

PROCESS OVERVIEW



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USER ROLES DEFINED

User Role	Description	Permissions
CAP Program Leader	The CAP Program Leader is like the 'Chief Executive Officer' or 'Director' of the CAP and is responsible for submitting the proposal and integrating all of the projects in the CAP into a cohesive and functional program. monitor	 Create/edit/submit CAP proposal Add/Delete CAP Principal Investigators View/edit/submit all associated Project Proposals
CAP Principal Investigator	Formerly 'CAP PIs' the CAP Principal Investigators are the individual project and/or group leaders within the CAP and are responsible for submitting one CAP Project proposal against the CAP.	 Create/edit/finalise CAP Project Proposals Add/Delete CAP staff members to Project proposal View CAP proposal and all CAP Project proposals
CAP Coordinator	The CAP coordinator is like the 'Chief Operating Officer' and 'Chief Financial Officer' of the CAP. They are responsible for coordinating the beamtime visits, including personnel and samples, and the submission of pre-beamtime paperwork to the User Office. Further to this, the primary CAP coordinator has control over any travel funds allocated to the CAP and has ultimate responsibility for reconciling the reimbursement of travel expenses to each organisation affiliated with the CAP. Once the CAP proposal is approved there may be an opportunity to assign assistant CAP Coordinators.	
Postdoc PhD Student MSc Student Undergrad Student Research Associate Other	The CAP staff members are the research associates, postdocs, students and administrative staff that encompass the groups of the CAP Principal Investigators.	 View CAP proposal and all CAP Project proposals Edit CAP Project proposal

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CREATING THE CAP PROPOSAL (CAP PROGRAM LEADER)

The CAP proposal must be generated by the CAP Program Leader. To create the CAP proposal, log into the Portal and follow the link 'Create a new Proposal' from the Dashboard view:

	Proposals
	Manage and create proposals here.
1 2 3	 <u>View</u> proposals (1) programs (1) <u>Create new proposal</u>

Enter the title of the CAP, select beamline(s) and the round and click 'Next':

Beamtime Proposal Stage 1:					
Expt Title *	Title of CAP				
Instrument					
Equipment Set Id	MX1: Macromolecular CrystallographyMX2: Micro Crystallography				
Show/Hide Details of Available Instruments					
Round Details					
Round *	2014/x CAP (Test)				
Show/Hide Details of Current Rounds					
Next > Cancel					

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Confirm the details of the CAP and click 'Create'.

Please confirm the information you have entered. Y and select again.	ou cannot change the Proposal Type once you have created the proposal. If you have made a mistake, select 'Back' to return
Expt Title Round Equipment Set Proposal Type	Title of CAP 2014/x CAP (Test) MX1: Macromolecular CrystallographyMX2: Micro Crystallography Collaborative Access Programs
Create < Back Cancel	

Complete the questions on the 'Experiment' tab.

	Experiment	Researchers	Beamline	Submit
1 P				

Adding Principal Investigators to the Proposal

On the 'Researchers' tab, add the **CAP Principal Investigators.** DO NOT include staff members associated with these group leaders, or your own group at this stage - these researchers can be added to the individual CAP Project proposals that will be created separately.

