The PSI Digital User Office DUO:

In vivo example for a single entry point

Workshop:
User single entry point
to ESRF and ILL

May 29, 2008

Stefan Janssen
Paul Scherrer Institute - User Office
Outline

1. Motivation and History: PSI User Labs
2. The PSI User Office
3. The PSI Digital User Office
4. DUO clones elsewhere
5. Questions and discussion
Outline

1. Motivation and History: PSI User Labs
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Uniqueness: three probes on one campus

Ideally suited for: solid state physics, soft condensed matter, chemistry, biology, materials science...

**SLS:** synchrotron X-rays
- 3rd generation synchrotron
- electron energy: 2.4 GeV
- operational: since 2001
- beamlines: 13 (end of 2007)
- under design/construction: 5

**SINQ:** cold and thermal neutrons
- spallation neutron source
- Thermal flux $1.1 \cdot 10^{14} n/cm^2/s$
- instruments: 17
- under design/construction: 1

**SμS:** μ-SR facilities
- world’s most intense continuous muon source
- operational: since 1974/1989
- instruments: 6
- under design/construction: 1
# PSI User Operation: numbers and orders of magnitude

## Key Numbers 2007

<table>
<thead>
<tr>
<th></th>
<th>SLS</th>
<th>SINQ</th>
<th>SµS</th>
<th>LTP</th>
<th>PSI Total</th>
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<td>122</td>
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</table>
Numbers of submitted proposals

**submission of new proposals SLS**

- 2002: 159
- 2003: 249
- 2004: 345
- 2005: 429
- 2006: 531
- 2007: 679

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**submission of new proposals SμS**

- 2002: 167
- 2003: 161
- 2004: 213
- 2005*: 87
- 2006: 347
- 2007*: 156

(*) only one proposal deadline in 2005 and 2007

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(*) before 2006 approximately 60 running longterm proposals have to be added (included in the statistics since 2006)
The message is:

we need a slim but efficient organization and effective tools!
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5. Questions and discussion
The situation before 2004:

**Individual and different organisation at each facility:**

- No common database
- Different software, Oracle (SLS), Filemaker (SINQ), Excel (SmS)
- Statistical data were taken with different methods, PSI wide statistics difficult
- No common look and feel, no corporate identity

**But:**

- Many processes and workflows are identical
- PSI is an ideal candidate for a single entry solution
- Synergy effects should be created!!
Since July 2004: the PSI User Office

PSI directorate
- Annual reports
- Keynumbers
- Statistical infos
- ...

PSI Human resources
- Migration formalities
- Online procedures

Facility managers
- Annual reports
- Keynumbers
- Statistical infos
- SAC, PRC mtgs
- Publication lists

Central contact
- Proposals
- Publications
- Experimental reports
- EU travel costs
- Renting bicycles
- ...

Users of SLS, SINQ, SμS

And many more:
- PSI safety officers,
- Conference Organisation, ...

EU access coordinators
- Annual reports
- Access databases
- ...

User Office
The PSI User Office team: 3 positions (1 + 1 + 2*0.5)

Main tasks:
• Calls for proposals, distribution of news, mailing lists, ...
• Handling of proposals, experimental reports
• Badge requests
• Organisation of workshops, user meetings, selection panel meetings, SAC’s, ...
• Publication database
• EU access programmes: payments of T&S, reports, databases
• Statistics of PSI user operation, statistical reports to PSI board, indicators
• Webpages (mainly SInQ)
• DUO (PSI Digital User Office)
Synergies: first results

- One common „look and feel“ for users of all facilities
- Workflow for users becomes more and more identical
- Uniform and standardized basis for PSI statistical data
- Joint X+n powder diffraction proposals
- PSI user meeting 2009
Outline

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The DUO „Godfathers“

Developed for SLS, based on a tool that Alain created for ELETTRA before!
Some DUO keydata

- 10,200 registered users
- 2,700 registered addresses of institutes/companies
- 4,764 proposals (editing included)
- 1,554 publications (since 2006 fully operational)
- 1,300-1,800 user clicks per day
- 26 conferences processed

