

Tutorial: How to Apply for access (Participants-samples-lab support declaration)

1. General context:

This tutorial is designed to help the users to learn how to declare the list of the participants for a beamtime session into the SUN set.

Participants Declarations is only possible if your proposal is accepted, scheduled and confirmed by email to the Main proposer.

For accessing SOLEIL infrastructures and data-processing network or asking for financial support and accommodation purposes, the Main proposers has to declare 3 lists (one of which is optional):

- The list of participants per session supposed to come at SOLEIL ([section 4](#));
- The list of samples among those declared in the proposal brought for the beamtime session ([section 5](#));
- The list of laboratories requested for some support ([section 6](#)) (only if it is necessary).

2. How to get Proposal number?

In the SUN set, the participants' declaration is done from the proposal number. First of all log into the [SUN set](#) and click on [Apply for access](#) module as in the figure 1:

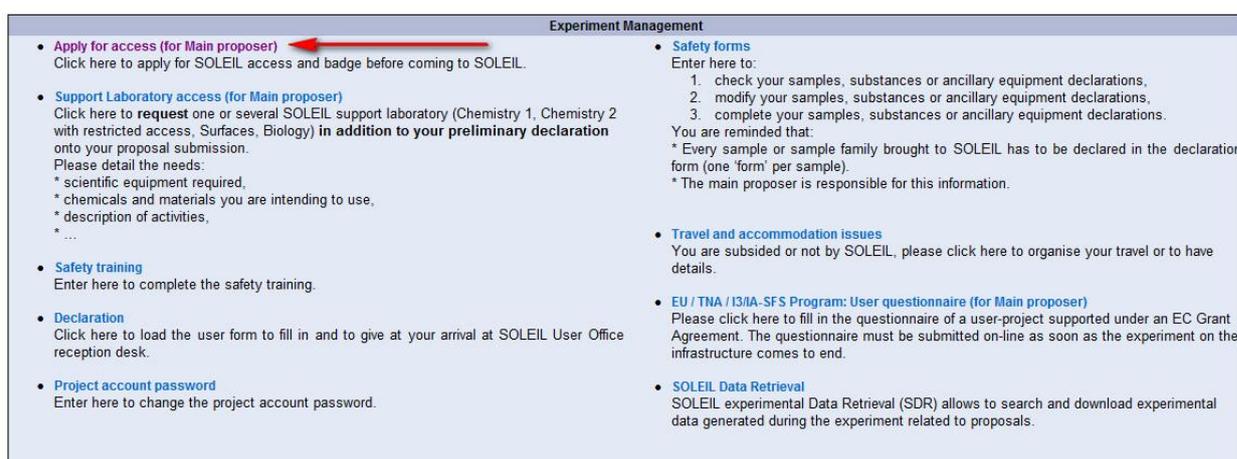


Figure 1: Apply for access (function)

When this module is opened, it will display under **Proposal Management** item a set of tabs with some filters for searching for a specific proposal, as in the figure 2. There are two tabs, one is dedicated to the management of the proposals before the experiment and the second is for the management of the proposals after the experiment. Each one contains the list of corresponding proposals.