Home » CAP8130: Test CAP Proposal 7/4/14						
Experiment	Researchers			Beamline	Submit	
CAP8130: Test CAP Proposal 7/4/	CAP8130: Test CAP Proposal 7/4/14					
Researchers Only the principal scientist is able to submit the	Researchers Only the principal scientist is able to submit the proposal. For CAP proposals only the CAP Leader can submit the proposal.					
How to add CAP Project Leaders to this CAP Please add only those scientists that will lead or the user role 'CAP Project Leader'. Do not add yo	e or more projects associated with our own team/staff members, nor th	n this CAP. Th nose of the C	nese scientists AP Project Lea	should be added with aders; these scientists	There must be one and only one principal scientist.	
will be added to the individual CAP Project propo	sals which will detail the projects h	noused under	the CAP umbr	rella.	CAP Proposal Roles	
How to assign the role of CAP Coordinator Where one of the CAP Project Leaders is to act Where the CAP Coordinator will not be one of the	How to assign the role of CAP Coordinator Where one of the CAP Project Leaders is to act as the CAP Coordinator, check the 'Is Coordinator' radio button next to their name.					
Coordinator' and check the 'Is Coordinator' radio I How to notify Project Leaders that they have When you have added all of the Project Leaders This will advise the researcher that they have bee proposal detailing their individual project/s.	Coordinator' and check the 'Is Coordinator' radio button next to their name. How to notify Project Leaders that they have been added to this CAP When you have added all of the Project Leaders to this proposal click the 'Send Email' button corresponding to each Project Leader. This will advise the researcher that they have been added to this proposal and that they must submit an associated CAP Project proposal detailing their individual project/s.					
Add Co-Proposal Scientist					researchers can be added to the individual CAP Project proposals which will detail the projects housed under the CAP umbrella.	
Name	User Role	ls Coordinator	Attending		The CAP Coordinator will manage the administration of the CAP program and	
Glyn Devlin1 (Australian Synchrotron)	CAP Leader		Yes 💌	Send Email	act as the point of contact with the Australian Synchrotron User Office. ONLY one CAP Coordinator can be assigned per CAP. Should your CAP	
					proposal be successful you may have an opportunity to assign additional	

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To add a CAP Principal Investigator, click 'Add Co-Proposal Scientist', enter a family name or an email address to search for the co-proposer in the Portal:

Detail view			х
Create Proposal	Scientist		<u>^</u>
If you know the en enter it here.	nail of the person you w	ant to add, as it was registered in t	his portal, please
Email address			
Otherwise, enter the second	ne first letters of their su	urname.	
Surname	Ророч		
Search			
We have found one or m here, please select that	ore records that may co record. Otherwise, you	orrespond to this information. If the may choose to create a new accor	details are contained unt (or search again).
			Total 1 result(s).
	Name	Active Account	
Donna Popov (Australia	n Synchrotron)	Yes	use
If you cannot find the ac Enter New Accou	count of the person you nt Details	were searching for, you may creat	e it yourself.
User Role * Attending Exp	CAP Proje	ct Leader 💌	

Ensure that the 'CAP Principal Investigator' User Role is selected, and click 'Use' to add the researcher to the proposal.

Add Co-Proposal Scientist					
			Dis	olaying	1-5 of 5 result(s).
Name	User Role	ls Coordinator	Attending Exp		
Cathy Harland (Australian Synchrotron)	CAP Project Leader 💌	0	Yes 💌	0	Send Email
Amanda Costanzo (Australian Synchrotron)	CAP Project Leader 💌	0	Yes 💌	٢	Send Email
Scott Kendall (Australian Synchrotron)	CAP Project Leader 💌	O	Yes 💌	٢	Send Email
Glyn Devlin1 (Australian Synchrotron)	CAP Leader	0	Yes 💌		Send Email
Donna Popov (Australian Synchrotron)	CAP Project Leader	O	Yes 💌	٢	Send Email

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Invite Principal Investigators to Create a Project Proposal Against this CAP

Click the 'Send Email' button for each CAP Principal Investigator added to notify them that they must submit a CAP Project proposal against this CAP; the email notification will provide the CAP Principal Investigators with the link required to create the Project proposal. Each time you click a 'Send Email' button you will receive a pop-up confirmation that the email was sent; refrain from clicking the next button before this notification has been shown. Please note that the CAP Program Leader will be copied on these emails. The CAP Program Leader should click the 'Send Email' button against their own name so that they receive the link to create a Project proposal.