One single entry portal for all PSI users
## DUO role concept

### Function selection

<table>
<thead>
<tr>
<th>Function</th>
<th>Description</th>
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</thead>
<tbody>
<tr>
<td><strong>User Office</strong></td>
<td>User Office functions.</td>
</tr>
<tr>
<td><strong>Review Committee</strong></td>
<td>Review committee members and chairperson functions: review proposals; assign proposals to committee members.</td>
</tr>
<tr>
<td><strong>Publication controlling</strong></td>
<td>Observe and maintain registered Publications</td>
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<tr>
<td><strong>Normal User</strong></td>
<td>Basic submit</td>
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<tr>
<td><strong>Beam</strong></td>
<td>Beam propo</td>
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<td><strong>DUO</strong></td>
<td>View /</td>
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<tr>
<td><strong>Distribution</strong></td>
<td>Maintain a list of contacts and send emails to a list of recipients.</td>
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<tr>
<td><strong>Facility Manager</strong></td>
<td>Management functions</td>
</tr>
<tr>
<td><strong>Work in Progress</strong></td>
<td>Work in progress (alpha or beta phase). Please do not use those tools!</td>
</tr>
<tr>
<td><strong>Immigration office</strong></td>
<td>Forward temporary working permits to users</td>
</tr>
<tr>
<td><strong>Proprietary manager</strong></td>
<td>Assign proprietary shifts</td>
</tr>
<tr>
<td><strong>Database browser</strong></td>
<td>Browse user DUO table</td>
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<tr>
<td><strong>Machine Manager</strong></td>
<td>Machine manager functions: define the machine calendar and change the machine status on the information screen.</td>
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<tr>
<td><strong>MPG Coordinator</strong></td>
<td>MPG Coordinator for PXII proposals</td>
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<td><strong>Dosimeter Manager</strong></td>
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<tr>
<td><strong>Normal User</strong></td>
<td>Basic functions like submitting a proposal, edit own personal information, submit a publication, etc...</td>
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<tr>
<td><strong>Host files manager</strong></td>
<td>Add/modify hosts</td>
</tr>
<tr>
<td><strong>City (Control tools)</strong></td>
<td>Home of the GFA control tools.</td>
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<tr>
<td><strong>SINQ sample environment</strong></td>
<td>Maintain the SINQ sample environment list</td>
</tr>
<tr>
<td><strong>Conference Organisation</strong></td>
<td>Basic conference organisation function for non user office accounts.</td>
</tr>
</tbody>
</table>

### Personal Management

- **Logbook**
  - Work with your personal or group logbook.

- **Change personal information**
  - Click here for changing your personal information like institute, phone number, email address.

- **Change password**
  - Click here to change your password. You will be asked for the current one for confirmation.

- **Logout**
  - Click here to logout from the DUO system.
**Normal User** role

### Proposals
- **Submit a new proposal**
  - Click here to order to create a new proposal. At any time, you can save your proposal and leave the DUC. The proposal then is in the state of being partially complete.
- **Edit/Delete an partially complete proposal**
  - Click here if you want to edit or delete a partially completed proposal. A proposal is partially complete until it is submitted (in a button). From then on, the proposal is considered complete and all for any modification will need to be processed at the user office.
- **Resubmit a proposal**
  - Click here if you want to edit and resubmit an old proposal. The old proposal must be already in our database.
- **View all proposals**
  - Click here to see (PDF format) your (as proposer or co-proposer) proposals stored within the DUC.
- **Submit end of run report**
  - Enter here to submit an end of run report to help us improve the user SUL.
- **Submit/Rob an experimental report**
  - Enter here to submit or edit an experimental report on a past proposal. This proposal is used for evaluating future proposals.
- **Register a publication**
  - Enter here to register a publication or report where part of the work has been performed at the SLS. This information will be important for evaluating future proposals.

### Proprietary Research
- **Request proprietary research shifts**
  - Click here to request shifts to be used for proprietary research.
- **Proprietary research cookbook**
  - Click here to get a PDF manual for proprietary research scheduling.
- **Schedule proprietary shifts**
  - Click here to request shifts to be used for proprietary research.

### Experiment Management
- **Apply for a group account (Kostenräger)**
  - Click here to apply for a group account which will allow you to buy items from the PSI central stock room.
- **Change E-Account password**
  - Click here to change your e-account password (SLO/Linux & SLO/Windows passwords).
- **Apply for badge and dosimeter**
  - Click here to apply for badge and dosimeter before coming to the PSI.
- **Guest house and hotels**
  - Click here for guest house and hotel accommodation.

