

IMS guidelines for answering the WP TE call for participation for the 2024 experimental campaigns on AUG, TCV, MAST-U and WEST & analysis and modelling for JET, AUG, TCV, MAST-U and WEST

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Introduction

This Annex provides you guidelines for filling out the Call for Participation of WPTE for 2024 experimental campaigns on AUG, TCV, MAST-U and WEST and data analysis and modelling from past Campaigns on these devices plus JET.

Note that the **workplan** you provide is the main element for WP TE to assess your participation. We therefore kindly ask the proponents to take special care when writing this section, and to carefully read the description of the Research Topics in Annex 1, to target your work plan adequately.

When answering the Call in IMS, the proponents should take the following steps:

- 1) Step 1 (General information) : select their salary rate and special category if applicable
- 2) Step 2 (Select campaign/experiments) : select the Research Topics they would like to contribute to
- 3) Step 3 (Work per experiment) : for a given Research Topic :
 - a. indicate their competence(s)
 - b. select when applicable if the proponent is a Research Topic Coordinator for this topic
 - c. indicate on which machine(s) they would like to contribute
 - d. for each machine, write a work plan at home lab and/or at device host lab when adequate, as well as an associated number of days proposed to perform the work.
- 4) Step 4 (Check and save for official submission) : check the overall proposal before saving and submitting it

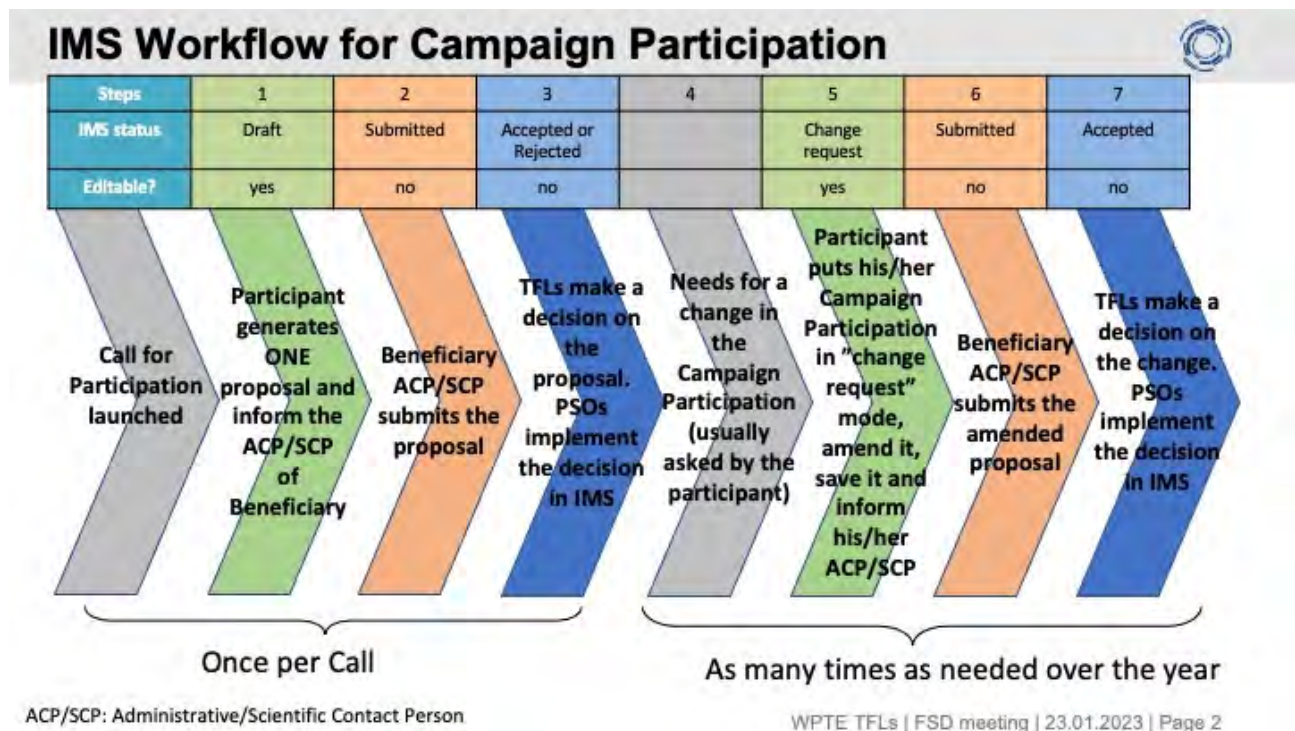
In the following sections, you will find a “how to” tutorial for each of these steps, as well as screenshots to help you through the process.