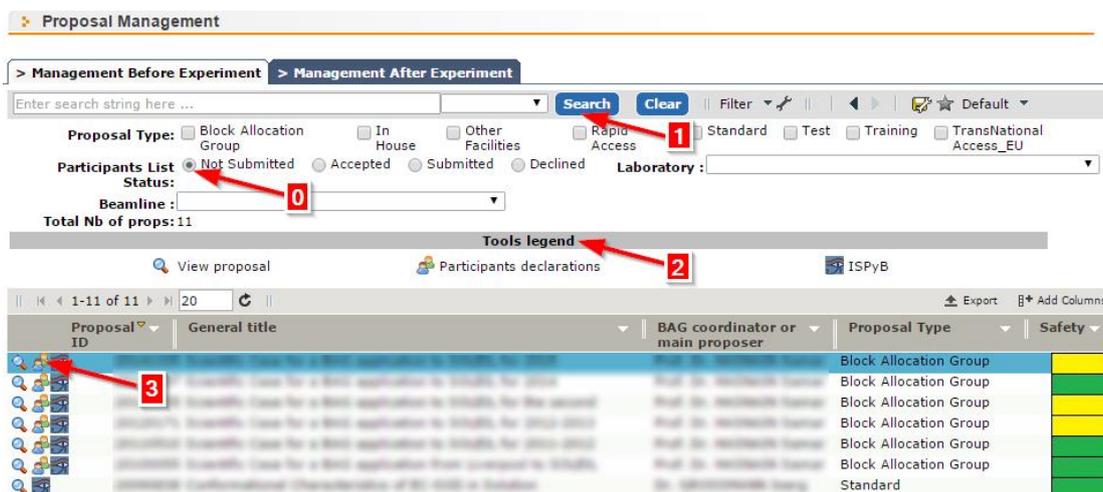


Figure 2: Proposal Management item

For participants' Declaration purposes in figure 2, follow next steps to get the proposal number:

1. Select **Management Before Experiment** tab
 2. Search for proposals with or without participants list which are not submitted
- For that purpose, we recommend to use the filters:
- [Participants List Status] set to "Not Submitted" (0) (in figure 2)
 - and click on [Search] button (1) (in figure 2)

If you have proposals corresponding to these criteria then you will get results in the table (Figure 3)

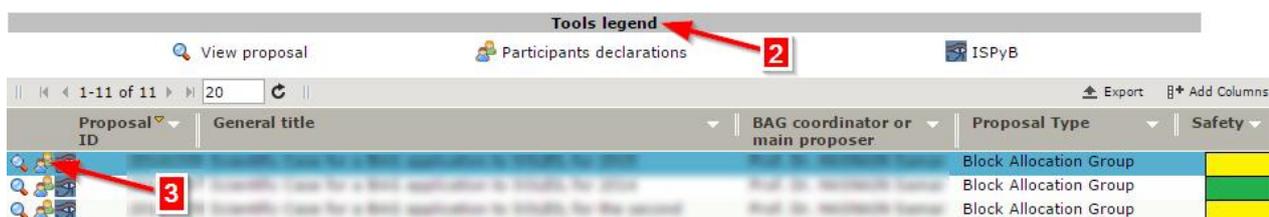


Figure 3: Table of results

There are some icons on the left hand side of each line of the results. To find out which icon does what, move your mouse over each icon, it will tell you what the icon is for in a tool tip otherwise look at the tools legend region (2) (in figure 3).

3. How to get the Beamtime session?

The Beamtime session for the experiment scheduled by the beamline manager can be getting from the table of the results (figure 3). From there:

1. Click on  participants declarations icon (3) related to the corresponding proposal number (in figure 3). Then, in figure 4, the beamtime session will be displayed in the corresponding tab. For a beamtime session, if one of the participants list status is Not Submitted (4.1) then a reminder below the beamtime session list will show steps by step all actions to do before submitting participants. At this point, we are ready to start the declaration of any participants, samples or request a support laboratory which will be discussed in the next sections but before doing that the key point is to:
2. Select Apply for access  button (4.2) related to the appropriate session (in figure 4)

Proposal Management

Management Before Experiment | Management After Experiment

Back | Update

Participants declarations - Proposal (Block Allocation Group) - Status: Accepted

General title: [redacted]

General | Beamlines | Exp. Requirements | BAG constitution | Images | Samples | Proposal Assessments | Beamtime Session Details

Tools legend

Apply for access **4.1** | Submit participants list to User Office | View Participants, Samples if BAG proposal, Lab. request

