

# Welcome To Pansophy

Pansophy Team

Valerie Bookwalter, Megan McDonald, Mike Dickey, Allen Samuels,  
Matthew Menia

Contact us at [Pansophy@jlab.org](mailto: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](#)

# Homepage Rundown

P2024 — Mozilla Firefox

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

Pansophy A System of Universal Knowledge

SERVICE request

you have been authenticated who am i click here to logout

MAIN MENU TRAVELERS MENU -> SRF OPS SRF S&T CLOSED PRJ TRAVELER TOOLS

P2024

## Welcome to Pansophy

### SRFOPS QUALITY POLICY

Quality is our commitment to deliver world-class SRF products and services that are worthy of our customers trust by

- **[E]**nabling and empowering our people to build safety, quality, and compliance into our products, technologies, and services.
- **[D]**elivering products to plan supporting system reliability, availability, and a great customer experience.
- **[I]**mprovement through measuring our quality objectives and driving systemic changes.
- **[T]**ransparently and proactively engaging our customers.

### SRFOPS QMS OBJECTIVES

A summary of [Quality Objectives](#) can be found at this link.

**CLEANLINESS IS NO JOKE! PARTICULATE-FREE ENGINEERING SPECIFICATIONS**

Particulate-Free Engineering Specifications are documents that highlight the best practices for particulate-free work such as: cleaning process specifications, cleanliness of facilities and consumables register.

This week, the spotlight is on Cleaning Process Specifications! Processes captured in [this document](#) are standard elements used to clean components such that the final cleanliness level is either achieved in the Chemroom or able to be achieved in a cleanliness facility prior to assembly. This document is intended to provide an overview of cleaning practices available at JLab within the SRF Institute and to guide the selection of cleaning processes for particulate-free components. For questions, contact [Tiffany Ganey](#) and [Ashley Mitchell](#).

What did the scientist say when they found two isotopes of helium?  
Heater

### SEND US YOUR LATEST TEST RESULTS OR SRF IMAGES!

Click the thumbnail for a full-size image

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

### Pansophy Announcements

**IMPORTANT ANNOUNCEMENT!**

**TRAVELERS MENU -> SRF OPS Listing has been modified due to the list being long.**

[Old Announcements](#)

### ATTENTION TRAVELER AUTHORS

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

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

### Pansophy Team

Valerie Bookwalter - Megan McDonald  
Allen Samuels - Matt Menia  
Mike Dickey  
Email Us



# 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 (restricted access)
- **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

# Pansophy Help

[MAIN MENU](#) [HELP MENU ->](#) [Request Page](#)

pansophy/HELP  
Jun 14, 2024 9:37:58 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

### [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

## SRFTERM REMOTE DESKTOP SERVER LOGIN

### [SRFTERM PC](#)

### [SRFTERM MAC](#)

## TRAINING

### [Welcome To Pansophy](#)

A basic guide on using Pansophy and filling out travelers

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

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

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

### [Pansophy Traveler Requests](#)

How to create and fill out a Pansophy Service Request

### [Docushare Training](#)

Covers the basics of accessing docushare and approving documents.

## TRAVELER AUTHORSHIP

### [Traveler Authorship](#)

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](#)



# Service Requests

- Users can submit requests for support with all aspects of pansophy.
- Preferred method to request additional permissions, record traveler concerns, or report errors

A screenshot of a web browser displaying the SERVICE request form. The browser's address bar shows the URL "https://pansophy.jlab.org/pansophyit/Production/UserRequests.cfm". The page header includes the Pansophy logo, the SERVICE request logo, and a user authentication status "you have been authenticated" with a "click here to logout" link. A navigation menu contains links for "MAIN MENU", "PRODUCTION MENU ->", "SERIAL NUMBER SEARCH", "OPEN/CLOSE STATUS", "STATUS BOARDS", "DRILLDOWN", and "View User Requests". The main content area is titled "pansophyit/PRODUCTION Jun 10, 2024 3:43:46 PM" and "Admin Menu". The form itself is titled "User Request to Pansophy Form" and includes fields for "User Requesting:" (set to "SAMUELS"), "Request Type:" (set to "General Request"), "Other users to be notified of request:" (with a list of "ACASTILL", "ACOLON", and "ADAMG"), "Project:" (set to "-0-"), "Priority Level:" (with radio buttons for "Low", "Medium", and "High", where "Low" is selected), and a "Comments:" text area. A "Submit Request" button is located at the bottom of the form. The footer of the page contains the text "Contact Us: PansophyTeam | InventoryTeam".

# Production Area

- An area focused on SRF operations production floor activities.
  - Component status boards
  - Production flow
  - Work control documents (Travelers/D3s/NCRs/Procedures)
- Limited to single projects.

The screenshot displays the Pansophy Production Area web interface. At the top, there is a navigation bar with the Pansophy logo, a 'SERVICE request' icon, and a user authentication status. Below the navigation bar, a 'WELCOME TO THE PRODUCTION AREA' message is centered. The main content area is divided into several sections: 'SN SEARCH' (Serial Number Search), 'OP/CL STATUS' (Travelers, NCRs, D3), 'STATUS BOARDS' (Production Status Boards), 'DRILLDOWNS' (Drill Downs for C50R, C100R, C50, C100, AND L2HE Projects), and 'SRFOPS WCD' (Work Control Documents). A large image on the right shows a person working on a large industrial component. A call to action at the bottom right encourages users to send test results or SRF images. The footer contains contact information for the Pansophy Team and Inventory Team.

