Welcome To Pansophy

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

- [QMS Documents Users](#)

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What is a Traveler?

- Jefferson Lab Work Control Document (WCD)

- Used to document work on parts and assemblies.

- Outlines steps and collects data from the users
  - Allows for later reference, data mining, reports and quality control

Homepage Rundown

Homepage Rundown- URL and Login

https://pansophy.jlab.org/pansophy/index.cfm

Pansophy Homepage URL

Users must log in to access Pansophy using their Jlab username and password

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Pansophy Slideshow
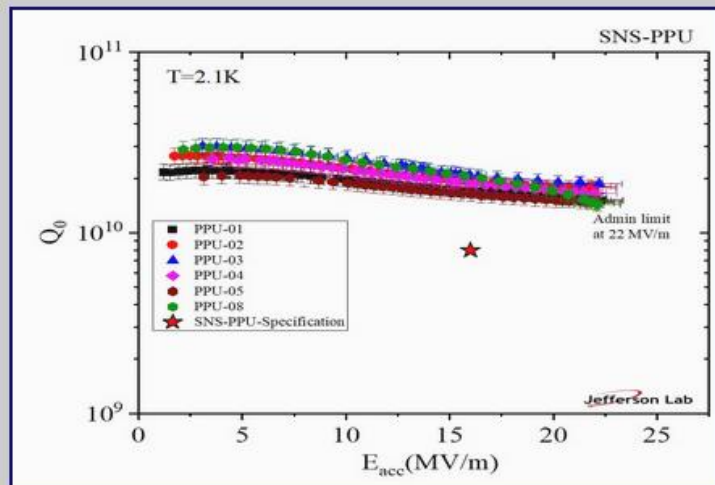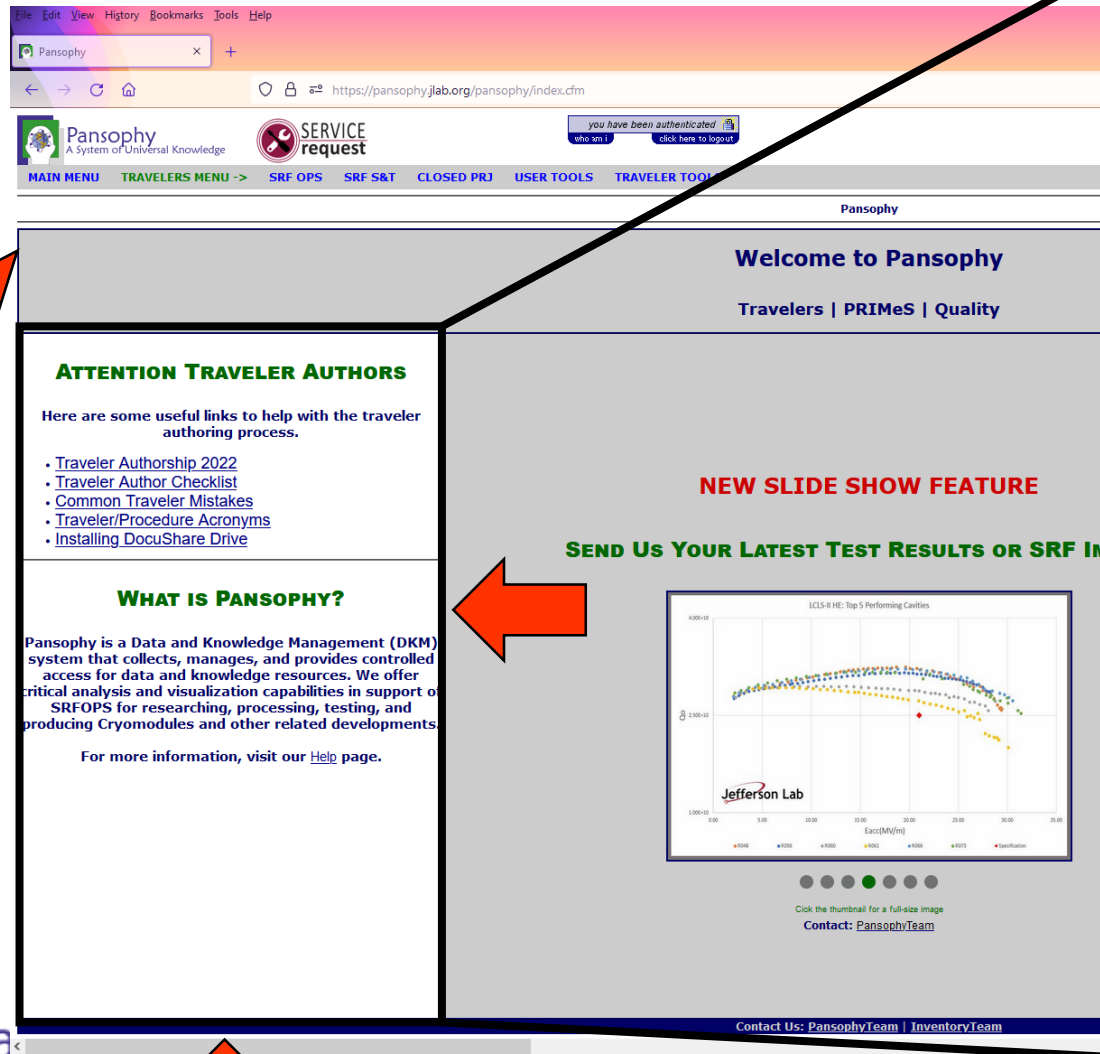
Homepage Rundown- Traveler Guides