Add Co-Proposal Scientist					
			Disp	olaying	1-5 of 5 result(s).
Name	User Role	ls Coordinator	Attending Exp		
Cathy Harland (Australian Synchrotron)	CAP Project Leader 💌	0	Yes 💌	•	Send Email
Amanda Costanzo (Australian Synchrotron)	CAP Project Leader 💌	\odot	Yes 💌	٢	Send Email
Scott Kendall (Australian Synchrotron)	CAP Project Leader 💌	0	Yes 💌	0	Send Email
Glyn Devlin1 (Australian Synchrotron)	CAP Leader	۲	Yes 💌		Send Email
Donna Popov (Australian Synchrotron)	CAP Project Leader	O	Yes 💌	0	Send Email

CAP Project and Shift Request Summary

Upon creation of the CAP proposal, there will be no associated CAP Projects and as such the 'Beamline Tab' will show '*No Results Found*':

Home » CAP8130: Test CAP Proposal 7/4/14					
Experiment	Researchers			Beamline	Submit
CAP8130: Test CAP Proposal 7/4	I/14				You can ask for only one beamline. Two
 Requested Shifts Summary 					bottom of the page to request particular operating modes of the beamline
Requested Shifts Summary					sample environments, detectors etc, and off-line laboratory facilities. When bringing your own equipment please provide as much detail as possible, incluicing any possible hearards
Proposal	Leader	Sta	itus		
No results found.					CAP Proposals
					This page provides an overview of all of the CAP Project proposals that have been generated under

AT THIS STAGE YOU WILL NEED TO SAVE THE PROPOSAL AND WAIT UNTIL ALL CAP PROJECT PROPOSALS HAVE BEEN GENERATED BY THE CAP PRINCIPAL INVESTIGATORS

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If you try to submit the CAP Proposal at this stage you will get the following error message:

Home » CAP8130: Test CAP Proposal 7/4/14			
Experiment	Researchers	Beamline	Submit
CAP8130: Test CAP Proposal 7/4/ Submit	/14		When your proposal is ready for submitting, do so here.
All required Information has been added:			
 No project proposal have been created 			
<- Back Save Cancel Sub	omit		

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ADDING A PROJECT TO A CAP (CAP PRINCIPAL INVESTIGATORS)

Once a CAP Principal Investigator has been added to the CAP proposal they must associate one CAP Project proposal with the CAP proposal. The simplest way to do this is by following the link send in the email notifying the CAP Principal Investigator of their addition to a CAP.

Alternative, the Principal Investigator can navigate to 'View' their proposals from the Dashboard:



Locate the appropriate CAP proposal that has been created by the CAP Program Leader and click the 'Add a Project to this CAP' symbol on the right hand side:

Home » Pro	oposals			
Manage	Propos	als		
You may o how the co <u>Advanced</u> 3	ptionally ent mparison sh <u>Search</u>	er a comparison operator (<, <=, >, >=, <> or =) al ould be done.	t the beginning	ng of each of your search values to specify Create Proposal
				Displaying 1-2 of 3 result(s).
ID	Round	Title	Туре	Principal Status 10 -
CAP8130 €	2014/x CAP (Test)	Test CAP Proposal 7/4/14	Collaborative Access Programs	Glyn Devlin1 In Preparation
CAP8101 ⊕	2014/x CAP (Test)	Test 01 April 2014	Collaborative Access Programs	Glyn Devlin Add a Project to this CAP

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Add the title of the Project; the instrument and round should be selected automatically. Confirm that the 'Parent Proposal' listed is the correct CAP proposal:

Beamtime Proposal Stage	1:		
Expt Title *		ii.	
Instrument			
Equipment Set Id	MX1: Macromolecular Crystallograp	hyMX2: Micro Crystallography 💌	
Round Details Round * Parent Proposal	2014/x CAP Project (test)		
Show/Hide Details of Current Rounds			
Deseased		То	tal 1 result(s).
Round	Description	All Dates	Name
2014/x CAP Project Test round for the generat (test)	ion of CAP Projects	Proposal 30/04/2014 Start Date 01/06/2014 End Date 30/06/2014	Australian Synchrotron
Next > Cancel			

Click 'Next' and create the proposal. You will be taken to the 'Experiment' tab of the proposal:

Home » CBR8134 (8130-4): Test CAP Proposal 7/4/14						
Experiment	Researchers	Beamline	Samples	Figures	Submit	

Complete all of the questions on the 'Experiment' tab.