### Personal Management
- **Logbook**
  - Work with your personal or group logbook.
- **Change personal information**
  - Click here for changing your personal information like institute, phone number, email address.
- **User profile / mailing lists**
  - Click here for changing your personal profile and choose to receive mails about specified subjects.
- **Change password**
  - Click here to change your password. You will be asked for the current one for confirmation.
- **Logout**
  - Click here to logout from the DUC system.
Your proposal 20080155 has been successfully submitted.

Proposal Title: High resolution x-ray structures of something like test samples.
Proposal Type: Normal
Requested beamline: PX
Total requested shifts: 6

You will be contacted by the user office as soon as the evaluation process is done.

-- The DUO system: https://duo.psi.ch/ --
Badge request

Badge and dosimeter application SINQ

This form will send a pre-filed request to our security staff, in order to get badge and dosimeter. Once you are here, please go to the PSI WEST RECEPTION and sign the request, and get your badge and dosimeter.

**Note on health insurance:**
In principle, you must take out your own illness and accident insurance (e.g. through travel insurance if not insured through your home institute or employer). You are not entitled to insurance or social security benefits from PSI.

**Please note:**
A new PSI regulation concerning the usage of IT resources has been released. Click here to download the regulation AW-95-06-01 as PDF.

☐ I confirm notice of the PSI regulation "Usage and Monitoring of IT Resources at PSI" (*)

### Additional information

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<td>Instrument to access (*)</td>
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(*) these fields are mandatory.
DUO role concept

Function selection

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<th>Full name</th>
<th>Dr. Stefan Jansen</th>
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<td>Username</td>
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Available functions

- **User Office**
  - User Office functions.

- **Review Committee**
  - Review committee members and chairperson functions: review proposals; assign proposals to committee members.

- **Publication controlling**
  - Observe and maintain registered Publications

- **NC BA**

- **B4 Bk**

- **DL Vl**

- **Dr**

- **Facility Manager**
  - Management functions

- **Work In Progress**
  - Work in progress (alpha or beta phase). Please do not use these tools!

- **Immigration Office**
  - Forward temporary working permits to users

- **Proprietary Manager**
  - Assign proprietary shifts

- **Database browser**
  - Browse user DUO table

- **Machine Manager**
  - Machine manager functions: define the machine calendar and change the machine status on the information screen.

- **MPG Coordinator**
  - MPG Coordinator for PXII proposals

- **Beamline Manager**
  - Beamline manager functions: review the feasibility of a proposal; schedule a proposal on the beamline calendar.

- **Project Manager**
  - Add/modify hosts

- **City (Control tools)**
  - Home of the GFA control tools.

- **SINQ sample environment**
  - Maintain the SINQ sample environment list

- **Conference Organisation**
  - Basic conference organisation function for non user office accounts.

Personal Management

- **Logbook**
  - Work with your personal or group logbook.

- **Change personal information**
  - Click here for changing your personal information like institute, phone number, email address.

- **Change password**
  - Click here to change your password. You will be asked for the current one for confirmation.

- **Logout**
  - Click here to logout from the DUO system.
### Proposals MARS

#### Status: Accepted, Finished, Review, Submitted

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<th>Proposal Title</th>
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</table>

#### Requests for Additional Instruments

- 20070573 DMC 5: Other Instrument: DMC 5
- 20070637 DMC 5: Other Instrument: DMC 5
- 20070651 DMC 5: Other Instrument: DMC 5

### Additional Information

- **Beamline manager** role
- **User Office**

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**Notes:**
- **Requests on additional Instruments**
- **Other Instrument:** DMC 5
- **Other Instrument:** DMC 5
- **Other Instrument:** DMC 5

---

**References:**
- [View] 20070636 High resolution Inelastic Neutron Scattering of the heterooctanuclear Cr7Cd molecular "wheel".
- [View] 20070631 Inelastic neutron scattering study of a structural model for manganese containing catalysts.
- [View] 20070620 High-Resolution Inelastic Neutron Scattering Study of the Vanadium(III)-trisoxalate complex as a precursor of extended network structures.
- [View] 20070606 Ammonia dynamics in metal ammimes for energy storage.
- [View] 20070581 Neutron Scattering on Polysaccharides HYDROGELS.
- [View] 20070549 Data Reduction on Back-scattering spectrometers. Test of different reduction methods by analysis of the inelastic neutron spectrum of the single molecule magnet Mn12.
## SLS Calendar function

### SLS Calendar of 2005 from January to June

Move mouse over the cells to see the detail.

