

How can we reduce stress when reporting?

Lessons learned from PR1

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INFN Bologna

TAM, 30/10/2024



Partners/Beneficiaries:

- check and complete data in the section *Researchers involved in the project* on the EC Portal:

STAFF, not users

Beneficiary	First Name	Surname	Gender	Nationality	Email	Career Stage	Role of researcher	Personal Identifier	Contract duration	Latest degree before entering project Degree Year Awarded Country	Last professional position (if any) before entering project Career Stage Country	Professional position for staff members leaving the project Career Stage Country	Actions
2-GANIL	Navin	Alahari	M	India	navin.alahari@ganil.fr	Category A - Top Grade	Leading	ORCID:0000-0003-2502-5t	Permanent				x

Missing Contract duration and professional info

Facility Coordinators:

- Check TA users' data files for all TAs completed in the period **01/09/2023 – 31/08/2024**. Complete/correct data **by the 15th of November**.

All the templates in the Project Resources section of the EURO-LABS website:
<https://web.infn.it/EURO-LABS/project-resources/>

Contact your Financial Officer or admin staff to ensure TA data are consistent with financial data

- **After the 15th November, do not change these data anymore** we start to fill the users' data on the EC portal (entering the data manually on the EC portal is a very time-consuming task).

- *EURO-LABS-TA-ApplicationData.xlsx*

EURO-LABS Trans-national Access Application Data form

Project Data						
Infrastructure - Facility						
Workpackage	(select)					
Access Provider	(select)					
Infrastructure	(select)					
Installation	(select)					
Type of access	(select)					
Infrastructure category	(select)					
Infrastructure domain	(select)					
Facility Coordinator	Surname	First name	Institute Name	Institute Address	City	Email
Experiment						
Year	2024					
Project Title						
Facility internal code	XXXXXXXX					
Project Code	select-2024-(select)-XXXXXXXX					
Activity Domain	(select)					
Project Execution Period	dd/mm/yyyy	dd/mm/yyyy				
Spokesperson(s)	Surname	First name	Institute Name	Institute Address		Email
Project Leader						
Application Date	dd/mm/yyyy					
ESP Meeting	dd/mm/yyyy					
Access limit granted in the project	OK					
User group membership	(select)					
Project Status	(select)					

Note:
In the project header data:
 - cells in red should be filled by the facility coordinator
 - cells in grey background should be filled by the Group Leader/PI
 - consult the [Help sheet](#) for information on how to fill some of the fields
 - use dd/mm/yyyy for the date format
 - the Project Code is a generated value - do not change!

Note:
In the User Data list below:
 - add rows (using copy) according to the team size
 - columns in red should be filled by the facility coordinator
 - columns in black should be filled by the Group Leader/PI before the experiment takes place
 - columns in green should be filled at the start or end of experiment once the days are validated
 - consult the [Help sheet](#) for information on how to fill some of the fields
 - use dd/mm/yyyy for the date format

Researcher															User Data (only for use within EURO-LABS)											
Entry	Name	Surname	Email	Gender (M/F/D/A)	Nationality	Year of Birth	Researcher Status	New User (y/n)	Home Institute Name	Legal Status/Address	Country	Dates in the Facility		TMA Request		Trainin g course	ESP Approvals		NoDays	No Hotel Nights	Travel expenses (y/n)	Arrival date (dd/mm/yyyy)	Departure date (dd/mm/yyyy)	Received financial support (y/n)		
												Expected arrival date (dd/mm/yyyy)	Expected departure date (dd/mm/yyyy)	NoDays	No Hotel Night		Travel expenses (y/n)	Travel expenses (y/n)								
1																										
2																										
3																										
4																										
5																										
6																										
7																										
8																										
9																										
0																										

REMINDER

What we need: TAs data

Once the application is **completed**:

- FCs keep the confirmation signed by PIs. Some FC prefer to keep the signed application file as confirmation of receiving TAs. Others prefer to use a dedicated confirmation file.
- FCs check and complete the TA data file, and upload them in the repository, so they don't go crazy rethinking and completing user data and files for reporting.

