



**TEAM LEADER  
TEAM CREATION GUIDE  
V. 1.2/2023**

# OVERVIEW

**IT IS MANDATORY TO HAVE AN INFN ACCOUNT WITH:**

- **ENABLED IT RESOURCES**
- **IT SECURITY COURSES PERFORMED**

**to get access to BTF areas and use BTF booking software.**

Create or update your own INFN USER account (see [INFN User Portal guide](#))

# OVERVIEW

This guide refers to:

1. Team Leader actions **after having got booking approval from BTF Management**
2. How creating BTF Team.

Team Leader has to build the team using:

- The email link received after BTF Management approval, or
- Connecting on <https://booking.dsi.infn.it/>

You have to:

- Building your BTF team. It means adding the INFN user profile of the selected team members in the software member list, see next pages.
- download, fill, signup (you and your boss) and upload the BTF access questionnaire to inform LNF administration of your data (see [Booking guide for Team Members](#))

**Each step is limited in time: if not completed by the deadline, it will result in exclusion (team or member) from beamtime.**

If you don't have a valid booking approval or you want to submit a booking request for a BTF beam time, please refer to this guide: [BTF Call Guide](#)

# USEFUL LINKS

## [BTF site](https://btf.lnf.infn.it/schedule-beam-request/)

<https://btf.lnf.infn.it/schedule-beam-request/>

## [BTF booking software](https://booking.dsi.infn.it/)

<https://booking.dsi.infn.it/>

## [INFNO User Portal guide](http://btf.lnf.infn.it/wp-content/uploads/sites/75/2023/03/Instruction_INFNOUSER_Portal.pdf)

[http://btf.lnf.infn.it/wp-content/uploads/sites/75/2023/03/Instruction\\_INFNOUSER\\_Portal.pdf](http://btf.lnf.infn.it/wp-content/uploads/sites/75/2023/03/Instruction_INFNOUSER_Portal.pdf)

## [Booking guide for Team Leader \(this guide\)](http://btf.lnf.infn.it/wp-content/uploads/sites/75/2023/03/Booking_guide_team_LEADER.pdf)

[http://btf.lnf.infn.it/wp-content/uploads/sites/75/2023/03/Booking\\_guide\\_team\\_LEADER.pdf](http://btf.lnf.infn.it/wp-content/uploads/sites/75/2023/03/Booking_guide_team_LEADER.pdf)

## [Booking guide for Team Members](http://btf.lnf.infn.it/wp-content/uploads/sites/75/2023/03/Booking_guide_team_MEMBER.pdf)

[http://btf.lnf.infn.it/wp-content/uploads/sites/75/2023/03/Booking\\_guide\\_team\\_MEMBER.pdf](http://btf.lnf.infn.it/wp-content/uploads/sites/75/2023/03/Booking_guide_team_MEMBER.pdf)



# TEAM CREATION

# TEAM CREATION

If your foreseen team member is present on the INFN USER portal (i.e. owns an INFN USER account), could be added to your BTF team by searching name, surname, fiscal code, email, or INFN USER portal UUID.

A list of matching identities on the bottom will appear. Select the desired name and the user will be added to the team list on the top.

Booking Request Questionnaire Completed

Management Request Approval Completed

Team Creation Waiting

Waiting Team Members Next Step

Request Completed Next Step

Selected State

Save Draft Complete

Selected team members

Michele Antonio Tota

Click complete button only when team is complete. The complete button is **undoable**.

Create your team

Q tota

If the person is not in the INFN database, click this button to invite person to register

| Name            | Surname      | UUID                                 |
|-----------------|--------------|--------------------------------------|
| Leonardo        | Mastrototaro | 7b37f3c9-2af6-485b-bd5f-231e1ec48747 |
| Michele Antonio | Tota         | 017579c1-6567-4dbb-a2fc-6ef092c48d1e |

# TEAM CREATION

It is possible to eliminate a team member by clicking on 'x' icon near the name or by clicking on the search result.