Status of participants List	Beamline	Station	Beamtime session	Local contact	Prep. Starting date	Prep. Ending date	Exp. Starting date	Exp. Ending date	Scheduled Shifts	Confirmed by BLM	Submitted Date
Accepted	PROXIMA 1	None	1/3	[redacted]	N/A	N/A	2015/03/20 - 08:00:00	2015/03/21 - 08:00:00	3/9	Yes	2015/02/26
Not Submitted	PROXIMA 1	None	2/3	[redacted]	N/A	N/A	2015/07/22 - 08:00:00	2015/07/23 - 08:00:00	3/9	Yes	
Not Submitted	PROXIMA 1	None	3/3	[redacted]	N/A	N/A	2015/06/15 - 08:00:00	2015/06/16 - 08:00:00	3/9	Yes	

Actions to do before submitting participants list :

1. Select Apply for access button.
2. Add participants and make sure that all forms are duly filled in the Participants tab.
3. At least one sample must be added to the beamtime session in the Samples tab.
4. For any request of support laboratory, submit them from Lab. Requests tab.

Figure 4: Beamtime sessions list table

4. How to declare Participants List?

To declare the participants list:

1. Go to the Beamtime sessions list table (figure 4) above
2. Select Apply for access button **4.2** related to the appropriate session (in figure 4)

Then the Participants tab is displayed by default (figure. 5 below):

- o with a reminder on the subsidies rules
- o followed by a table of participants

On top of the participants table there are a couple of actions that allow to:

- add participants :
 - either with **+ Add from proposal** button **(5)** (in figure 5) (for selection of all or some co-proposers/PI members from the proposal)
 - or with **++ More** button **(6)** (in figure 5) (for selection from users list)
 - fill in or modify the form of the selected participant by means of **Edit** button
 - view the form of the selected participant(s) by means of **View** button
 - remove the selected participant(s) from the list by means of **Remove** button
3. Add participants either with **+ Add from proposal** button **(5)** or with **++ More** button **(6)** (in figure 5)
 4. Edit and fill out each participant form. Note that all mandatory fields (dates **(7, 10)**, subsidies **(8)**, Guest house **(9)**) are displayed with yellow background (figures 6, 7)

For overbooking issue, the Main Proposer is invited to prioritize the subsidized participants' accommodation at the Guest House (G.H.), for participants from Iles de France Region Institutes **(11)** (in figure 6).

5. Make sure that all forms are dully field in the Participants tab otherwise you won't be able to submit them.

Actions to do before submitting participants list :

1. Select **Apply for access** button.
2. Add participants and make sure that all forms are duly filled in the **Participants** tab.
3. At least one sample must be added to the beamtime session in the **Samples** tab.
4. For any request of support laboratory, submit them from **Lab. Requests** tab.

Participants | Samples | Lab. Requests

Participants can be taken in charge:

Either by SOLEIL for users from French Institutes:

- up to 3 participants, for each session
- up to 7 days (Man/Day), for the preparation of the experiment.

- 1/ Participants from Ile de France Region Institutes are partially subsidized: guest house and canteen meals;
- 2/ Participants from Other Regions Institutes are fully subsidized: travel, guest house and canteen meals.

For overbooking issue, the Main proposer is invited to prioritize the subsidized participants accommodation at the Guest House (G.H.), from Ile de France Region Institutes.

Either under the TransNational Access program, within the limit of 2 users per project (for European home institutions) in the framework of specific programs according to the scientific field:

In case of several beamtime sessions: The 1st venue is fully subsidized (travel, G.H. and canteen meals). The others are partially subsidized (G.H. and canteen meals).

According to these rules, the main proposer has to point out the participants whose expenses should be covered.

For more details: [Administrative Issues](#)

Participant	Name	SOLEIL arrival date	SOLEIL departure date	Is responsible for the session?	SOLEIL support	G.H. priority	Guest House	Nb of night(s)	European support	Safety training passed	SOLEIL subsidy (experiment)	SOLEIL subsidy (preparation)	European support (preparation)
		2015/07/21	2015/07/23	No	Yes	1	Yes	2	No	No	Yes	No	N/A
		2015/07/21	2015/07/23	Yes	No	1	Yes	2	Yes	Yes	N/A	N/A	No

Status of participants List from User Office: Not Submitted Date of submission:

Figure 5: Participants tab

Edit participants form [Update] [Cancel]

Please fill in all fields with yellow background.