Adding CAP Staff Members to your Project

On the 'Researchers' tab click the 'Add Co-Proposal Scientist' button to add your group/team members (as appropriate). Enter a family name or an email address to search for the co-proposer in the Portal. When you have identified the correct researcher, click 'use' to add them to the proposal, ensuring that the appropriate user role is selected from the dropdown.

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	16
Australian	NON
Synchrotron	
Synchrotron	

Detail view				×
Create Proposal S	cientist			^
If you know the email here.	of the person you want t	to add, as it was registered in this po	rtal, please enter it	
Email address				
Otherwise, enter the f	irst letters of their surna	me.		=
Surname	aragao			
Search				
We have found one or more please select that record. C	records that may corres Otherwise, you may choo	spond to this information. If the details use to create a new account (or searc	s are contained here, ch again).	
			Total 1 result(s).	
	Name	Active Account		
David Aragao (Australian Sy	nchrotron)	Yes	use	
If you cannot find the accou	nt of the person you wer Details	re searching for, you may create it yo	urself.	
User Role *	CAP Staff Men	nber 💌		
Attending Exp				

Please note that there can only be a single CAP Principal Investigator per Project proposal.

Enter the Shift Requests for your Project

Enter your MX1 and MX2 shift requests on the 'Beamline' tab;

Home » CBR8134 (8130-4): Test CA	AP Proposal 7/4/14				
Experiment	Researchers	Beamline	Samples	Figures	Submit
CBR8134 (8130-4): Pro	ncel Next >>			You can ask f drop down lis bottom of the operating m sample envir off-line labor bringing you provide as m including any	for only one beamline. Two its are provided at the page to request particular does of the beamline, onments, detectors etc, and atory facilities. When rown equipment please uch detail as possible, y possible hazards.

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Click the MX*(MX1) or MX*(MX2) tabs and select a shift request from the dropdown:

▼ MX* (MX1)			
Show/Hide Equipment Details			
		Displaving 1-7 of 7 result(s)	
Parameter		Values	
Source		AS Bending Magnet / in-vacuum undulator (U22)	
* Energy Range		5 - 18 keV / 5.5 - 28 keV	
Monochromator Type		Si <111> Sagittal focus / Si <111> & Si <311>	
Resolution dE/E		1.4 x 10 ⁻⁴ / 1.4 x 10 ⁻⁴	
Flux (Photons/sec)		2 x 10 ¹¹ / 4 x 10 ¹² at 12.6 keV	
Beam Size Focused (HxV)		0.15 x 0.15 mm (fixed) / 0.01 x 0.02 - 0.1 x 0.1 (variable)	
Beamline Scientist		Dr Tom Caradoc-Davies	
Experimental Setup		.#	
No. Shifts Requested	6 (2 days)		
Lab Ancillary requested			
Biochemistry Preparation Lab	▼ Ad	id	
An	cillaries, Detect	ctors, Sample Environment	
No results found.			
▶ MX* (MX2)			

Please note that this shift request is for 12 months.

Enter your Samples and Figures

Enter your samples and upload any supporting figures on the 'Samples' and 'Figures' tabs, respectively.

Home » CBR8134 (8130-4): Test C	AP Proposal 7/4/14				
Experiment	Researchers	Beamline	Samples	Figures	Submit
Please add a sample for each dis Also please create a sample entr CBR8134 (8130-4): Pro Samples Add Sample	stinct group of samples. ry called "User Chemicals" for ch oject 4	emicals that you will bring w	ith you for your experiment.	These pages of the sample bring with yo summary of with each dis be provided. For informati the <u>CAS Rea</u>	are used to provide details es and chemicals that you u. A brief description and he safety issues associated tinct group of samples must on about CAS numbers see <u>istry web page</u> .
Sample Desc	ription / Name	Hazardous	Hazards		
No results found.					
<- Back Save Ca	ancel Next >>				

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Finalising the CAP Project Proposal

Once you are satisfied that all aspects of the CAP Project Proposal are correct, you can finalise the proposal. Please note that, once finalised, the CAP Program Leader will still be able to edit your proposal.

