

BAG/LTP progress guidance

The Peer Review process requires a full set of proposal reports to be in place and for the most current science and reporting templates in UAS to be used.

General points – all PIs and ACs to note – requests from the panels:

- If you are renewing your BAG (a continuation), **you need to revise and refresh your list of funding sources and the list of co-investigators on your BAG to reflect an up-to-date and current state of your proposal.**
- For BAGs/LTPs: **Please request the amount of time needed in the 6-month allocation period being submitted for only.**
- **Lead PIs and ACs: please ensure the rest of the BAG Co-I are made aware of any relevant information and progress of the BAG**
- **There is no need to duplicate information on the new science case in the report - Reports should state objectives as context and report observations from beamtime use**
- Please use *a legible font size* - the panels note some submissions use very small font size on some proposal documents and want these to be legible in any format.
- On XChem proposals: the XChem BAG document templates are available [here](#)

There is important **information in the accompanying power point slides, and you are strongly encouraged to read through** those in parallel with this document.

The 4 scenarios outlined below represent the states your BAG/LTP could be in. Please identify the relevant one for your BAG and submit accordingly.

Screenshots in the below refer to views you may have when looking at the proposal in the UAS.

(Note that the images have had redactions applied in the form of grey boxes)

You do not need to run your BAG through consecutive Allocation Periods, it is legitimate to pause a BAG if needed and then submit at a later date.

The following definitions may help when you look at the stages of the BAG/LTP – see top right on the proposal view:

* **Draft** is displayed when a submission is due/expected

* **Decision Pending** is displayed when a submission is ready to review (visible once proposal is submitted)

* **Open** is displayed when a submission has been reviewed and is awarded time

* **Report Pending** is displayed when an experiment report is due/expected

* **Closed** is displayed when an experiment report is uploaded, and the submission is completed

NOTE: Uploading a report for an AP will cause the displayed state for that AP to transition to Closed.

UAS overview of a BAG/LTP proposal

Principal Investigator [redacted]
Instrument(s) [redacted]
Responsible Administrator (01235 778571)
Current Proposal PDF

Proposal State: **DRAFT**
Risk Rating: None
Grant Funded: No
Access Route: Block Allocation Group (BAG)
Submission(s): 1st Draft

Cancel Changes Save Changes Submit Proposal

Science Overview
Investigators
Instruments
Funding
ERA
Samples
Equipment
Experimental Methods
ERA Summary
Awards Overview

Please identify the key people associated with this proposal. Only registered users can be added to a proposal. You can use the Add Investigator window to invite people to register. Investigators are advised that:

- The **Principal Investigator (PI)** has overall responsibility for all aspects of a proposal and is the main contact with Diamond regarding all issues with a proposal. A PI can edit and submit proposals.
- An **Alternate Contact (AC)** is a named member on the proposal who has been nominated by the PI to receive all information from Diamond concerning the proposal. The AC can respond in place of the PI and must be an experienced user. An AC can edit and submit the proposal.
- A **Co-Investigator (CI)** is named on a proposal by the PI or AC. A CI can edit but not submit the proposal.
- The above investigator types named for this proposal will have access to all scientific data, and other information about all experimental sessions, within this proposal.
- An **ERA Editor** has the ability to create, edit and submit ERA items (Samples, Equipment, and Experimental Methods) and view the proposal, but cannot edit other proposal information or access scientific data (unless granted access by being added to specific sessions)
- An **Associate** has a relationship to the proposal outside of the UAS, but has no permissions to access the proposal in UAS or scientific data (unless granted access by being added to specific sessions). This relationship is available to other Diamond systems which may provide additional functionality based on it.

The Proposal PI must login and connect their ORCID ID via their registration details.