<table>
<thead>
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<th>W</th>
<th>January</th>
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### Scheduled Shifts
- **Red**: Shutdown
- **Blue**: Machine development
- **Green**: User Operation (shift available)
- **Yellow**: Maintenance
- **Orange**: Beamline devel. / optional Machine devel.
- **Light Green**: Machine devel. / optional Beamline devel.
- **Gray**: Scheduled
- **Brown**: Commissioning
DUO role concept

Function selection

<table>
<thead>
<tr>
<th>Full name</th>
<th>Dr. Stefan Janssen</th>
</tr>
</thead>
<tbody>
<tr>
<td>Username</td>
<td>janssen</td>
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Available functions

- **User Office**
  - User Office functions.

- **Review Committee**
  - Review committee members and chairperson functions: review proposals; assign proposals to committee members.

- **Publication controlling**
  - Observe and maintain registered Publications

- **Norr**
  - Basic submission

- **Bean**
  - Bean proposal

- **DUO**
  - View

- **Distr**
  - Maintain a list of contacts and send emails to a list of recipients

- **Facility Manager**
  - Management functions

- **Work in Progress**
  - Work in progress (alpha or beta phase). Please do not use those tools!

- **Immigration Office**
  - Forward temporary working permits to users

- **Proprietary Manager**
  - Assign proprietary shifts

- **Database browser**
  - Browse user DUO table

- **Machine Manager**
  - Machine manager functions: define the machine calendar and change the machine status on the information screen.

- **MPG Coordinator**
  - MPG Coordinator for PXII proposals

- **Logbook**
  - Work with your personal or group logbook.

- **Change personal information**
  - Click here for changing your personal information like institute, phone number, email address.

- **Change password**
  - Click here to change your password. You will be asked for the current one for confirmation.

- **Logout**
  - Click here to logout from the DUO system.
Review member role

Proposal 20080176

Test title

Some useful comment

Please fill out the referee form:

Comment (*)
Good proposal. Interesting application using neutron and x-ray complementarities.

Score (*)

Reasonable number of Days
2 (Info)

Competence factor
1.0 (Info)

(*) mandatory fields.

[Cancel] [Save]
Dear Dr. Mustermann

Thank you for your proposal to perform an experiment at SINQ. We are pleased to inform you that your proposal was accepted.

Below please find the details of beam time allocation:

<table>
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<th>ID</th>
<th>200800097</th>
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<tr>
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<tr>
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<td>Swiss Cheese for breakfast??</td>
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<td>Days allocated</td>
<td>7</td>
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<td>Status</td>
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Comment of the proposal review committee: None

You will be contacted soon by the instrument responsible(s) to arrange the allocation of beam time.

Sincerely yours

PSI User Office

e-mail: sinq@psi.ch
phone: +41 56 310 4666
**DUO role concept**

**Function selection**

<table>
<thead>
<tr>
<th>Function</th>
<th>User Office functions.</th>
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<td><strong>User Office</strong></td>
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<tr>
<td></td>
<td>User Office functions.</td>
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</tr>
<tr>
<td><strong>Review Committee</strong></td>
<td>Review committee members and chairperson functions: review proposals; assign proposals to committee members.</td>
</tr>
<tr>
<td><strong>Publication controlling</strong></td>
<td>Observe and maintain registered Publications</td>
</tr>
<tr>
<td><strong>Normal User</strong></td>
<td>Basic functions like submitting a proposal, add own personal information.</td>
</tr>
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</table>

**Available functions**

- Database browser
  - Browse user DUO table
- Machine Manager
  - Machine manager functions: define the machine calendar and change the machine status on the information screen.
- MPG Coordinator
  - MPG Coordinator for PXII proposals
- Dosimeter Manager
  - Function for dosimeter manager

**User Office**

**User Office functions.**

- Distribution Lists
  - Maintain a list of contacts and send emails to a list of recipients.
- Facility Manager
  - Management functions
- Work In Progress
  - Work in progress (alpha or beta phase). Please do not use these tools!
- Immigration office
  - Forward temporary working permits to users
- Proprietary manager
  - Assign proprietary shifts

- Control group tools, like testplans, CVS reports, Hosts management
- Host file manager
  - Add/modify hosts
- City (Control tools)
  - Home of the GFA control tools.
- SINQ sample environment
  - Maintain the SINQ sample environment list
- Conference Organisation
  - Basic conference organisation function for non user office accounts.

