

Traveler Authorship

Pansophy Team

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Contact us at Pansophy@jlab.org

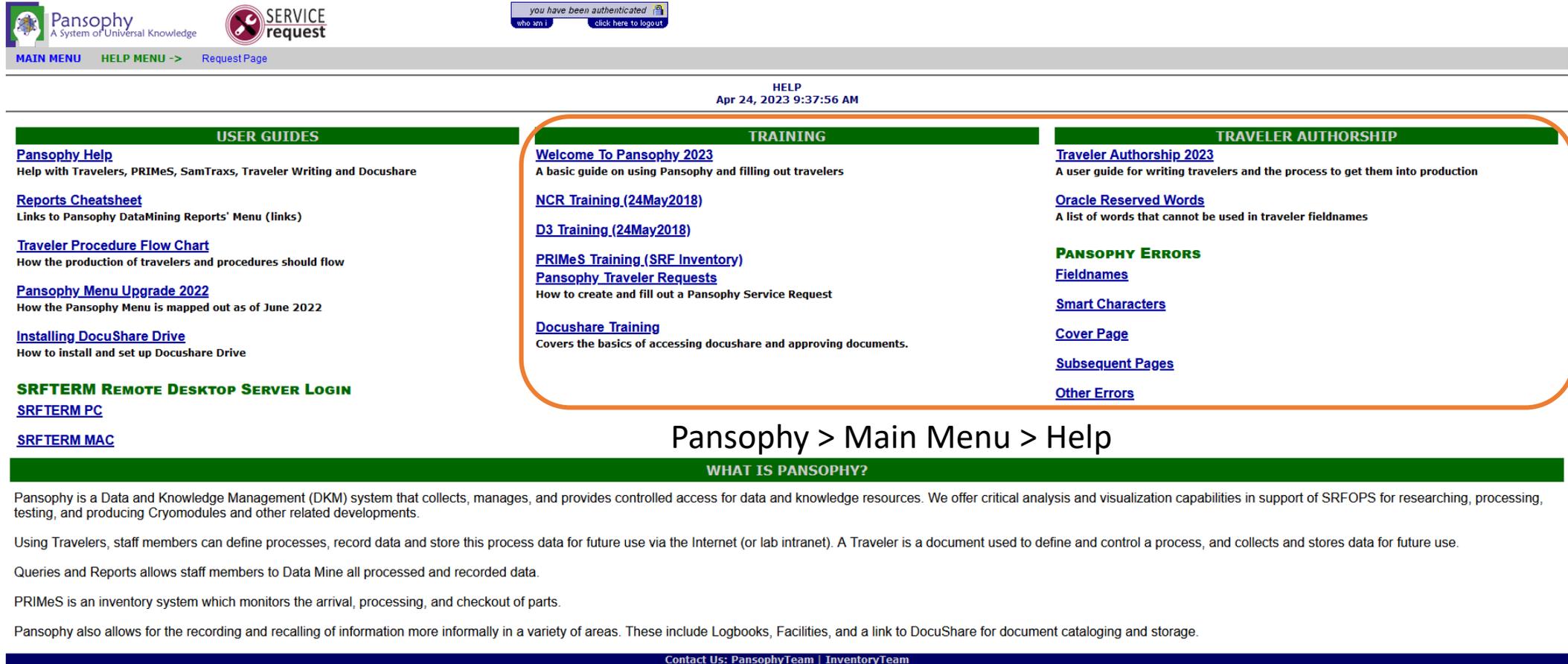


Reference Material

- 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](#)



Location of Training Slides



Pansophy
A System of Universal Knowledge

SERVICE request

you have been authenticated
who am I click here to logout

MAIN MENU HELP MENU -> Request Page

HELP
Apr 24, 2023 9:37:56 AM

USER GUIDES	TRAINING	TRAVELER AUTHORSHIP
<p>Pansophy Help Help with Travelers, PRIMEs, SamTraxs, Traveler Writing and Docushare</p> <p>Reports Cheatsheet Links to Pansophy DataMining Reports' Menu (links)</p> <p>Traveler Procedure Flow Chart How the production of travelers and procedures should flow</p> <p>Pansophy Menu Upgrade 2022 How the Pansophy Menu is mapped out as of June 2022</p> <p>Installing DocuShare Drive How to install and set up Docushare Drive</p> <p>SRFTERM REMOTE DESKTOP SERVER LOGIN</p> <p>SRFTERM PC</p> <p>SRFTERM MAC</p>	<p>Welcome To Pansophy 2023 A basic guide on using Pansophy and filling out travelers</p> <p>NCR Training (24May2018)</p> <p>D3 Training (24May2018)</p> <p>PRIMEs Training (SRF Inventory) Pansophy Traveler Requests How to create and fill out a Pansophy Service Request</p> <p>Docushare Training Covers the basics of accessing docushare and approving documents.</p>	<p>Traveler Authorship 2023 A user guide for writing travelers and the process to get them into production</p> <p>Oracle Reserved Words A list of words that cannot be used in traveler fieldnames</p> <p>PANSOPHY ERRORS</p> <p>Fieldnames</p> <p>Smart Characters</p> <p>Cover Page</p> <p>Subsequent Pages</p> <p>Other Errors</p>

Pansophy > Main Menu > Help

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 Cryomodels 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](#)

Homepage Rundown- Traveler Guides

The screenshot shows the Pansophy homepage with a navigation bar at the top containing 'MAIN MENU', 'TRAVELERS MENU ->', 'SRF OPS', 'SRF S&T', 'CLOSED PRJ', 'USER TOOLS', and 'TRAVELER TOOLS'. A 'SERVICE request' icon and a 'you have been authenticated' status bar are also visible. The main content area is divided into several sections: 'ATTENTION TRAVELER AUTHORS' (highlighted with a red arrow), 'NEW SLIDE SHOW FEAT', 'SEND US YOUR LATEST TEST RESULTS' (with a graph), and 'WHAT IS PANSOPHY?' (highlighted with a red arrow). A 'Contact Us: PansophyTeam | InventoryTe' link is at the bottom.

ATTENTION TRAVELER AUTHORS

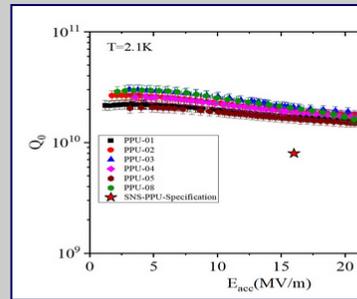
Here are some useful links to help with the traveler authoring process.

- [Traveler Authorship 2022](#)
- [Traveler Author Checklist](#)
- [Common Traveler Mistakes](#)
- [Traveler/Procedure Acronyms](#)
- [Installing DocuShare Drive](#)

WHAT IS PANSOPHY?