**PRODUCTION**

**WELCOME TO THE PRODUCTION AREA**

**SN SEARCH**  
Serial Number Search  
Across Projects and travelers  
Where is that component?

**OP/CL STATUS**  
Travelers  
NCRs  
D3

**STATUS BOARDS**  
Production Status Boards  
More to Come

**DRILLDOWNS**  
Drill Downs for C50R, C100R, C50, C100, AND L2HE  
Projects  
More to Come

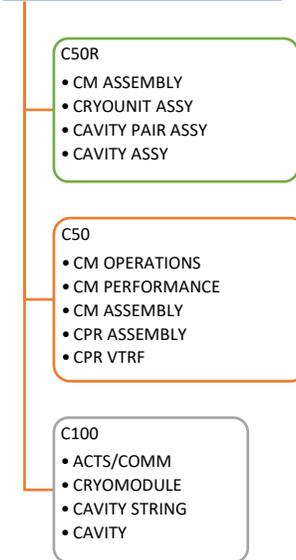
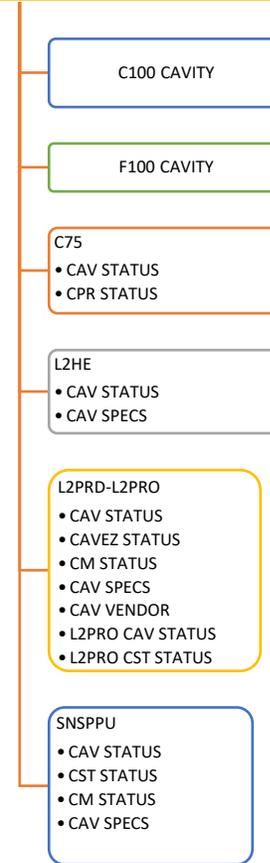
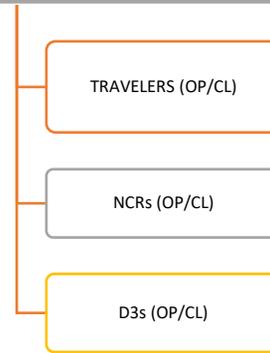
**SRFOPS WCD**  
Work Control Documents  
For SRFOPS Production  
Travelers and Procedures

**SEND US YOUR LATEST TEST RESULTS OR SRF IMAGES!**  
Contact: [PansophyTeam](#)

Contact Us: [Pansophy Team](#) | [Inventory Team](#)

# Production Menu

- **Serial Number Search** – Find which travelers a specific SN has been used in. Sequence numbers hyperlink to form instance.
- **Open/Close Status** – Listing of all open/closed instances for selected document. Different variations: OP/CL Travelers, OP/CL D3s, OP/CL NCRs, OP/CL WCA
- **Status Boards** – Provides users a holistic approach to a process flow
- **Drilldowns** – Captures SN, traveler statuses, and KPIs on a single display. Shows production from single cavity through to completed cryomodule, acceptance testing and commissioning



# Projects Area

- This area consists of status boards and reports as necessary for the dissemination of data to SRFOPS' Project Customers.
- External portal area for MLP projects view data collected by the SRFOPS Production Group.

**Pansophy**  
A System of Universal Knowledge

**SERVICE request**

you have been authenticated  
click here to log out

MAIN MENU PROJECTS MENU > SNSPPU LZHE L2PRD

pansophy/PROJECTS  
Jul 15, 2024 10:51:43 AM

**Welcome to the Project Configuration Area**

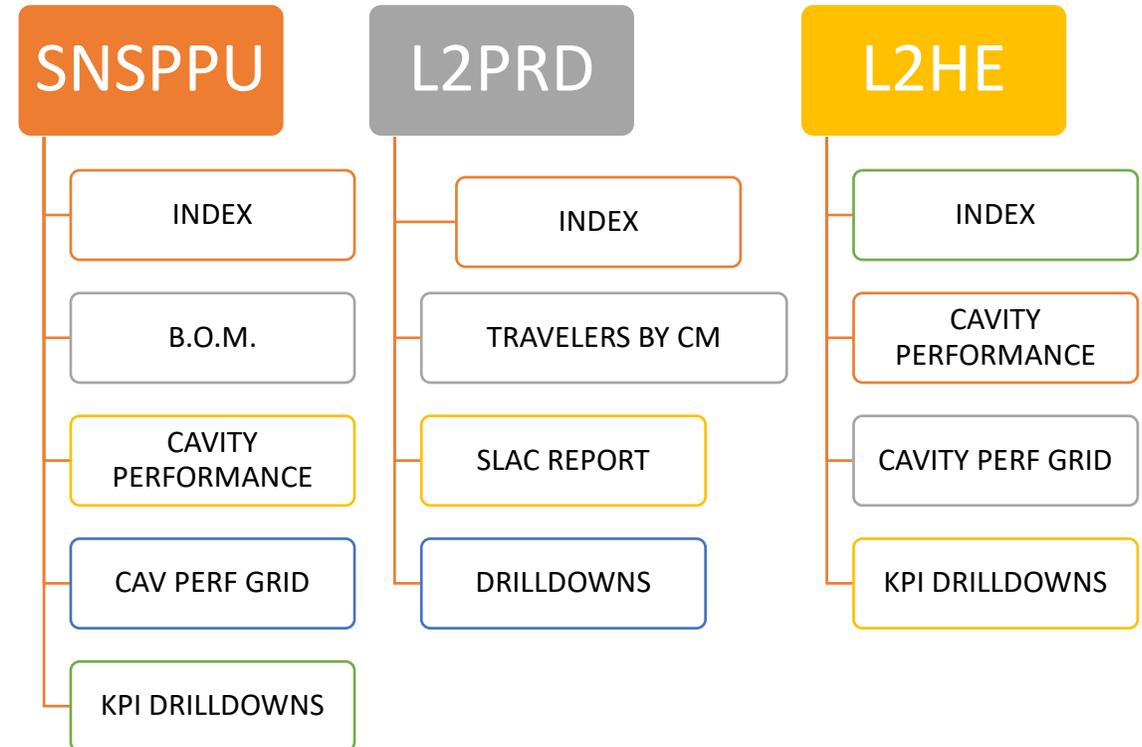
Please select an option from the menu above.

<b>SNSPPU</b> Index B.O.M. Cavity Performance CAV Perf Grid <b>KPI Drilldowns</b> CM Assy CST CAV	<b>LZHE</b> Index Cavity Performance Cavity Performance <b>KPI Drilldowns</b> CM CST CAV	<b>L2PRD</b> Index Travelers by CM Cavity Test Summary L2PRO CAV PERF L2PRO CAV PERF SLAC Report <b>Drilldowns</b> ACTS CM Assy Cavity String Cavity
---	---	---

Contact Us: Pansophy Team | Inventory Team

# Projects Menu

- **Drilldowns** - Captures SN, traveler statuses, and KPIs on a single display. Links are not active and only KPIs are displayed due to external user restrictions.
- **SLAC Report** – Users can select a cryomodule and view or generate a SLAC report in excel. Report contains information about parts performance
- **Cavity Test Summary** – Users can select a cryomodule to view which cavities are installed. Users can also view linked VTRF traveler and comments made.



# Datamining

- Area for specialized queries and reports for analyzing traveler data.

The screenshot shows the Pansophy DATAMINE web application interface. At the top, there is a navigation bar with the Pansophy logo, a 'SERVICE request' button, and a user authentication status 'you have been authenticated' with a 'click here to logout' link. Below the navigation bar, the main content area is titled 'WELCOME TO THE DATA MINING AREA' and features a 'Don't just collect data: use it.' banner. The interface is divided into four main sections: 'QUERIES', 'CAVITY PERFORMANCE', 'ARCHIVED REPORTS', and 'CLOSED PRJ AREA'. Each section contains specific instructions and links for data analysis.