General remarks

- You will need an IMS account to be able to answer the present call. If you do not have one already, please anticipate your request to the PMU as much as possible, significantly ahead of the call deadline.
- In order to get an account on IMS, you need to go to <https://ims.euro-fusion.org> and click on the “Account application”.
- When going under IMS, you should select Horizon Europe 2021-2027 (FP9) (or go directly to <https://ims.euro-fusion.org/fp9>). From there, you should look for the relevant open Call and click on “Generate Proposal”. You are then ready to start filling your proposal!
- The fields with a red asterisk are mandatory. You will not be able to proceed to the next step if these are not filled.
- You should use the previous and next buttons at the bottom of the page to move between steps.
- **You should avoid using “copy and paste” from another software into IMS (in particular when filling your work plan), as this is not compatible with the IMS editor and will result in poorly readable input.**
- If you have technical issues filling out the present call under IMS, please contact the PMU WP TE coordination officer S. Moradi (Sara.Moradi@euro-fusion.org)

If you have scientific questions about specific Research Topics, please contact the Scientific Coordinators (SCs) and the reference WP TE Task Force Leaders (TFLs) indicated in Annex 1.

As a reminder, the figure below illustrates the workflow of Campaign Participation in IMS.



Step 1 : general information

You should select a special category if applicable (in particular if you are supported through another funding scheme, such as ERG, EEG or ERC grants). Leave it as “not applicable” otherwise.

You should then select your salary rate : this should be in most cases “1. Averaged salary for planning FP9”, except if you are fully covered by other funding schemes, in which case you should select “0. Covered by other means”.

The other categories corresponding to industry are likely not to be used for WP TE.

In case of doubt, please ask the IMS Administrative Contact Person (ACP) of your laboratory.

The screenshot shows a web application window titled "Create Proposal for Campaign Call". The interface has a tabbed navigation system with four tabs: "1. General Information" (selected), "2. Select Campaign/Experiments", "3. Work per Experiment", and "5. Check & save for official submission".

Under the "1. General Information" tab, there are three main input fields:

- Person ***: A dropdown menu with "Benoit Lobb (EPFL)" selected.
- Special Category (if applicable)**: A dropdown menu with "Not applicable" selected. Below it is a text prompt: "Please indicate if you are belonging to special category like PMU, JEU, Fellow, ...".
- Salary Rate ***: A dropdown menu with "1. Averaged salary for planning FP9" selected.

Below these fields is a search bar with the text "Choose..." and a magnifying glass icon. A "Previous" button is on the left, and "Cancel" and "Next" buttons are on the right. The search results list the following options:

- 0. Covered by other means
- 1. Averaged salary for planning FP9
- 2. Industry AE: 06-FPH
- 2. Industry AE: 11-EAI
- 2. Industry AE: 14-CSM
- 3. Industry AE: 15-ANN-Ansaldo

Step 2 : select campaign / experiments

You should select the Research Topics you would like to contribute to (see Table 1 of Annex 1 for the description of the Research Topics).

In particular, RT11 refers here to JET data analysis & modelling of the DTE2 campaign (including the completion of DTE2 experiments performed in DTE3), while RT10 corresponds to JET data validation for a specific list of diagnostics (see Table 3 of Annex 1).

All other proposals for JET analysis (outside DTE2 related work and JET data validation) should be submitted under one of the adequate 9 Research Topics (RT-01 to RT-09).

WARNING: Please note that you should tick at this stage all the Research Topics you would like to contribute to, as this will generate the corresponding boxes to be filled for the next step. In other words, if you go back from Step 3 to Step 2 to change something, everything that was inserted at Step 3 will be lost.

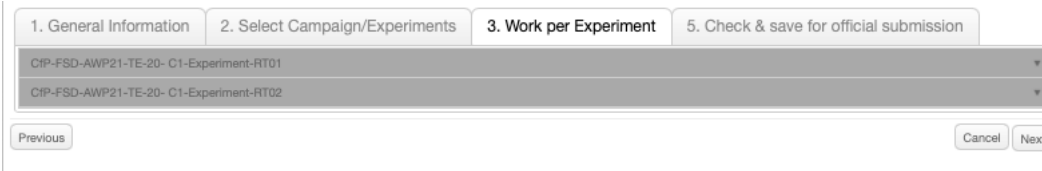
The screenshot shows a web browser window with the URL ims.euro-fusion.org. The page title is "Create Proposal for Campaign Call". The form has four tabs: "1. General Information", "2. Select Campaign/Experiments", "3. Work per Experiment", and "4. Check & save for official submission". The "2. Select Campaign/Experiments" tab is active, displaying a list of Research Topics (RT01 to RT11) with checkboxes. Red arrows point to RT10 and RT11, with text indicating they should be selected for JET data validation and DTE2 A&M respectively.

