

BAG/LTP progress guidance

The Peer Review application process requires a full set of proposal reports to be in place and for *the most current science case and reporting templates in UAS to be used (except for XChem as below)*.

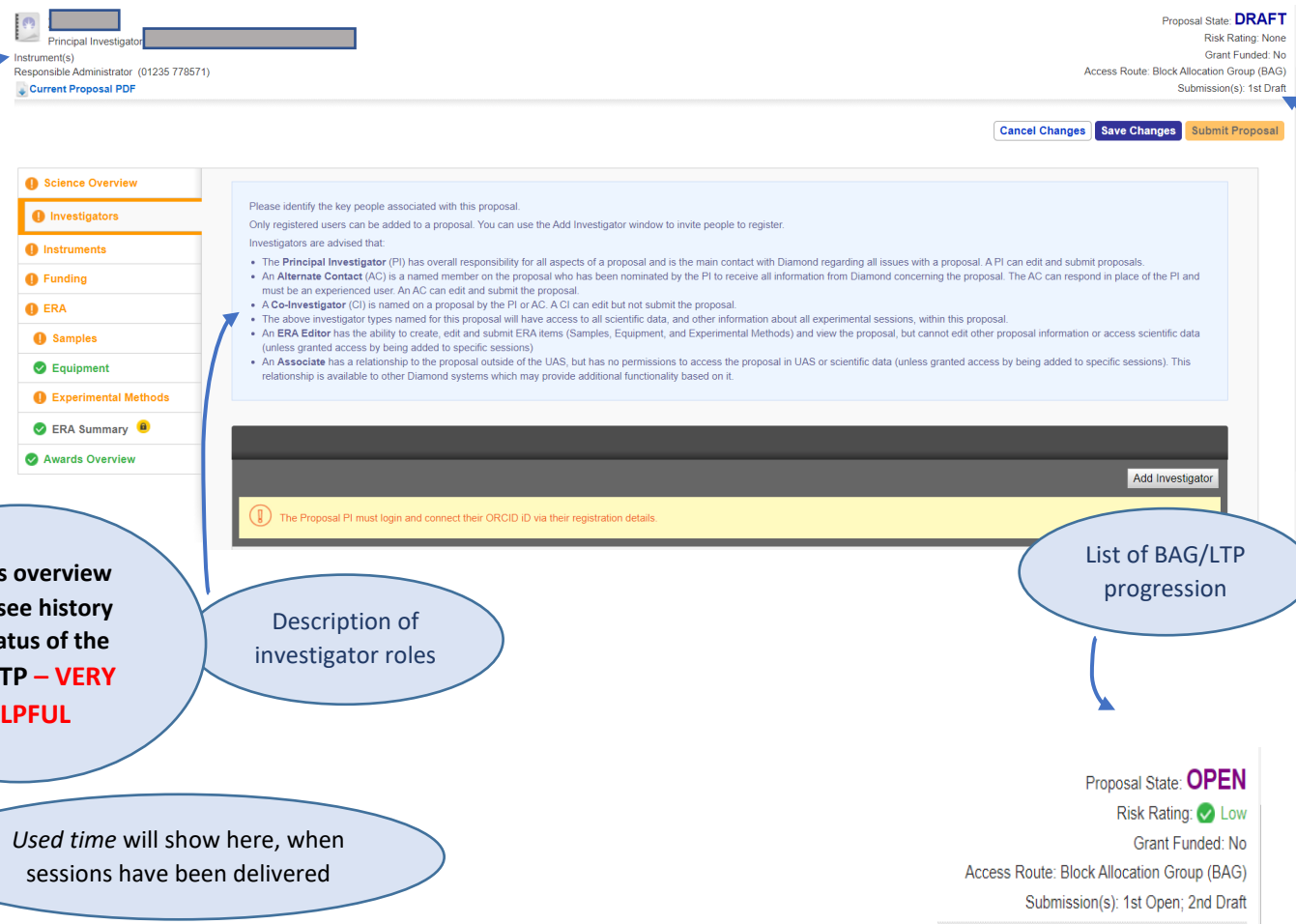
For ALL: There is important information in the accompanying power point slides, and you are strongly encouraged to read through those in parallel with this document.