Home » CBR8134 (8130-4): Test C	AP Proposal 7/4/14				
Experiment	Researchers	Beamline	Samples	Figures	Submit
CBR8134 (8130-4): Pro Submit	oject 4			When submit	your proposal is ready for ting, do so here.
 All required Information h 	as been added:				
<< Back Save Cano	Finalise				

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SUBMITTING THE CAP PROPOSAL (CAP MAIN INVESTIGATOR)

Before submitting the CAP proposal the CAP Program Leader must review the Project proposals associated with the CAP to ensure that they are completed to the Program Leader's satisfaction and are in the 'Finalised' status.

To do this navigate via the Portal Dashboard and view your CAP proposal. Update the CAP proposal by clicking the 'Update' link:

Mana	Manage Proposals						
You may optionally enter a comparison operator (<, <=, >, >=, <> or =) at the beginning of each of your search values to specify how the comparison should be done.							uld be done.
Advanc	ed Search					Displaving 1-	10 of 109 result(s)
ID	Round	Title	Туре	Principal Scientist	Status	Beamline	10 🔻
CAP817	2014/x CAP 70 Proposals (Test round ONLY)	CAP test again	Collaborative Access Programs	Cathy Harland	In Preparation	MX*	update

Navigate to the 'Beamline' tab. Once the CAP Project proposals have been generated you will see a summary of the Project details including the total shift requests for the CAP:

Experiment	Researchers	Beamline		Figures	
P8170: CAP test again					
Requested Shifts Summary					
Requested Shifts Summary					
			Disclose		
			1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1		14/ 0
			Displaying	3 1-5 of 5 resu Shifts	lt(s
Proposal	Leader	Status	Shifts Requested: MX* (MX1)	3 1-5 of 5 resu Shifts Requested: MX* (MX2)	lt(s
Proposal CBR8171 (8170-1): Test project	Leader Cathy Harland	Status Finalised	Shifts Requested: MX* (MX1)	g 1-5 of 5 resu Shifts Requested: MX* (MX2) 10	lt(s
Proposal CBR8171 (8170-1): Test project CBR8172 (8170-2): Test project	Leader Cathy Harland Cathy Harland	Status Finalised Finalised	Displaying Shifts Requested: MX* (MX1) 0 3	g 1-5 of 5 resu Shifts Requested: MX* (MX2) 10 5	It(s
Proposal CBR8171 (8170-1): Test project CBR8172 (8170-2): Test project CBR8173 (8170-3): Test CAP project	Leader Cathy Harland Cathy Harland Tom Caradoc-Davies	Status Finalised Finalised Finalised	Displaying Shifts Requested: MX ^e (MX1) 0 3 7	3 1-5 07 5 resu Shifts Requested: MX* (MX2) 10 5 11	It(s
Proposal CBR8171 (8170-1): Test project CBR8172 (8170-2): Test project CBR8173 (8170-3): Test CAP project CBR8174 (8170-4): again!	Leader Cathy Harland Cathy Harland Tom Caradoc-Davies Cathy Harland	Status Finalised Finalised Finalised Finalised	Displaying Shifts Requested: MX* (MX1) 0 3 7 8	g 1-5 of 5 resu Shifts Requested: MX* (MX2) 10 5 11 0	It(s
Proposal CBR8171 (8170-1): Test project CBR8172 (8170-2): Test project CBR8173 (8170-3): Test CAP project CBR8174 (8170-4): again! CBR8175 (8170-5): Test	Leader Cathy Harland Cathy Harland Tom Caradoc-Davies Cathy Harland Donna Popov	Status Finalised Finalised Finalised Finalised In Preparation	Displaying Shifts Requested: MX* (MX1) 0 3 7 8 0	g 1-5 of 5 resu Shifts Requested: MX* (MX2) 10 5 11 0 0	lt(s