**QUERIES**  
Serial Number Search:  
1. Select One or Multiple Projects  
2. Select a Component Acronym  
3. Select One or Multiple Serial Number  
4. **RESULTS:** list of all travelers where the serial number(s) is found!

**User Defined**  
**VARGRID**

**CAVITY PERFORMANCE**  
Cavity Performance Grid:  
Want to see all the VTRF tests for a Project?

**C50R**  
**C100**  
**F100**  
**R100**

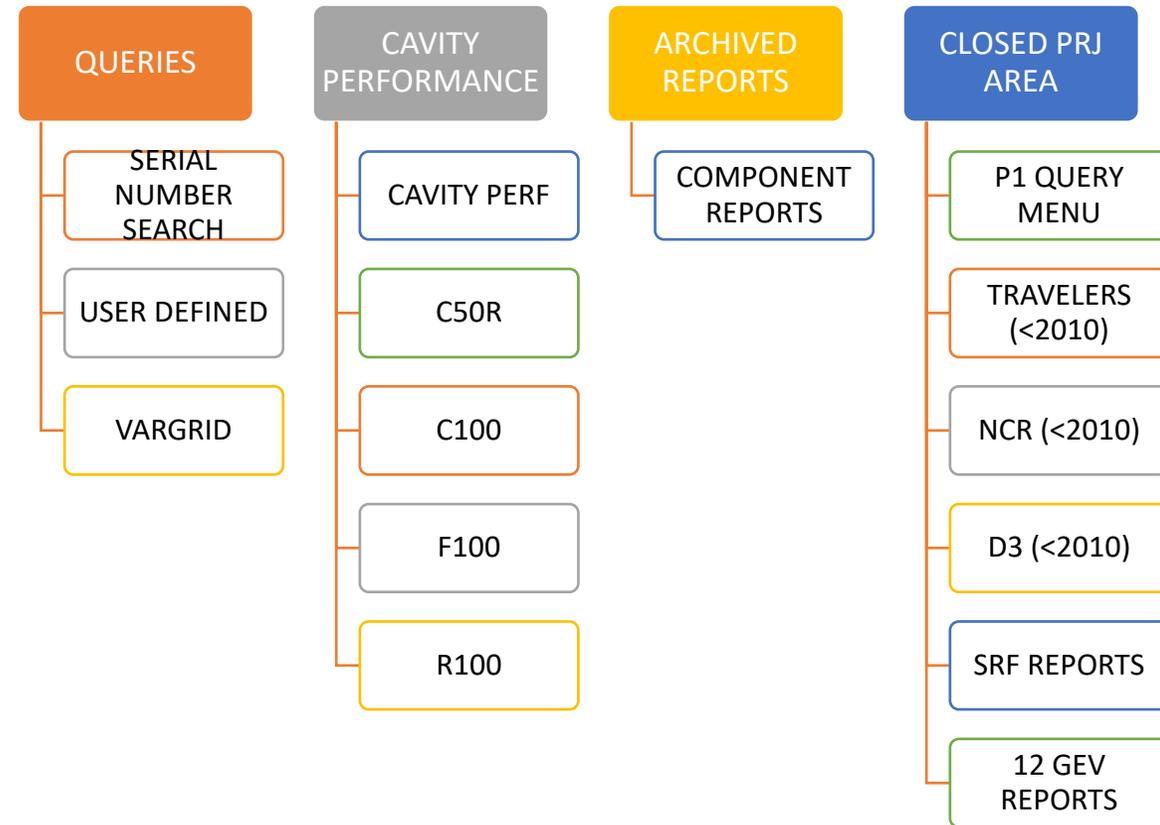
**ARCHIVED REPORTS**  
COMPONENT REPORTS:  
1. Select A Project Area  
2. A list of available Component Reports will be displayed in the dropdown  
3. Select A Report  
4. **RESULTS:** See the PROGRESS of any COMPONENT

**CLOSED PRJ AREA**  
Projects Done under Pansophy Version 1  
**P1 Query Menu**  
**Travelers (<2010)**  
**NCR (<2010)**  
**D3 (<2010)**  
**SRF REPORTS**  
**12 GeV REPORTS**

Contact Us: PansophyTeam | InventoryTeam

# Datamining Menu

- **Serial Number Search** - Find which travelers a specific SN has been used in. Sequence numbers hyperlink to form instance.
- **User Defined Queries** – allows users to generate custom queries that are traveler specific
- **VARGRID** – allows users to view all data for a traveler stored in the database
- **Cavity performance** – allows users to display a pre-defined list of variable values for cavities from VTRF test traveler. (often considered KPIs for the project)
- **Component Reports** – users can select a project and traveler to view a predefined list of component data fields
- **Closed project area** – contains status boards and reports used in past projects along with backwards compatibility for projects prior to 2010. Of note in this area is 12GeV status boards to support magnet group and LLRF group work.



# QC Reports

- This area contains reports commonly used to monitor the quality of SRFOPS production for all projects.
- Most reports are single project display. Charting and Graphing are used where appropriate
  - Reports for Travelers/NCRs/D3s typically used for quality control.
  - Quality reports
  - Project overview reports

