GATE
General Access Tool for HZB User Facility

Handbook – GATE-Usertool

Proposer, Responsible Experimentalist, Experimentalist, Registration, User Account, Proposal Submission, Prepare Experiment Time, After Experiment Time
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1 IS A GATE ACCOUNT MANDATORY FOR ME?

GATE is the online General Access Tool to the Experimental 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 proposal as referee.

1.2 Roles and their GATE Tasks

<table>
<thead>
<tr>
<th>Role</th>
<th>GATE Task</th>
</tr>
</thead>
<tbody>
<tr>
<td>Proposer</td>
<td>Each proposal has one proposer. The tasks are:</td>
</tr>
<tr>
<td></td>
<td>• Submit the proposal.</td>
</tr>
<tr>
<td></td>
<td>• Add one or more co-proposer to the proposal.</td>
</tr>
<tr>
<td></td>
<td>• Appoint one responsible experimentalist.</td>
</tr>
<tr>
<td></td>
<td>• Upload publications about the experiment.</td>
</tr>
<tr>
<td></td>
<td>• Submit a proposal review feedback if required.</td>
</tr>
</tbody>
</table>

**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

<table>
<thead>
<tr>
<th>Role</th>
<th>GATE Task</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>HZB employees as proposer</strong></td>
<td>To do inhouse research or to get instrument time HZB employees must submit a proposal.</td>
</tr>
<tr>
<td></td>
<td>• Submit proposal for inhouse research and do all the tasks as a proposer.</td>
</tr>
<tr>
<td></td>
<td>• Submit proposal for instrument time for maintenance, calibration or repair of an instrument.</td>
</tr>
<tr>
<td><strong>Co-proposer</strong></td>
<td>The proposer appoints minimum one co-proposer to his proposal.</td>
</tr>
<tr>
<td></td>
<td>• Can upload publications about the experiment.</td>
</tr>
<tr>
<td></td>
<td>• Only a co-proposer can be appointed as responsible experimentalist.</td>
</tr>
<tr>
<td><strong>Responsible Experimentalist</strong></td>
<td>Each proposal has one responsible experimentalist. The tasks of the responsible experimentalist are:</td>
</tr>
<tr>
<td></td>
<td>• Give additional safety information.</td>
</tr>
<tr>
<td></td>
<td>• Organize the experiment.</td>
</tr>
<tr>
<td></td>
<td>• Nominate the experimental team for each experiment time.</td>
</tr>
<tr>
<td></td>
<td>• It is not mandatory for the responsible experimentalist to be a member of the experimental team.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> If the responsible experimentalist is member of the experimental team he must add himself to the experimental team to get access to HZB.</td>
</tr>
<tr>
<td></td>
<td>• Apply for funding.</td>
</tr>
<tr>
<td></td>
<td>• Ask for guesthouse reservation if necessary.</td>
</tr>
<tr>
<td></td>
<td>• Submit the report and the feedback after the experiment.</td>
</tr>
<tr>
<td></td>
<td>• Can upload publications on the experiment.</td>
</tr>
<tr>
<td><strong>Experimentalist</strong></td>
<td>The experimental team is one or more persons. Each experimentalist has his own tasks:</td>
</tr>
<tr>
<td></td>
<td>• Upload the mandatory documents and information for his access to the campus.</td>
</tr>
<tr>
<td></td>
<td>• Do the mandatory online trainings.</td>
</tr>
<tr>
<td></td>
<td>• Do the guesthouse reservation if necessary.</td>
</tr>
<tr>
<td></td>
<td>• Do the reimbursement if necessary.</td>
</tr>
<tr>
<td><strong>Referee</strong></td>
<td>• Reviews the proposals.</td>
</tr>
</tbody>
</table>
2 REGISTRATION

GATE is the online General Access Tool to the Experimental 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.

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 your browsers navigation toolbar.
   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**.
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 Infomail and Newsletter

Infomail and newsletter are two different types of communicative media from the HZB.

- **Infomail**
  You get reminders of calls for proposals and user meetings. We recommend you subscribe to infomail.

- **Newsletter**
  The newsletter keeps you up-to-date about workshops, conference announcements, instrumentation and a lot of other things.