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An attempt to submit a CAP proposal that is associated with CAP Project proposals that are not in the 'Finalised' status will elicit the following error message:

Experiment	Researchers	Beamline	Figures
P8170: CAP test again			
bmit			
You cannot submit this proposal becau	use of the following error condition(s):		
 The following project are not finalise 			

The CAP Program Leader can modify and finalise the CAP Project proposals on behalf of the CAP Principal Investigators by clicking on the 'Update' icon next to each project:

Experiment	Researchers	Beamline		Figures	
P8170: CAP test again					
Requested Shifts Summary					
Requested Shifts Summary					
			Dieploving	1 E of E root	lt/o
			Displaying) 1-5 of 5 resu Shifts	ilt(s
Proposal	Leader	Status	Displaying Shifts Requested: MX* (MX1)) 1-5 of 5 resu Shifts Requested: MX* (MX2)	ılt(s
Proposal CBR8171 (8170-1): Test project	Leader Cathy Harland	Status Finalised	Displaying Shifts Requested: MX* (MX1) 0) 1-5 of 5 resu Shifts Requested: MX [±] (MX2) 10	ilt(s
Proposal CBR8171 (8170-1): Test project CBR8172 (8170-2): Test project	Leader Cathy Harland Cathy Harland	Status Finalised Finalised	Displaying Shifts Requested: MX* (MX1) 0 3) 1-5 of 5 resu Shifts Requested: MX* (MX2) 10 5	ilt(s
Proposal CBR8171 (8170-1): Test project CBR8172 (8170-2): Test project CBR8173 (8170-3): Test CAP project	Leader Cathy Harland Cathy Harland Tom Caradoc-Davies	Status Finalised Finalised Finalised	Displaying Shifts Requested: MX* (MX1) 0 3 7) 1-5 of 5 resu Shifts Requested: MX* (MX2) 10 5 11	ilt(s
Proposal CBR8171 (8170-1): Test project CBR8172 (8170-2): Test project CBR8173 (8170-3): Test CAP project CBR8174 (8170-4): again!	Leader Cathy Harland Cathy Harland Tom Caradoc-Davies Cathy Harland	Status Finalised Finalised Finalised Finalised	Displaying Shifts Requested: MX* (MX1) 0 3 7 8	1-5 of 5 resu Shifts Requested: MX* (MX2) 10 5 11 0	
Proposal CBR8171 (8170-1): Test project CBR8172 (8170-2): Test project CBR8173 (8170-3): Test CAP project CBR8174 (8170-4): again! CBR8175 (8170-5): Test	Leader Cathy Harland Cathy Harland Tom Caradoc-Davies Cathy Harland Donna Popov	Status Finalised Finalised Finalised Finalised In Preparation	Displaying Shifts Requested: MX* (MX1) 0 3 7 8 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	1-5 of 5 resu Shifts Requested: MX* (MX2) 10 5 11 0 0	llt(s

DELETING A PROJECT PROPOSAL

If there is a need to remove a Project from this CAP it can be deleted from the '<u>My Proposals</u>' page. From the 'My Proposals' view, locate the CAP proposal from the list and expand its selection by clicking on the (+) symbol next to the proposal ID (in the left-most column); this will show a list of all associated projects. To delete a Project click the (-) symbol in the right-most column in the row corresponding the the Project you wish to remove. Please note that once deleted a Project can not be recovered. Once a Project that been finalised by the CAP Principal Investigator it can not be removed. If you need to remove a Project that has been finalised please contact the <u>User Office</u>.

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Once the CAP Program Leader is satisfied with all of the CAP Project proposals the CAP Proposal can be submitted.

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