Research Topic	Selected
RT10	<input type="checkbox"/>
RT03	<input type="checkbox"/>
RT08	<input type="checkbox"/>
RT05	<input type="checkbox"/>
RT01	<input type="checkbox"/>
RT02	<input type="checkbox"/>
RT04	<input type="checkbox"/>
RT09	<input type="checkbox"/>
RT07	<input type="checkbox"/>
RT06	<input type="checkbox"/>
RT11	<input type="checkbox"/>

Previous Cancel Next

Step 3 : work per experiment

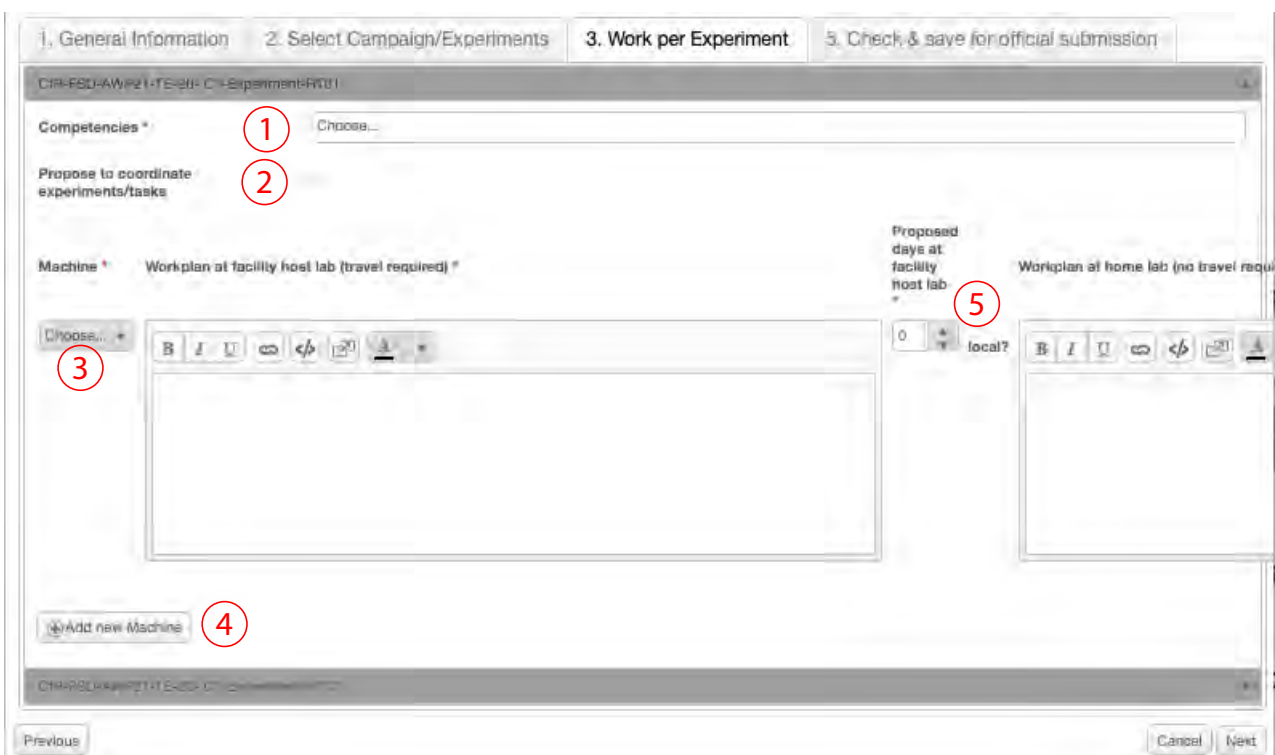
When going to this step, you will find a table with a line for each Research Topic you selected in step 2.



At this stage if something is incorrect for the Research Topics selection, you can go back to step 2 and add/remove what it is needed.

You can expand or collapse the Research Topic box by clicking on the Research Topic grey line.

You should then click on each Research Topic line and fill the details of your scientific proposal as described below.



① You should select from the list the competences you would like to apply for this Research Topic.

