

Pansophy Request Page

Pansophy Team

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Reference Material

- Sign in to Pansophy and DocuShare
 - [DocuShare link](#)
 - [Pansophy link](#)
- DocuShare Directory of Training Slides and Referenced Material
 - SRF Institute > 01 - SRF Projects > [06- For Reference, Additional Template and Processes](#)
- Training Slides:
 - SRF Institute > 01 - SRF Projects > 06- For Reference, Additional Template and Processes > [Pansophy Related Training](#)
- Pansophy Help
 - Pansophy Home > Main Menu dropdown > Help

Location of Training Slides

USER GUIDES

[Pansophy Help](#)

Help with Travelers, PRIMeS, SamTraxs, Traveler Writing and Docushare

[Reports Cheatsheet](#)

Links to Pansophy DataMining Reports' Menu (links)

[Traveler Procedure Flow Chart](#)

How the production of travelers and procedures should flow

[Docushare Upload and Download](#)

How to download and upload files to Docushare

[Pansophy Menu Upgrade 2022](#)

How the Pansophy Menu is mapped out as of June 2022

[Installing DocuShare Drive](#)

How to install and set up Docushare Drive

PANSOPHY TRAINING

[Welcome To Pansophy 2022](#)

A basic guide on using Pansophy and filling out travelers

[NCR Training \(24May2018\)](#)

[D3 Training \(24May2018\)](#)

[PRIMeS Training \(SRF Inventory\)](#)

[Pansophy Request Training](#)

TRAVELER AUTHORSHIP

[Traveler Authorship 2022](#)

A user guide for writing travelers and the process to get them into production

[Oracle Reserved Words](#)

A list of words that cannot be used in traveler fieldnames

PANSOPHY ERRORS

[Fieldnames](#)

[Smart Characters](#)

[Cover Page](#)

[Subsequent Pages](#)

[Other Errors](#)

Getting Started

- Requests may not be related to a single project. For these requests select “-All-” in the project dropdown menu.
- Some requests may not fit the types provided. These requests should be completed as a general request where detailed descriptions can be provided in the comments field.
 - Attaching additional documentation may help to complete the task.

How to Access the Request Form

- Once logged into Pansophy users will click the 'Service Request' button to the left of user authentication.
- This will create a popup window containing the request form.
- The request service button is available on every page in Pansophy.

The screenshot shows a web browser window displaying the Pansophy homepage. The browser's address bar shows the URL <https://pansophy.jlab.org/pansophy/index.cfm>. The page features a navigation menu with links for MAIN MENU, TRAVELERS MENU, SRF OPS, SRF S&T, CLOSED PRJ, USER TOOLS, and TRAVELER TOOLS. A 'SERVICE request' button is highlighted with a red box. Below the navigation, the page content includes a 'Welcome to Pansophy' message, a 'NEW SLIDE SHOW FEATURE' announcement with a graph titled 'LCLS-II HE: Top 5 Performing Cavities', and an 'IMPORTANT ANNOUNCEMENT!' regarding a slideshow of test results. The footer includes the Pansophy logo and the text 'A System of Universal Knowledge'.

General Request Required Fields

- User Requesting is a required field that is set to the user logged in by default. If a user is making a request for another employee select the name of employee, the request will be submitted for.
- Request Type is a required field that is set to general request by default. The type can be changed through the dropdown menu
- Project is a required field. Select the project related (or closest) to the request from the dropdown menu.
- Priority level is a required field. A priority of high would indicate this request is holding up production while a priority of low would allow reasonable time for the request to be completed.

The screenshot shows a web form titled "User Request to Pansophy Form". The form contains several fields and sections:

- User Requesting:** A dropdown menu with "MENIA" selected. This field is highlighted with a red box.
- Request Type:** A dropdown menu with "General Request" selected. This field is highlighted with a red box.
- Other users to be notified of request:** A section with a list of users: ACASTILL, ACOMER, and ADAMG. A note above the list says "Use CTRL+Left button click to select multiple users".
- Project:** A dropdown menu with "-0-" selected. This field is highlighted with a red box.
- Priority Level:** A section with three radio buttons: "Low" (selected), "Medium", and "High". This section is highlighted with a red box.
- Comments:** A text area for entering comments.
- Submit Request:** A green button at the bottom of the form.

