underrepresented populations PI is a first-time principal investigator PI has not received magnet time recently, i.e. during the previous scheduling period. PI has used past magnet time effectively. Other						
Considerations that decreas	ed prioritization of this experiment: (For Internal Use Only)						
	 Previous high-quality data collected by the PI at the NHMFL has not been published in a timely manner Compelling evidence that the requested experimental technique is not likely to yield high quality data based on PI's prior results or discussions with the PI. Other 						
Additional Comments	Cancel						

III. <u>REVIEWER (UPRC Members)</u>

1) Proposal Workflow – Review the Proposal

- 1. Navigate to <u>https://users.magnet.fsu.edu</u> 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.
- 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.
- 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	

IV. FACILITY COORDINATOR (if applicable)

1) Experiment Workflow – Review Experiment

- 1. Navigate to <u>https://users.magnet.fsu.edu</u> 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 | <u>Management</u> | <u>Profile</u> | <u>Proposals</u> | <u>Experiments |</u> <u>Search</u> | 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.

	My Facility's Active Experiments								
	My Active Experiments My Inactive Experiments								
My Facility's Active	Experiments My Facility's New Experiments My Facil	lity's Inactive Experiments							
	Experiments Needing My Review Experiments I've Revi	ewed							
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							

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

Acti	ons			
Experiment	Information			
Prior Results (Download)				
Print Preview				
Revi	ews			
Add Review				
View Reviews	- 0			
Proposal				
View Parent Pr	oposal			

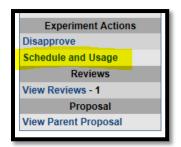
7. Click the link and follow instructions to "**Submit**" a review.

V. FACILITY DIRECTOR & FACILITY MANAGER

1) Experiment Workflow – Scheduling & Usage

NOTE:

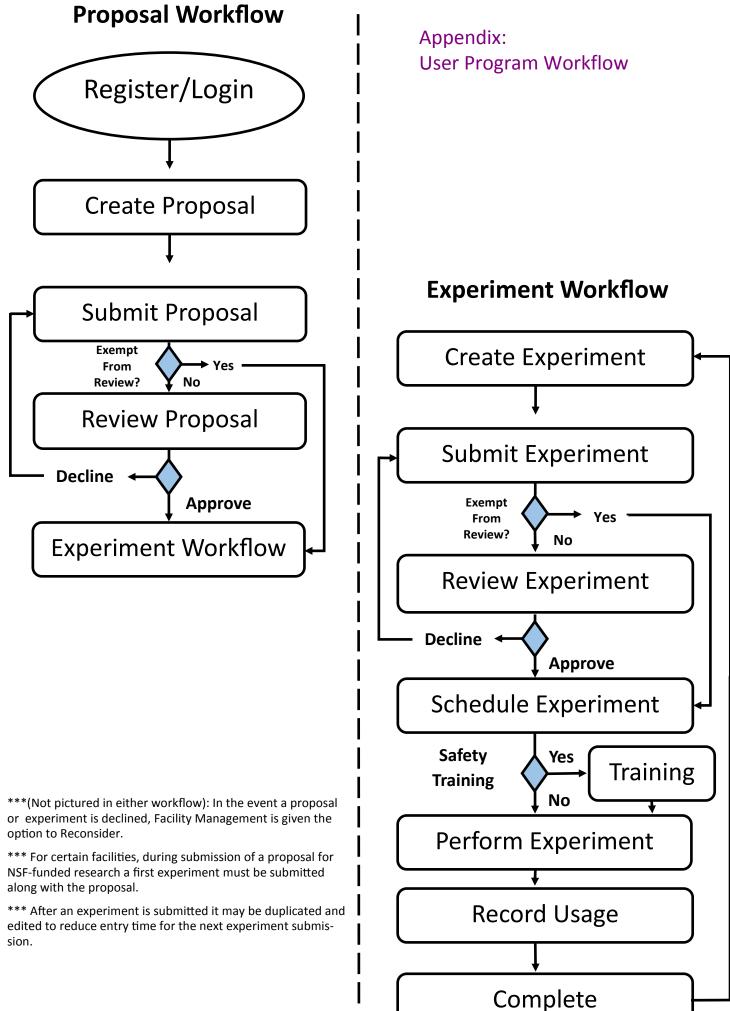
* If the experiment was approved, a **"Schedule and Usage"** link will appear on the Actions bar.



1. Click **"Schedule and Usage"** on the action bar and you will be redirected to the Schedule and Usage page.

Title: Status:		test Scheo	luled					
Assigned Exp	eriment Scheo	lule						
		Actions		Start Date	End Date	Days		
		(Edit	t) (Delete)	11/11/2014	11/20/2014	10		
				1	7 T superconducting magnet:	10		
					Total:	10		
		Add Assigned Experiment Schedule						
Magnet Time l	Jsage							
	Actions	Start Date	End Date		Magnet System			
	(Edit) (Delete)	11/18/2014	11/21/2014		17 T superconducting magn	et		
				Add Magnet Tim	e Usage			
		View Experiment						

- 2. Click "Add Assigned Experiment Schedule" to complete the form and "Save" an experiment schedule.
- 3. If applicable, click **"Add Magnet Time Usage"** to complete the form and **"Save".**
- 4. After completing the assigned schedule and magnet time usage, you will be redirected to the experiment display page. Logout.



GF 6/26/14