Homepage Rundown- Main Menu

Hovering over the different options creates new drop downs

TRAVELER Main SUB-Menus

SRF OPS: Operations

SRF S&T: Science and Technology (formerly R&D)

CLOSED PRJ: Closed Projects

User TOOLS: Batch edits and file retrieval

Traveler TOOLS: Useful utilities for users

Main Menu Options

- **Travelers:** Links to Travelers for Active and Closed Projects, User Tools

- **Production:** Serial Number search, statuses, drilldowns, and SRFOPS Work Control Documents (WCD)

- **Projects:** Project Report area for Multi-Lab Projects (MLP) like SNSPPU and LCLS-II HE

- **Datamine:** Menu for accessing the datamining

- **QC Reports:** Quality Control Reports board

- **PRIMeS:** The SRF Project Inventory Management System home page

- **Facilities:** Map of the SRFOPS production floor and Calibration system (still under development)

- **DocuShare:** Links to Project Areas and useful SRFOPS areas

- **Logbooks:** Menu for accessing the pansophy logbook and link to e-logbook (Accelerator)

- **Help:** Menu for additional help and guides

- **Admin:** Pansophy administrative menu (<u>restricted access</u>)

- **SamTraxsII:** Menu for editing and viewing the Sample Tracking II thin films and particulate research data

MAIN MENU

TRAVELERS
PRODUCTION
PROJECTS
DATAMINE
QCREPORTS
PRIMeS
FACILITIES
DOCUSHARE
LOGBOOKS
HELP
ADMIN
SAMTRAXSII

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Pansophy Help

Found under the Main Menu drop-down

Links to User Guides, Pansophy Training, and Traveler Authorship.

Words restricted in use for fieldnames in travelers

MAIN MENU   HELP MENU ->   Request Page

HELP
Mar 15, 2023 10:07:38 AM

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 Training
Covers the basics of accessing docushare and approving documents.

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 Traveler Requests
How to create and fill out a Pansophy Service Request

SRFTERM REMOTE DESKTOP SERVER LOGIN
SRFTERM PC

SRFTERM MAC

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

WHAT IS PANSOPHY?

Pansophy is a Data and Knowledge Management (DKM) system that collects, manages, and provides controlled access for data and knowledge resources. We offer critical analysis and visualization capabilities in support of SRFOPS for researching, processing, testing, and producing Cryomodules and other related developments.

Using Travelers, staff members can define processes, record data and store this process data for future use via the Internet (or lab intranet). A Traveler is a document used to define and control a process, and collects and stores data for future use.

Queries and Reports allows staff members to Data Mine all processed and recorded data.

PRIMeS is an inventory system which monitors the arrival, processing, and checkout of parts.