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

2.5 Acknowledgment

You have acknowledge the data protection policy and the HZB Rules of Usage. Without this acknowledgment you cannot 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 Helmholtz-Zentrum Berlin. 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.

![Sidebar with logout option]

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.
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 user office.
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 entrance to 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 Permission to Transmit Personal Data to KFN / KFS

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

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

If you give permission, HZB will send the following personal data to KFN and/or 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

<table>
<thead>
<tr>
<th>Step</th>
<th>Actions and requirements</th>
</tr>
</thead>
<tbody>
<tr>
<td>Submit proposal</td>
<td>Add a new proposal. When it is completed, submit the proposal to HZB. After submission, you cannot change the proposal.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> If changes are necessary, contact the GATE manager.</td>
</tr>
<tr>
<td>Decision process</td>
<td>During the decision process, you have nothing to do in GATE. You get the result per email.</td>
</tr>
<tr>
<td></td>
<td>After the decision, you see more information about your proposal in GATE.</td>
</tr>
<tr>
<td>Result</td>
<td><strong>No experiment time (proposal rejected)</strong></td>
</tr>
<tr>
<td></td>
<td>For some facilities you see referees comments in the proposal info.</td>
</tr>
<tr>
<td></td>
<td><strong>Experiment time allocated</strong></td>
</tr>
<tr>
<td></td>
<td>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 referees comments.</td>
</tr>
<tr>
<td></td>
<td>Prepare the experiment time in GATE (see &quot;Responsible Experimentalist&quot; on page 37).</td>
</tr>
</tbody>
</table>
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)

<table>
<thead>
<tr>
<th>Proposal form page</th>
<th>Rules</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Choose the HZB research facility</strong></td>
<td>• Start page to create the proposal form. Is only seen once.</td>
</tr>
<tr>
<td></td>
<td>• For each HZB research facility the proposal form is different. You cannot change the HZB research facility after &quot;start submission&quot;. In this case you must create a new proposal.</td>
</tr>
<tr>
<td><strong>General Proposal Data</strong></td>
<td>• You must edit all mandatory fields to come into the next step.</td>
</tr>
<tr>
<td></td>
<td>• 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.</td>
</tr>
<tr>
<td><strong>Co-proposer</strong></td>
<td>• Only a co-proposer can have the role of a responsible experimentalist.</td>
</tr>
<tr>
<td></td>
<td>• For each co-proposer a GATE account is mandatory.</td>
</tr>
<tr>
<td></td>
<td>• You can add co-proposers.</td>
</tr>
<tr>
<td></td>
<td>• Add the co-proposers before you submit the proposal.</td>
</tr>
<tr>
<td></td>
<td>• You need to add a co-proposer after proposal submission? Contact the GATE manager.</td>
</tr>
<tr>
<td><strong>Technical requirements</strong></td>
<td>• One technical requirement is mandatory for all proposals.</td>
</tr>
<tr>
<td></td>
<td>• The other requests depend on the HZB research facilities.</td>
</tr>
<tr>
<td></td>
<td>Additional functions or forms you get for some facilities:</td>
</tr>
<tr>
<td></td>
<td>• Upload an experimental plan for each technical requirement.</td>
</tr>
<tr>
<td></td>
<td>• Add more than one technical requirement.</td>
</tr>
<tr>
<td></td>
<td>• Add Sample.</td>
</tr>
<tr>
<td></td>
<td>• Add more than one sample.</td>
</tr>
</tbody>
</table>
### Proposal form page

#### 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.
- Resubmission has special rules (see "Resubmit and Submit Continuation" on page 32).

### 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.

Example 1: No experimental time could be requested. You have to select the "scientific college" and upload a "scientific case and result 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 description 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.

<table>
<thead>
<tr>
<th>No file is uploaded</th>
<th>File is uploaded and proposal is saved</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="example" alt="No file selected" /></td>
<td><img src="example" alt="File selected" /></td>
</tr>
</tbody>
</table>

*PDF file (maximum 2 pages) + 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 a **unsubmitted proposal**. The general data page of the proposal comes into view.

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.

