EUCALL Workshop:
User Access at
Advanced Laser Light Sources

User Portal
GATE @ HZDR

HZDR

HELMHOLTZ
ZENTRUM DRESDEN
ROSSENDORF

ELI-Beamlines, 21 – 22 September 2017

Outline

User Portal

→ Basic Functionalities, useful add-ons and luxury

→ Workflow

→ GATE @ HZDR as an example

→ Relation with the users

Demands on a User Portal

Basic functionalities:

- User registration
- Acceptance of term & conditions of access
- Confirmation regarding open access, dual use, ethical issues, etc.
- Proposal submission
- Evaluation Process
- Communication with the applicant
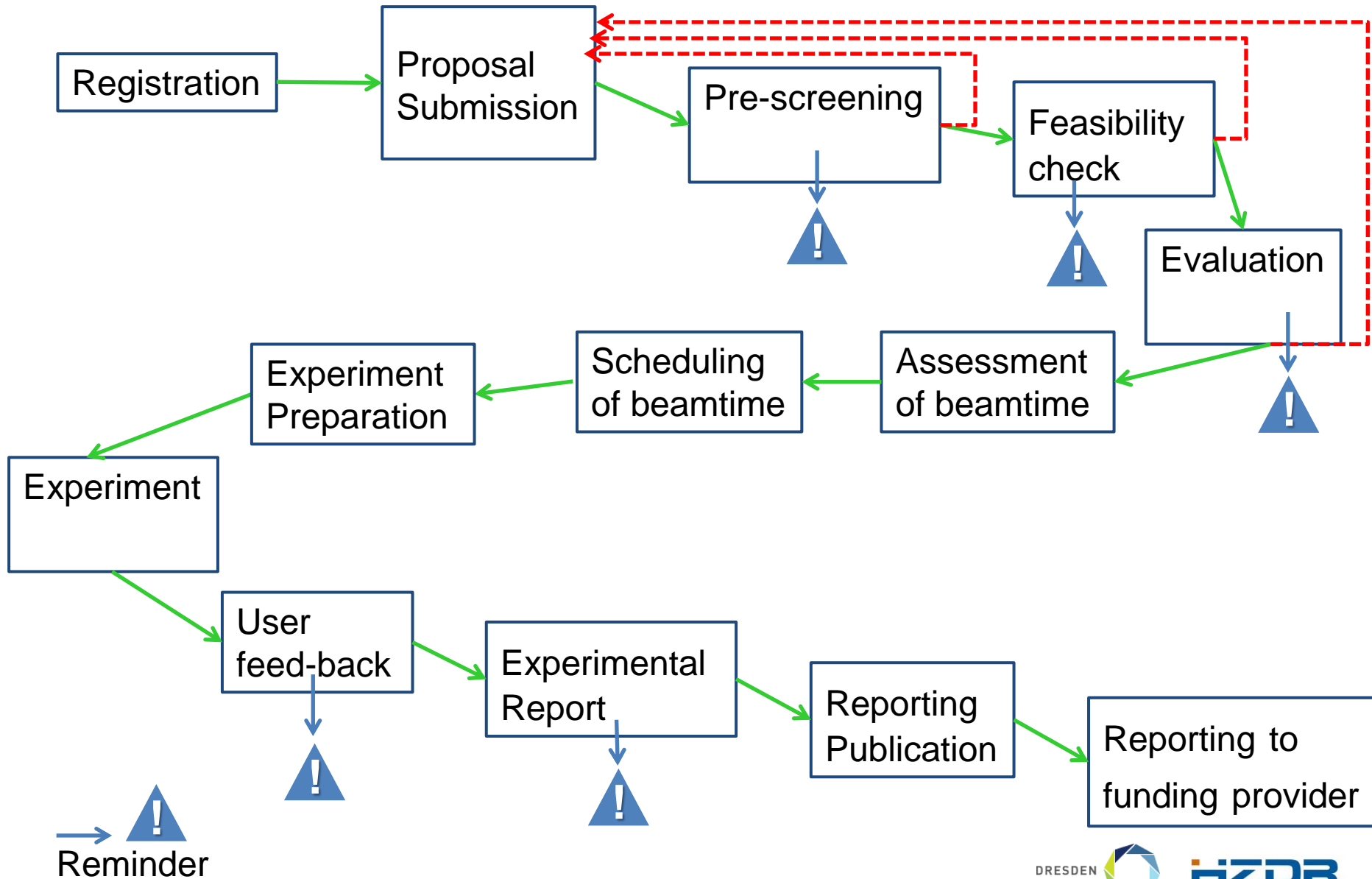- Reporting of results

