


# TRAVELER AUTHOR CHECKLIST

## AUTHORING


### FRONT PAGE

- Is the Traveler ID in the correct format?
    - In Pansophy, navigate to TRAVELERS > AUTHORIZED USERS > TP ACRONYMS to verify
      - <https://pansophy.jlab.org/pansophy/Admin/TPAcronyms2020d.cfm>
    - If you have further questions, contact the Pansophy Team for help
  - Are you in the current traveler template?
    - The current (Oct. 2020) traveler template includes the NCR Informative Emails, NCR Dispositioners and D3 Emails fields on the first page
    - If you do not have the current format, please open a new document with the current template
      - Instructions on this can be found here  
<https://pansophy.jlab.org/pansophy/Documents/TravelerAuthorship2020.ppsx>
  - Did you add NCR Dispositioners and NCR Informative emails?
    - What is the difference between the two?
      - **NCR Dispositioners:** someone who receives an email about an instantiated NCR and is able to assign an initial and final disposition to the NCR
      - **NCR Informative Emails:** someone who receives an email to inform them that an NCR has been instantiated. They **cannot** disposition the NCR and the email is for informative purposes
    - These fields should be the username, separated by a comma with no spaces
      - Ex: megan,bookwalt,mdickey
    - A username is not in both the dispositioner and informative email line


NCR Informative Emails	Megan,bookwalt,mdickey
NCR Dispositioners	Megan,bookwalt,mdickey

NCR Informative Emails	Mdickey,samuels
NCR Dispositioners	Megan,bookwalt


- Did you add D3 emails?
  - What are D3 emails?
    - **D3 Emails:** Similar to the NCR Informative emails, these emails go to the specified users to inform them that a D3 has been instantiated for a specific traveler
  - These fields should be the username, separated by a comma with no spaces
- Have you attached the appropriate reference files?
  - You can upload your drawing or excel sheets to **Traveler Included Files** in the appropriate project folder in DocuShare and link it to the traveler from there
- Are you revising an already existing traveler?
  - Please use the word document located in the **Approved Travelers** folder in DocuShare for editing
    - Sometimes a traveler has behind the scenes errors that the Pansophy Team corrects. The word document in the **Approved Travelers** folder will contain any necessary corrections made by the Pansophy Team
  - Ensure that you update the **Traveler Revision** and the **Revision Note**

### TRAVELER INSTRUCTIONS AND DATA COLLECTION

- Is there a serial number on the first page?
  - A traveler requirement is that there is an SN on the first page. If you are unaware of the acronym, please navigate to TRAVELERS > AUTHORIZED USERS > TP ACRONYMS in Pansophy and select **Component** in the **Listing For** dropdown

- <https://pansophy.jlab.org/pansophy/Admin/TPAcronyms2020d.cfm>

- Are the fieldnames descriptive to the step being performed?

Step No	Instructions	Data Input
2	Assemble the cavity	[[Tech2]] <<SRF>> [[Date2]] <<TIMESTAMP>> [[Comment2]] <<COMMENT>>
...	...	...
7	Perform leak check	[[Tech7]] <<SRF>> [[Date7]] <<TIMESTAMP>> [[Comment7]] <<COMMENT>>



- These fieldnames are not descriptive to the step being performed

Step No	Instructions	Data Input
2	Assemble the cavity	[[CavAssyTech]] <<SRF>> [[CavAssyDate]] <<TIMESTAMP>> [[CavAssyComment]] <<COMMENT>>
...	...	...
7	Perform leak check	[[LeakCheckTech]] <<SRF>> [[LeakCheckDate]] <<TIMESTAMP>> [[LeakCheckComment]] <<COMMENT>>

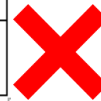


- These fieldnames are descriptive of the step being performed which will aide in future datamining (Example: User Defined Query)

- Are the fieldnames unique (no duplicates)?