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

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

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

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 67).
Example 2: Publications available

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.
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 RESUBMISSION AND CONTINUATION SUBMISSION

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

<table>
<thead>
<tr>
<th>Proposal</th>
<th>Action</th>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>MK-191-00043</td>
<td>submit continuation</td>
<td>Documentation MX Proposal</td>
</tr>
<tr>
<td>ST [1]</td>
<td>HTML</td>
<td></td>
</tr>
<tr>
<td>MK-191-00039</td>
<td>submit full report</td>
<td>Other</td>
</tr>
<tr>
<td>ST [1]</td>
<td>HTML</td>
<td></td>
</tr>
<tr>
<td>ST [1]</td>
<td>PDF</td>
<td></td>
</tr>
</tbody>
</table>

#### 6.1 Resubmit and Submit Continuation

- The possibility for resubmit or submit continuation depends on the HZB research facility.

- If you resubmit or submit a continuation, 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.

- If you submit a continuation you can change some proposal data.

- If you resubmit your proposal you cannot change the proposal data. You must submit a new proposal if you wish to change proposal data.
6.2 Resubmit proposal

Resubmission is possible for some HZB research facilities. Resubmission means you submit the same proposal again:

- You can not change the proposal data. If you will do changes, submit a new proposal.
- If the proposal has a ranking it remains as it is.
- For some HZB research facilities you must insert the date information.
- Resubmission does not guarantee experiment time.

Resubmission is possible:

- Only once.
- Until the deadline of proposal submission.
- Only for the next submission period.
- Equipment for one technical part of the proposal is available in the next submission period. You see which technical parts are not available.

Resubmission is NOT possible:

- You do not see resubmit on the proposal list.
- The requirement requested for all technical parts is not available in the next period.
- The proposal is not from the last submission period.
- The GATE manager has not allowed to resubmit the proposal.

Follow this process to resubmit a proposal:

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 resubmit, if resubmission is possible.
3. Click on resubmit. The resubmit page comes into view.
4. Accept the HZB data policy.
5. Press resubmit. A copy of the proposal is submitted. The proposal has a new name and is marked with R.
6.3 Why can I not resubmit my proposal?

In some cases you can not resubmit the proposal.

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

- Your proposal is for the HZB research facility which do not allow resubmission.
- Your proposal is too old. The maximum of days or period for resubmission is fixed for each HZB research facility.
- Equipment for all technical parts is not available in the next period.
6.4 Submit Continuation

Submit continuation is possible for some HZB research facilities. It means:

- You can edit some proposal data.
- There are some empty fields you must edit.
- For some HZB research facilities a new review process is necessary.
- Submit continuation does not guarantee experiment time.

Submit continuation is possible:

- If it is allowed for the HZB research facility.
- 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.
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.
6.5 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 one 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 one 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 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.

<table>
<thead>
<tr>
<th>Experimentalists</th>
<th>Name</th>
<th>Funding requested</th>
<th>Presence</th>
<th>Guesthouse requested</th>
<th>Online trainings</th>
<th>AWC</th>
<th>Radiation protection</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Marta Musterfrau</td>
<td>yes, special request: only guesthouse</td>
<td>29 Nov 2013 – 30 Nov 2013</td>
<td>no</td>
<td>needed</td>
<td></td>
<td>not required 0</td>
</tr>
<tr>
<td></td>
<td>Max Mustermann, EML, Heidelberg, DE</td>
<td>yes, travel refund, accommodation, daily allowance</td>
<td>29 Nov 2013 – 30 Nov 2013</td>
<td>yes</td>
<td>needed</td>
<td>needed</td>
<td>not required 0</td>
</tr>
<tr>
<td></td>
<td>Theo Test, EML, Heidelberg, DE</td>
<td>refused, You are too old for this funding program</td>
<td>29 Nov 2013 – 29 Nov 2013</td>
<td>yes</td>
<td>valid until 30.07.2015</td>
<td></td>
<td>Submission needed</td>
</tr>
</tbody>
</table>

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

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.
7.4 Overview: Proposal List

On the Proposal list you see all your proposals.

Unsubmitted proposal
The table summarizes the unsubmitted proposals.

<table>
<thead>
<tr>
<th>View before deadline</th>
<th>View after deadline</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Proposal</strong></td>
<td><strong>Proposal</strong></td>
</tr>
<tr>
<td>191.00520</td>
<td>Docutest Proposal for BESSY/IrrEER</td>
</tr>
<tr>
<td>CRX.18-00031</td>
<td>X-Ray Docu</td>
</tr>
</tbody>
</table>

- **Edit proposal**
  Click on the pencil icon.
- **Delete proposal**
  Click on the trash icon.