The form fits different needs:

- Eligibility under the Horizon E rules.
- Facility procedures to provide TAs and support users
- Periodic reports, including data to be entered manually on the EC portal

EURO-LABS Trans-national Access Application Data form

So, it is important to fill in and check the data carefully when the TA is completed:

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In the project header data:
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 - consult the **Help sheet** for information on how to fill some of the fields
 - use dd/mm/yyyy for the date format

Reimbursed (or to be reimbursed) user

User Data (only for use within EURO-LABS)																							
Entry	Name	Surname	Email	Researcher				Employing organisation/Home institution				Dates in the Facility			TNA Request			OSP Approved			Actual		
				Gender (M/NB/W)	Nationality	Year of Birth	Researcher Status	New User (y/n)	Home Institute Name	Legal Status	Address	Country	Expected arrival date (dd/mm/yyyy)	Expected departure date (dd/mm/yyyy)	NoDays	No Hotel Nights	Travel expenses (y/n)	Trainin g course	NoDays	No Hotel Nights	Travel expense s (y/n)	Arrival date (dd/mm/yyyy)	Departure date (dd/mm/yyyy)
1				(select)	(select)		(select)	(select)	(select)	(select)	(select)	(select)	(select)				(select)	(select)	(select)	(select)	(select)	(select)	(select)
2				(select)	(select)		(select)	(select)	(select)	(select)	(select)	(select)	(select)				(select)	(select)	(select)	(select)	(select)	(select)	(select)
3				(select)	(select)		(select)	(select)	(select)	(select)	(select)	(select)	(select)				(select)	(select)	(select)	(select)	(select)	(select)	(select)
4				(select)	(select)		(select)	(select)	(select)	(select)	(select)	(select)	(select)				(select)	(select)	(select)	(select)	(select)	(select)	(select)
5				(select)	(select)		(select)	(select)	(select)	(select)	(select)	(select)	(select)				(select)	(select)	(select)	(select)	(select)	(select)	(select)
6				(select)	(select)		(select)	(select)	(select)	(select)	(select)	(select)	(select)				(select)	(select)	(select)	(select)	(select)	(select)	(select)
7				(select)	(select)		(select)	(select)	(select)	(select)	(select)	(select)	(select)				(select)	(select)	(select)	(select)	(select)	(select)	(select)
8				(select)	(select)		(select)	(select)	(select)	(select)	(select)	(select)	(select)				(select)	(select)	(select)	(select)	(select)	(select)	(select)
9				(select)	(select)		(select)	(select)	(select)	(select)	(select)	(select)	(select)				(select)	(select)	(select)	(select)	(select)	(select)	(select)

Users' data complete and correct

If you wish to include members of the research group, e.g. for USP assessment, please separate them from USERS with an empty line and clear indication (e.g. "members of the research group"). Our script fails to correctly process red-coloured or strikethrough characters



In case of a multi-visit TA, it is up to the FC to decide if it should be considered one project or different ones, and ensure to avoid duplication of users making multiple visits in the same experiment

Facility Coordinators:

- For TAs completed after 31/08/2024: check and complete the data files and keep the files ready for uploading (*EURO-LABS-TA-ApplicationData.xlsx*). Upload the files **continuously**, when TA is completed (not after **7th of March**).
- Fill in the with TAs objectives and achievements for all your completed TAs and keep the file ready (*EURO-LABS-TA-ExperimentReport.xlsx*). Upload the files as soon as possible, not after **7th of March**

All the templates in the Project Resources section of the EURO-LABS website:
<https://web.infn.it/EURO-LABS/project-resources/>

EURO-LABS EURO-LABS Trans-national Access Experiment Report form	
Project Data	
Experiment	
<i>Project Title</i>	
<i>Facility internal code</i>	XXXXXX
<i>Project Code</i>	
<i>Project Execution Period</i>	dd/mm/yyyy-dd/mm/yyyy
<i>Date</i>	
Report	
(maximum 1200 words)	
<i>Scientific justification of the experiment:</i>	
<i>Objectives for this run:</i>	
<i>Main achievements:</i>	
<i>Difficulties encountered:</i>	
<i>Beam types used:</i>	
<i>Other information wrt your visit to the facility which you wish to share with the Facility Coordination</i>	

Facility Coordinators, Task Leaders:

- If you have Publications not already reported in RP1, fill in the with TAs Publications and keep the file ready (*EURO-LABS-FacilityPublicationList.xlsx*). Upload the file as soon as possible, not after **7th of March**.