Participant info
 Participant name: [Name] Participant institute: [Institute]
 Country: France City: [City]
 Is responsible for the session?: No Yes

Dates
 Please justify in the **Comment** panel below if the participant intends to arrive before or leave after the beamtime allocation for preparation (if this is the case please contact the beamline Manager).
 SOLEIL arrival date: [2015/07/21] SOLEIL departure date: [2015/07/23]

European Subsidy
 Do you request European support?: No Yes

SOLEIL Subsidy
 Do you request SOLEIL support?: No Yes
 Will benefit subsidiary for experiment?: No Yes
 Will benefit subsidiary for preparation?: No Yes

Guest House (G.H.)
 Non subsidized user, who would like to book a room at SOLEIL G.H., click 'Yes' to the next question AND contact directly [SOLEIL G.H. manager](mailto:SOLEIL.G.H.manager) (hebergement@synchrotron-soleil.fr) to confirm the booking. According to room availabilities, you will receive a notification one week before your arrival at the G.H.
 Does the participant needs a room at the G.H.?: No Yes
 G.H. arrival date: [2015/07/21] G.H. departure date: [2015/07/23]
 G.H. priority: 1 2 3 G.H. room number: []
 Nb of night(s): [2]

In case of non consecutive nights, please precise the corresponding dates (YYYY/MM/DD) []
Default value is calculated from 'G.H. arrival date' to 'G.H. departure date'. For shorter and non consecutive nights, please set correct value and precise below the corresponding dates (YYYY/MM/DD).

Computer
 Does the participant intend to use his laptop computer? : No Yes

Comments
 General comments : []