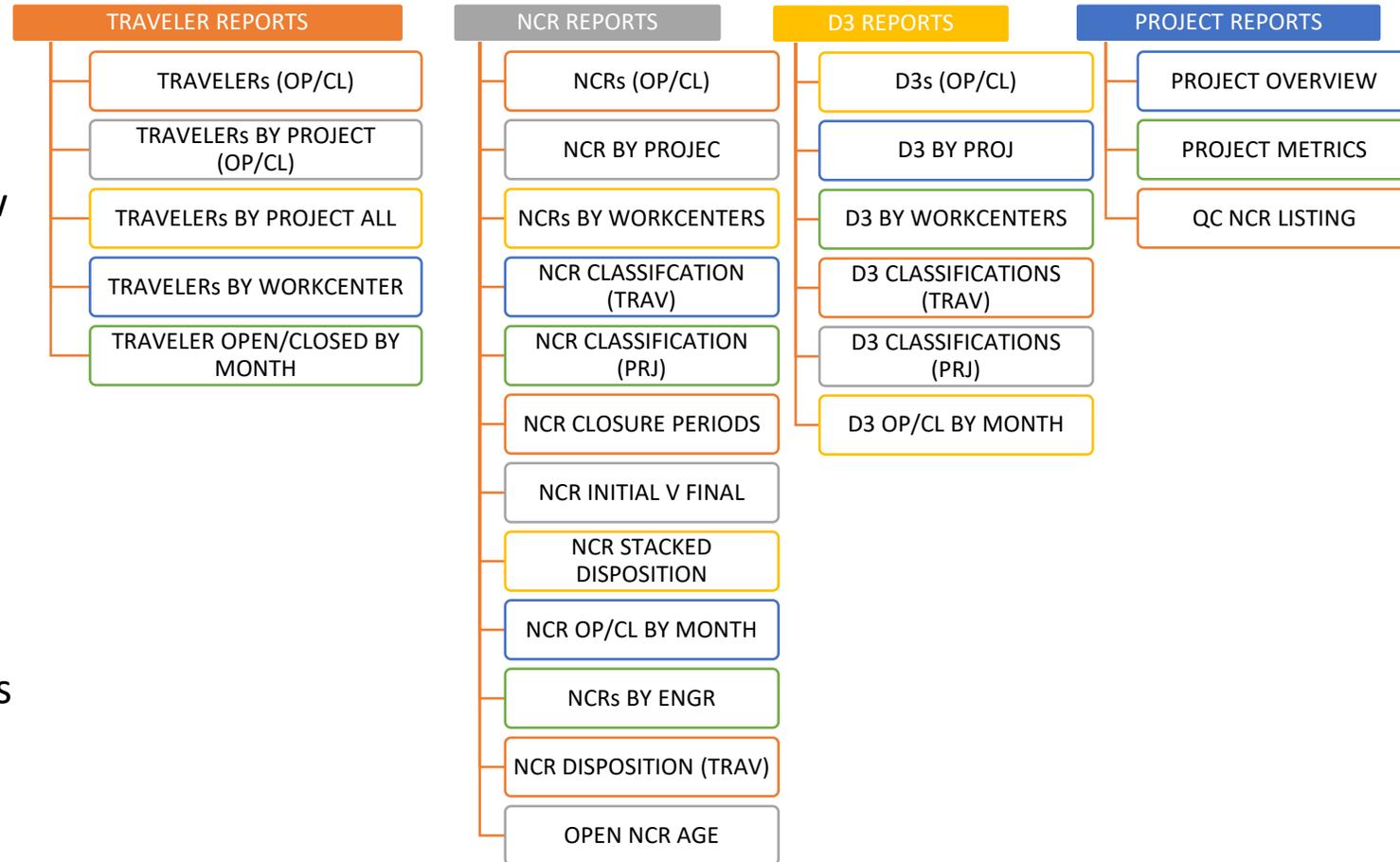
The screenshot shows the 'QC Reports' menu interface. At the top, there is a navigation bar with the Pansophy logo, 'SERVICE request', and a user authentication status. Below the navigation bar, the page title is 'WELCOME TO THE QUALITY CONTROL REPORTS MENU'. The main content is organized into four columns:

- TRAVELER REPORTS**
  - Traveler Related Reports
  - TRAVELERS (OP/CI)
  - TRAVELERS BY PROJECT OP/CI
  - TRAVELERS BY PROJECT ALL
  - TRAVELERS BY WORKCENTER
  - TRAVELER OPEN/CLOSED BY MONTH
  - TRAVELER OPENED BY AGE
- NCR REPORTS**
  - NCR Related Reports
  - NCRs (OP/CI)
  - NCRs BY PROJECT (Op/CI)
  - NCRs BY WORKCENTER
  - NCR CLASSIFICATION (TRAVELER)
  - NCR CLASSIFICATION (PROJECT)
  - NCR CLOSURE PERIODS/NCR INITIAL v FINAL DECISION
  - NCR STACKED DISPOSITIONS
  - NCR OPEN/CLOSED BY MONTH
  - NCRs by ENGR
  - NCR DISPOSITIONS (TRAVELER)
  - OPEN NCR AGE
- D3 REPORTS**
  - D3 Related Reports
  - D3s (Op/Ci)
  - D3s BY PROJ Op/CI
  - D3s BY WORKCENTERS
  - D3 CLASSIFICATION (TRAVELER)
  - D3 CLASSIFICATION (PROJECT)
  - D3 OPEN/CLOSED BY MONTH
- PROJECT REPORTS**
  - Project Overviews
  - PROJECT OVERVIEW
  - PROJECT METRICS
  - QC NCR LISTING
  - QC NRC GRID

At the bottom of the page, there is a footer with the text 'Contact Us: PansophyTeam | InventoryTeam'.

# Reports

- **Traveler Reports** – These reports allow users to view open and closed travelers by different metrics.
- **NCR Reports** - These reports allow users to view open and closed NCRs by different metrics including project, work centers, classification, dispositions, and age
- **D3 Reports** - These reports allow users to view open and closed D3 reports by different metrics including project, work center, and classifications.
- **Project Reports** - Includes different reports that allow users to view traveler, NCR, and D3 metrics on the same page. Different filters are available with different reports.



# Writing Data to Travelers

# 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
- Current Traveler ID naming convention: Project-Work Center Activity (WCA)-Component-Action
  - Acronym list for Traveler and Procedure IDs can be found on the right side of the Pansophy homepage

# Data Entry Fields

Ribbon Code	Traveler Code	Definition
Checkbox	[[FieldName]]<<CHECKBOX>>	Checkbox indicates the answer to a question is “yes”.
Comment	[[FieldName]]<<COMMENT>>	Allows user to collect comments in a large input box.
File Upload	[[FieldName]]<<FILEUPLOAD>>	Allows user to upload any type of file to the server. Files name must be UNIX compliant.
Float	[[FieldName]]<<FLOAT>>	Creates input box that accepts numbers containing a decimal point.
SN	[[FieldName]]<<SN>>	Provides a textbox that accepts serial numbers (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.
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 an 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

# Traveler Menu

The screenshot displays the Pansophy SERVICE request web application. At the top left is the Pansophy logo with the tagline "A System of Universal Knowledge". To the right, a "SERVICE request" logo is visible. A notification bar at the top right states "you have been authenticated" with a user icon and a "click here to logout" link. Below the logo is a navigation bar with tabs: "MAIN MENU", "TRAVELERS MENU" (highlighted), "SRF OPS", "SRF S&T", "CLOSED PRJ", and "TRAVELER TOOLS". A dropdown menu is open under "TRAVELERS MENU", listing "OPS SERVICES", "CEBAF PROJECTS", "WFO PROJECTS", "AUP PROJECTS", "EIC PROJECTS", and "SRFTRNG". To the right of this menu, "ER5C" and "C100R" are listed. The main content area shows "pansophy/TRAVELERS" and the date/time "Jul 11, 2024 10:43:03 AM". Below this, it says "ER5C" and "Traveler Area: Edit / View / Print" with a link to "SRFOPS WCDs Master Procedures". A search box labeled "ER5C Search For:" is present, followed by a list of search results. A red circle highlights the "SRFTRNG" option in the dropdown menu. A blue callout box on the right says "Select a project and traveler".