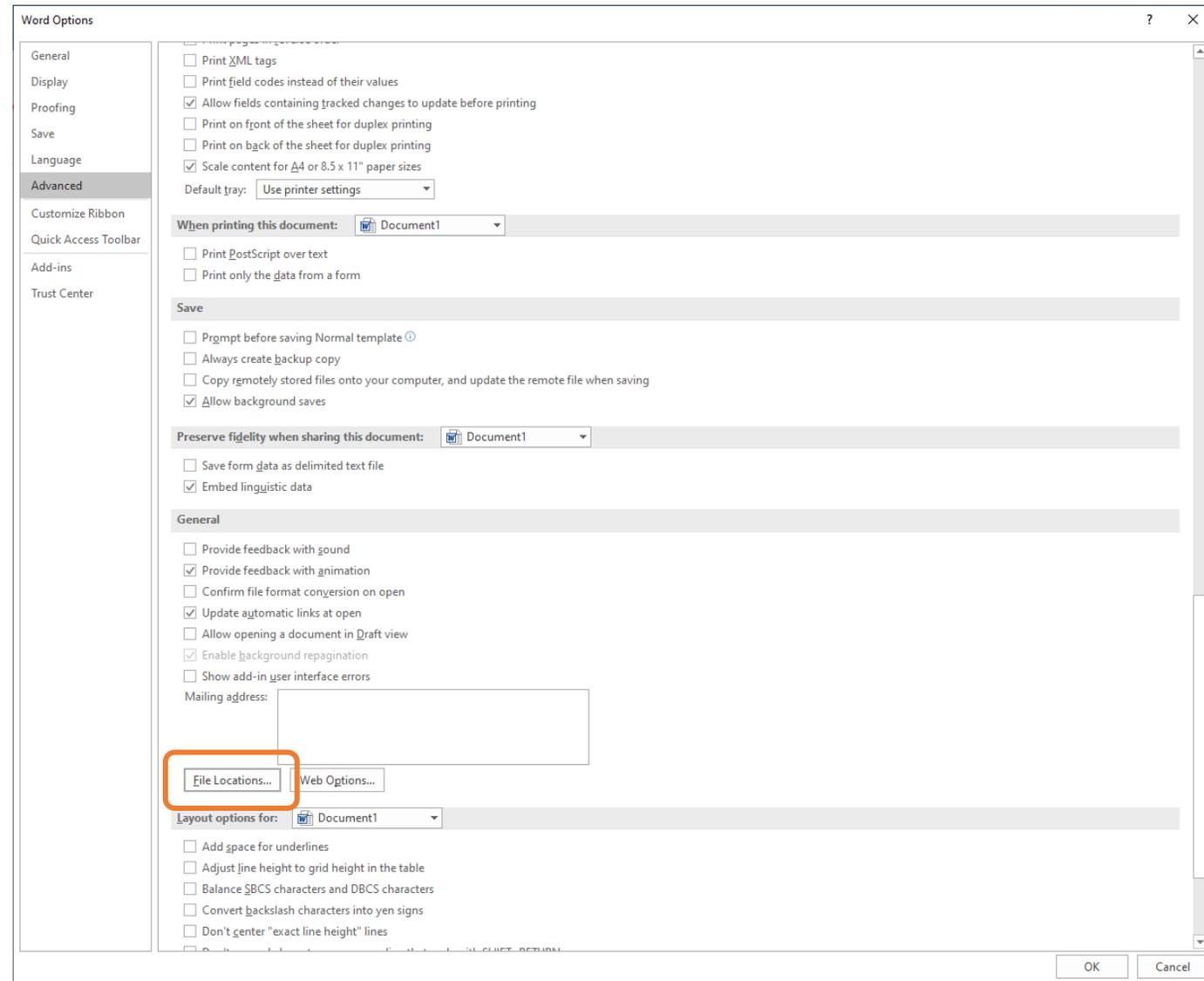
Pansophy is a Data and Knowledge Management (DKM) system that collects, manages, and provides controlled access for data and knowledge resources. We offer critical analysis and visualization capabilities in support of SRFOPS for researching, processing, testing, and producing Cryomodules and other related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

For more information, visit our [Help](#) page.



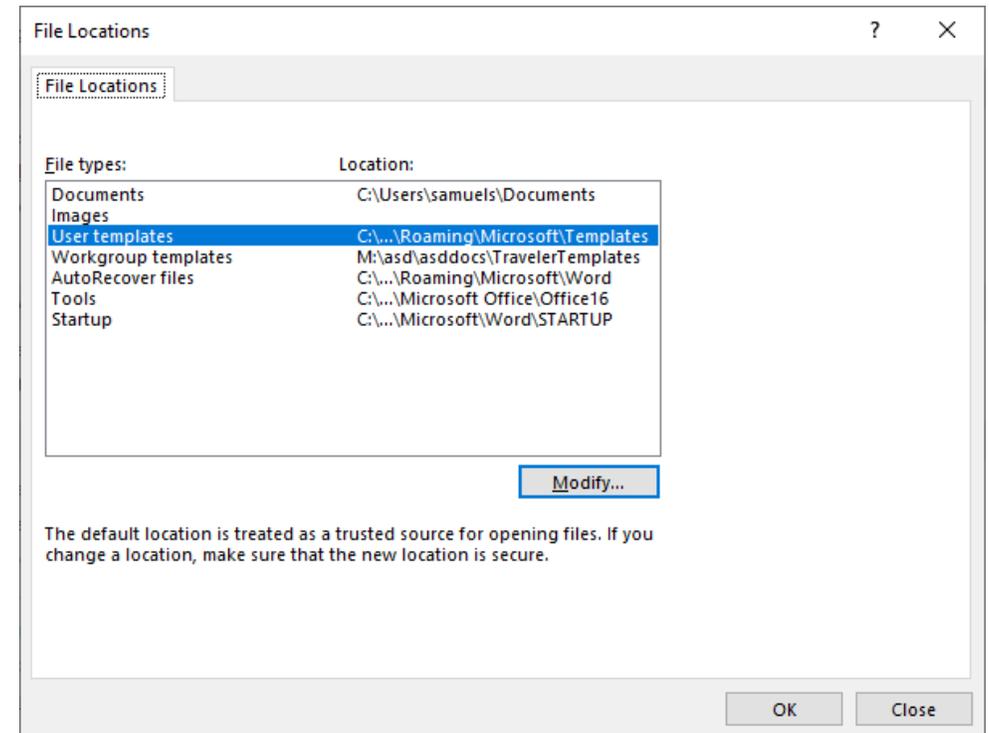
Attach the Template

- Open Microsoft Word
- Open a Blank document
- Select the **File** tab
- Select **Options**
- Select **Advanced**
- Scroll down to **General**
- Click **File Locations**



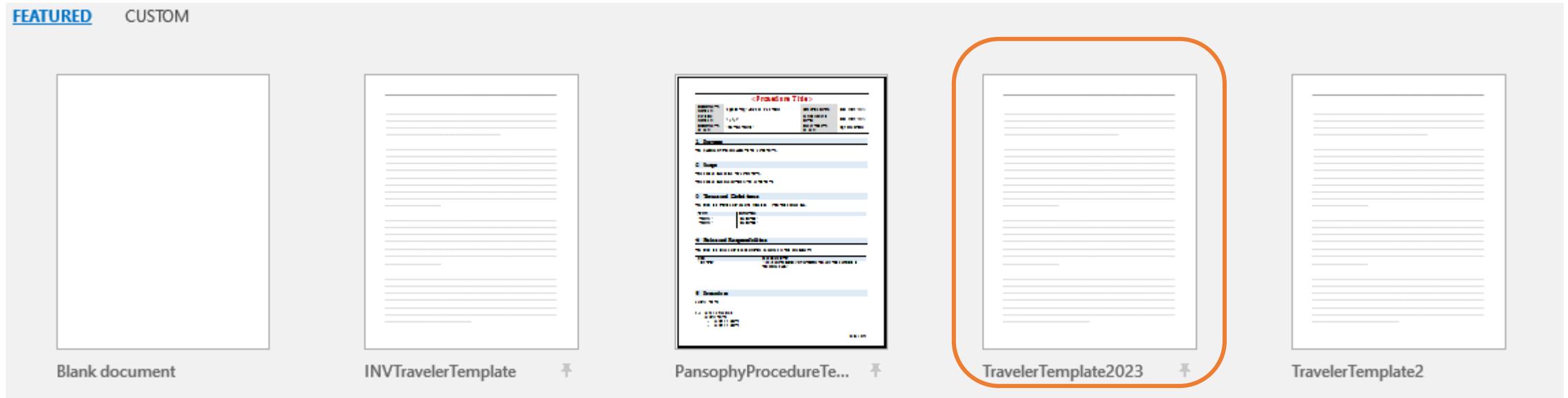
Attach the Template Cont.