Figure 6: Participant form for SOLEIL subsidies

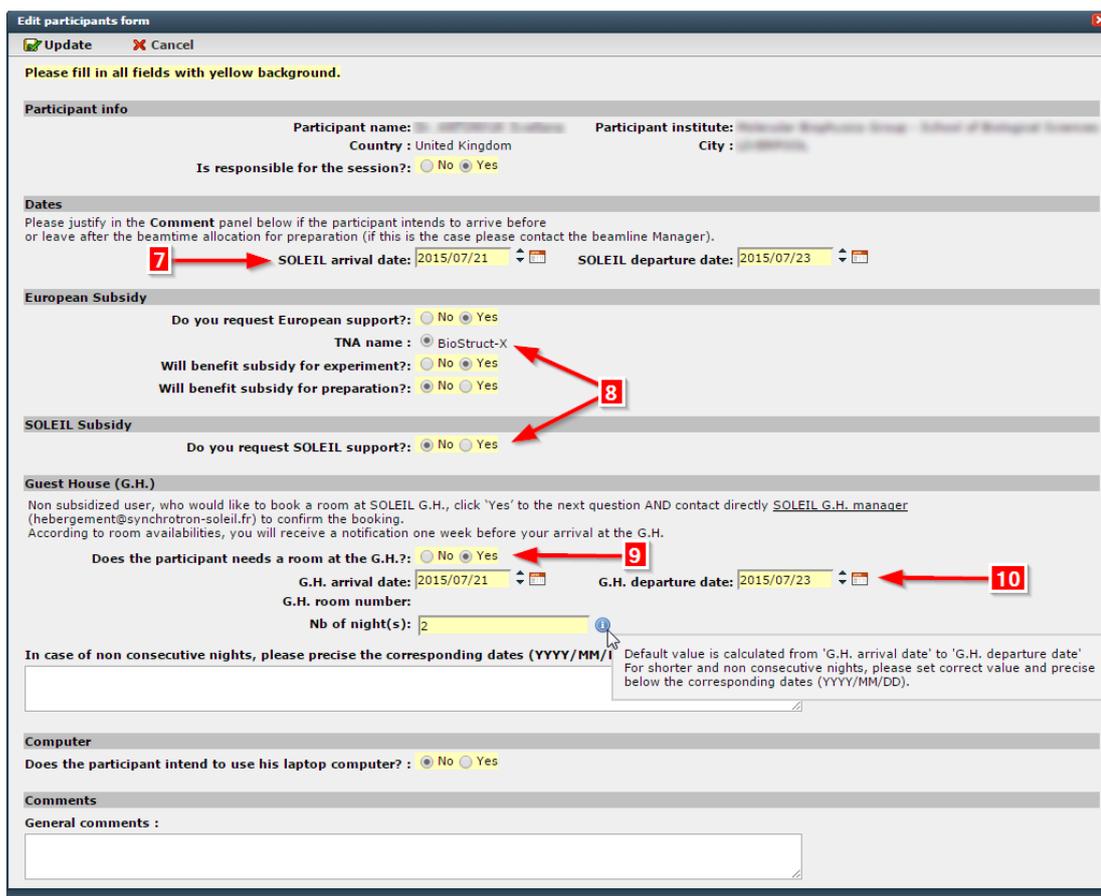


Figure 7: Participant form for EU subsidies

5. How to declare Samples list?

To declare the samples list:

1. Go to the Beamtime sessions list table (figure 4) above
2. Select Apply for access  button (4.2) related to the appropriate session (in figure 4)
Then the Participants tab is displayed by default (figure 5 above)
3. Select Samples tab where two tables of samples are displayed (figure 8):
The “Available samples” (13) table contains all declared and validated samples (from the proposal submission and from the safety form function).

By default the top table displays the available samples (13) (in figure 8) with two actions that allow to:

- add samples by moving them from the “Available samples” table to “Samples of the session” table:
 - either with  Select samples button (14.1) (in figure 8)
(for multiple selection of samples after having checked some checkboxes as in the figure 8)
 - or with  button (14.2) (in figure 8)
(for single selection of sample directly by clicking on it)
 - view the selected sample by means of  button
4. Select all samples that you intend to bring at SOLEIL for the experiment either with  Select samples (14.1) or with  button (14.2) and they will appear in the “Samples of the session” (18) table (in figure 8).
 5. At least one sample must be added to the beamtime session in the **Samples** tab otherwise you won't be able to submit them.

Actions to do before submitting participants list

1. Select **Apply for access** button.
2. Add participants and make sure that all forms are duly filled in the **Participants** tab.
3. At least one sample must be added to the beamtime session in the **Samples** tab.
4. For any request of support laboratory, submit them from **Lab. Requests** tab.