Useful add-ons:

- Application for travel support
- Preparation of Beamtime
  - ✓ Registration of additional team members
  - ✓ Radiation protection
  - ✓ Booking guesthouse
  - ✓ Visitor's card
- Statistics for Reporting to funders
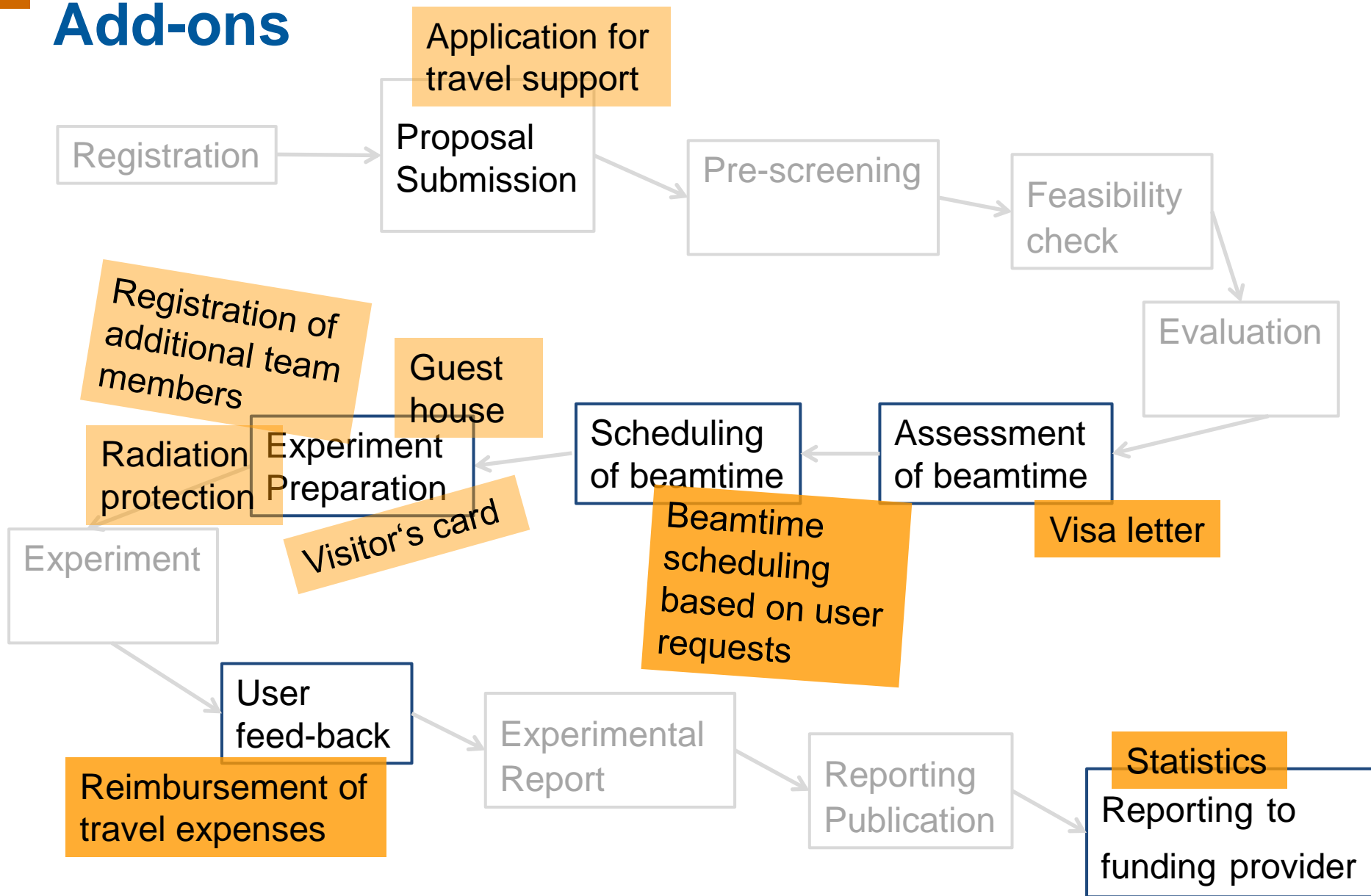- User publications

Luxury:

- Beamtime schedule based on user requests
- Reimbursement of travel expenses
- Visa letters

Work Flow

Add-ons

Application for travel support

Registration → Proposal Submission → Pre-screening → Feasibility check

Feasibility check → Evaluation

Registration of additional team members

Guest house

Radiation protection

Experiment Preparation

Visitor's card

Scheduling of beamtime ← Assessment of beamtime ← Evaluation

Visa letter

Beamtime scheduling based on user requests

Experiment

User feed-back → Experimental Report → Reporting Publication

Reimbursement of travel expenses

Statistics

Reporting to funding provider

DRESDEN concept   HZDR

HZDR GATE

HZDR GATE is the general access tool to the research infrastructures (RI) at HZDR, offering access to external user!