Pansophy also allows for the recording and recalling of information more informally in a variety of areas. These include Logbooks, Facilities, and a link to DocuShare for document cataloging and storage.

Contact Us: PansophyTeam | InventoryTeam

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Data In

Putting data into Travelers

Traveler Menu

Decoding Traveler IDs

- Current Traveler ID naming convention: Project-Work Center Activity (WCA)-Component-Action

- May experience previous naming convention in older projects (e.g. C100, C50, L2PRD)
  - Previous naming convention was Project-Area-Action-Component

- Acronym list for traveler IDs can be found on the Pansophy homepage > User Tools > Traveler Tools > TP Acronyms

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Traveler Example – Traveler Cover Page (P0)

Header Page of Travelers Displays Traveler ID, Descriptions, and linked reference material

Traveler Area: **Edit** / View

SNSPPU

Search For: SNSPPU- [   ] (i.e. CAV-INSP)

SNSPPU-CAV-ASSY-HELV-R2 -- SNSPPU Helium vessel welding
SNSPPU-CHEM-CAV-HPR-R1 -- SNS-PPU Traveler for Cavity High Pressure Rinse Processing
SNSPPU-CLNRM-CAV-TSTD-R1 -- SNSPPU Cavity Transfer to Test Stand

Select Traveler ▾	NEW	Page 0 ▾	NEXT	LAST		NEW

SerialNum: 0	Traveler ID: SNSPPU-INSP-HEHDF	Rev: R2	Page:0	Traveler Seq Number: 0

Traveler Title	SNS PPU Cavity Helium Vessel FPC End Head Inspection Traveler			
Traveler Abstract	Traveler defines inspection process for the FPC end head, one of three helium vessel components			
Traveler ID	SNSPPU-INSP-HEHDF			
Traveler Revision	R2			
Traveler Author	K. M. Wilson			
Traveler Date	13-Jul-20			
NCR Informative Emails	areilly,fischer			
NCR Dispositioners	kwilson,edaly,macha, huque			
D3 Emails	kwilson,edaly,macha, huque			
Approval Names	K. M. Wilson	A. DeKerlegand	K. Macha	E. Daly
Approval Signatures				
Approval Dates				
Approval Title	Author	Reviewer	Reviewer	Project Manager
References	List and Hyperlink all documents related to this traveler. This includes, but is not limited to: safety (THAs, SOPs, etc), drawings, procedures, and facility related documents.			
104211700-M8U-8200-A023-A FPC END HEAD WELDMENT	104211700-M8U-8200-A006 FPC END DISHED HEAD	104211700-M8U-8200-A026 HELIUM VESSEL ASSEMBLY	SNSPPU-CAV-ASSY-HELV	
Revision Note				
R1	Initial release of this traveler.			
R2	Added some dimensions for inspection.			

Select Traveler ▾	NEW	Page 0 ▾	NEXT	LAST		NEW

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Traveler Example- P1

Search For: SNSPPU- [   ] (i.e. CAV-INSP)

SNSPPU-CAV-ASSY-HELV-R2 -- SNSPPU Helium vessel welding
SNSPPU-CHEM-CAV-HPR-R1 -- SNS-PPU Traveler for Cavity High Pressure Rinse Processing
SNSPPU-CLNRM-CAV-TSTD-R1 -- SNSPPU Cavity Transfer to Test Stand

| Select Traveler ⌄ | VIEW all / SAVE PDF | Page 1 ⌄ | FIRST | PREV | NEXT | LAST | |

SerialNum: 0   **Traveler ID: SNSPPU-INSP-HEHDF**   **Rev: R2**   **Page:1**   **Traveler Seq Number: 0**