Add Investigator

Awards overview tab to see history and status of the BAG/LTP

Description of investigator roles

Used time will show here, when sessions have been delivered

List of BAG/LTP progression

Proposal State: **OPEN**
Risk Rating: **Low**
Grant Funded: No
Access Route: Block Allocation Group (BAG)
Submission(s): 1st Open; 2nd Draft

Finding the used time delivered on your BAG/LTP – proposal top left

Principal Investigator [redacted]
Used Time: 6 days, and 52 minutes; Pending Time: 1 shift
Instrument(s) MX, VMXi, B21, I23, I24
Responsible Administrator [redacted] (01235 778571)
Current Proposal PDF Related Proposal: Continuation of MX [redacted]

Click on the 'i' to get the breakdown of this time, by AP and instrument:

Award	Used	Pending
AP34 B21	1 shift	1 shift
AP33 MX	3 days, 16 hours, and 12 minutes	
AP33 B21	1 shift	
AP34 MX	1 day, 9 hours, and 40 minutes	
AP34 I24	10 hours	
AP33 I24	5 hours	

As part of your request for additional time in the next allocation period you should:

- Input the shifts required (this is for a 6 month period)

Note that Diamond mainly uses **shifts** in its reporting to the panel – 1 shift = 8 hrs, 1 day = 3 shifts

On USED TIME REPORTING: Please note that some users have been using previous BAG sessions in the last AP which should have been closed and not used. For an accurate number of delivered

shifts you need to refer to all relevant BAG proposals that had time in AP35 when you work out your used time for reporting.

When the BAG/LTP is in progress/open the following blue banner explains what will need to be submitted:

[Cancel Changes](#) [Save Changes](#) [Close Proposal](#) [Cancel Proposal](#) [Validate P](#)

As part of your request for additional time in the next allocation period you should:

1. Input the shifts required (this is for a 6 month period)
2. Review the investigators and add new investigators if appropriate
3. Add a new science case if there are any additional projects

In addition, please ensure that you have submitted a report to support your proposal by using the Experiment Report tab.

<input checked="" type="checkbox"/> Admin	Access Route* Block Allocation Group (BAG)
<input checked="" type="checkbox"/> Science Overview	Funded By Grant* No
<input checked="" type="checkbox"/> Investigators	Submission PDF Choose File No file chosen
<input type="checkbox"/> Instruments	
<input checked="" type="checkbox"/> Sessions	

When submitting a report for the AP just completed (AP35, ending end of September) you will also see further guidance:

EXPERIMENT REPORT FOR AP35 (APR 2024 - OCT 2024)

1. Please download report template and complete offline in your own time. [Download Template](#)

2. Please ensure your completed document is saved as a PDF file.

3. Return to this page and upload your completed PDF document.

You must upload an Experiment Report before submitting


Choose file No file chosen

Progress review – please select the state your BAG is in and follow the guidance

1. In the case of a BAG/LTP with its 1st AP open in AP36



- Submit a request for time on the BAG/LTP in AP37 (Apr-Sep-2025) in UAS
Reporting: **No report** is required - These BAGs/LTPs will not have had any time yet in AP36 (as that starts in October-24).

Proposal view top right:

Proposal State: **OPEN**
Risk Rating:  Low
Grant Funded: No
Access Route: Block Allocation Group (BAG)
Submission(s): 1st Open; 2nd Draft

From the Awards Overview tab


Awards on this and related proposals

Proposal	Allocation Period	Total Requested Shifts	Awarded Shifts	Reviewed PDF	Decision	Experiment Report
Bl 	AP36 (Oct 2024 - Apr 2025)	102	24	 Snapshot for AP36 (Oct 2024 - Apr 2025)	Accepted	

2. In the case of a BAG/LTP with its 2nd AP open in AP36

- Submit a request for time on the BAG/LTP in AP37 (Apr-Sep-2025) in UAS
- Reporting: Upload the **6 monthly report** in UAS – this will cover time used in AP35 (i.e., Apr-Sep-2024)

Proposal view top right (Shows no report submitted)

Proposal State: **OPEN**
Risk Rating:  Low
Grant Funded: No
Access Route: Block Allocation Group (BAG)
Submission(s): 1st Report Pending; 2nd Open; 3rd Draft

From the Awards Overview tab

Note that in this case the BAG history on the Awards Overview tab also shows a report for time used in AP35 is needed.