- In the **File Locations** pop up, select **Workgroup templates**
- Click the **Modify...** button
- Browse to
M:\asd\asddocs\TravelerTemplates
- Click **OK**
- Click **OK** on File Locations
- Click **OK** on Word Options



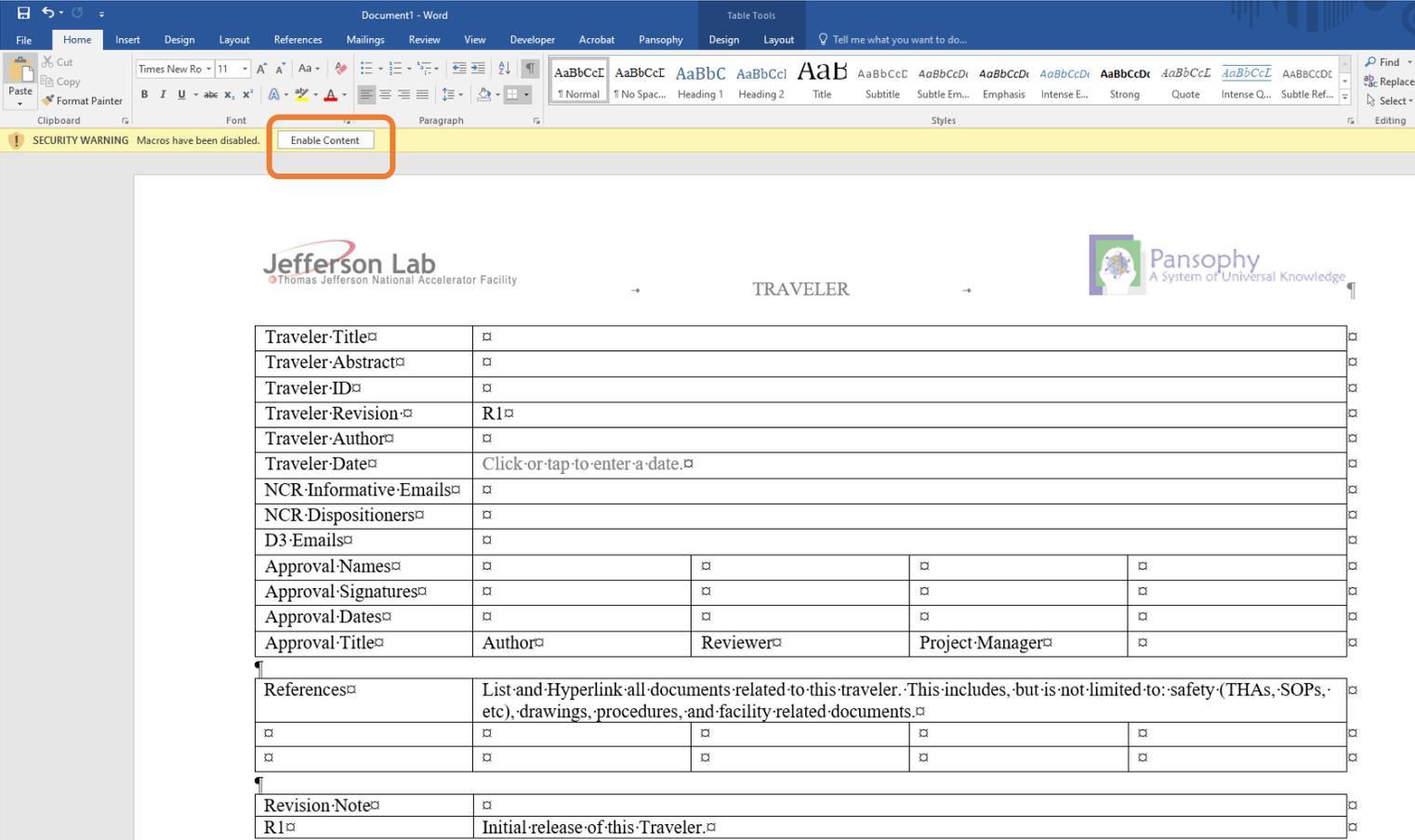
Attach the Template Cont.

- Restart Word
- All templates (Traveler, Procedure and Inventory Traveler) will now be available under the **TEMPLATE** area when Word is first opened



Creating a Traveler

- Select **TravelerTemplate2023** from the templates
 - You should now see the pansophy tab in the ribbon
- Be sure to click **Enable Content** to access the Pansophy Tab



The screenshot shows the Microsoft Word interface with the Pansophy ribbon selected. A yellow security warning bar at the top reads "SECURITY WARNING: Macros have been disabled." and contains an "Enable Content" button highlighted with a red box. Below the ribbon, the document content includes the Jefferson Lab logo, the word "TRAVELER" in the center, and the Pansophy logo. A form with various fields is displayed, including a table for approval information and a section for references.

Traveler-Title			
Traveler-Abstract			
Traveler-ID			
Traveler-Revision	R1		
Traveler-Author			
Traveler-Date	Click or tap to enter a date.		
NCR-Informative-Emails			
NCR-Dispositioners			
D3-Emails			
Approval-Names			
Approval-Signatures			
Approval-Dates			
Approval-Title	Author	Reviewer	Project-Manager

References

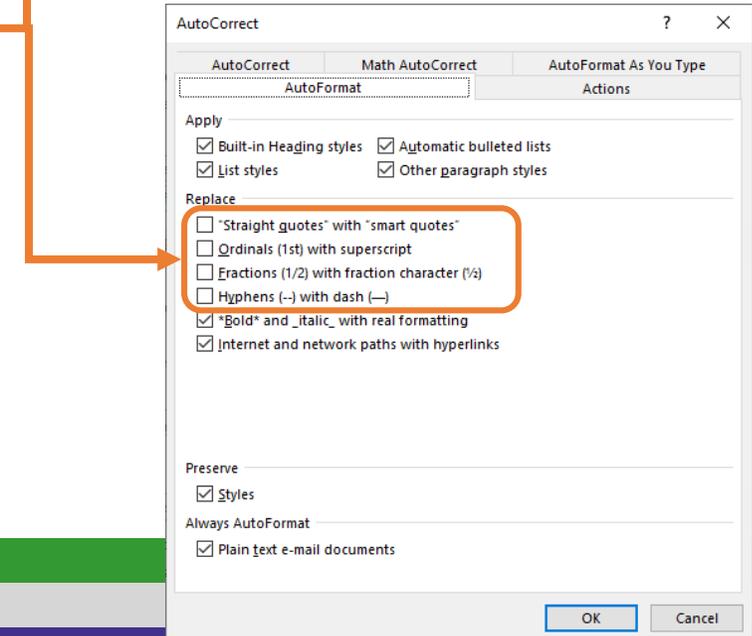
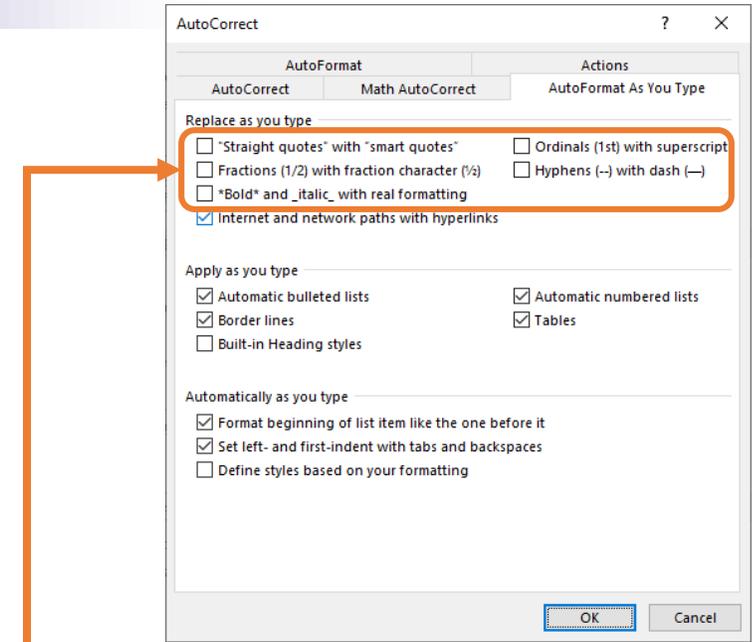
List and Hyperlink all documents related to this traveler. This includes, but is not limited to: safety (THAs, SOPs, etc), drawings, procedures, and facility-related documents.

Revision-Note

R1 Initial release of this Traveler.