Types of Requests

- In addition to the general request form five additional forms are provided.
- **NOTE:** 'Add username to dropdown' is only applicable to existing employees

The screenshot shows a web form titled "User Request to Pansophy Form". The "Request Type" dropdown menu is open, displaying the following options: General Request, New Acronym Request, Serial Number Request, Add username to dropdown, Employee Permissions Request, and Traveler Requests. A red circle highlights the dropdown menu. To the left of the dropdown, there is a list of usernames: ADAMG, AMANDAE, and AOBRIEN. Below the dropdown, there is a "Priority Level" field with a red asterisk indicating it is a required field.

Requesting a New Acronym

- Requesting an acronym will add three required fields to the form.
 - Component name (Enter data in textbox)
 - Drawing number (Enter data in textbox)
 - Description of acronym (Enter data in textbox)

User Request to Pansophy Form

User Requesting: MENIA Request Type: New Acronym Request

Other users to be notified of request: Use CTRL+Left button click to select multiple users Users to be notified

ADAMG
AMANDAE
AOBRIEN

Project: -0- *Required Field Priority Level: Low Medium High

Browse... No file selected.

Comments:

ACRONYM REQUEST INFO

Component Name:

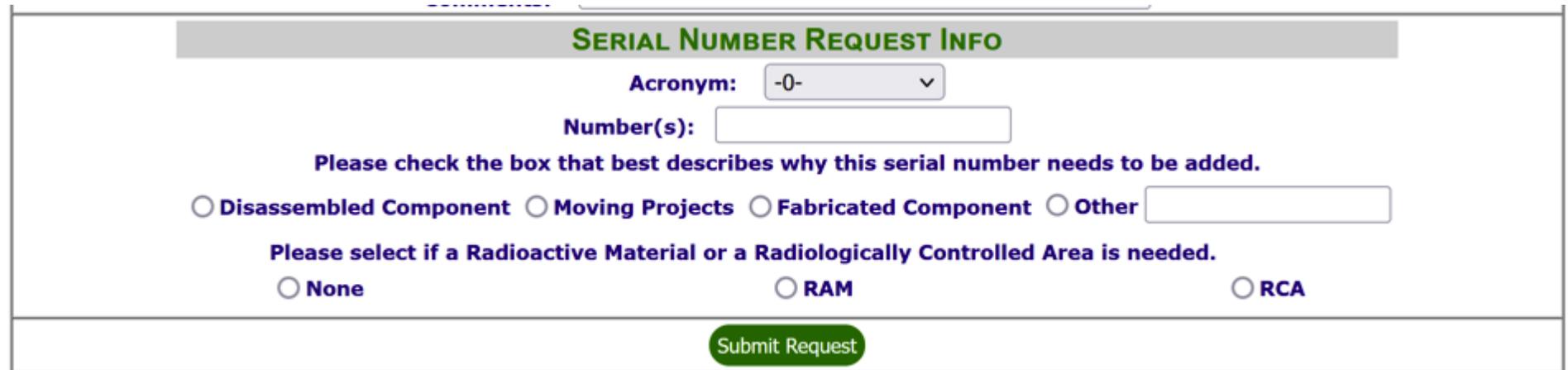
Drawing Number:

Description of Acronym:

Submit Request

Requesting a Serial Number

- Requesting a serial number will add four required fields to the form.
 - Acronym (Select from dropdown menu)
 - Serial number: Multiples entered separated by comma (Enter in textbox)
 - Reason for request (Select radio button option that best suites need)
 - Radioactive material or radiologically controlled area needed (Select radio button)



The screenshot shows a web form titled "SERIAL NUMBER REQUEST INFO". The form contains the following fields and options:

- Acronym:** A dropdown menu with the value "-0-" selected.
- Number(s):** A text input field.
- Reason for request:** A section with the instruction "Please check the box that best describes why this serial number needs to be added." and four radio button options: "Disassembled Component", "Moving Projects", "Fabricated Component", and "Other" (with an adjacent text input field).
- Radioactive material or radiologically controlled area needed:** A section with the instruction "Please select if a Radioactive Material or a Radiologically Controlled Area is needed." and three radio button options: "None", "RAM", and "RCA".
- Submit Request:** A green button at the bottom of the form.



Requesting an Existing User be Added to Dropdowns

- This request is only available for existing employees not new hires and will add two required fields to the form.
 - User group (This dropdown shows groups that users can be added to)
 - Username (Dropdown containing existing employees)

ADD USER TO DROPDOWN

Disclaimer: This menu option is only for existing users. If you are a new user please visit the employee permissions form.