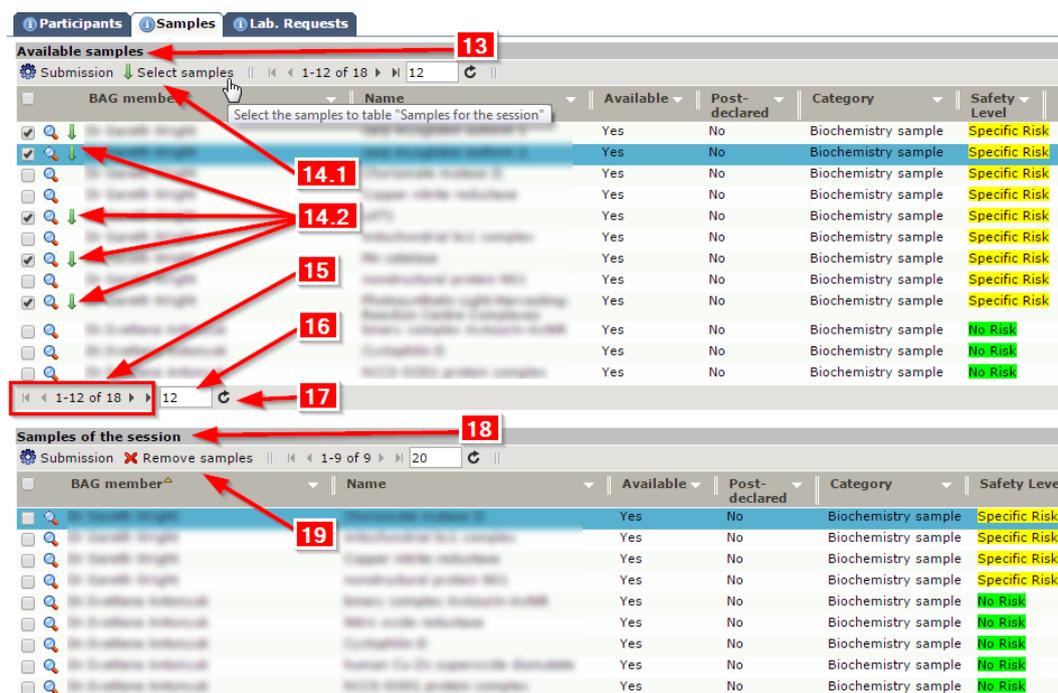


Figure 8: Samples tab

Please note that the list of “Available samples” (13) or “Samples of the session” (18) can be presented over several pages.

In that case use the browsing buttons (15) to go from page to page. You can choose the number of samples that you want to see by page. To do that:

- Set the value in the editing field (16) next to the browsing button.
- Click on the icon (17) to refresh the list

If you want to withdraw sample(s) from the session, check the checkbox of the appropriate sample(s) and click on the button (19).

6. How to request a Support Laboratory?

To request a support laboratory:

- Go to the Beamtime sessions list table (figure 4) above
- Select **Apply for access** button (4.2) related to the appropriate session (in figure 4)
Then the Participants tab is displayed by default (figure 5 above)
- Select Lab. Requests tab where the list of all requested laboratories are displayed (figure 9)
- Add a Lab. Request by clicking on button (20) (in figure 9)
Then the laboratory Request form will be displayed (figure 10)
- Select among the list of Laboratories (21), the appropriate support lab. you would like to request
- Click on button (22) to initialize the laboratory request (in figure 10)
Then the laboratory request form will be refreshed with an additional table of equipments (figure 11)
- If needed add one or some equipment(s) by clicking on the button (23) (in figure 11)
Then the available equipments list for the laboratory requested will be displayed (in figure 12)
Select the equipment(s) you want to use in the laboratory by checking them (23.1) and add them to your request with the select button (23.2) and they will appear in the table of equipments (figure 11).
- Confirm your request of a support laboratory by clicking on button (24) (in figure 11) and a notification by email will be sent to the Laboratory Manager.

Actions to do before submitting participants list :

1. Select **Apply for access** button.
2. Add participants and make sure that all forms are duly filled in the **Participants** tab.
3. At least one sample must be added to the beamtime session in the **Samples** tab.
4. For any request of support laboratory, submit them from **Lab. Requests** tab.