General points – all PIs and ACs to note – requests from the review 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 the up-to-date and current state of your proposal.
- For BAGs/LTPs: **Please request only the amount of time needed in the *6-month allocation (1AP) period*** being submitted for.
- **Lead PIs and ACs:** please ensure the rest of the BAG Co-Is are made aware of any relevant information and progress of the BAG.
- There is no need to duplicate information between the science case and the report - Reports should state objectives as context and report observations from beamtime used.
- **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](#) – [XChem BAG science case](#); [6 month report](#); [Final review](#) – please provide an updated science case every AP

UAS overview of a BAG/LTP proposal

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



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.

Add Investigator

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

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

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

Description of investigator roles

Used time will show here, when sessions have been delivered

List of BAG/LTP progression

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

* **Decision Pending** is displayed when a submission is ready to be reviewed by the panel (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.

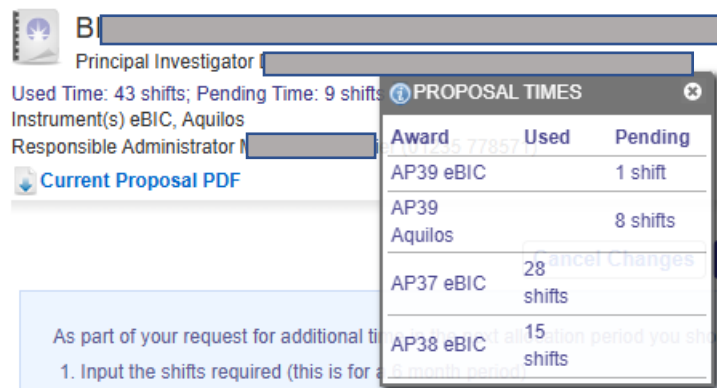
USED TIME

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



Principal Investigator [redacted]
 Used Time: 43 shifts; Pending Time: 9 shifts ⓘ
 Instrument(s) eBIC, Aquilos
 Responsible Administrator [redacted]
[Current Proposal PDF](#)

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



Award	Used	Pending
AP39 eBIC		1 shift
AP39 Aquilos	8 shifts	
AP37 eBIC	28 shifts	
AP38 eBIC	15 shifts	

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

On USED TIME REPORTING: For an accurate number of delivered shifts you need to refer to all relevant BAG proposals that had time in AP38 (Oct-25-Mar-26) 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:

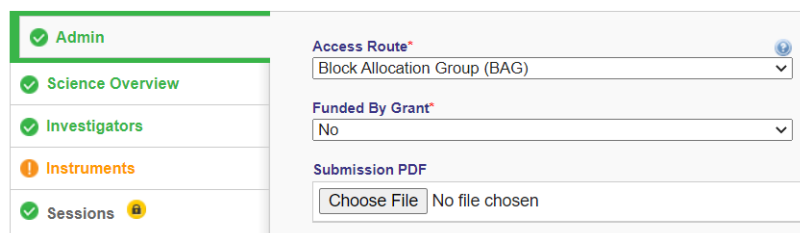
[Cancel Changes](#)
[Save Changes](#)
[Close Proposal](#)
[Cancel Proposal](#)
[Validate F](#)



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.




Admin
 Science Overview
 Investigators
 Instruments
 Sessions

Access Route*
 Block Allocation Group (BAG)

Funded By Grant*
 No

Submission PDF
 Choose File No file chosen

When submitting a report for the AP just completed (AP38, ending end of March-26) you will see further guidance:

✓ Admin	<p>EXPERIMENT REPORT FOR AP38 (SEPT 2025 - MAR 2026)</p> <p>1. Please download report template and complete offline in your own time. Download Template</p> <p>2. Please ensure your completed document is saved as a PDF file.</p> <p>3. Return to this page and upload your completed PDF document.</p> <p>You must upload an Experiment Report before submitting !</p> <p><input type="button" value="Choose File"/> No file chosen</p>
✓ Science Overview	
✓ Investigators	
! Instruments	
✓ Sessions 	
✓ Funding	
✓ Experimental Risk Assessment (ERA)	
✓ Samples	
✓ Equipment	
✓ Experimental Methods	
✓ ERA Summary	
! Experiment Report	
-	

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

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 for one or more allocation periods if needed and then submit at a later date.



1. In the case of a BAG/LTP with its 1st AP open in AP39

- Submit a request for time on the BAG/LTP in AP40 (October-26 - March 2027) in UAS Reporting: **No report** is required - These BAGs/LTPs will not have had any time yet in AP39 (as that starts in April-26).