Before you Begin

- Turn on Paragraph Marks
 - Will assist in editing by displaying hidden symbols
- Turn off Smart Tags
 - File > Options > Proofing > Autocorrect Options
 - Deselect the following checkboxes
 - Smart characters create error symbols in pansophy



Pansophy Ribbon



Pansophy Ribbon



1. Entry Fields
2. Page Mods
3. User Sets
4. Part SN



Pansophy Ribbon: Entry Fields

CheckBox	Float	Note	Select
Comment	SN	Radio	Text
FileUpload	Integer	SciNot	Timestamp
Entry Fields			

- Entry Fields are the ONLY valid data inputs for travelers
 - Collects entered data for the traveler
- Formats:
 - `[[FieldName]] <<FIELDTYPE>>`
 - `[[FieldName]] {{CHOICE1,CHOICE2,...}} <<FIELDTYPE>>`
- FieldName is the variable name for the entry field
 - Displayed in the traveler and labels the field in the database
- FieldType is the type of input
- `{{CHOICE1,CHOICE2,...}}` is for fields that have multiple selection options



Pansophy Ribbon: Entry Fields Dictionary

CheckBox	Float	Note	Select
Comment	SN	Radio	Text
FileUpload	Integer	SciNot	Timestamp
Entry Fields			

Ribbon Code	Traveler Code	Definition
CheckBox	[[FieldName]] <<CHECKBOX>>	A checkbox that indicates the answer to a question is “yes”.
Comment	[[FieldName]] <<COMMENT>>	Allows you to collect comments in a large input box.
FileUpload	[[FieldName]] <<FILEUPLOAD>>	Allows you to upload any type of file to the server. File name must contain ONLY letters, numbers and underscores.
Float	[[FieldName]] <<FLOAT>>	Creates in input box that accepts numbers containing a decimal point.
SN	[[FieldName]] <<SN>>	Provides a text box that accepts serial numbers (both numbers and letters). A Part SN is preferred over an SN Field.
Integer	[[FieldName]] <<INTEGER>>	Creates an input box that accepts whole numbers only.
Note	[[FieldName]] <<NOTE>>	Use to alert programmers of special traveler requirements (ex: calculations).
Radio	[[FieldName]] {{Choice1,Choice2,Choice3}} <<RADIO>>	Creates a series of radio buttons (only one can be selected) base on the author supplied list of choices.



Pansophy Ribbon: Entry Fields Dictionary

Cont.

CheckBox	Float	Note	Select
Comment	SN	Radio	Text
FileUpload	Integer	SciNot	Timestamp
Entry Fields			

Ribbon Code	Traveler Code	Definition
SciNot	[[FieldName]] <<SCINOT>>	Allows for the numbers in scientific notation.
Select	[[FieldName]] {{Choice1,Choice2,Choice3}} <<SELECT>>	Creates an author defined pull-down menu.
Text	[FieldName]] <<TEXT>>	Creates a input box for text entries. Smaller than a Comment box, just one line.
Timestamp	[[FieldName]] <<TIMESTAMP>>	Provides an input box which accepts date & time. Also supplies a “Now” button which will automatically enter the current date & time.
YesNo	[[FieldName]] <<YESNO>>	Creates radio buttons that answer a yes/no question
Holdpoint	[[FieldName]] {{Username1,Username2}} <<HOLDPOINT>>	Creates a hold point in the traveler, preventing any further data entry.
Emails	[[FieldName]] {{Username1,Username2}} <<EMAIL>> [[FieldName]] {{Subject Line}} <<EMAILSUBJ>>	Send an email to author specified users when a page is submitted. Must use the same Field Name for both lines of Entry Fields



Pansophy Ribbon: Special Fields

- Sometimes a traveler will require special coding beyond what entry fields offer
 - If this is required, use the <<NOTE>> field

```
[[This is the only field you can have special characters in, including spaces. This is so you can leave a note to alert us when special coding is needed.]]<<NOTE>>¶
```

- A <<HOLDPOINT>> is used to pause the traveler process until cleared by an authorized person
 - Data can be submitted on the page as the holdpoint, but not subsequent pages until cleared.
 - If the holdpoint is on the last page, it prevents the traveler from being closed until cleared
 - IMPORTANT: Only one holdpoint per traveler page

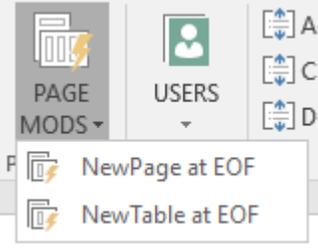
```
[[TravHoldPoint]]·{{SAMUELS,BOOKWALT,MEGAN}}<<HOLDPOINT>>¶
```

- <<EMAIL>> and <<EMAILSUBJ>> sends an email to traveler author specified users
 - Must use the same Field Name for both lines of Entry Fields
 - Can use spaces in the subject line, no other special characters

```
[[TravEmail]]·{{SAMUELS,BOOKWALT,MEGAN}}<<EMAIL>>¶  
[[TravEmail]]·{{Traveler Needs Your Attention}}<<EMAILSUBJ>>¶
```



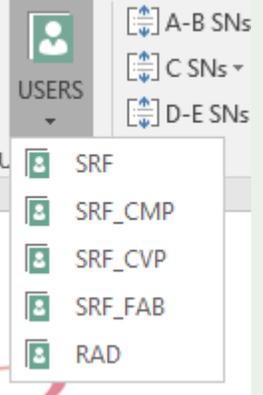
Pansophy Ribbon: Page Mods

Ribbon Code	Definition	
NewPage at EOF	Inserts a page break at the End Of the File	
NewTable at EOF	Inserts a page break and a table for steps, instructions and data input at the End Of the File	



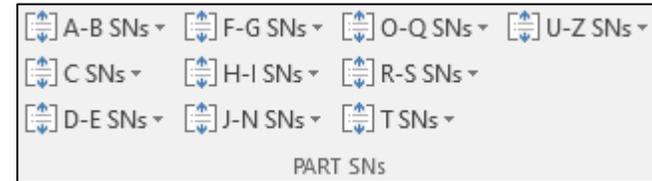
Pansophy Ribbon: User Sets

Ribbon Code	Traveler Code	Definition
SRF	[[SRF_FIELDNAME]] <<SRF>>	SRF User Set
SRF_CMP	[[SRFCMP_FIELDNAME]] <<SRFCMP>>	SRF Cryomodule User Set
SRF_CVP	[[SRFCVP_FIELDNAME]] <<SRFCVP>>	SRF Cavity User Set
SRF_FAB	[[SRFFAB_FIELDNAME]] <<SRFFAB>>	SRF Fabrication User Set
RAD	[[RAD_FIELDNAME]] <<RAD>>	Radcon User Set

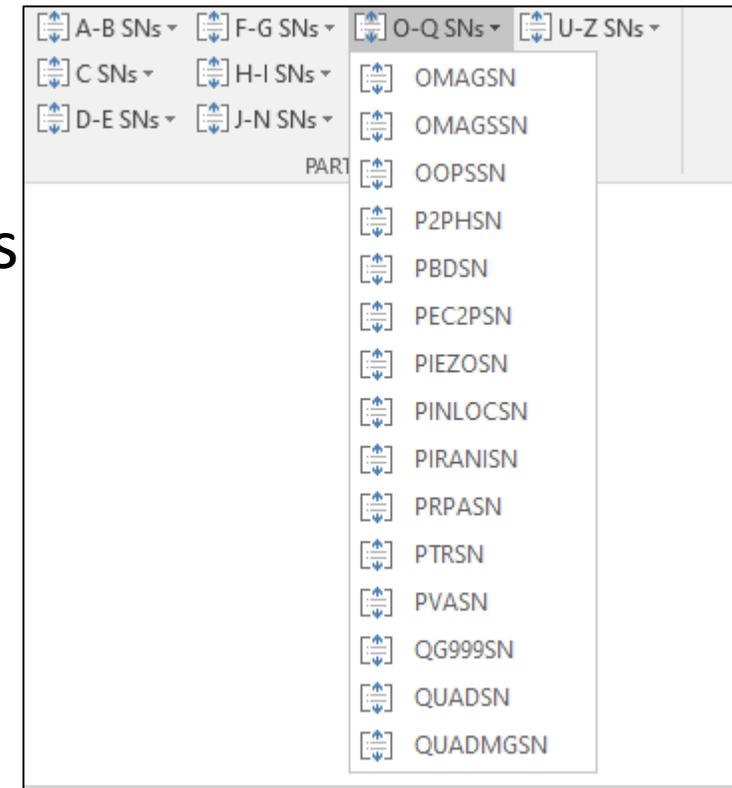


If a username does not appear online, contact pansophy to add them in.