Figure 9: Lab. Request tab

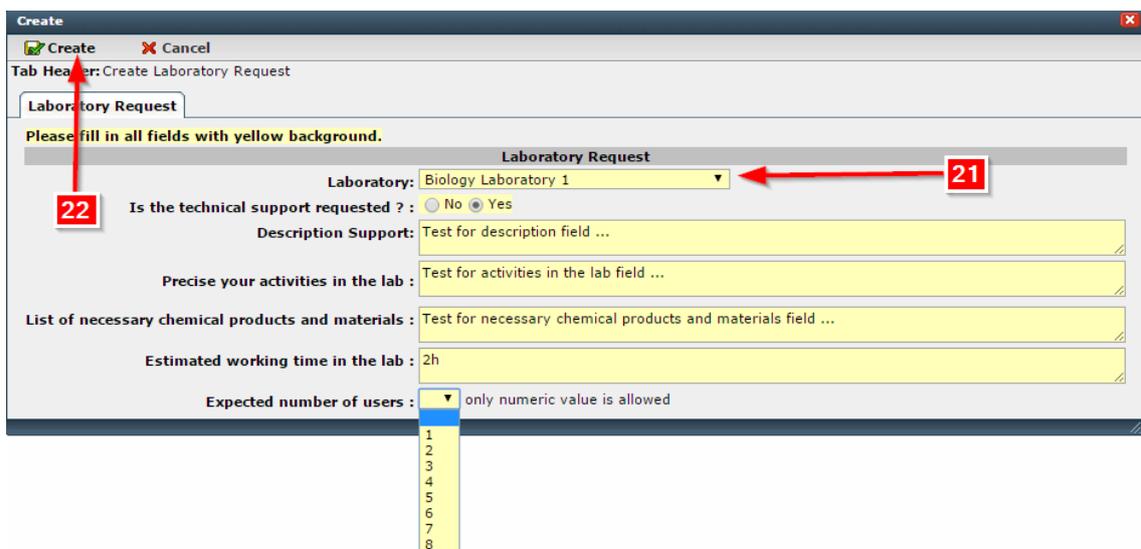


Figure 10: Create Laboratory Request form

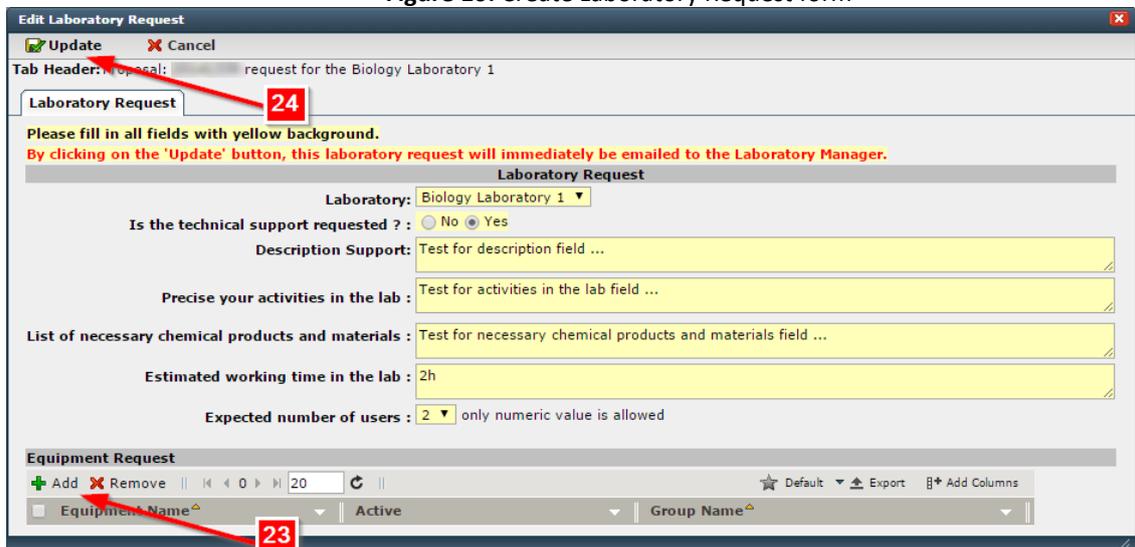


Figure 11: Create Lab. Request and add Equipment(s)