**SRFTRNG** Component, or Task)

- ER5C-ACC-CM-COMM-R1 -- C75 Cryomodule Commissioning
- ER5C-ACC-CM-DCOM-R1 -- C50 Cryomodule Decommissioning Test
- ER5C-CHEM-CAV-CBP-R2 -- Centrifugal Barrel Polishing of C75 cavities
- ER5C-CHEM-CAV-DEGR-R3 -- C75 Cavity Degrease
- ER5C-CHEM-CAV-FLAP-R2 -- C75 Cavity flange Final lapping traveler
- ER5C-CHEM-CAV-HEP-R4 -- C75 Cavity Horizontal Electropolish
- ER5C-CHEM-CAV-HPR-R1 -- C75 Cavity High Pressure Rinse
- ER5C-CHEM-CAV-ILAP-R2 -- C75 Cavity flange initial lapping traveler
- ER5C-CHEM-CAV-THK-R4 -- C75 cavity thickness measurement
- ER5C-CHEM-COMP-BCP-R3 -- BCP weld-prep region of C75 Nb cavity components
- ER5C-CHEM-COMP-DEGR-R2 -- C75 Pair Components Preparation
- ER5C-CHEM-DBEL-BCP-R2 -- BCP of C75 dumb-bells
- ER5C-CHEM-DGLG-LAP-R2 -- C75 Dog Leg Flange Lapping Traveler
- ER5C-CHEM-ENDD-LAP-R1 -- C75 End Dish Flange Lapping Traveler
- ER5C-CHEM-FLNG-BCP-R2 -- BCP of ER5C Nb cavity flanges
- ER5C-CHEM-FPFT-LAP-R2 -- ER5C Field Probe Flange Lapping Traveler
- ER5C-CHEM-HCEL-BCP-R2 -- BCP of ER5C Nb half-cells
- ER5C-CHEM-HOME-LAP-R2 -- C75 Elbow lapping traveler
- ER5C-CHEM-INAD-LAP-R2 -- C50R Inner Adapter flange lapping traveler
- ER5C-CLNRM-CAV-ASSY-R2 -- ER5C single five cell cavity assembly in the clean room for VTA testing

Select a project and traveler

# Traveler Example - Traveler Cover Page (P0)

Once on P0 select the 'new' button to create a traveler

Traveler Area: [Edit](#) / [View](#)

ER5C

ER5C Search For:  (i.e. Workstation, Component, or Task)

ER5C-ACC-CM-DCOM-R1 -- C50 Cryomodule Decommissioning Test  
 ER5C-CHEM-CAV-CBP-R2 -- Centrifugal Barrel Polishing of C75 cavities  
 ER5C-CHEM-CAV-DEGR-R3 -- C75 Cavity Degrease

---

Select Traveler  Page 0

SerialNum: 0	Traveler ID: ER5C-CHEM-CAV-CBP		Rev: R2	Page:0	Traveler Seq Number: 0
Traveler Title	Centrifugal Barrel Polishing of C75 cavities				
Traveler Abstract	This traveler captures information related to the Centrifugal Barrel Polishing of C75 cavities				
Traveler ID	ER5C-CHEM-CAV-CBP				
Traveler Revision	R2				
Traveler Author	G. Ciovati				
Traveler Date	18-Dec-23				
NCR Informative Emails	kdavis,areilly				
NCR Dispositioners	Gciovati,wildeson,weaksmc				
D3 Emails	Gciovati,kdavis,wildeson				
Approval Names	A. Wildeson	G. Ciovati	K. Davis	A. Reilly	
Approval Signatures					
Approval Dates					
Approval Title	Author	Reviewer 1	Reviewer 2	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.				
C75-PR-CHEM-CAV-CBP-R1	Barrel polisher manual HZ-280	C75 CBP Drawings			
CBP procedure for C75 cavities	Operation manual for the Barrel Polisher	Folder with drawings of the CBP cage parts and cavity blanks			
Revision Note					
R1	Initial release of this Traveler.				
R2	Update reviewer from A. Mitchell to A. Wildeson. Update project manager from K. Macha to A. Reilly.				

---

Select Traveler  Page 0

# Traveler Example- P1

Select Traveler VIEW all SAVE PDF Page 1 FIRST PREV NEXT LAST NEW

SerialNum: Traveler ID: ER5C-CHEM-CAV-CBP Rev: R2 Page:1 **Traveler Seq Number: -1**

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	and check whether the cavity was filled with 1 gal of water mixed with 400 medium-type media only ably of the cavities in the cages in the Comment box. Fill a D3 if the cavities into the barrel polishing cages was completed.	SetupTech1 -0- SetupTech2 -0- CBPMedia -0- FluidAdded <input type="radio"/> Yes <input type="radio"/> No AssyComment
3	Run the Centrifugal Barrel Polisher at 110 RPM for 5 min, then stop the machine and check for any loose bolt in any of the cages. Pay attention to any unusual noise during the 5 min run. Record any issue in the Comment box and select if and how it was fixed. Repeat the 5 min run if issues were corrected after the 1st run. If issues persist, stop work and contact the supervisor.	AssemblyDone <input type="text"/> NOW (ex format 18-Jun-2005 16:30) Frst5minRunSuccessful <input type="radio"/> Yes <input type="radio"/> No VerifyingTech1 -0- Scnd5minRunSuccessful <input type="radio"/> Yes <input type="radio"/> No VerifyingTech2 -0-
4	Enter the prescribed time of barrel polishing. Record the start time.	HoursPolishing <input type="text"/> hours MinPolishing <input type="text"/> min