Users are kindly required to register in HZDR GATE in order to be able to

- submit a proposal for beamtime at ELBE, IBC or DRACO
- participate in accepted experiments at ELBE, IBC or DRACO
- provide user feedback and to submit experimental reports
- publish data resulting from experiments at an RI at HZDR.

Login

Login via umbrellaID

umbrella

umbrellaID

or

HZDR GATE Login

or

Institutional Login via Shibboleth

umbrella

umbrellaID

Oder wählen Sie Ihre Institution aus einer Liste:

Wählen Sie Ihre Institution au ▼ **OK**

Institution direkt selbst eingeben

New Users: Registration

- Developed by Helmholtz-Zentrum Berlin and in use for access management to BESSY II and BER II

- Adopted to requirements of HZDR in 2013/ 2014 (one FTE)

- In routine use for access to
  - ELBE – Center for High-power Radiation Sources
    → two deadlines per year in spring and fall
  - Ion Beam Center
    → continous submission of proposals
  - DRACO laser
    → continous submission of proposals

DRESDEN concept

HZDR

HZDR GATE - Barbara Schramm

Welcome to **HZDR GATE**, the webtool governing all issues related to user access to the Research infrastructures at HZDR!

Next deadline for the submission of proposals for ELBE: October 18th, 2017.
There is no deadline for IBC and for DRACO due to their rolling process!

You have ...
▶ 5 not submitted proposal
▶ 1 publications not yet assigned to the respective HZDR facility
▶ Any new publications?

My proposal
▶ Submit a new proposal
▶ Proposal list
▶ Publication list / submit publications

Personal section
▶ Personal data
▶ Connect with Institutional Login
▶ Change password
▶ Change username
▶ Online trainings
▶ Terms and conditions for user access to the experimental facilities

Referee section
▶ Review proposals
▶ Proposals per call
▶ Proposals
▶ Reports
▶ Referee Handbook

HZDR

Navigation sidebar:
- ▼ GATE
  - ▼ HZDR GATE
    - ▶ My proposal
    - ▶ New proposal
    - ▶ Proposal list
    - ▶ Publication list
  - ▶ Referee section
    - ▶ Review proposals
    - ▶ Proposals per call
    - ▶ Proposals
    - ▶ Reports
    - ▶ Referee Handbook
  - ▶ Personal section
    - ▶ Personal data
    - ▶ Connect with Institutional Login
    - ▶ Change password
    - ▶ Change username
    - ▶ Online trainings
    - ▶ Terms and conditions for user access to the experimental facilities
  - ▶ Handbook
  - ▶ Request support
  - ▶ Logout

DRESDEN concept   **HZDR**

HZDR GATE - Barbara Schramm

New proposal

General proposal data	

Title *

Abstract *
max. 1000 characters

| **Proposal type *** | Standard | **Scientific College *** | |
| **Main research area *** | | **Scientific Category *** | |

Funding ☐ Funding requested   Information about funding

Scientific case and results expected ☑ **example / templates (IBC)**	

**Scientific case and *
results expected (pdf)**   Durchsuchen...   Keine Datei ausgewählt.
Accepted format: *.pdf, max. of 2 pages

next step

DRESDEN concept   HZDR

Trans-national Access Programme

User groups from outside Germany applying for access to a beamline involved in an Integrating Activity funded by the European Commission may request financial support for their travel expenses. The request for funding from a trans-national access programme has to be indicated in the proposal form. Beamlines to which trans-national access may be requested are listed below including the corresponding EU project.

Beamlines: FELBE and TELBE

Project:

Context, eligibility and obligations:

In the framework of the trans-national access programme of the project CALIPSOplus, funded by the European Union as an integrating activity, support for travel and subsistence is offered for user carrying out experiments at accelerator-based light sources located outside the country of their home institution.

To a limited extend also users from Third countries are eligible for funding.

In publications resulting of user projects supported in this way acknowledgement of support by the European Union is mandatory using the following sentence:

The research leading to this result has been supported by the project CALIPSOplus under the Grant Agreement 730872 from the EU Framework Programme for Research and Innovation HORIZON 2020.