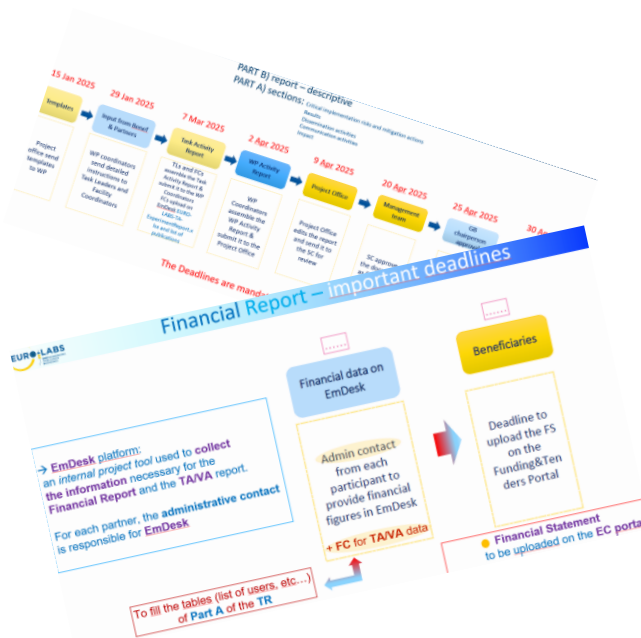
All the templates in the Project Resources section of the EURO-LABS website: <https://web.infn.it/EURO-LABS/project-resources/>



EURO-LABS Trans-national Access Application Data form

List of Publications										
Periodic Report	TA Project Code	Publication Year	Authors	Title	References	Publication type	Peer reviewed(yes/no)	DoI (Digital Object Identifier)	Open Access (Y/N)	Link
(select)							(select)		(select)	

Please, Meet the Deadlines!



DELIVERABLES

ID	Deliverable Name	WP	Task	Due month	Delivery date (expected/actual)	Status	Comments
D1.1	Periodic Report 1 (Sept 2022 - Aug 2023)	WP1	1.1	14	4 Nov 2023	Achieved	Report
D5.1	Research Infrastructure release completed	WP5	5.1	18	29 Feb 2024	Achieved	ULL Report
D5.4	The new health checked at least two facilities and been used optimally	WP5	5.2	24	01 Aug 2024	Achieved	ULL Report
D5.5	Report on activities after 2 years, including follow-up from participants	WP5	5.4	24	30 Aug 2024	Achieved	ULL Report

MILESTONES

ID	Milestone Name	WP	Task	Planned Delivery month	Delivery date (expected/actual)	Status	Comments
M10	Prototype and software ready for services	WP4	4.1.1	16	29 Oct 2023	Achieved	ULL Report
M11	Design of the shielding system including safety-related aspects	WP4	4.4.1	16	30 Oct 2023	Achieved	ULL Report
M12	Electronic Interlock Quadrupole Quadrupole Lens Assembly installed and tested	WP4	4.4.4	16	19 Dec 2023	Achieved	ULL Report
M13	Call for proposal to be hosted at EC?	WP2	2.4	18	22 Jan 2024	Achieved	ULL Report
M15	Contract awarded for the TAVAs in 10 phases and first codes available for users in the virtual facility	WP2	2.4	18	29 Feb 2024	Achieved	ULL Report
M16	Completed database containing selected features of remote access tools	WP2	2.5	18	29 Feb 2024	Achieved	ULL Report
M17	Report on TAVAs operations for different facilities	WP2	2.5	18	29 Feb 2024	Achieved	ULL Report
M18	Design of the IT tools and purchase of material and equipment for the device	WP4	4.4.3	16	29 Feb 2024	As	ULL Report
M19	Cooling system developed	WP4	4.4.3	16	27 Feb 2024	Achieved	ULL Report
M20	at least 20% of AI2 delivered	WP4	4.1	24	29 Aug 2024	Achieved	ULL Report
M21	at least 20% of AI2 delivered	WP4	4.2	24	29 Aug 2024	Achieved	ULL Report
M22	at least 20% of AI2 delivered	WP4	4.3	24	29 Aug 2024	Achieved	ULL Report
M23	at least 20% of AI2 delivered	WP4	4.3	24	29 Aug 2024	Achieved	ULL Report
M24	100 lowest qualification and activation of the beam profile patterns	WP4	4.4.6	24	30 Aug 2024	Achieved	ULL Report
M25	Mechanics of the source adjusted to fit into the experimental area	WP4	4.4.1	24	30 Aug 2024	Achieved	ULL Report

Prevention is better than cure:
if you need any help or have any questions, please don't hesitate to contact us





Users – What are they?

(Research group is usually larger)

- ✓ economically supported



All agree

- ✓ who visited the facilities (even without reimbursement)
- ✓ who received a direct benefit from the project (beam, technic support, etc.)