**INSTANTIATE**

Select Traveler VIEW all SAVE PDF Page 1 FIRST PREV NEXT LAST NEW

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

Press 'instantiate' button to assign a sequence number before entering data



# Entering Data

Select previously created traveler

VIEW all SAVE PDF Page 1 FIRST PREV NEXT LAST NCR Select NCR D3 Select D3 NEW		
Please submit page before opening Please submit page before opening		
Traveler ID: ER5C-CHEM-CAV-CBP Rev: R2 Page:1 Traveler Seq Number: 26		
<p>Select Traveler</p> <p>Select Traveler</p> <p>26 Op</p> <p>25 SC75-J-002 CI</p> <p>24 SC75-RI-001 Op</p> <p>23 SC75-J-003 Op</p> <p>22 SC75-J-002 Op</p> <p>21 SC75-J-001 Op</p> <p>20 SC75-RI-025 CI</p> <p>19 SC75-RI-026 CI</p> <p>18 SC75-RI-025 CI</p> <p>17 SC75-RI-023 CI</p> <p>16 SC75-RI-023 CI</p> <p>15 SC75-RI-021 CI</p> <p>14 SC75-RI-021 CI</p> <p>13 SC75-RI-019 CI</p> <p>12 SC75-RI-019 CI</p> <p>11 SC75-RI-012 CI</p> <p>10 SC75-RI-013 CI</p> <p>9 SC75-RI-012 CI</p>	<p><b>Instructions</b></p> <p>Select the serial number of the first C75 cavity to be barrel polished.</p> <p>Select the serial number of the second C75 cavity to be barrel polished.</p> <p>If only one cavity was barrel polished, describe what was used as a counterweight in the Comment box</p> <p>Select the technicians doing the work.</p> <p>Select the type of media used for CBP and check whether the cavity was filled with 1 gal of water mixed with 400 mL of TS Compound M, for coarse and medium-type media only</p> <p>Enter any issues found during the assembly of the cavities in the cages in the Comment box. Fill a D3 if the procedure was not followed.</p> <p>Enter the date and time the assembly of cavities into the barrel polishing cages was completed.</p> <p>Run the Centrifugal Barrel Polisher at 110 RPM for 5 min, then stop the machine and check for any loose bolt in any of the cages. Pay attention to any unusual noise during the 5 min run. Record any issue in the Comment box and select if and how it was fixed. Repeat the 5 min run if issues were corrected after the 1st run. If issues persist, stop work and contact the supervisor.</p> <p>Enter the prescribed time of barrel polishing. Record the start time.</p>	<p><b>Data Input</b></p> <p>CAVSN1 -0-</p> <p>CAVSN2 -0-</p> <p>PolishComment</p> <p>SetupTech1 -0-</p> <p>SetupTech2 -0-</p> <p>CBPMedia -0-</p> <p>FluidAdded <input type="radio"/> Yes <input type="radio"/> No</p> <p>AsseyComment</p> <p>AssemblyDone <input type="text"/> NOW</p> <p>(ex format 18-Jun-2005 16:30)</p> <p>Frst5minRunSuccessful <input type="radio"/> Yes <input type="radio"/> No</p> <p>VerifyingTech1 -0-</p> <p>Scnd5minRunSuccessful <input type="radio"/> Yes <input type="radio"/> No</p> <p>VerifyingTech2 -0-</p> <p>HoursPolishing <input type="text"/> hours</p> <p>MinPolishing <input type="text"/> min</p>
SUBMIT TO DATABASE		
VIEW all SAVE PDF Page 1 FIRST PREV NEXT LAST NCR Select NCR D3 Select D3 NEW		
Please submit page before opening Please submit page before opening		
Contact Us: Pansophy   InventoryTeam		

**SUBMIT EACH PAGE**

# Uploading Files

1. Clicking the Attach Files button will open another tab

DISHSN -0- v

Process:

dTech -0- v

ENDDWeldTime  NOW

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

ENDDWeldComment

ENDDWeldFiles Attach Files:

You have attached no files.

Weld Inspection:

## **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

# Upload Files Page

**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.**

Currently uploading files to the #URL.travelerID# traveler.

Data fields that require a file attachment are listed below.

Upload a new file:

No file selected.

You have attached no files.

2. Click Browse and select the file you wish to upload. Ensure filenames are UNIX compliant
3. Click Attach File
4. Click Post Entry

Update Files:

Select the file you would like to replace:

Select the file you are replacing it with:

No file selected.

Delete Files:

Select the file you would like to delete:



# File Viewing on Traveler

DISHSN

FBASN

**Welding Process:**

ENDDWeldTech

ENDDWeldTime

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

ENDDWeldComment

**ENDDWeldFiles Attach Files:**

**PANSOPHY ANNOUNCEMENTS**



On Tuesday, April 16th at 5am, Pansophy will go down as our servers get upgraded. Please be sure to log off before then. Pansophy will not be online again until April 17th at 7am.

Screenshot 2024-04-11 155940.png

5. File will be displayed next to Attach Files button



# Hold Points (Not Signer)

- 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)

LeakTech

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

PassLeakCheck  Yes  No

LeakCheckDoc Attach Files:   
You have attached no files.

LeakComment

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

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

ReviewComment

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

No Submit Button

Page 3

Please submit page before opening

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



# Hold Points (Signer)

**STOP** Supervisor sign-off required to continue.

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

ReviewComment

pansophy.jlab.org

Are you sure you wish to clear this hold point?

**OK** Cancel

**GO**

Hold Point has been cleared by: SAMUELS  
Date:2024-06-10 15:05:52.0

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

ReviewComment

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

# Hold Points on the Last Page

NCR <input type="button" value="D3"/> Select D3 <input type="button" value="NEW"/>	
Please submit page before opening	
Traveler Seq Number: 57	
Data Input	
RF_test_raw_data Attach Files: <input type="button" value="Attach Files"/>	You have attached no files.
RF_test_processed Attach Files: <input type="button" value="Attach Files"/>	You have attached no files.
ProcessedDataFiles Attach Files: <input type="button" value="Attach Files"/>	You have attached no files.
df AdditionalDataFiles Attach Files: <input type="button" value="Attach Files"/>	You have attached no files.
 This is a hold point. Supervisor sign-off required to continue. Valid Signers are: davis,stirbet	
Cavity Meets Specifications <input type="radio"/> Yes <input type="radio"/> No	

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 without a service request

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

Rev: R4 Page:4 Traveler Seq Number: 98

**Data Input**

LeakTestPassed  Yes  No  
LeakComment

ExternalCavCooling  Yes  No  
DesiredCCflow   
CoolingComment

AVGEQUATORTEMP  C  
PROCESSCURRENT   
PolishTime  min  
ProcessComments

AttachDataFile Attach Files: Attach Files  
You have attached no files.