Pansophy Ribbon: Part SNs



- Each dropdown lists the different Part SNs available for use in alphabetic order
- E.G. [[OMAGSN]] <<OMAGSN>>
- A <<SN>> field may be used if no acronym is available yet.

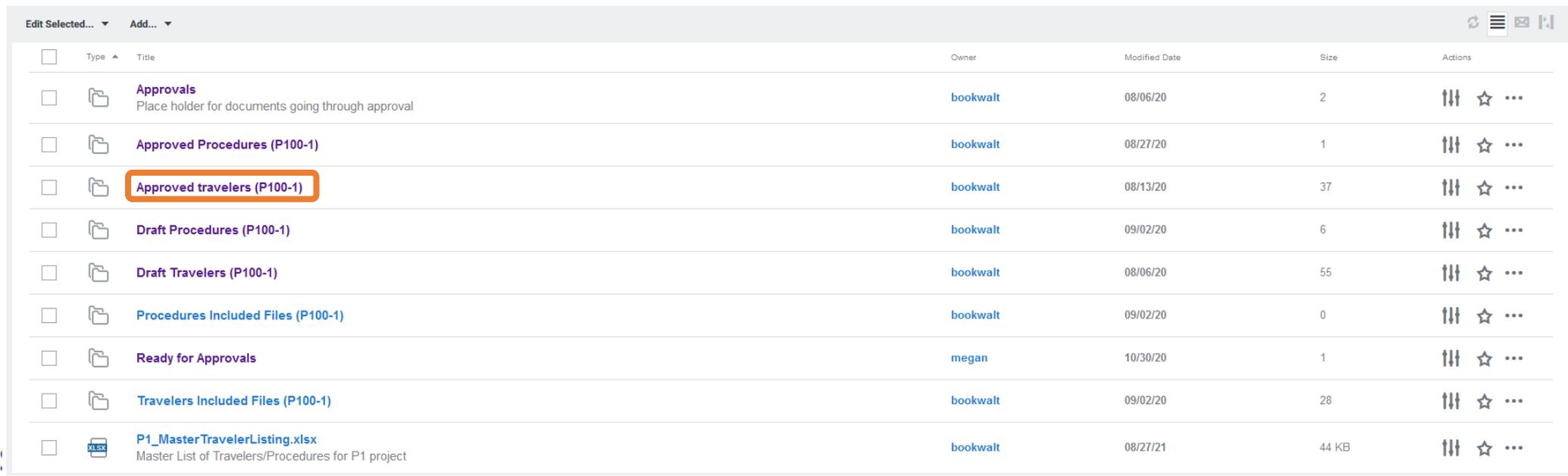


Authoring a Traveler



Using an Old Traveler

- Older travelers can be used as starting points for new revisions or new versions in different projects.
- All files for in production travelers can be found in a project's Approved Travelers folder



<input type="checkbox"/>	Type	Title	Owner	Modified Date	Size	Actions
<input type="checkbox"/>	Folder	Approvals Place holder for documents going through approval	bookwalt	08/06/20	2	⋮ ☆ ⋮
<input type="checkbox"/>	Folder	Approved Procedures (P100-1)	bookwalt	08/27/20	1	⋮ ☆ ⋮
<input type="checkbox"/>	Folder	Approved travelers (P100-1)	bookwalt	08/13/20	37	⋮ ☆ ⋮
<input type="checkbox"/>	Folder	Draft Procedures (P100-1)	bookwalt	09/02/20	6	⋮ ☆ ⋮
<input type="checkbox"/>	Folder	Draft Travelers (P100-1)	bookwalt	08/06/20	55	⋮ ☆ ⋮
<input type="checkbox"/>	Folder	Procedures Included Files (P100-1)	bookwalt	09/02/20	0	⋮ ☆ ⋮
<input type="checkbox"/>	Folder	Ready for Approvals	megan	10/30/20	1	⋮ ☆ ⋮
<input type="checkbox"/>	Folder	Travelers Included Files (P100-1)	bookwalt	09/02/20	28	⋮ ☆ ⋮
<input type="checkbox"/>	File	P1_MasterTravelerListing.xlsx Master List of Travelers/Procedures for P1 project	bookwalt	08/27/21	44 KB	⋮ ☆ ⋮



Using an Old Traveler Cont.

- Ensure that the traveler is in the current template
 - If the first page is missing the NCR informative and D3 emails rows, it is in the old template
 - If this happens, create a new traveler in the current template and transfer the information

Traveler Title	C75 Cryounit Disassembly			
Traveler Abstract	This traveler contains the necessary information to disassemble a CEBAF cryounit.			
Traveler ID	C75-CU-DISA			
Traveler Revision	R1			
Traveler Author	John Fischer			
Traveler Date	23-Aug-2017			
NCR Emails	rlegg.fischer,reilly,worland,macha			
Approval Names	John Fischer	Bob Legg	Ken Worland	Kurt Macha
Approval Signatures				
Approval Dates				
Approval Title	Author	CMA Group Lead	Reviewer	Reviewer
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.			
Cryounit Helium Vessel dwg	Cryounit HV MLI dwg	Cryounit Nitronic Rod Seat MLI dwg	Cryounit Tuner Assy dwg	Cryounit VV End View dwg
Cryounit Waveguide Front View dwg	Cryounit Waveguide Top View dwg	RADCON Control Document	RADCON Briefing Slides	
Revision Note				
R1	Initial release of this Traveler.			



Filling Out a Traveler: Header Page

Traveler Title	Traveler Title			
Traveler Abstract	This is a brief description of the traveler			
Traveler ID	PROJ-WCA-COMP-ACTION			
Traveler Revision	R2			
Traveler Author	Allen Samuels			
Traveler Date	15-Sep-22			
NCR Informative Emails	SAMUELS,MEGAN			
NCR Dispositioners	MDICKEY,BOOKWALT			
D3 Emails	SAMUELS,MEGAN,MDICKEY,BOOKWALT			
Approval Names	A. Samuels	M. Mcdonald	V. Bookwalter	
Approval Signatures				
Approval Dates				
Approval Title	Author	Reviewer	Project Manager	
References	List and Hyperlink all documents related to this traveler. This includes, but is not limited to: safety (TRIP, etc), drawings, procedures, and facility related documents.			
Drawing #	PROJ-PR-WCA-COMP-ACTION-R1 Project PDF	OSP	SRF-MSPR-WCA-COMP-ACTION-SRF Master Procedure	
Revision Note				
R1	Initial release of this Traveler.			
R2	Brief description of changes made			

Traveler title is different from Traveler ID
 Traveler ID format: Project-Work Center Area-Component-Action

- This will be the filename, along with the revision number
- Discuss Traveler ID with Project Coordinator
- Ensure Traveler ID is listed in the Work Control Document (WCD) register
- Acronyms can be found on the pansophy website > Traveler Tools > TP Acronyms

NCR/D3 format:
 USERNAME1,USERNAME2,USERNAME3, etc

- No spaces, between emails
- No duplicates usernames between NCR categories
 - NCR Informative get email alerts about NCRs. NCR Dispositioners can go in and address them.

Filling Out a Traveler: Header Page Cont.