**Personal Management**

- Logbook
  - Work with your personal or group logbook.
- Change personal information
  - Click here for changing your personal information like institute, phone number, email address.
- Change password
  - Click here to change your password. You will be asked for the current one for confirmation.
- Logout
  - Click here to logout from the DUO system.
# User office role

## EU funding

- **Proposals**
  - View all Proposals, edit "funded" flag.
- **XLS of scheduled shifts**
  - Excel export of scheduled shifts
- **XLS of Proposals**
  - Excel report of Proposals
- **Count number of experiments 2007**
  - Excel report to help count the number of experiments

## Messages

- **News**
  - Edit message for the DUO Message bar. The 3 most recent messages of this list are shown on the users startup page.
- **Events**
  - Edit events list. Events are displayed in the web pages and on the information monitors.
- **DUO Welcome Message**
  - Define the welcome message on the DUO startup page.

## Exports / Reports

- **PDF Users list**
  - Generate a pdf of the user database.
- **DUO Statistics**
  - Bar graphs of the DUO statistics. Can be browsed by year or month.
- **NB Prop by beamline**
  - Generate an XLS (excel 2.1 file format) containing the number of proposals by beamline. (SLS/PSI/ETH/CH/EU/TOT)
- **NB Shifts requested by beamline**
  - Generate an XLS (excel 2.1 file format) containing the number of requested shifts by beamline. (SLS/PSI/ETH/CH/EU/TOT)
- **NB Shifts requested by beamsline (weighted)**
  - Excel Report of requested shifts by beamline. The shifts are distributed among SLS/PSI/ETH/CH/EU weighted by the number of proposer and co-heroes.
- **NB Shifts assigned by beamline**
  - Generate an XLS (excel 2.1 file format) containing the number of assigned shifts by beamline. (SLS/PSI/ETH/CH/EU/TOT)
- **NB Shifts scheduled by beamline**
  - Generate an XLS (excel 2.1 file format) containing the number of scheduled shifts by beamline. (SLS/PSI/ETH/CH/EU/TOT)
- **NB Shifts scheduled by beamline (weighted)**
  - Excel Report of scheduled shifts by beamline. The beamtime is distributed among SLS/PSI/ETH/CH/EU weighted by proposer and co-heroes.
- **Distribution Lists**
- **Proposals overview**
- **Missing experimental reports**
  - List of proposals in status "finished" or "accepted with more than 50% of beamtime used.
- **XLS Users list**
  - Generate an XLS (excel 2.1 file format) containing the users database.
- **XLS PSI Users list**
  - Generate an XLS (excel 2.1 file format) containing the users database from PSI.
- **XLS PSI (not SLS) writers**
  - Generate an XLS (excel 2.1 file format) containing proposer and co-proposers which work at PSI but NOT at SLS.
- **XLS NOT PSI writers**
  - Generate an XLS (excel 2.1 file format) containing proposer and co-proposers which doesn't work at PSI (neither at SLS).
- **XLS Institutes export**
  - Generate an XLS (excel 2.1 file format) containing the institute database.
- **XLS Proposals list from EU countries**
  - Generate an XLS (excel 2.1 file format) containing the list of proposals.
- **XLS Proposer list**
  - Generate an XLS (excel 2.1 file format) containing all proposers.
- **XLS Feedbacks statistics**
  - Generate an XLS (excel 2.1 file format) containing the feedback statistics.
- **XLS Calendar shifts types**
  - Generate an XLS (excel 2.1 file format) containing the feedback statistics.
- **DUO profiler**
  - Display how much time each DUO page take in order to be executed.
- **SLS Overbooking**
  - Calculate overbooking.
- **Active Proposals**
  - XLS Export. Overview of all active proposals
### User office role: 2 examples

**Visitor list**

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**Statistical data, number of users, visits**
e.g. per year, facility, per beamline, per institute, per country ...
User office role: 2 examples

More

Mailing

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<th>List</th>
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Mail

| Sender | stefan.janssen@psi.ch |
| Subject of the mail |

Special tags

The followings tags are replaced inside the mail:

Warning: the system is case sensitive!