Step No.	Instructions	Data Input
1	**Initial Inspection**	
	Technician Name **Date of Inspection** **Serial Number of part**	InspTechName [-0- ⌄] InspectionDate [ ] [NOW] (ex format 18-Jun-2005 16:30) HEHDFSN [-0- ⌄]
	Is head generally free from excessive dirt or other contaminants? (Head is not expected to be clean to UHV standards.)	PartCleanOk ○ Yes ○ No
	Visually inspect the rest of the head. There should be no dents (minor surface dings can be disregarded), or gouges (other than minor surface defects), or other damage.	VisualOk ○ Yes ○ No
	Look at all welds and verify they are smooth and flush, with no crevices, cracks or protrusions. This is not intended to be a formal weld inspection, but to verify that welds generally appear as expected and no damage has occurred in transit.	WeldsOk ○ Yes ○ No
	There should be no unusual discoloration to the titanium, especially around the welds.	ColorationOk ○ Yes ○ No
	Verify weld chamfer as shown on Section A-A of 104211700-M8U-8200-A006. Exact dimensions are not critical but should be approximately 0.25 x 45 degrees.	ProperWeldChamfer ○ Yes ○ No
	Comments Upload photos of any damage.	VisualInspComment [ ] Must submit traveler before attaching files.

| Select Traveler ⌄ | VIEW all / SAVE PDF | Page 1 ⌄ | FIRST | PREV | NEXT | LAST | |

Instantiating Travelers

Entering Data

Select previously created traveler

Page Control Buttons

Add/Update Data

| Select Traveler | VIEW all SAVE PDF | Page 1 | FIRST | PREV | NEXT | LAST | NCR Select NCR Please submit page before opening | D3 Select D3 Please submit page before opening | NEW |

Select Traveler
1   Op
2   Op

1

Traveler ID: SNSPPU-INSP-HEHDF   Rev: R2   Page:1   Traveler Seq Number: 1

Instructions	Data Input
Initial Inspection	
Technician Name **Date of Inspection** **Serial Number of part**	InspTechName -0- ▼ InspectionDate 09-Dec-2020 15:08 NOW (ex format 18-Jun-2005 16:30) HEHDFSN -0- ▼
Is head generally free from excessive dirt or other contaminants? (Head is not expected to be clean to UHV standards.)	PartCleanOk ○ Yes ○ No
Visually inspect the rest of the head. There should be no dents (minor surface dings can be disregarded), or gouges (other than minor surface defects), or other damage.	VisualOk ◉ Yes ○ No
Look at all welds and verify they are smooth and flush, with no crevices, cracks or protrusions. This is not intended to be a formal weld inspection, but to verify that welds generally appear as expected and no damage has occurred in transit.	WeldsOk ○ Yes ○ No
There should be no unusual discoloration to the titanium, especially around the welds.	ColorationOk ○ Yes ○ No
Verify weld chamfer as shown on Section A-A of 104211700-M8U-8200-A006. Exact dimensions are not critical but should be approximately 0.25 x 45 degrees.	ProperWeldChamfer ○ Yes ○ No
Comments Upload photos of any damage.	VisualInspComment
	alInspPhoto Attach Files: Attach Files ave attached no files.

SUBMIT TO DATABASE

| Select Traveler | VIEW all SAVE PDF | Page 1 | FIRST | PREV | NEXT | LAST | NCR Select NCR Please submit page before opening | D3 Select D3 Please submit page before opening | NEW |

Contact Us: ...ophyTeam |

SUBMIT EACH PAGE

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Uploading Files

IMPORTANT
Traveler MUST be instantiated before uploading files

Note: Uploading files will refresh the page and remove unsaved data. Submit first or upload files before entering data

PREV   NEXT   LAST   NCR   Select NCR ⌄

1-CAV   Rev: R1   Page:1

Data Input

CAVSN -0- ⌄

InspSummary Attach Files: Attach Files   **1**

You have attached no files.

TravOpenWho -0- ⌄

TravOpenDate _____ NO

(ex format 18-Jun-2005 16:30)

Clicking the Attach Files button will open another tab

Click Attach File, then Post Entry

Upload a new file: **3**

Browse... Instantiating Traveler 1.PNG Attach File

You have attached no files.

Reset Form   Post Entry >>

4

NOTE: Spaces and special characters, excluding dashes and underscores, are not allowed in filenames. Also note that using Internet Explorer or Google Chrome on this page will produce unexpected results.

Upload a new file:

Browse... No file selected.   Attach File   **2**

You have attached no files.