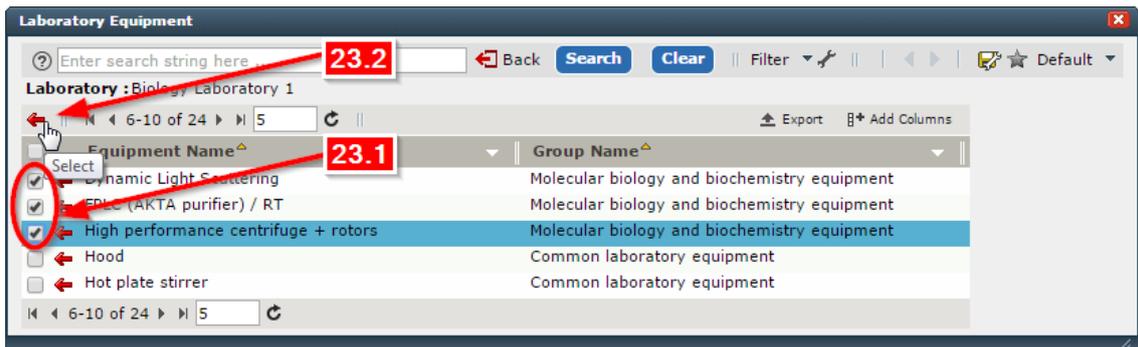


Figure 12: Submit Lab. Request to Laboratory Manager

7. How to submit the participants list to User Office?

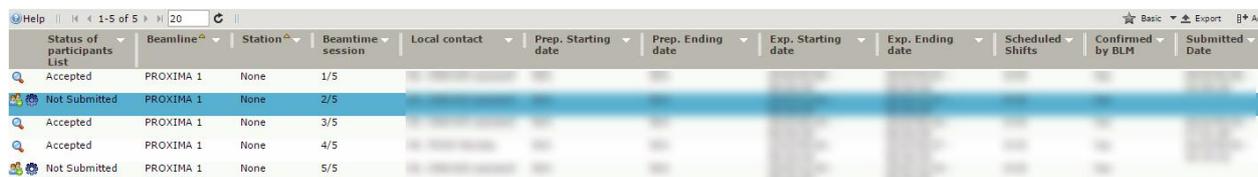
To submit the participants list to User Office:

1. Add participants and make sure that all forms are duly filled in the **Participants** tab (see [section 4](#)).
2. At least one sample must be added to the beamtime session in the **Samples** tab (see [section 5](#)).
3. For any request of support laboratory, submit them from **Lab. Requests** tab (see [section 6](#)).

The button used to submit the participants list to the User Office is this  button.

It is displayed at any time for all **Not Submitted** participants list (see figures: 13, 14, 15, 16):

- a) on the selected beamtime session row in the figure 13:



Status of participants List	Beamline	Station	Beamtime session	Local contact	Prep. Starting date	Prep. Ending date	Exp. Starting date	Exp. Ending date	Scheduled Shifts	Confirmed by BLM	Submitted Date
Accepted	PROXIMA 1	None	1/5								
Not Submitted	PROXIMA 1	None	2/5								
Accepted	PROXIMA 1	None	3/5								
Accepted	PROXIMA 1	None	4/5								
Not Submitted	PROXIMA 1	None	5/5								

Figure 13: Beamtime session list with the « Submit participants list to the User Office »  button

- b) on the participants tab:



Figure 14: Participants tab

- c) on the Samples tab:

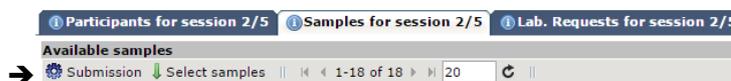


Figure 15: Samples tab

- d) on the Lab. Requests tab:



Figure 16: Lab. Requests tab

But if you click on the submit  button and if some mandatory fields in the above steps (7.1/ 7.2/ 7.3) are not completed correctly then you will be prompted by a message telling you the missing points and where to do it.

This is done to help you to see the missing points before submission of the participants list.

After completing correctly the steps stated above (7.1/ 7.2/ 7.3), you can submit your participants list by clicking on the « Submit participants list to the User Office »  button. By doing that the final confirmation screen will appear (figure 17):



Edit Laboratory Request

I need to request a support laboratory
 I do not need to request a support laboratory
 I have already requested a support laboratory

Do you confirm the submission?

Yes No

Figure 17: Submit Participants List to User Office

Good job! Thank you.