User Group(s): Username:

[Submit Request](#)

Contact Us: [PansophyTeam](#) | [InventoryTeam](#)

Requesting Permissions for Employees

- This form will allow users to request more permissions for existing or new employees.
- While this form shows available permissions some permissions may require additional approval outside of the Pansophy team.
- **NOTE:** If you are a supervisor requesting permissions for another employee you will remain 'User Requesting'

Requesting Permissions for Employees

- Form will allow users to select permissions from three areas.
 - M:Drive Access
 - Pansophy Access
 - Docushare Access

Disclaimer: Some pansophy, docushare, and M:Drive access selections may require additional approval beyond Pansophy Team. M:Drive selections refer to write to permission versus read to permissions.

M:Drive Access Requests

/sgroup/asd/asddata area(s)

Requires YubiKey Activation: Create a Service Now Request <https://jlab.servicenowservices.com/>

Pansophy Team Group Areas	Areas Handled by other SRF Personnel
<input type="checkbox"/> ACC (Accelerator Group)	<input type="checkbox"/> SRFEE (Christiana Wilson)
<input type="checkbox"/> SRFCVP (SRF Cavity Processing Group)	<input type="checkbox"/> SRFDATA (Kirk Davis)
<input type="checkbox"/> SRFINF (SRF Infrastructure Group)	<input type="checkbox"/> CMM (Anne McEwen)
<input type="checkbox"/> SRFFABG (SRF Fabrication Group)	<input type="checkbox"/> MLP Area (Christine Fragapane)
<input type="checkbox"/> SRFTFGROUP (Thin Film Group)	<input type="checkbox"/> SRFSIGN (Anne McEwen)

Pansophy Access

Welcome to Pansophy 101 Training

Traveler/Procedure Author? **Requires Traveler Authorship Training**

Pansophy Group(s) (select one group)

<input type="radio"/> SRFOPS	<input type="radio"/> MLP
<input type="radio"/> SRF S&T	<input type="radio"/> FERMI
<input type="radio"/> FACILITIES	<input type="radio"/> SLAC
<input type="radio"/> STUDENT	<input type="radio"/> ANL
<input type="radio"/> CRYO	<input type="radio"/> ORNL
<input type="radio"/> MACHSP	<input type="radio"/> USLARP
<input type="radio"/> MSSURV	<input type="radio"/> STX

Pansophy Project Area Access

-0- ▾

Docushare Access

Requires a DocuShareLicense -Contact docushare@jlab.org

DocuShare Training

DocuShare Group(s)

<input type="checkbox"/> Traveler/Procedure Author	<input type="checkbox"/> SRF Management
<input type="checkbox"/> SRF QA Procedure Owner	<input type="checkbox"/> SRF Group Leader
<input type="checkbox"/> Business Sensitive	

Requesting Permissions (Existing Employee)

- If existing employee is selected, then two required fields will be added to the form.
 - Employee Username (Dropdown menu)
 - Employee Supervisor (Dropdown menu)

EMPLOYEE REQUESTS

New Employee or Existing Employee Existing Employee ▾

Employee Username: -0- ▾ **Employee Supervisor:** -0- ▾

Requesting Permissions (New Employee)

- If new employee is selected three required fields will be added to the form. This is because a new employee may not have been added to dropdown menus so additional information is needed.
 - Employee full name (Enter in textbox)
 - Employee username (Enter in textbox)
 - Employee supervisor (Dropdown menu)

EMPLOYEE REQUESTS

New Employee or Existing Employee New Employee ▼

Employee Full Name:	<input type="text"/>
Employee Username:	<input type="text"/>
Employee Supervisor:	-0- ▼

Traveler Delete/Reopen Requests

- This request will add four required fields to the form.
 - Traveler ID (Enter in textbox)
 - Sequence number (Enter in textbox)
 - Delete/Reopen/Other (Select radio button)
 - QMS reasoning (Enter in textbox)

TRAVELER REQUESTS

Traveler ID:

Sequence Number(s):

Delete Reopen Other

QMS Reason for traveler to be reopened/deleted or describe the other reason.

What happens once I submit a request?

1. Email automatically sent to pansophy
2. Logged into a new database system for requests
3. A Pansophy Team member will perform the request and/or ask for clarification on request.
4. An email will be sent when request is completed.

Thank You For Listening

Questions?

Additional questions or concerns can be directed to pansophy@jlab.org