In addition, after the beamtime response to the Horizon2020 user survey is strongly recommended following this link.

Submission of an experiment report to the facility having been used is mandatory.

Definition of proposal form

ELBE - Beamline and beamtime　　ℹ️ Device overview

Beamline *　　[　　　　　　▾]

Preferred local contact *　　[　　　　　　▾]

Mode of operation *　　[　　　　▾]

Requested beamtime *　　[　　] Shifts (12 hours each)

Operation schedule

Preferred dates　　1) [　　　] - [　　　]　　2) [　　　] - [　　　]

Unfeasible dates　　1) [　　　] - [　　　]　　2) [　　　] - [　　　]

Experimental plan ❓ example / templates (IBC)

Experimental plan *
(pdf)　　[Durchsuchen...]　Keine Datei ausgewählt.

Project Consortium

Spokes person for the proposal*　　[　▾]

Collaborating partner from HZDR　　[　▾]

If your project is a collaboration with scientist(s) from HZDR, the HZDR partners need to be mentioned as co-proposers (previous step) a
dropdown menue here above. Please note however that the local expert/ beamline scientist who will assist for the beamtime, needs not t
Therefore please mention him/her here only in justified cases!

Characterization of the project

I confirm that the research presented in this proposal is neither funded by industry nor will the results directly be made availab

☐ **confirmation***

Type of project　　[Short term ▾]

Project is essential part of PhD thesis　　[no ▾]　**If yes, please give name of PhD student** [　　　　　　]

Project is essential part of reviewed research grant　　[no ▾]　**If yes, please specify** [　　　　　　]

Definition of email templates

externe Datenweitergabe

externe Messgastgruppen

Proposal-Formular-Definition

Feedback-Formular-Definition

Wissenschaftliches Nutzer-Profil

Wissenschaftliche Kategorien

Forschungsgebiete

EU-Kategorien

Grand Challenges

Institutsmerkmale

Sicherheitsgruppen

Mail archive

Statistic

Handbooks

Personal settings

Preview message options

Proposal		view

➕ **message preview**

Text template parts for mail template Feasibility Trigger
Change message text part?

Sort	Name	Text		is valid for	
1	trigger feasibility check I	Dear Colleague, a new proposal has been submitted for the ELBE beamline to which you have been assigned as local expert. Please check this proposal for feasibility at your earliest convenience but not later than #DLFEAS#. To this end, please log into the HZDR website. Direct access to this particular proposal: https://www.hzdr.de/db/!Gate.Admin.Feasibility?xpid=#PID# Overview: https://www.hzdr.de/db/!Gate.Admin.Feasibility save		☑ ELBE ☐ IBC ☐ DRACO	🗑
2	trigger feasibility check I	Dear Colleague, a new proposal has been submitted. Please check the proposal for feasibility within the next 2 days. Thank you very much in advance.		☐ ELBE ☑ IBC ☐ DRACO	🗑

DRESDEN concept HZDR

Email templates

- Contract Proposal-Eingabe
- Infotexte
- externe Datenweitergabe
- externe Messgastgruppen
- Proposal-Formular-Definition
- Feedback-Formular-Definition
- Wissenschaftliches Nutzer-Profil
- Wissenschaftliche Kategorien
- Forschungsgebiete
- EU-Kategorien
- Grand Challenges
- Institutsmerkmale
- Sicherheitsgruppen
- Mail archive

Preview message options

| Proposal | 1036 | view |

■ message preview

HZDR Proposal 17201036-ST submitted, please perform feasibility check

from: gate-admin@hzdr.de
to:

Dear Colleague,

a new proposal has been submitted for the ELBE beamline to which you have been assigned as local expert.
Please check this proposal for feasibility at your earliest convenience but not later than 02.11.2017.
To this end, please log into the HZDR website.

- Direct access to this particular proposal: https://www.hzdr.de/db/!Gate.Admin.Feasibility?xpid=1036
- Overview: https://www.hzdr.de/db/!Gate.Admin.Feasibility

Please note: a restricted access to the GATE-Admin tool is provided to you in order to enable the feasibility check. Therefore the login to the HZDR website is required.

Thank you and best regards,
Barbara Schramm
Access management ELBE

„Open to the World"

Important characteristics of a User portal:

✓ Easy to find

✓ Easy to use

✓ Convenient

➡ ✓ Use a federated identitiy system
→ Umbrella ID www.umbrellaid.org

✓ Link to wayforlight (www.wayforlight.eu),
Lightsources.org and others

✓ Single entry point to all ELI facilities/ all (optical) laser
facilities?

Thank you for your attention!