- Example: if a leak check is performed more than once in a traveler, do not name the fields the same

Step No	Instructions	Data Input
2	Perform initial leak check	[[LeakCheckTech]] <<SRF>> [[LeakCheckDate]] <<TIMESTAMP>> [[LeakCheckComment]] <<COMMENT>>
...	...	...
7	Perform final leak check	[[LeakCheckTech]] <<SRF>> [[LeakCheckDate]] <<TIMESTAMP>> [[LeakCheckComment]] <<COMMENT>>



Step No	Instructions	Data Input
2	Perform initial leak check	[[LeakCheck1Tech]] <<SRF>> [[LeakCheck1Date]] <<TIMESTAMP>> [[LeakCheck1Comment]] <<COMMENT>>
...	...	...
7	Perform final leak check	[[LeakCheck2Tech]] <<SRF>> [[LeakCheck2Date]] <<TIMESTAMP>> [[LeakCheck2Comment]] <<COMMENT>>



Step No	Instructions	Data Input
2	Perform initial leak check	[[InitialLeakCheckTech]] <<SRF>> [[InitialLeakCheckDate]] <<TIMESTAMP>> [[InitialLeakCheckCmnt]] <<COMMENT>>
...	...	...
7	Perform final leak check	[[FinalLeakCheckTech]] <<SRF>> [[FinalLeakCheckDate]] <<TIMESTAMP>> [[FinalLeakCheckCmnt]] <<COMMENT>>

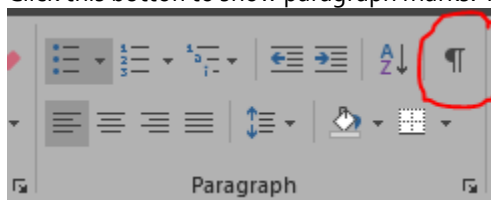


- The above are just examples of different ways to properly name fieldnames

- Have you verified that there are no special characters in your field names?

- The only special character allowed is an underscore ( \_ )
- **No spaces allowed**

- Click this button to show paragraph marks. This assists in seeing spaces in field names



- Did you use the proper data types?

- The description of each data type can be found in <https://pansophy.jlab.org/pansophy/Documents/TravelerAuthorship2020.ppsx>

## REVIEW

### UPLOADING TO DRAFT TRAVELERS

1. When you feel your traveler is ready for review, you may upload it to the **Draft Travelers** folder for the appropriate project area in DocuShare
  - A. <https://jlabdoc.jlab.org/docushare/dsweb/View/Collection-16191>
2. Make the fellow reviewers aware that the document is there
3. Reviewers can review and make changes as they feel appropriate from this folder
4. Reviewers will inform author if/when they make changes and feel that the document is ready for approvals

### READY FOR APPROVALS

- When reviewers have notified the author that they are done reviewing, the author can prepare to upload the traveler to the new **Ready for Approvals** folder in DocuShare
  - Authors, before uploading, please ensure that the traveler still follows the traveler author rules and that all reviewer comments and change tracking has been deleted
- When the traveler has been uploaded to the new **Ready for Approvals** folder, send an email to [pansophy@jlab.org](mailto:pansophy@jlab.org) with the traveler title to inform the Pansophy Team that it is ready
- The Pansophy Team will then move the document to the approvals folder to route it for signatures/approvals
- Great job! Once the traveler has been approved by all reviewers, your work for the authoring of that traveler is complete!

## CLOSING REMARKS FROM THE PANSOPHY TEAM

- Please refrain from emailing the traveler to the **Pansophy Team**
  - We have been very busy with the influx of travelers and the document can often get lost in our inboxes
- If you need assistance in traveler authorship, please email [pansophy@jlab.org](mailto:pansophy@jlab.org) (this will send the email to Megan, Allen, Valerie and Mike)
- We understand that it is sometimes hard to break old habits but these changes will ensure that all travelers:
  - Will follow a better process flow and , in turn, can be uploaded for approvals and to Pansophy in a more timely manner
  - Will require little to no editing from the Pansophy Team