- @FULLNAME@
  Replaced with the full name of the contact (eg Mr. John Smith)
- @USERNAME@
  Replaced with the user name the contact should use to connect to the duo (eg john_smith)
- @PASSWORD@
  Replaced with the password the contact should provide to connect to the duo (eg smith123)
Problem: no PSI wide publication database

Idea: users might be interested to include their publication records in their new proposals

Solution: DUO can be used by external users and by PSI staff/secretaries to create publ lists

Realization: DUO interacts with ISI Web of Science database
To unsubscribe from this mailing list (publcheck), please click the following link:
https://duo.psi.ch/duo/change_mailing.php?CMD=UkVNOQ5NdRk6MTA5
Outline

1. Motivation and History: PSI User Labs
2. The PSI User Office
3. The PSI Digital User Office
4. **DUO clones elsewhere**
5. Questions and discussion
DUO has been developed by PSI but we don’t mind to give it to other facilities for free!

Support: we give the software as such. The IT department of the partner maintains the clone and is responsible for that.

Return: if the DUO clone develops modules suited for PSI DUO, we might use those.

Open Source: not yet, but might be a future option if even more facilities are interested.
DUO clones

2005 - BOAT @ BESSY:
BESSY Online Access Tool

Welcome to BESSY's Online Access Tool

INFORMATION The next open call will be from 2008-05-10 to 2008-08-15

Login or register here for access to the proposal form, the safety registration form, the application for badge & dosimeter and the experimental report.

Please do not hesitate to contact us in case you need help.

- Registration
  Enter here if you are new to BOAT.
- Login
  Enter here to login to BOAT. You will be prompted for your BOAT user name and password.
- Lost password
  Enter here if you do not remember your BOAT username and/or password. You will be prompted for your email address and the BOAT will email to you your login information as stored in the system. Please contact us in case of remaining problems.

Please note: this web application uses cookies and java script
It has been developed for Mozilla 1.0 and Firefox 1.0, Netscape 6 or Internet Explorer 5.5.
Some functionalities may not work well with older versions.
DUO clones

2006 - DOOR @ DESY:
DESY Online Office for Research with Photons

Welcome to DOOR, which is based on DUO from PSI. Please note that you need to register in order to use this system to submit research proposals and apply for beamtime. Please do not hesitate to contact us in case you have further questions.

- **Registered DOOR user**
  Log in using your DOOR username and password.

- **Forgotten password**
  If you do not remember your DOOR username and/or password, your login information will be sent to your previously registered e-mail address.

- **New DOOR user**
  To obtain a DOOR username and password, please register here.

- **Imprint**
  DESY Imprint

Please contact us if you encounter problems using DOOR.
Welcome to the **SOLEIL User Net**.

This is your space to submit a proposal, to ask for access, ..., and manage your personal record as stored in the SUN set.

Please do not hesitate to contact [SOLEIL user office](#) in case you need help.

- **New SUN set user**
  Enter here if you were never registered at SOLEIL as a User to create an account. Registration has to be done only once.

- **Lost password**
  Enter here if you do not remember your SUN set username and/or password. You will be prompted for your email address and the SUN set will email you to login information. Please contact [SOLEIL user office](#) in case of remaining problems.

- **Registered SUN set user**
  Enter here to log in to the SUN set. You will be prompted for your SUN set username and password.

**Warning:** this web application has been developed for Firefox 1.5 or Internet Explorer 6.0. Some functionalities may not work well with older versions.
DUO clones - Future

When do ILL and ESRF join the club??
Summary:

Let’s make it as easy as possible for the users, who are our customers and who ensure the existence of the large user facilities!!
Thanks for your attention …

1. Motivation and History: PSI User Labs
2. The PSI User Office
3. The PSI Digital User Office
4. DUO clones elsewhere

5. Questions and discussion