Booking Request Questionnaire (Completed) Management Request Approval (Completed) Team Creation (Waiting) Waiting Team Members (Next Step) Request Completed (Next Step)

Selected State

Save Draft Complete

Click complete button only when team is complete. The complete button is **undoable**.

Selected team members

Michele Antonio Tota (x)

Create your team

Q tota

If the person is not in the INFN database, click this button to invite person to register

| Name            | Surname      | UUID                                 |
|-----------------|--------------|--------------------------------------|
| Leonardo        | Mastrototaro | 7b37f3c9-2af6-485b-bd5f-231e1ec48747 |
| Michele Antonio | Tota         | 017579c1-6567-4dbb-a2fc-6ef092c48d1e |

Without the INFN user account, it is not possible to search for people and add them as team members. Please share this guide with non-registered people in your group, to make them get an INFN USER account:

[INFN User Portal guide](#)

# TEAM CREATION

**Each foreseen member of the team must be registered on the INFN USER portal System.**

Without the INFN user account, it is not possible to search for people and add them as team members. Please share this guide with non-registered people in your group, to make them get an INFN USER account: [INFN User Portal guide](#)

Booking Request Questionnaire Completed

Management Request Approval Completed

Team Creation Waiting

Waiting Team Members Next Step

Request Completed Next Step

Selected State

Save Draft Complete

Selected team members

Click complete button only when team is complete. The complete button is **undoable**.

Create your team

Q By name, surname, fiscal code, email or UUID

If the person is not in the INFN database, click this button to invite person to register

| Name | Surname | UUID |
|------|---------|------|
|------|---------|------|

It is also possible to invite a team member **WITHOUT** INFN ACCOUNT to register on the INFN USER portal system by clicking on the respective button.

An email will be sent to the specified address (team member) with the instruction to register to the INFN USER portal.



# TEAM CREATION

**Note:** The team leader is automatically added as a team member.

Once the team is complete it is possible to save a draft or complete the state by clicking on opposite buttons.

By clicking on the <<**Complete**>> button, an automated procedure will send an email to all the team members (also yourself), reminding them to complete the final steps for uploading individual access documentation.

The screenshot shows a web interface for team creation. At the top right, there are two buttons: "Save Draft" (blue) and "Complete" (green), which are highlighted with a green box. Below them, a note states: "Click complete button only when team is complete. The complete button is **undoable**." Under the heading "Selected team members", there are two tags: "Ramon Orrù" and "Massimo Pistoni", each with a close icon. Below this is a search bar with the text "massimo pistoni" and a blue button that says "If the person is not in the INFN database, click this button to invite person to register". At the bottom, there is a table with columns for Name, Surname, and UUID.

| Name    | Surname | UUID                                 |
|---------|---------|--------------------------------------|
| Massimo | Pistoni | b16478a4-d23f-4613-9511-f26a85768ac9 |

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# TEAM CREATION FINAL STEP

**Note:** Even as a team leader, you have to submit access documentation like any other member. Please refer to this guide:

[Booking guide for Team Members](#)

NOW IT'S THE TIME TO INFORM YOUR TEAM MEMBERS TO FOLLOW THE INSTRUCTION IN THE RECEIVED EMAIL AND THIS GUIDE:

[Booking guide for Team Members](#)



# TEAM LEADER CHECK TEAM STATUS

# TEAM OVERVIEW

The team leader can check the team status anytime by entering its booking request. Clicking on «My booking» section on the left menu it is possible to visualize all booking requests where the logged user is a team leader (submitter) or member of booking.

The screenshot displays the 'My Booking' interface. On the left, a navigation menu is visible with 'My Booking' highlighted in a green box. The main content area shows a search filter section with dropdowns for 'Entity' and 'Resources', and input fields for 'From' and 'To'. Below this, a list of booking requests is shown. The first request is 'BTF( Line1, Line2 )' with a 'Maintenance' tag. The second request is 'BTF( Line2 )' with an 'Info' tag and a 'Request Submitted' status; its 'Submitter' field is highlighted in a green box. The third request is 'BTF( Line1 )' with an 'Info' tag and a 'Request Submitted' status. Each request entry includes the submitter's name, the booking dates, the creation time, and buttons for 'Details' and 'Edit'.