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

Proposal	Allocation Period	Total Requested Shifts	Awarded Shifts	Reviewed PDF	Decision	Experiment Report
LE 	AP39 (Mar 2026 - Sept 2026)	3	5	 Snapshot for AP39 (Mar 2026 - Sept 2026)	Accepted	

2. In the case of a BAG/LTP with its 2nd AP open in AP39



- Submit a request for time on the BAG/LTP in AP40 (October-26 - March 2027) in UAS
- Reporting: Upload the **6 monthly report** in UAS – this will cover time used in AP38 (i.e., October-25 – March-26)

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 AP38 is needed.


Proposal	Allocation Period	Total Requested Shifts	Awarded Shifts	Reviewed PDF	Decision	Experiment Report
B	AP39 (Mar 2026 - Sept 2026)	24	12	 Snapshot for AP39 (Mar 2026 - Sept 2026)	Accepted	
B	AP38 (Sept 2025 - Mar 2026)	24	12	 Snapshot for AP38 (Sept 2025 - Mar 2026)	Accepted	

Report will show here once submitted

3. In the case of a BAG/LTP with its 3rd AP open in AP39

- Submit a request for time on the BAG/LTP in AP40 (October-26 - March 2027) in UAS
- Reporting: Upload the **6 monthly report** in UAS – this will cover time used in AP38 (i.e., October-25 – March-26)

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 AP38 is needed.

Awards on this and related proposals

Proposal	Allocation Period	Total Requested Shifts	Awarded Shifts	Reviewed PDF	Decision	Experiment Report
CY	AP39 (Mar 2026 - Sept 2026)	9	9	Snapshot for AP39 (Mar 2026 - Sept 2026)	Accepted	
CY	AP38 (Sept 2025 - Mar 2026)	9	9	Snapshot for AP38 (Sept 2025 - Mar 2026)	Accepted	
CY	AP37 (Apr 2025 - Sept 2025)	9	9	Snapshot for AP37 (Apr 2025 - Sept 2025)	Accepted	CY40138_XPDF_BAG_report_Oct2025_fv.pdf

Report will show here once submitted

4. In the case of a BAG/LTP with its 4th AP open in AP38 or AP39

- If the BAG/LTP is in the 4th AP in AP38 and **no continuation** is needed, *a report for AP38 will still be required*


BAGs - continuations

- **For continuing BAGs due for renewal:** submit a (new) (continuation) proposal for AP40 (October-26 - March 2027) in UAS
- If you wish to continue this BAG you can find the continuation link in the proposal view:


Role	Access Route	Outstanding Action(s)	
Principal Investigator	Block Allocation Group (BAG)	Submit Report »	<input type="button" value="Copy"/> <input type="button" value="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 AP 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


And the experiment report tab will be amber

✓ Admin
✓ Science Overview
✓ Investigators
✓ Instruments
✓ Sessions 
✓ Funding
✓ Experimental Risk Assessment (ERA)
✓ Samples
✓ Equipment
✓ Experimental Methods
✓ ERA Summary
 Experiment Report
✓ Awards Overview

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. The tab will turn green.

From the *Awards Overview* tab

Awards on this and related proposals

Proposal	Allocation Period	Total Requested Shifts	Awarded Shifts	Reviewed PDF	Decision	Experiment Report
MX	AP39 (Mar 2026 - Sept 2026)	17	21	Snapshot for AP39 (Mar 2026 - Sept 2026)	Accepted	
MX	AP38 (Sept 2025 - Mar 2026)	13	18	Snapshot for AP38 (Sept 2025 - Mar 2026)	Accepted	 Report will show here once submitted
MX	AP37 (Apr 2025 - Sept 2025)	13	13	Snapshot for AP37 (Apr 2025 - Sept 2025)	Accepted	SCI-USO-DOC-0043 BAG 6 Mthly Report 0925.pdf
MX	AP36 (Oct 2024 - Apr 2025)	13	17	Snapshot for AP36 (Oct 2024 - Apr 2025)	Accepted	SCI-USO-DOC-0043 BAG 6 Mthly Report 0325.pdf

Note that in this case the BAG history on the **Awards Overview** tab shows a report for time used in AP38 is needed and indicates that time will have been or will be given in AP38.

A useful, clear way of naming the reports would be include the proposal number or the name of the BAG in the file name.

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

If you have already submitted your next BAG for AP40, and uploaded your report for AP38, 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](#))