User Office Software Collaboration

April 2024

Dynamic

Virtually nothing is hard coded. Templating tools are simple to use by non-software developers giving flexibility to changes.

User Focused

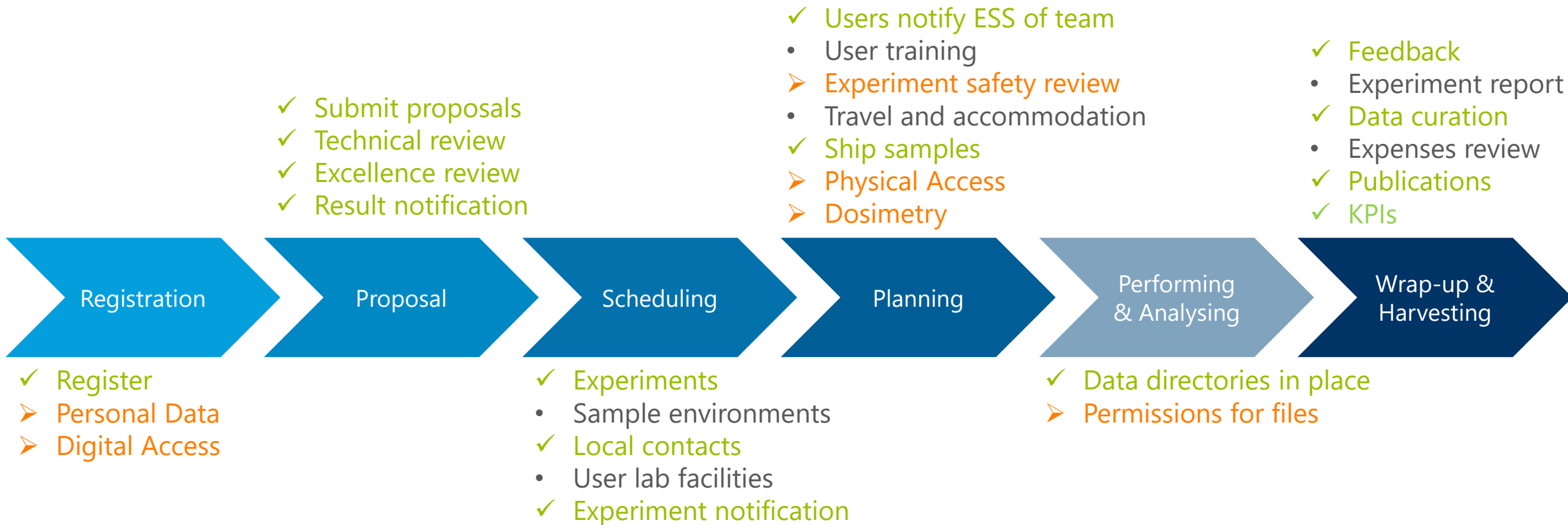Providing a clean, simple to navigate and use system for participants in user access.

Integrated

Providing an access point to all elements of the user journey from registration to data curation.

The User Journey

✓ Users notify ESS of team
• User training
➤ Experiment safety review
• Travel and accommodation
✓ Ship samples
➤ Physical Access
➤ Dosimetry

✓ Feedback
• Experiment report
✓ Data curation
• Expenses review
✓ Publications
✓ KPIs

✓ Submit proposals
✓ Technical review
✓ Excellence review
✓ Result notification

Registration	Proposal	Scheduling	Planning	Performing & Analysing	Wrap-up & Harvesting

✓ Register
➤ Personal Data
➤ Digital Access

✓ Experiments
• Sample environments
✓ Local contacts
• User lab facilities
✓ Experiment notification

✓ Data directories in place
➤ Permissions for files

Encoded Flexibility

Software designed to allow for changing situations

Templates:

Form building tools enabling any combination of input types – text, rich text, boolean, drop down (& multi-select), images, uploads, api data