Awards on this and related proposals						
Proposal	Allocation Period	Total Requested Shifts	Awarded Shifts	Reviewed PDF	Decision	Experiment Report
LB	AP36 (Oct 2024 - Apr 2025)	9	10	Snapshot for AP36 (Oct 2024 - Apr 2025)	Accepted	
LB	AP35 (Apr 2024 - Oct 2024)	9	11	Snapshot for AP35 (Apr 2024 - Oct 2024)	Accepted	

3. In the case of a BAG/LTP with its 3rd AP open in AP36

- Submit a request for time on the BAG/LTP in AP37 (Apr-Sep-2025) in UAS
- Reporting: Upload the **6 monthly report** in UAS – this will cover time used in AP35 (i.e., Apr-Sep-2024)

Proposal view top right:

Proposal State: **OPEN**
 Risk Rating: Low
 Grant Funded: No
 Access Route: Block Allocation Group (BAG)
 Submission(s): 1st Closed; 2nd Closed; 3rd Open; 4th Draft

From the Awards Overview tab

Note that the BAG history on the Awards Overview tab also shows a report for time used in AP34 is needed.

Awards on this and related proposals						
Proposal	Allocation Period	Total Requested Shifts	Awarded Shifts	Reviewed PDF	Decision	Experiment Report
MX	AP36 (Oct 2024 - Apr 2025)	26	28	Snapshot for AP36 (Oct 2024 - Apr 2025)	Accepted	
MX	AP35 (Apr 2024 - Oct 2024)	20	25	Snapshot for AP35 (Apr 2024 - Oct 2024)	Accepted	
MX	AP34 (Oct 2023 - Apr 2024)	20	17	Snapshot for AP34 (Oct 2023 - Apr 2024)	Accepted	SCI-USO-DOC-0043 BAG 6 Mthly Report

4. In the case of a BAG/LTP with its 4th AP open in AP36

- If the BAG/LTP is in the 4th AP and **no continuation** is needed, a *report for AP35 will still be required*
- **For continuing BAGs due for renewal:** submit a (new) (continuation) proposal for AP37 (Apr-Sep-2025) in UAS
- If you wish to continue this BAG you can find the continuation link on the proposal view:

Role	Access Route	Outstanding Action(s)	
Principal Investigator	Block Allocation Group (BAG)	Submit Report »	Copy Continue in new Proposal

- Reporting: You need to complete and upload the **Final (18 month) report** in UAS – this will cover the **full extent of the BAG** until this point (i.e., on used time in 3 APs' worth of research activity at Diamond)

Proposal view top right:

Proposal State: **OPEN**
Risk Rating: Low
Grant Funded: No
Access Route: Block Allocation Group (BAG)
Submission(s): 1st Closed; 2nd Closed; 3rd Closed; 4th Open

If the report for the 4th is due

Proposal State: **OPEN**
Risk Rating: Low
Grant Funded: No
Access Route: Block Allocation Group (BAG)
Submission(s): 1st Closed; 2nd Closed; 3rd Closed; 4th Report Pending

If a report has been submitted this may be described under the 4th submission as 'reported' – this means the proposal is still open, but the report has been added in UAS.

From the *Awards Overview* tab

Awards on this and related proposals

Proposal	Allocation Period	Total Requested Shifts	Awarded Shifts	Reviewed PDF	Decision	Experiment Report
Bl[redacted]	AP36 (Oct 2024 - Apr 2025)	216	135	Snapshot for AP36 (Oct 2024 - Apr 2025)	Accepted	
Bl[redacted]	AP35 (Apr 2024 - Oct 2024)	198	150	Snapshot for AP35 (Apr 2024 - Oct 2024)	Accepted	
Bl[redacted]	AP34 (Oct 2023 - Apr 2024)	126	117	Snapshot for AP34 (Oct 2023 - Apr 2024)	Accepted	[redacted]_experimental_report_April_2024.pdf
Bl[redacted]	AP33 (Apr 2023 - Oct 2023)	111	99	Snapshot for AP33 (Apr 2023 - Oct 2023)	Accepted	[redacted]_experimental_report_Sep_2023.pdf

Note that in this case the BAG history on the Awards Overview tab shows a report for time used in AP35 is needed and indicates that time will be given in AP36.

An experiment report will show up in the right hand column if it has been uploaded to the proposal.

If you have already submitted your next BAG for AP37, and uploaded your report for AP35, there should be nothing more to do. (Please note if you used old templates for XChem proposals you might need to review these in light of the new templates available [here](#))