Close Traveler?  Yes  No

SUBMIT TO DATABASE

Rev: R1 Page:1 Traveler Seq Number: 1

**Data Input**

caps whenever practical. The sealing surface of the flange shall be protected from scratches and gouges. The weldments should be handled according to

008, 015, 012, INFFSN -0-  
LeakcheckOk  Yes  No  
LeakcheckFile Attach Files: Attach Files  
You have attached no files.  
LeakcheckComment

StorageTech -0-  
StorageDate  NOW  
(ex format 18-Jun-2005 16:30)



# Opening an NCR or D3

- NCR: Non Conformance Report
  - should be issued for any part that does NOT meet the specified requirements
- D3s: Detours Deviations Discrepancies
  - should be issued for any process that cannot be completed as specified 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

# NCR Instantiation

SerialNum: C100-RI-001		Traveler ID: C100R-NCR		Rev: R12	Page:1
<b>NCR Traveler (Page 1 : Initiate and Describe)</b>					
<b>INITIATE An Non-Conformance Report</b>					
<b>The Part</b> <i>Auto Filled from initiating traveler. If auto-fill does not occur ensure values are entered:</i> Part Acronym <input type="text" value="CAVSN"/> *required Serial Number <input type="text" value="C100-RI-001"/> *required Drawing Number <input type="text" value="CRM1207013-0001"/> Part Description <input type="text" value="CAVITY ASSEMBLY"/>		<b>Non-Conformance Categories</b> <input type="checkbox"/> ShippingDamage <input type="checkbox"/> Dimensional Surface Form: <input type="checkbox"/> Roughness <input type="checkbox"/> Flatness <input type="checkbox"/> Parallelism Surface Damage: <input type="checkbox"/> Scratches <input type="checkbox"/> Dings <input type="checkbox"/> Delamination <input type="checkbox"/> Plating Surface Contamination: <input type="checkbox"/> Stains <input type="checkbox"/> Oxidation <input type="checkbox"/> Residues			
<b>The Traveler</b> <i>Auto Filled from initiating traveler. If auto-fill does not occur ensure values are entered:</i> TravelerID <input type="text" value="C100R-CLNRM-CAV-ASSY"/> *required TravelerRevision <input type="text" value="R4"/> *required TravSeqNumber <input type="text" value="1"/> *required		RF Components: <input type="checkbox"/> InspectionFailure <input type="checkbox"/> RFTTestFailure <input type="checkbox"/> LeakTestFailure <input type="checkbox"/> CMTFRFPerformance <input type="checkbox"/> VTARFPerformance Cryomodule: <input type="checkbox"/> Vacuum <input type="checkbox"/> RF <input type="checkbox"/> Instrumentation <input type="checkbox"/> Mechanical <input type="checkbox"/> OTHER			
<b>The Technician</b> DescribeStaff <input type="text" value="-0-"/> DescribeDate <input type="text" value="23-Jul-2024 10:46"/> <input type="button" value="NOW"/> (ex format 18-Jun-2005 16:30)		<b>Problem Comments and Description Files</b> Problem Description: Thoroughly and carefully describe the discrepancy with the part. If "OTHER" is chosen as category in above box, carefully describe the discrepancy including keywords that can be used for searching. DescribeComment <input type="text"/> <small>Instantiate traveler before attaching files.</small>			
<b>Notifications</b> The Engineers listed will be emailed and can respond to this NCR upon submit of this page. Engineer(s) to be Emailed: forehead ganey kdavis The Engineers listed will be automatically emailed upon submit of this page. Engineer(s) to be Emailed: areilly Persons to be Emailed: DescribeStaff:					

When filling out an NCR only select one non-conformance category. If a part has more than one non-conformance then multiple NCRs will need to be opened.

Select all reasons for the noncompliance report being opened and provide an explanation of issue along with attaching any files or pictures needed for documentation.

# NCR Initial Disposition

SerialNum: C100-05R      Traveler ID: C100R-NCR      Rev: R12      Page:2      Traveler Seq Number: 111

**NCR Traveler (Page 2 : First Disposition)**

**Engineer First Response**

**The Responding Engineer**  
RespondingEngineer:    
RespondingDate:    
(ex format 18-Jun-2005 16:30)

**The Disposition**  
*Disposition: {Engrs to disposition: menia}*  
*A Disposition must be selected. Then provide details in the comment box below.*  
*To select a FINAL Disposition for this NCR, please advance to PAGE 4.*

Hold/Re-measure  
Hold/Modify

**Disposition Comments and Description Files**  
*Provide details in comment box and upload documents needed to further describe the disposition selected above.*  
*If an action is to be taken against the part (Re-measure/Modify), then describe the corrective actions to be taken.*

DispositionComment:

DispositionDocs Attach Files:   You have no attached files.

**Notifications**  
The appropriate staff will be automatically emailed upon submit of this page.  
**Engineer(s) to be Emailed:**  
menia  
**Persons to be Emailed:**  
DescribeStaff: MEGAN  
RespondingEngineer:

**To select a FINAL Disposition for this NCR, please advance to PAGE 4.**

Select Traveler:                   Page 2                                    Select NCR:             Select D3:      

Please submit page before opening      Please submit page before opening

Contact Us: PansophyTeam | InventoryTeam

Select an initial disposition. Provide description and attach any files or pictures needed for documentation.

Initial dispositions are not always needed.

# NCR Final Disposition

SerialNum: C100-05R      Traveler ID: C100R-NCR      Rev: R12      Page:4      Traveler Seq Number: 111

**NCR Traveler (Page 4 : Final Disposition)**

---

**Engineer Final Response**

**The Final Engineer**

FinalEngineer

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

**The Final Disposition**

Final Disposition: {Engrs to disposition: menia}  
A Disposition must be selected. Then provide details in the comment box below.

**Final Disposition Comments and Description Files**

Provide details in comment box and upload documents needed to further describe the disposition selected above.  
If an action is to be taken against the part (Re-measure/Modify), then describe the corrective actions to be taken.  
This traveler will be closed automatically. If additional actions are required, please contact the NCR staff.

FinalDocs Attach Files:

You have no attached files.

---

**Notifications**

The appropriate staff will be automatically emailed upon submit of this page.

**Engineer(s) to be Emailed:**  
menia

**Persons to be Emailed:**  
DescribeStaff: MEGAN  
RespondingEngineer:  
Reworkstaff:  
Verifystaff:

*NCR will be automatically CLOSED upon selection of a disposition.*

Select the final disposition. Provide description and attach any files or pictures needed for documentation.