Traveler·Title□	Traveler·Title□			
Traveler·Abstract□	This is a brief description of the traveler□			
Traveler·ID□	PROJ-WCA-COMP-ACTION□			
Traveler·Revision·□	R2□			
Traveler·Author□	Allen·Samuels□			
Traveler·Date□	15-Sep-22□			
NCR·Informative·Emails□	SAMUELS,MEGAN□			
NCR·Dispositioners□	MDICKEY,BOOKWALT□			
D3·Emails□	SAMUELS,MEGAN,MDICKEY,BOOKWALT□			
Approval·Names□	A·Samuels□	M·Mcdonald□	V·Bookwalter□	□
Approval·Signatures□	□	□	□	□
Approval·Dates□	□	□	□	□
Approval·Title□	Author□	Reviewer□	Project·Manager□	□
References□	List and Hyperlink all documents related to this traveler. This includes, but is not limited to: safety (THA etc), drawings, procedures, and facility related documents.□			
Drawing·#□	PROJ-PR-WCA-COMP-ACTION-R1·Project·PDF□	OSP□	SRF-MSPR-WCA-COMP-ACTION-SRF·Master·Procedure□	□
□	□	□	□	□
Revision·Note□	□			
R1□	Initial release of this Traveler.□			
R2□	Brief description of changes made□			
Page Break				

Hyperlink any files the author deems necessary

- Ensure the links work and go to in production references

Once a traveler is in production, a new revision is needed for any modifications

- Update the revision number and add a description of changes

Make sure the revision numbers match

Be sure a page break is at the end of the header page

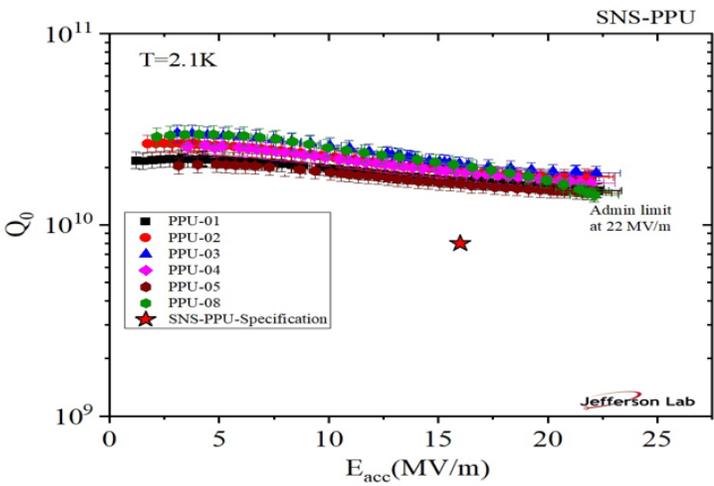


Filling out a Traveler: Entry Fields Rules

- Fieldnames must be unique and descriptive
 - Travelers with duplicate fieldnames names will result in errors during upload
 - [[Technician]] does not describe what is being done. [[VacuumTech]] or [[VacTech]] is more descriptive
- Fieldnames must be nonsequential (E.G. [[FieldName1]], [[FieldName2]], etc. is not preferred)
 - The exception is within an individual step and with Part SNs
 - Don't label them based on the step (E.G. [[FIELDNAME4 in step 4]])
- Camel Case is preferred (E.G. [[CamelCase]], [[SRFCamelCase]])
- Fieldname character limit is 40 characters
- Fieldnames cannot start with a number
- No spaces or special characters in fieldname except for underscore _
- 1 field and fieldname per line.
- No more than 1 holdpoint per page



Traveler Page Example

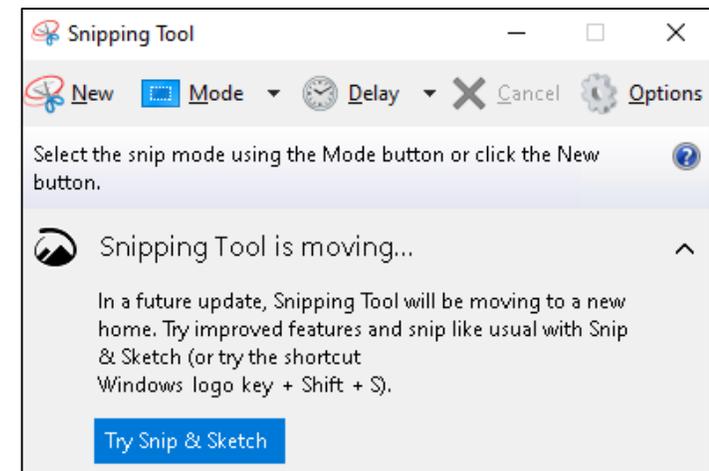
Step.No.	Instructions	Data Input
1	Step 1 instructions	[[FIELDNAME_SRF]]-<<SRF>> [[StartTimeForWhatStepIs]]. <<TIMESTAMP>> [[DescriptiveCommFieldName]]. <<COMMENT>>
2	Step 2 instructions	
	Step 2 instructions-continued  Step 2 picture <ul style="list-style-type: none"> • → Step 2 bullet points • → Also a bullet point • → Still a bullet point list 	[[FloatForGraph]]-<<FLOAT>> [[This is the only field you can have special characters in, including spaces. This is so you can leave a note to alert us when special coding is needed.]]-<<NOTE>> [[OMAGSSN]]-<<OMAGSSN>>
3	Step 3 instructions	[[TravComp]]-<<CHECKBOX>>

- The first work page (P1) needs at minimum:
 - Part SN
 - SRF User Group
 - Comment
 - Timestamp
- Valid SNs can be found under the Pansophy tab > Part SNs
- If your component is not listed, verify on the pansophy webpage > Traveler Tools > SN List



Images in a Traveler

- Travelers can have images
- Arrows and other symbols must be part of the image, and cannot be in the word document
 - To add, edit an image in word and screenshot using the snipping tool, then replace image and symbols with new image
 - Alternatively use PowerPoint to the same effect.



Extra Lines

- Using extra lines to line up instructions and fields does not work
- If needed, split the steps up into different cells

X

Step No.	Instructions	Data Input
1	Select the serial number of the first C75 cavity to be barrel polished. Select the serial number of the second C75 cavity to be barrel polished. If only one cavity was barrel polished, describe what was used as a counterweight in the Comment box	[[CAVSN1]] <<CAVSN>> [[CAVSN2]] <<CAVSN>> [[PolishComment]] <<COMMENT>>
2	Select the technicians doing the work.	[[SetupTech1]] <<SRFCVP>>

X

Step No.	Instructions	Data Input
1	Select the serial number of the first C75 cavity to be barrel polished. Select the serial number of the second C75 cavity to be barrel polished. If only one cavity was barrel polished, describe what was used as a counterweight in the Comment box	CAVSN1 -0- CAVSN2 -0- PolishComment
2	Select the technicians doing the work	SetupTech1

✓

Step No.	Instructions	Data Input
1	Select the serial number of the first C75 cavity to be barrel polished.	[[CAVSN1]] <<CAVSN>>
	Select the serial number of the second C75 cavity to be barrel polished.	[[CAVSN2]] <<CAVSN>>
	If only one cavity was barrel polished, describe what was used as a counterweight in the Comment box	[[PolishComment]] <<COMMENT>>
2	Select the technicians doing the work	[[SetupTech1]] <<SRFCVP>>



Page Breaks

- Travelers are preferred to be on multiple pages
- Page breaks create new pages on the web
- Use Pansophy Tab > Page Mods > New Table at EOF to insert a page break and new table at the end of the document
- If a table needs to be broken up, go to the layout tab and use the split table tool

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.		
Revision Note			
R1	Initial release of this Traveler.		
Page Break			
Step No	Instructions	Data Input	
1			
2		[[TravEmail]]:{{SAMUELS,BOOKWALT,MEGAN}}-<<EMAIL>> [[TravEmail]]:{{Traveler-Needs-Your-Attention}}-<<EMAILSUBJ>>	
3		[[TravHoldPoint]]:{{SAMUELS,BOOKWALT,MEGAN}}-<<HOLDPOINT>>	
Page Break			
Step No	Instructions	Data Input	
4			
5			
6			