This corresponds to the IMS tags listed in table 2 of Annex1, and specifies whether your expertise for this Research Topic is in diagnostic or sub systems operation (DO), and/or data analysis and interpretation (DAI) and/or modelling (MOD). The competence “JET Data Validation” (VAL) can be selected only with RT10 . You can also select others (OTH) if none of the above applies. In particular, proponents applying as Research Topic Coordinators can use the “others” category.

Note that you can select several competences for a given RT. You can also select different competences for different RT if you wish.

In terms of Diagnostic Operation (DO), WP TE will only support activities which are not included in the standard operational costs of the device. If you plan to operate or support the operation of a diagnostic that is not included in the device operation costs, but will be useful to a Research Topic, please state your expertise in

your workplan, providing details on what your work will include. Please contact the WPTE TFLs if you are uncertain that the diagnostic support you propose is eligible for funding.


② Research Topic Coordinators (RTCs) selected for the Research Topics should tick the “Propose to coordinate experiments/tasks” box.

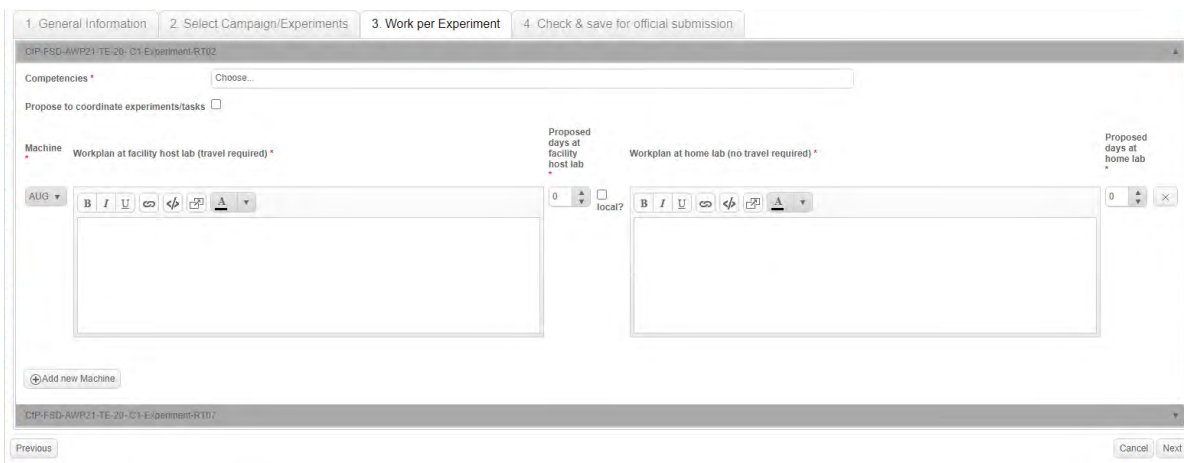
Please note that for RTCs, a total participation of more than 2 person months is strongly recommended (1 person month equals 17.5 days, as 12 months represent 210 working days).

③ You should select which machine(s) you want to contribute to in the list of predefined devices participating to the Research Topic.

④ If you would like to contribute to several devices, use the “Add New Machine” button, which will generate the boxes needed for each device.

If you would like to change the device, you can just go back to the device selection ③ and change it.

If you would like to suppress a machine, you can use the  box on the far right of the screen (see below). Note that this will suppress all the layout related to this device, so you will lose the associated work plan(s), proposed days etc.



⑤ You should then tick the “local ?” box if you are part of the laboratory hosting the device. This will suppress the boxes for the workplan/days requiring travel to the device, not needed for you (see next section for details).

- As an example, EPFL staff participating to RT-01 on TCV should tick “local” in the corresponding TCV box, but not tick the “local” box in the JET layout if they wish to contribute to JET for RT-01.
- Consequently, when the “local” box is ticked, the layout changes and only the “home lab (no travel)” contribution is displayed.

Workplans and proposed days

You have to provide a work plan for each pair of “Research Topic + Device” you want to contribute to.

⑥ You can then write your work plan both for work from your home lab (work plan at home lab), and if applicable, for work from the lab hosting the facility if you need to travel on site (work plan at facility host lab).

Please note that staff from the facility host lab need to select “local” when applying for their facility, and should only fill out the “work plan at home lab” section.

Your work plan should be complete though concise (typically ~2-3 lines for each machine within each Research Topic), and should refer to the description of the Research Topics given in Annex 1.

It should clearly state the link with Scientific Objectives of the Research Topics (as listed in the Scientific Objectives table for each RT in Annex 1) and explain how will contribute.