# NCR Dispositions

	Initial Disposition	Final Disposition	Description of Disposition Pathway
1	N/A	Conforming	Conforming. Allowed by SRF and customer. Use for production.
2	Hold/Re-measure	Conforming	Re-measured. Verified. Conforming. Use for production.
3	Hold/Modify	Conforming	Modified. Verified. Conforming. Use for production.
4	N/A	Use as is	Nonconforming. Justified for use by SRF and the customer. Use for production.
5	Hold/Re-measure	Use as is	Re-measured. Nonconforming. Justified for use by SRF and the customer. Use for production.
6	Hold/Modify	Use as is	Modified. Nonconforming. Justified for use by SRF and the customer. Use for production.
7	N/A	Return to Vendor	Nonconforming. Return to vendor.
8	Hold/Re-measure	Return to Vendor	Re-measured. Nonconforming. Return to vendor.
9	Hold/Modify	Return to Vendor	Modified. Nonconforming. Return to vendor.
10	N/A	Reject	Nonconforming. Segregate.
11	Hold/Re-measure	Reject	Re-measured. Nonconforming. Segregate.
12	Hold/Modify	Reject	Modified. Segregate.

For more information on NCRs and dispositions please reference the procedure below

<https://jlabdoc.jlab.org/docushare/dsweb/Get/Document-247643/SRF-12-PR-001%20Nonconforming%20Product.pdf>



# D3 Instantiation

SerialNum: C100-RI-001		Traveler ID: C100R-D3		Rev: R3		Page:1		Traveler Seq Number: -1				
DETOURS, DEVIATIONS AND DISCREPANCIES (D3s)												
Traveler Connection			Classification (select all that apply)									
<b>Part Identification</b> <i>Auto Filled from initiating traveler. If auto-fill does not occur ensure values are entered:</i> Part Acronym <input type="text" value="CAVSN"/> *required Serial Number <input type="text" value="C100-RI-001"/> *required Drawing Number <input type="text" value="CRM1207013-0001"/> Part Description <input type="text" value="CAVITY ASSEMBLY"/>			<b>Administrative:</b> <input type="checkbox"/> SCHEDULE <input type="checkbox"/> DAMAGE <input type="checkbox"/> MISTAKE		<b>Chemistry:</b> <input type="checkbox"/> BCP <input type="checkbox"/> USC <input type="checkbox"/> HPR <input type="checkbox"/> EP <input type="checkbox"/> HEP <input type="checkbox"/> DEGREASE		<b>Facility:</b> <input type="checkbox"/> ELECTRICAL <input type="checkbox"/> FACILITY <input type="checkbox"/> HRDWUNAVAIL <input type="checkbox"/> TOOLINGUNAVAIL		<b>Testing:</b> <input type="checkbox"/> ABORTED <input type="checkbox"/> LEAK <input type="checkbox"/> RF <input type="checkbox"/> THICKNESS		<b>Work Centers:</b> <input type="checkbox"/> CMA <input type="checkbox"/> CMM <input type="checkbox"/> EBW <input type="checkbox"/> FURNACE <input type="checkbox"/> LAPPING <input type="checkbox"/> INSPECTION <input type="checkbox"/> TUNING	
<b>Traveler Association</b> <i>Auto Filled from initiating traveler. If auto-fill does not occur ensure values are entered:</i> TravelerID <input type="text" value="C100R-CLNRM-CAV-ASSY"/> *required TravelerRevision <input type="text" value="R4"/> *required TravSeqNumber <input type="text" value="1"/> *required			<b>Assembly:</b> <input type="checkbox"/> ALIGNMENT <input type="checkbox"/> DESIGN <input type="checkbox"/> FIT_UP <input type="checkbox"/> INSTRUMENTATION <input type="checkbox"/> LEAK <input type="checkbox"/> MAGNETIC <input type="checkbox"/> RF		<b>Fabrication:</b> <input type="checkbox"/> BRAZING <input type="checkbox"/> PRESS <input type="checkbox"/> WELDING		<b>Processing:</b> <input type="checkbox"/> BAKE <input type="checkbox"/> HEAT <input type="checkbox"/> VACUUM		<b>General:</b> <input type="checkbox"/> VTA <input type="checkbox"/> CMTF <input type="checkbox"/> OTHER			
DESCRIPTION												
Description: Thoroughly and carefully describe the activity or event that caused the generation of this Deviation (D3). Upload files if needed if "OTHER" is chosen as category in above box, carefully describe the discrepancy including keywords that can be used for searching. DescriptionTechnician <input type="text" value="-0-"/> DescriptionTime <input type="text" value="23-Jul-2024 11:14"/> NOW (ex format 18-Jun-2005 16:30)					DescriptionComment <input type="text"/> Must submit traveler before attaching files.							
ACTION												
Action(s): Thoroughly and carefully describe the ACTIONS or ACTIVITIES taken as a result of this Deviation (D3). Describe any processing, treatments, tests, etc. that were used to resolve or test this deviation. Upload files if needed. ActionTechnician <input type="text" value="-0-"/> ActionTime <input type="text" value="NOW"/> (ex format 18-Jun-2005 16:30)					ActionComment <input type="text"/> Must submit traveler before attaching files.							
RESOLUTION												
Resolution: Thoroughly and carefully describe the final resolution of this Deviation (D3). What actions resolved this problem, if a resolution was found. If NO RESOLUTION was found then what next steps should be taken to resolve this deviation? Upload files if needed. ResolveTechnician <input type="text" value="-0-"/> ResolveTime <input type="text" value="NOW"/> (ex format 18-Jun-2005 16:30)					ResolveComment <input type="text"/> Must submit traveler before attaching files.							
NOTIFICATION												
Was this D3 RESOLVED? Or is additional information or discussion needed? ResolveStatus <input type="radio"/> Yes <input checked="" type="radio"/> No *required D3 will be auto closed IF A RESOLUTION WAS FOUND					The Engineers listed will be automatically emailed upon submit of this page. Engineers to be Emailed:							

Select all reasons for the D3 being opened and provide an explanation of issue along with attaching any files or pictures needed for documentation. Provide explanation of actions taken and what was done to resolve the issue.

# 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

# Thank You For Listening

Questions?

Additional questions or concerns can be directed to [pansophy@jlab.org](mailto:pansophy@jlab.org)

# Training Release, Revision History, and Approvals

Rev #	Major Changes	Effective Date:
1	Initial version	23 JULY 2024

Approved by:	Name:	Signature:	Date:
Document Owner	Matthew Menia		
Reviewer 1	Megan McDonald		
Reviewer 2	Allen Samuels		
Project Lead	Valerie Bookwalter		