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.*
- 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.

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

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

Callout: *Awards overview tab to see history of the BAG/LTP*

Callout: *Description of investigator roles*

Callout: *Used time will show here, when sessions have been delivered*

Callout: *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

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

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

Award	Used	Pending
AP34 B21		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	

Note that Diamond mainly uses the 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 |

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 (AP34) you will also see further guidance:

EXPERIMENT REPORT FOR AP34 (OCT 2023 - APR 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

Progressing the BAG/LTP for peer review

1. In the case of a BAG/LTP with its 1st AP open in AP35

- Submit a request for time on the BAG/LTP in AP36 (Oct-24-Mar-25) in UAS
  Reporting: **No report** is required - These BAGs/LTPs will not have had any time yet in AP35 (as that starts in April-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
LB	AP35 (Apr 2024 - Oct 2024)	9	11	Snapshot for AP35 (Apr 2024 - Oct 2024)	Accepted	

2. In the case of a BAG/LTP with its 2nd AP open in AP35

- Submit a request for time on the BAG/LTP in AP36 (Oct-24-Mar-25) in UAS
- Reporting: Upload the **6 monthly report** in UAS – this will cover time used in AP34 (i.e., Oct-23-Mar-24)

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 AP33 is needed.

Proposal	Allocation Period	Total Requested Shifts	Awarded Shifts	Reviewed PDF	Decision	Experiment Report
	Awards on this and related proposals					
MX	AP35 (Apr 2024 - Oct 2024)	7	9	Snapshot for AP35 (Apr 2024 - Oct 2024)	Accepted	
MX	AP34 (Oct 2023 - Apr 2024)	11	11	Snapshot for AP34 (Oct 2023 - Apr 2024)	Accepted	

3. In the case of a BAG/LTP with its 3rd AP open in AP35

- Submit a request for time on the BAG/LTP in AP36 (Oct-24-Mar-25) in UAS
- Reporting: Upload the **6 monthly report** in UAS – this will cover time used in AP34 (i.e., Oct-23-Mar-24)

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

Or

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

Both these scenarios show a report is due for AP34

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.

Proposal	Allocation Period	Total Requested Shifts	Awarded Shifts	Reviewed PDF	Decision	Experiment Report
Awards on this and related proposals						
BI	AP35 (Apr 2024 - Oct 2024)	60	54	Snapshot for AP35 (Apr 2024 - Oct 2024)	Accepted	
BI	AP34 (Oct 2023 - Apr 2024)	54	54	Snapshot for AP34 (Oct 2023 - Apr 2024)	Accepted	
BI	AP33 (Apr 2023 - Oct 2023)	60	54	Snapshot for AP33 (Apr 2023 - Oct 2023)	Accepted	SCI-USO-DOC-0043 BAG 6 Mthly Report ICL.pdf

4. In the case of a BAG/LTP with its 4th AP open in AP35

- If the BAG/LTP is in the 4th AP and **no continuation** is needed, a *report for AP34 will still be required*
- **For continuing BAGs due for renewal:** submit a (new) (continuation) proposal for AP36 (Oct-24-Mar-25) 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 AP's 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

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.

From the *Awards Overview* tab

Awards on this and related proposals

Proposal	Allocation Period	Total Requested Shifts	Awarded Shifts	Reviewed PDF	Decision	Experiment Report
LB	AP35 (Apr 2024 - Oct 2024)	8	6	Snapshot for AP35 (Apr 2024 - Oct 2024)	Accepted	
LB	AP34 (Oct 2023 - Apr 2024)	9	7	Snapshot for AP34 (Oct 2023 - Apr 2024)	Accepted	
LB	AP33 (Apr 2023 - Oct 2023)	9	9	Snapshot for AP33 (Apr 2023 - Oct 2023)	Accepted	XChem BAG 6 month Report Form AP33 Final.pdf
LB	AP32 (Sept 2022 - Apr 2023)	10	11	Snapshot for AP32 (Sep 2022 - Apr 2023)	Accepted	Experimental Report XCHEM-BAG

Note that in this case the BAG history on the Awards Overview tab shows a report for time used in AP34 is needed and indicates that time will be given in AP35 for which a report will also be needed for the following Call.

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 AP36, and uploaded your report for AP34, 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)