It could be interpreted in different ways

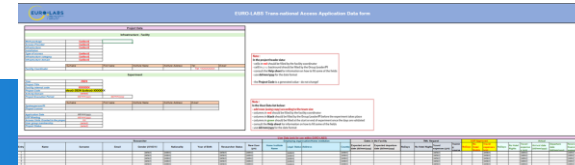
If you are in doubt, ask your WP Coordinator

In our view it's important:

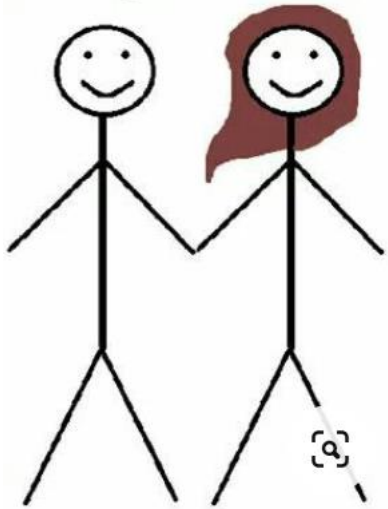
- ✓ Consistency with the HORIZON rules and EURO-LABS project
- ✓ users are those whose data we have to count and enter (manually!!) on the EC portal (not all the wider research group)
- ✓ Do not make us investigate or psychoanalyze your user data files trying to interpret them correctly



zotta - INFN



They are Bill&Billa

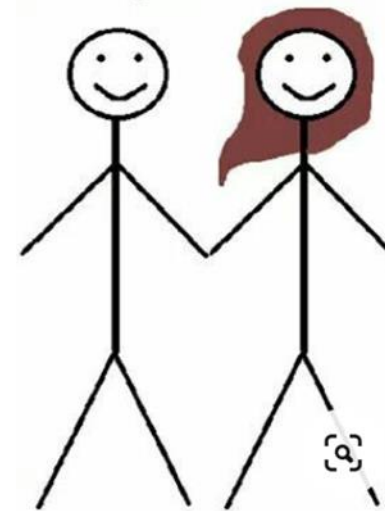


They are EURO-LABS TA Users

They want to participate:

- ✓ They follow the RI instructions
- ✓ They give all the information and documents required
- ✓ They enjoy their transnational access experience

They are EURO-LABS TA Spokespersons

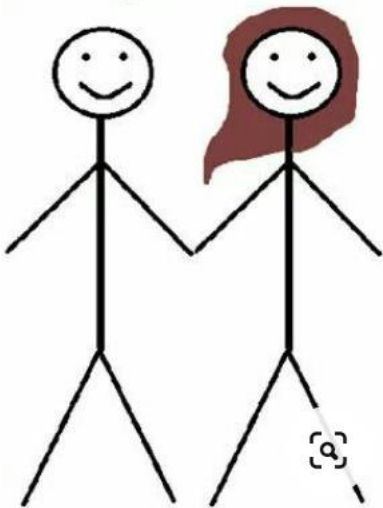


They are submitting an application:

- ✓ They fill carefully all TA data in the forms
- ✓ When the TA is completed, they check, correct complete all data before signing that they have received TA and send all documents required by the FC

They are Facility Coordinators

They are involved in EURO-LABS TAs



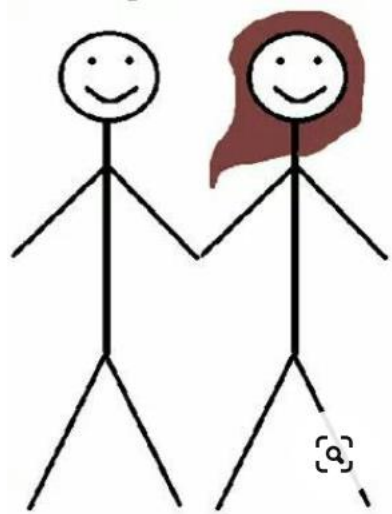
They receive and manage an application:

- ✓ They check all data is complete and consistent. Request to be completed if necessary.
- ✓ Submit the application to USP (according to the procedures established in every WP)
- ✓ When the TA is completed they check / complete / correct data files and do everything necessary (for example, for reimbursement procedures)
- ✓ They upload the data files
- ✓ **They respect all the DEADLINES**

- ✓ By 15/11/2024 Complete and correct TA data files for all TAs made up to 31/08/2024
- ✓ Provide Report 2 information the on time
- **For any doubts, they contact their WP coordinator and / or us**



They are Bill&Billa



Be like Bill&Billa!