Proposals related to the continuation of JET DTE2 data analysis and modelling under RT11 should mention explicitly in the work plan the experiment M18-** or M21-** it corresponds to.

Proposals related to JET data validation under RT10 should mention explicitly to which diagnostic(s) it corresponds in the list provided in Table 3 of Annex 1.

Proposals for participation addressing issues raised by the **ITER new baseline** (see for instance the document listing R&D issues to be investigated [here](#)), as well as for **extrapolating findings from present WP TE devices** to next step fusion devices, such as ITER and DEMO, are encouraged.

You will find below examples of an adequate work plan for the case of a proposal on data analysis (the same applies for diagnostic operation and modelling), as well as examples of work plans with too scarce / too much information.

X Not enough information	✓ Adequate workplan	X Too much details
Work for RTxx on data analysis	Work for RTxx on data analysis of the diagnostic yy, in order to derive/assess/compare ... the parameters ... and progress on the physics issue ... in link with the scientific objective Dzz.	Work for RTxx on data analysis of the diagnostic yy, starting by applying the following method then under the following assumption ... but depending on ... as described in the paper ... we will then ... and finally if ... we will also ... once this is done, we will go to the second step for reformatting the data as ... etc etc

Please be reminded that you should type your work plan and avoid “copy and paste” from another software, as IMS is not compatible with this process (see example below).

⑦ Finally, you will need to enter the number of proposed days associated to each of your work plan(s), separating the work at home lab and at the facility host lab.

- Focussing participation on a restricted number of RTs with a total participation (including home lab work and work at facility host lab if applicable) in the WPTE programme of more than 1 person month is strongly encouraged (1 person month equals 17.5 days, as 12 months represent 210 working days).
- Reminder: working from your home lab implies that no travel is required, while working at facility host lab means that you need to travel to the facility, and that missions will be required. Note that even if days are granted under “work plan at facility host lab”, you will still need to go through the mission approval procedure from WP TE and the host lab.
- Should the on-site commitment be possible, depending on the COVID local situation, it is advisable to spend at least 2 weeks on-site at the device involved.

Note that when proposing to contribute to JET analysis, you are welcome to propose on site days at JET, as dedicated analysis meetings are foreseen to be organized by WP TE TFL at JET premises in 2024.

All these steps should be repeated for each pair of “Research Topic + device”.

WARNING: Please check carefully all your contributions at this stage before proceeding to the next step, as in some cases, the system can run unstable when going back from step 4 to step 3, and you might lose data.

Step 4 : check and save for official submission

When going to this final step, you will find an overview of your contribution over all Research Topics / devices.

If you spot a mistake or a missing item at this stage, you can still go back to step 3 and update your contribution, but you might lose some of your input in the process.

Once you are happy with the content, you should click on the “save” button at the bottom of the page. **Your proposal will then be accessible to the IMS Administrative Contact Person (ACP) of your home lab for a final validation and submission. Only submitted (and not draft) proposals can be accepted by PMU/PSO.**

The screenshot displays the 'Create Proposal for Campaign Call' application at step 5: 'Check & save for official submission'. The interface is divided into several sections:

- Summary:** Shows 'Person *' (David Loebl (DIR LL)), 'Special Category' (JWI application), 'Salary Rate *', and 'Total consortium contribution for this proposal €€' (Proposed: 11,766, Accepted: 0,000).
- Experiment 1 (DIR-PSO-AWP21-TE-26-DI):**
 - Machine: DA-DTH
 - Proposed days at facility host lab: 0 (Text: 'This is not a very good proposal')
 - Proposed days at home lab: 0 (Text: 'This is not a very good proposal')
 - Workplan at facility host lab (travel required): [Empty]
 - Workplan at home lab (no travel required): [Empty]
- Experiment 2 (DIR-PSO-AWP21-TE-26-DI):**
 - Machine: FCV
 - Proposed days at home lab: 0 (Text: 'This one neither')
 - Workplan at home lab (no travel required): [Empty]
- Experiment 3 (DIR-PSO-AWP21-TE-26-DI):**
 - Machine: MASP1
 - Proposed days at facility host lab: 0 (Text: 'Pedestal stability analysis of 2021 data')
 - Proposed days at home lab: 0 (Text: 'Pedestal stability analysis of 2021 data')
 - Workplan at facility host lab (travel required): [Empty]
 - Workplan at home lab (no travel required): [Empty]

At the bottom of the page, there are 'Previous' and 'Save' buttons.