Active proposals
The table summarizes all active proposals.

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

<table>
<thead>
<tr>
<th>Proposal</th>
<th>Title</th>
<th>Proposer</th>
<th>accept / reject</th>
</tr>
</thead>
<tbody>
<tr>
<td>MX-192-00056</td>
<td>Dokumentation MX Proposal</td>
<td>Marta Musterfrau, Affiliation 2018 (Docu Test), DE</td>
<td>accept / reject</td>
</tr>
<tr>
<td>CR/45</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PDF</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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**.
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 50).

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.
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.

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 50).

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

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 fulfill 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 vita, 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

<table>
<thead>
<tr>
<th>Experimentalist</th>
<th>Funding requested</th>
<th>Presence</th>
<th>Guesthouse requested</th>
<th>Online trainings</th>
<th>AWG?</th>
<th>Radiation protection</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marta Musterfrau</td>
<td>yes, special request only guesthouse</td>
<td>23 Apr 2014 - 27 Apr 2014</td>
<td>no</td>
<td>valid until 07.10.2014</td>
<td>needed</td>
<td>not required</td>
</tr>
<tr>
<td>Max Mustermann</td>
<td>no, stays refund, accommodation, daily allowance</td>
<td>23 Apr 2014 - 27 Apr 2014</td>
<td>requested</td>
<td>needed</td>
<td>needed</td>
<td>not required</td>
</tr>
<tr>
<td>Theo Test, EMU, Heidelberg, DE</td>
<td>refused. You are not old for test funding program</td>
<td>23 Apr 2014 - 26 Apr 2014</td>
<td>performed 23 Apr 2014 - 28 Apr 2014</td>
<td>start training</td>
<td>started training</td>
<td>submitted needed</td>
</tr>
</tbody>
</table>

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.

   ![Guesthouse Request Form](image)

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.

<table>
<thead>
<tr>
<th>Name</th>
<th>Funding requested</th>
<th>Presence</th>
<th>Guesthouse requested</th>
<th>Online trainings</th>
<th>AWC</th>
<th>Radiation protection</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maria Mustermann</td>
<td>yes, special request: only guesthouse</td>
<td>23 April 2014 – 27 April 2014</td>
<td>no</td>
<td>Radiation protection (Adlershof)</td>
<td>Safety instructions ESSY II (guests)</td>
<td>valid until 07.10.2014</td>
</tr>
</tbody>
</table>

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 16).
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.
3. Search the required 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. 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.

<table>
<thead>
<tr>
<th>Experimentalists</th>
<th>Name</th>
<th>Funding requested</th>
<th>Presence</th>
</tr>
</thead>
<tbody>
<tr>
<td>Max Muslemann</td>
<td>yes, you get travel costs and accommodation</td>
<td>29 April 2013 - 05 May 2013</td>
<td></td>
</tr>
</tbody>
</table>

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

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.

   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.

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.
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.

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.

9.3 Submit Other Reports

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

1. After the experiment time:
   Submit other report. Which type you must send is fixed from GATE.

2. 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.

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

<table>
<thead>
<tr>
<th>Your publication in GATE</th>
<th>HZB facility</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vvoll, Mirella; Angelucci, Francesco; Iani; Andrea; Morea, Veronica; Angelucci, Sebastiano; Di Salvo; Martino Luigi; Contostabili, Roberto; Role of a Conserved Active Site Cation-pi interaction in Escherichia coli Serine Hydroxymethyltransferase, <em>J. Biochemistry</em> <strong>48</strong> (2009), p. 12034-12045</td>
<td>BESSY II  7T-MP-W-MAGS/SAXS</td>
</tr>
</tbody>
</table>

**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.
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.
- 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.
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.

<table>
<thead>
<tr>
<th>Symbol</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Symbol]</td>
<td>Experiment time available. Click on a plus to add experiment time.</td>
</tr>
<tr>
<td>![Symbol]</td>
<td>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.</td>
</tr>
<tr>
<td>![Symbol]</td>
<td>Your experiment time is prepared. The experimental team, safety confirmation, chemicals and sample information are fixed.</td>
</tr>
<tr>
<td>![Symbol]</td>
<td>Scheduled experiment time of another proposer</td>
</tr>
</tbody>
</table>
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.