Reset Form   Post Entry >>

Update Files:

Select the file you would like to replace:

Select the file you are replacing it with:

Browse... No file selected.   Replace

Delete Files:

Select the file you would like to delete:

Delete

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- Click Browse
- In the pop-up, open the file you wish to upload
- Ensure filenames are UNIX compliant

File will be displayed next to Attach Files button   **5**

T1-CAV   Rev: R1   Page:1

Data Input

CAVSN -0- ⌄

InspSummary Attach Files: Attach Files

Instantiating Traveler 1.PNG

TravOpenWho -0- ⌄

Hold Points (Not Signer)

SensorTech -0- [dropdown]
SensorInstall [field] NOW
(ex format 18-Jun-2005 16:30)
SensortComment
[text area]

STOP This is a hold point.
Supervisor sign-off required to continue.
Valid Signers are: rlegg,powen,lking, fischer

ShipCapTech -0- [dropdown]
ShipCapDate [field] NOW
(ex format 18-Jun-2005 16:30)
ShipCapSOTRVerify -0- [dropdown]
ShipCapComment
[text area]

BackfillTech -0- [dropdown]
BackFillDate [field] NOW
(ex format 18-Jun-2005 16:30)
BackFillComment
[text area]

- Hold Points can only be cleared by the designated person(s)
- Until the hold point is cleared, data cannot be added to subsequent pages (No 'Submit to Database' button)

STOP There is a hold point in effect. Processing of this traveler can not continue without supervisor approval.

FIRST   PREV   No Submit Button   NCR   Select NCR

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Hold Points (Signer)

SensorTech -0-

SensorInstall [   ] NOW
(ex format 18-Jun-2005 16:30)
SensortComment
[   ]

STOP Supervisor sign-off required to continue.

Are you sure you wish to clear this hold point?

OK   Cancel

SensorTech -0-

SensorInstall [   ] NOW
(ex format 18-Jun-2005 16:30)
SensortComment
[   ]

GO

Hold Point has been cleared by: SAMUELS
Date:2020-12-17 08:54:00.0

- This means a designated "signer" is logged in
- Click the Stop Sign, then click your decision in the pop-up
- This means the hold point is cleared

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Hold Points on the Last Page

If Hold Points are on the last page, traveler cannot be closed until Hold Point is cleared

No Close Button

Securing Data

1. Until a Traveler is closed, data can be entered and edited

2. Once closed, ALL DATA is locked and cannot be changed

3. Data is never deleted, a history of all changes is kept

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Opening an NCR or D3

- NCR: Non Conformance Report
  - should be issued for <u>any part that does NOT meet the specified requirements</u>

- D3s: Detours Deviations Discrepancies
  - should be issued for any process that cannot be completed <u>as specified</u> in the traveler or supporting documentation.
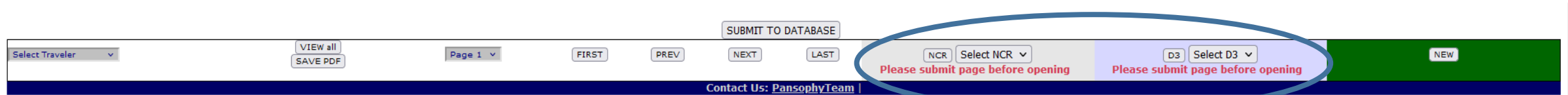
- After Instantiating a traveler, the buttons to open an NCR or D3, or view a previously opened one, appear
- Submit the page data to the database before opening either

Common Issues

- Be sure to Instantiate a traveler before entering data

- Press "Submit to Database" on every page

- Ensure filenames are UNIX compliant (alphanumeric, underscores, and hyphens are all that's allowed)

- Close travelers when data entry is complete and validated

- Required fields are fields that must have data before submitting. Will result in an error message if left blank

- Floats and Scientific Notation must have data entered in the correct format.
    - Ex: 1.2 for float, 3.21e10 for Scientific Notation

Service Requests

- Used to request assistance and fixes to traveler problems
  - E.G. adding a serial number, opening or obsoleting a traveler sequence, changing employee permissions, etc.
  - Priority level is decided by level of production holdup
    - Low=no holdup, medium= no holdup but future holdups predicted, high= currently holding up production.
  - Please see the Pansophy Traveler Requests slides on the help page for more information

Thank You For Listening

Questions?

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

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