Draft Travelers Folder

- Each DocuShare project area has a draft travelers folder
 - This folder is for authors to upload a copy of their draft traveler while in the editing process
 - Also used for preliminary review between approvers before being sent out for official approvals

06 - Process Documents/Travelers (L2HE)

Type	Title	Owner	Modified Date	Size	Actions
Folder	Approvals	megan	10/06/20	2	⋮ ☆ ⋮
Folder	Approved Procedures - (L2HE)	bookwalt	09/30/20	23	⋮ ☆ ⋮
Folder	Approved Travelers - (L2HE)	bookwalt	08/24/20	116	⋮ ☆ ⋮
Folder	Draft Procedures - (L2HE)	bookwalt	10/06/20	14	⋮ ☆ ⋮
Folder	Draft Travelers - (L2HE)	bookwalt	08/24/20	52	⋮ ☆ ⋮
Folder	Other Process Documents	ganey	05/12/22	4	⋮ ☆ ⋮
Folder	Procedures Included Files - (L2HE)	bookwalt	10/06/20	14	⋮ ☆ ⋮
Folder	Ready for Approvals	megan	11/05/20	1	⋮ ☆ ⋮
Folder	Travelers Included Files - (L2HE)	bookwalt	10/06/20	70	⋮ ☆ ⋮



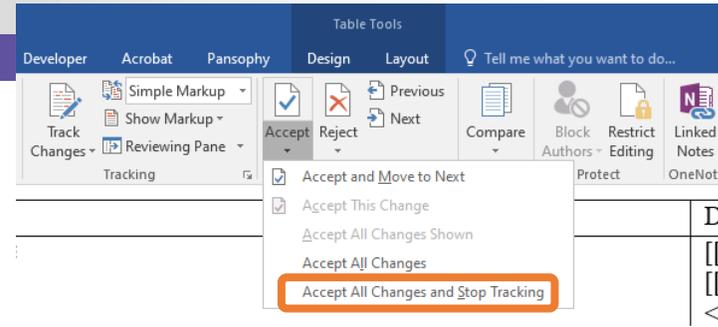
Approvals



When a traveler is ready for approval

- Before a traveler is put out for approval, make sure it is ready to go into pansophy AS IS to the best of your ability
 - Pansophy may make small edits and reserves the right to send travelers back for revision
 - If at any time a traveler needs to be sent back for major revision, the approval process is restarted

Traveler cleanup

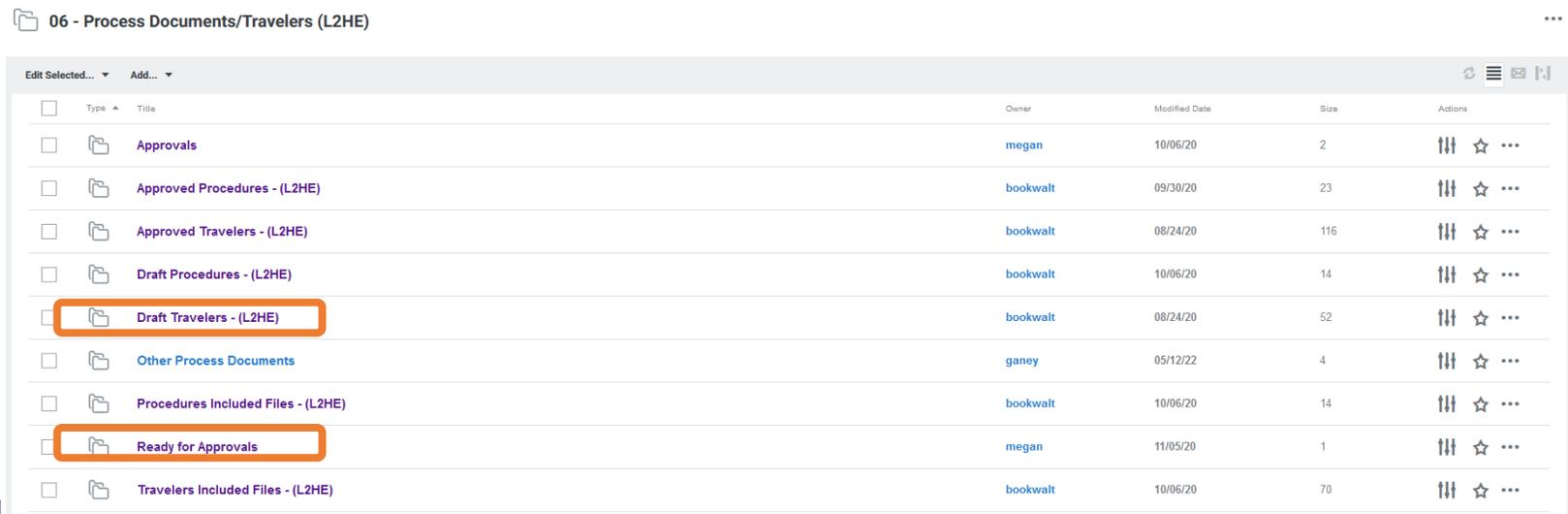


- If it was used, turn off track changes and accept all revisions
- Delete comments and remove highlights
- Remove double spaces
 - Ctrl + h, or open find and replace. Search for double spaces, replace with single. Run until zero results
- If creating a new traveler from an older one, errors might carry over
 - Keep an eye out for smart quotes and apostrophes, or use find and replace to root them out



Putting a traveler out for approval

- Up until this point, in progress travelers remain in the project draft folder in DocuShare.
- When it is ready, upload the traveler word document to the Ready for Approvals folder.
 - Pansophy **does not** accept travelers via email.



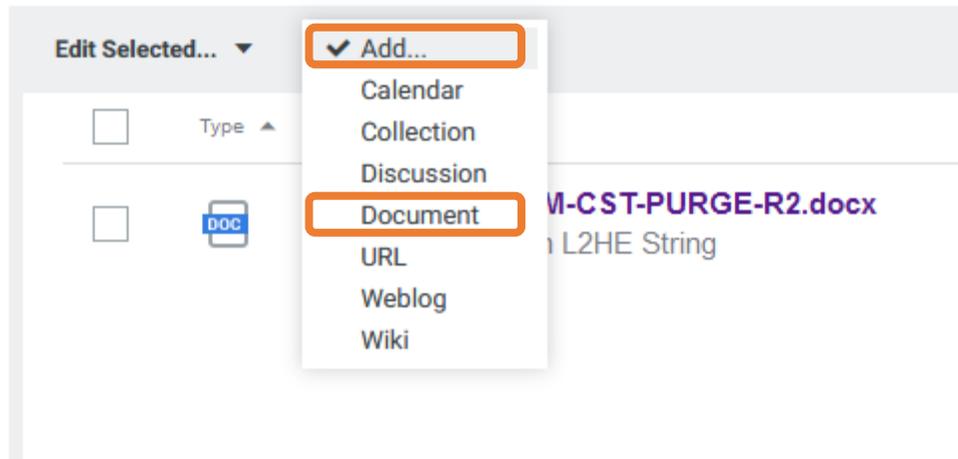
06 - Process Documents/Travelers (L2HE)

Type	Title	Owner	Modified Date	Size	Actions
Folder	Approvals	megan	10/06/20	2	View, Star, More
Folder	Approved Procedures - (L2HE)	bookwalt	09/30/20	23	View, Star, More
Folder	Approved Travelers - (L2HE)	bookwalt	08/24/20	116	View, Star, More
Folder	Draft Procedures - (L2HE)	bookwalt	10/06/20	14	View, Star, More
Folder	Draft Travelers - (L2HE)	bookwalt	08/24/20	52	View, Star, More
Folder	Other Process Documents	ganey	05/12/22	4	View, Star, More
Folder	Procedures Included Files - (L2HE)	bookwalt	10/06/20	14	View, Star, More
Folder	Ready for Approvals	megan	11/05/20	1	View, Star, More
Folder	Travelers Included Files - (L2HE)	bookwalt	10/06/20	70	View, Star, More

Putting a traveler out for approval: Uploading

- Open ready for approvals, click the "Add" dropdown, and select Document

 Ready for Approvals



Putting a traveler out for approval: Uploading

Cont.