No **need** for software developer time to create and amend templates

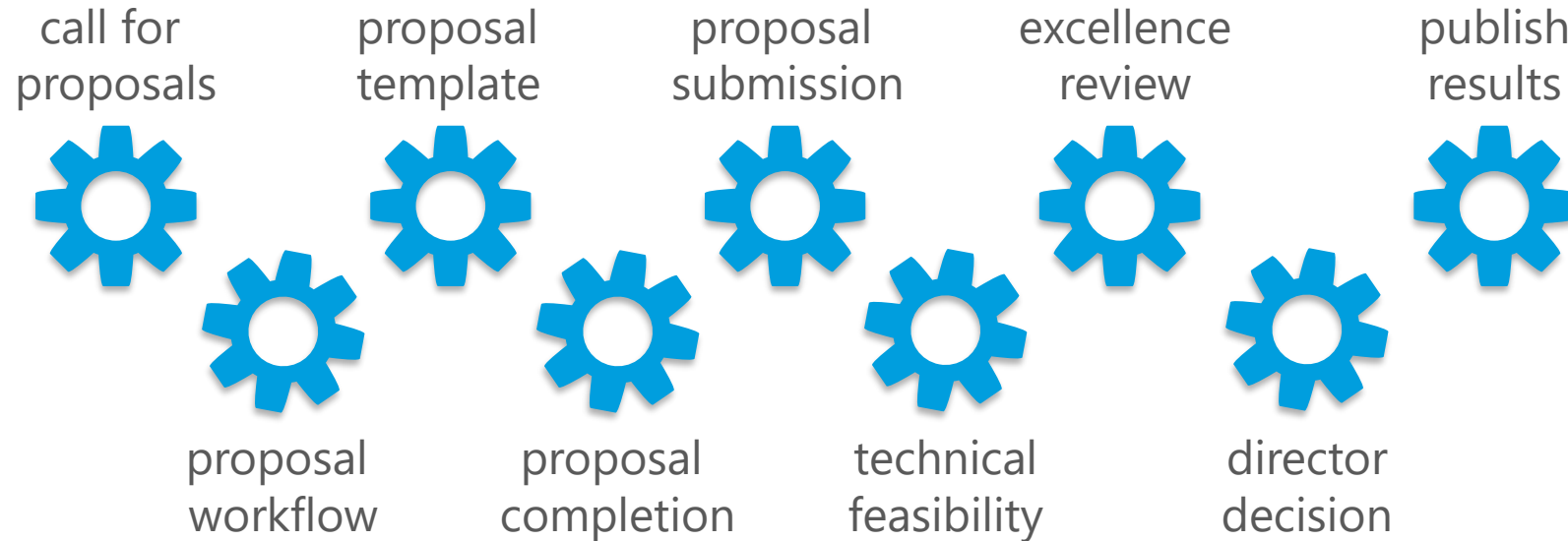Formatting templates to determine how input information is collated in to pdf documents and bundles

Workflows:

A series of steps the proposal works through, jointly defined by the call information and the templates

Simplest state: call opens, proposal template becomes available for user completion, call closes, proposals become fixed for the review process

Science Reviewers
If the proposal will be reviewed by a panel of external experts, this panel needs to be defined and attached to the call

Title
Clear, unique name for the call to identify it both internally and to the user community

Instruments
After a call is defined, the instruments available in that call are added to the call

Dates
Start and end dates for:
- Proposal submission
- Technical review
- Science review
- Notification period
- Machine cycle

Workflow
- This defines which steps occur in proposal submission and review
- Outline the criteria for a proposal to proceed to the next step

Templates
Templates are needed for:
- Core proposal questions
- Experiment safety input questions
- PDF formatting of final proposal

Call for Proposals

6
1
5
2
4
3

ess

Proposal Submission and Review

call for proposals

proposal template

proposal submission

excellence review

publish results

proposal workflow

proposal completion

technical feasibility

director decision

2 x DEMAX call for proposals -> nearly 40 submitted proposals
1 x DEMAX call for proposals -> nearly 20 proposals reviewed in UOS with external review tools
DEMAX rolling call for proposals -> 4 proposals submitted proposals
ISIS and CLF proposals via STFC collaboration -> over 1000 submitted proposals

Scheduling

The data policy states that:

Basic proposal information (proposal title, abstract and sample composition) will become publically accessible once the experiment is scheduled.

Instruments

Sample Environments

Local Contacts

Other Resources

SWAP and SCUO team testing
Instrument Scientists demo
Development on-going

Experiment Planning

User Logistics

Experiment Safety Review

User Training

Shipping Samples

Sample Tracking

Wrap up and Data Harvesting

Alignment or branching software?

Examples of branching software:

- ESS don't encode information in the proposal number
- STFC encode call and other information in proposal number
- When an ESS proposal is submitted it is immutable unless the user office return it to draft state
- When an STFC proposal is submitted it can still be edited until a given date
- Requirements for multiple facilities and downstream processes
- Requirements for multi-instrument proposals and downstream processes

While the branching approach is possible and will be necessary to solve some differences in practise, we should align our practises to avoid over-complicating the software

Why Collaborate?

You can use the software without collaborating:
- The User Office Software is open source in GitHub
- Between now and year end both ESS and STFC have resources allocated to provide comprehensive documentation

But
- Collaboration encourages discussion of best practise and promotes aligned working practises
- Collaborating, rather than taking the code and working alone, enables simple routine software maintenance and modernisation
- Collaboration increases the number of people familiar with UOS and reduces single points of failure

Aligning Facility Requirements

- Effective progress will come by the user offices determining best practise

- The software can be developed with the flexibility to accommodate best practise

- How should we come to understand the needs we each have and present that to the software developers?

- How should we review the software regularly to ensure it is meeting our needs and feecback our opinions?

Finish presentation