   ![MX Schedule Example]

   **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.

   ![MX Schedule](image1)

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.

   ![Schedule Details](image2)

   **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.

   ![Schedule Changes](image3)

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.
12 CXR DIFFRACTION CALENDAR

The responsible experimentalist has to schedule the experiment time for some CXR proposal.

- The minimum is one shift.
- One shift has 1 hour.
- Add your allocated shifts to the CXR Diffraction calendar.

12.1 Open the CXR Diffraction Calendar

If you have to schedule CXR experiment time, you see the CXR Diffraction calendar in the preparing experiment time section.

Follow this process to open the CXR Diffraction calendar:

1. Open your personal GATE homepage.
2. In section Preparing experiment time click on CXR Diffraction calendar. The CXR scheduling page comes into view.
3. Adjust the period you have in mind for the experiment.
4. Activate the instruments you want to see in the schedule.
   **Hint:** You see only the instruments you have proposals for.
5. Press show schedule. The CXR Diffraction calendar comes into view.
12.2 Overview: CXR Diffraction Calendar

There are different instruments for CXR. You see all instruments you have selected for the CXR Diffraction calendar and you see the explanation about the colors and modes above the CXR Diffraction calendar.

<table>
<thead>
<tr>
<th>Symbol</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Plus Symbol" /></td>
<td>Experiment time available. Click on a plus symbol to add experiment time.</td>
</tr>
<tr>
<td><img src="image" alt="Minus Symbol" /></td>
<td>Your appointment is not accepted at this time.</td>
</tr>
<tr>
<td><img src="image" alt="Star Symbol" /></td>
<td>Your experiment time is not prepared. The appointment is accepted. You must prepare some open tasks for the appointment. Click on the field to show them.</td>
</tr>
<tr>
<td><img src="image" alt="Schedule Symbol" /></td>
<td>Your scheduled experiment time. Click on the link to show the details.</td>
</tr>
<tr>
<td><img src="image" alt="Cancel Symbol" /></td>
<td>You made a request for cancelation. The contact person must cancel the appointment and then you can add the experiment time again.</td>
</tr>
</tbody>
</table>
12.3 Schedule CXR Diffraction Experiment Time

As a responsible experimentalist, you must schedule the allocated experiment time for your experiment. After you scheduled the experiment time the CXR manager must accept the appointment.

Schedule Appointment

Follow this process to schedule the experiment time:

1. Open the CXR Diffraction calendar for the appointment period and the instrument. The CXR Diffraction calendar comes into view.
2. Click on a plus symbol. A list of the proposals with remaining experiment time comes into view.
3. Click on a proposal name. The schedule details come into view.
   
   ![Scheduling](image)

   **Note:** Click on the proposal name to open the proposal in a new tab or window.
4. Adjust the number of **Shifts** you want to schedule. Default is one shift.
5. Press **save appointment**. Your experiment time is scheduled and must be accepted by the CRX manager.

To Do After Acceptance

You get an email, if the appointment was accepted. Now you must complete your experiment time. Therefore you open the preparing experiment time page.

- Open the appointment in the CXR Diffraction calendar and click on complete preparing experiment time.
- At the section **Preparing experiment time** click on As responsible experimentalist.

**Hint:** You must agree to the experiment time policy before you see the preparing experiment time functions.
12.4 Change CXR Experiment Time

As responsible experimentalist, you schedule the allocated experiment time for your experiment. Sometimes it is necessary to reduce or increase the period. You can not change the appointment in WIMS.

Ask the CXR manager to change the period of the appointment.

12.5 Request Cancelation of CXR Experiment Time

You can not delete an appointment in the CXR Diffraction calendar by yourself. If you want to delete an appointment, you must 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 an appointment:

1. Open the CXR Diffraction calendar for the period and the instrument. The CXR Diffraction calendar comes into view.
2. Click on one of the shifts of the experiment time period you want to 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 CXR manager must delete the date.
5. Click on close window. The CXR Diffraction calendar comes into view.

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

12.6 Additional Maintenance of CXR Experiment Time

Sometimes there are technical problems with the equipment. An additional maintenance for the equipment is necessary. The CXR 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 CXR manager and you must schedule the experiment time again.