- Browse to select the traveler word document to upload
- Document title is automatically created from the filename
- Use the traveler title for the document summary
- When finished, scroll down to the bottom and hit "Apply"

Add Document

Add Document By: Uploading a document now
 Uploading a document later

Filename: No file selected.

Title:
Summary:

Description:



A rich text editor toolbar with various icons for text formatting (bold, italic, underline, strikethrough, text color, background color), alignment (left, center, right, justified), list creation (bulleted, numbered), indentation, link, unlink, insert image, insert table, insert link, insert unlink, and font settings (font face, size, format). Below the toolbar is a large, empty text area for entering the document description.

Keywords:

Expiration Date: hh mm

Max Versions:
(required)

Author (enter usernames):



Approval Email

- After the Document Coordinator routes a traveler for approval, the approvers will receive an email and link

You have a new DocuShare document routing task:

Subject: P1-TRAIN-STUFF-R1.docx

Date: 09/17/2021 15:26:48

To view your pending document routing tasks, click on the link below to login to DocuShare:

https://jlabdoc.jlab.org/docushare/dsweb/routing/routing_email.jsp?url=request_base.jsp&routingSlipRequestID=21667&workFlowJobName=21662



Approving a Document

- Clicking the approval link will take you to this page
- You can download and view the routed document from here
- Must be logged in to Docushare to approve

The screenshot shows a document approval interface. At the top, it says "For Your Approval" and lists the sender as Allen Samuels, the subject as P1-TRAIN-STUFF-R1.docx, and the date as Friday, September 17, 2021 03:26:48 PM EDT. Below this is a table with columns for "Type" and "Title". The table contains one entry: a document icon followed by the text "P1-TRAIN-STUFF-R1.docx". To the right of this entry is an "Actions" column with icons for download, print, and share. Below the table is a "Comments:" section with a rich text editor toolbar (bold, italic, underline, bulleted list, numbered list, link, unlink, help) and a large text area containing the text "Comments on the document go here". At the bottom left of the comments section is a checkbox labeled "Save as private".

- Click to save your comment
- Approve or disapprove the traveler

Three buttons are shown at the bottom right of the interface, each enclosed in an orange rounded rectangle. From left to right, they are labeled "Respond Later", "Disapproved", and "Approved". The "Approved" button is highlighted with a darker background.

Check Approval Status

- Status routing can be checked in Docushare.
 - Travelers under approval are found in the project's Approvals folder
- Open the properties, then go to routing.

□  P1-TRAIN-STUFF-R1.docx samuels 09/17/21 200 KB 1  ☆ ...

P1-TRAIN-STUFF-R1.docx
Version 1

View Properties

View

- View
- Edit
- Permissions
- Notifications
- Locations
- Version History
- Comments (0)
- Routing** 2
- Change History

Title: P1-TRAIN-STUFF-R1.docx

Summary:

Description:

Keywords:

Handle: Document-248214

Owner: [Allen Samuels \(User-2008, samuels.JLAB\)](#) 

Create Date: Friday, September 17, 2021 11:36:43 AM EDT

Modified Date: Friday, September 17, 2021 11:36:43 AM EDT

Modified By:

Expiration Date: Monday, September 20, 2021 12:00:00 AM EDT

Locked By:

Abstract:

Add Versions: Allowed

Author (enter usernames):

Content Type: Microsoft Word (.docx) - application/vnd.openxmlformats-officedocument.wordprocessingml.document

Document Classification: Other

File name: P1-TRAIN-STUFF-R1.docx

Is Placeholder: No

Keyword1:

Keyword2:

Keyword3:

Lessons Learned:

Check Out 

Upload a New Version 

Delete Document 

Add to Favorites 

Route 

Lock 

View in HTML 

Check Approval Status Cont.

- Open the link to check who has approved or disapproved and who has not.

Routing

Description	Owner	Status	Date
 P1-TRAIN-STUFF-R1.docx 3	samuels	Approved	09/17/21

 My Tasks ✕

Report on Routing for Approval

From: DocuShare Document Routing Service
Subject: Re: P1-TRAIN-STUFF-R1.docx
Date: Friday, September 17, 2021 03:26:48 PM EDT

Type	Title	Actions
	P1-TRAIN-STUFF-R1.docx	 

Status: Approved

Recipient	Response	Date	Added Versions	Response Versions
Step 1: Approval, 100% respond				
 Allen Samuels	Approved	09/17/21	-	1 (Version-136256)

[Keep for Later](#) [Delete This Job](#)

Overdue Documents and What Happens

- When a Traveler or Procedure is overdue, an email will be sent to the approvers
 - The Project Coordinator will be notified by the Document Coordinator if necessary

You have a new DocuShare document routing task:

Subject: C100R-CAV-RFIN-R2.docx

Date: 10/14/2021 00:00:07

Step 1 OVERDUE: 10/13/2021

To view your pending document routing tasks, click on the link below to login to DocuShare:

https://jlabdoc.jlab.org/docushare/dsweb/routing/routing_email.jsp?url=report_base.jsp&reportType=ForApprovalOverdue&routingSlipRequestID=21808¬ifyID=21822&workFlowJobName=21808

Disapproved Travelers

- If a traveler is disapproved, an email will be sent out to the approvers
- Once corrections are made, the approval process will be restarted
- Use the version routed to the approvers when making revisions

From: Allen Samuels <samuels@jlab.org>
Sent: Monday, September 12, 2022 2:58 PM
To: Danny Forehand <forehand@jlab.org>; Tiffany Ganey <ganey@jlab.org>
Cc: pansophy@jlab.org
Subject: FW: New DocuShare document routing task (Step 1 Completion): C100R-PR-CLNRM-CAV-ASSY2-R1.docx

The C100R-PR-CLNRM-CAV-ASSY2 procedure has been disapproved. Please make the necessary revisions and put the revised traveler back in the ready for approvals folder.

Allen

From: DocuShare Workflow <docushare@jlab.org>
Sent: Monday, September 12, 2022 2:49 PM
To: Allen Samuels <samuels@jlab.org>
Subject: New DocuShare document routing task (Step 1 Completion): C100R-PR-CLNRM-CAV-ASSY2-R1.docx

You have a new DocuShare document routing task:

Subject: C100R-PR-CLNRM-CAV-ASSY2-R1.docx
Date: 09/12/2022 14:48:45

Step 1 Completion:

Chris Dreyfuss

Tiffany Ganey, 09/12/2022 07:50:29 Approved:

Danny Forehand, 09/12/2022 14:48:43 Disapproved:

Tony Reilly, 09/08/2022 15:31:02 Approved:

To view your pending document routing tasks, click on the link below to login to DocuShare:

https://jlabdoc.jlab.org/docushare/dsweb/routing/routing_email.jsp?url=report_base.jsp&reportType=ForApprovalCompletion&routingSlipRequestID=26234¬ifyID=26245&workFlowJobName=26234



Approved and Uploaded to Pansophy

- When a traveler is approved and in pansophy, an email will be sent out to the approvers
- Traveler files are uploaded to the project's Approved Travelers folder for review and use for new revisions

The C100R-CAV-ASSY2-R2 traveler has been approved and uploaded to pansophy.

Allen

From: DocuShare Workflow <docushare@jlab.org>

Sent: Tuesday, September 20, 2022 11:08 AM

To: Allen Samuels <samuels@jlab.org>

Subject: New DocuShare document routing task (Step 1 Completion): C100R-CAV-ASSY2-R2.docx

You have a new DocuShare document routing task:

Subject: C100R-CAV-ASSY2-R2.docx

Date: 09/20/2022 11:07:38

Step 1 Completion:

Chris Dreyfuss, 09/20/2022 11:07:38 Approved:

Tiffany Ganey, 09/12/2022 14:28:31 Approved:

Danny Forehand, 09/12/2022 14:45:52 Approved:

Tony Reilly, 09/12/2022 14:34:19 Approved:



Thank You For Listening

Questions?

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