Clicking on «Edit» button the team leader can enter into booking request detail where the team status is shown.

# TEAM OVERVIEW

From Booking detail view there are two different ways to show the team status.

The first is shown on history state «Team Creation»

The screenshot displays the 'Team Overview' interface. At the top, it shows the period '2023-04-03 / 2023-04-09' and the submitter 'Giovanni Lorenzo Napoleoni BTF ( Line2)'. A progress bar indicates the following stages: 'Booking Request Questionnaire' (Completed), 'Management Request Approval' (Completed), 'Team Creation' (Completed), 'Waiting Team Members' (Waiting), and 'Request Completed' (Next Step). Below the progress bar, the 'States' section shows 'Secretariat Request Approval' (pending) and 'Team Creation Questionnaire' (completed). The 'Selected State' is 'Waiting for team members'. A 'Modify Team Members' button is visible. The 'States History' section is highlighted with a green box and contains two entries for 'Team Creation - Completed on: 2023-03-08 09:18'. The first entry shows a 'Team Creation Questionnaire' with a link to 'Team Creation Questionnaire' and a file 'BTF\_measure\_description\_file.docx'. The second entry is a table showing the status of team members:

| Name                       | Submitted Questionnaire | Secretariat Approval | Personnel Approval |
|----------------------------|-------------------------|----------------------|--------------------|
| Giovanni Lorenzo Napoleoni | ✓                       | ⌚                    | ⌚                  |
| Michele Antonio Tota       | ⌚                       | ⌚                    | ⌚                  |

# TEAM OVERVIEW

The second view is activated by clicking the «Team Creation» state on top timeline.

Period: 2023-04-03 / 2023-04-09 [Info](#)

Submitter: Giovanni Lorenzo Napoleoni  
BTF ( Line2)

Booking Request Questionnaire **Completed**

Management Request Approval **Completed**

**Team Creation** **Completed**

Waiting Team Members **Waiting**

Request Completed **Next Step**







**Selected State**

**List of selected identities**

| Name                       | Submitted Questionnaire | Secretariat Approval | Personnel Approval |
|----------------------------|-------------------------|----------------------|--------------------|
| Giovanni Lorenzo Napoleoni | ✓                       | ⌚                    | ⌚                  |
| Michele Antonio Tota       | ⌚                       | ⌚                    | ⌚                  |

# TEAM OVERVIEW

In each view there is a panel where it is possible to show the team member procedure status.

| Selected State              |   |   |   |
|-----------------------------|---|---|---|
| List of selected identities |   |   |   |
| Name                        | Submitted Questionnaire   | Secretariat Approval  | Personnel Approval  |
| Giovanni Lorenzo Napoleoni  |  |  |  |
| Michele Antonio Tota        |  |  |  |



The action specified on column has been completed with success



The action specified on column is waiting for user action



The action specified on column has been completed with refuse

In this example, the first team member has submitted the team questionnaire and the Acceleration Division secretariat approved it, while the Personnel administration approval is still waiting.

The second team member has submitted the team questionnaire but it has been refused by the AD secretariat. In this case, the user must resubmit a corrected questionnaire (the state is in waiting).

# TEAM OVERVIEW

When all team members are approved, the booking is complete and an email will be sent to each member reporting that they are allowed to access to BTF Facility.

Team leaders can view the review team status by clicking on the «My Booking» Section.

There will be reported which team member has been approved to access the BTF facility and which has not.

**Results**

**BTF( Line1 , Line2 )** Maintenance  
Submitter: Giovanni Lorenzo Napoleoni  
From: 2023-04-17 To: 2023-04-23  
Created at: 2023-03-06 14:33  
Last Update at: 2023-03-06

**BTF( Line2 )** Info  
Submitter: Giovanni Lorenzo Napoleoni  
From: 2023-04-03 To: 2023-04-09  
Created at: 2023-03-08 09:53  
Last Update at: 2023-03-08

Request Completed

User Giovanni Lorenzo Napoleoni approved as team member User Michele Antonio Tota approved as team member

Details

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