Starting in September 2010, Principal Investigators wanting to request Instruments from IRIS/PASSCAL must obtain a user account on the PASSCAL website. Once a user account is created, PI's will be able to request instruments, track existing requests, assign collaborator permissions to other PI's, and more. Additionally, PI's with accounts will find that much required information for mobilization/demobilization/rebilling forms will be entered automatically.

Once your user account is Activated, you will be able to add or update your Contact Information. PASSCAL will also be pre-creating new accounts for selected PI's with active experiments. Either way, once your account has already been Activated, you will be notified via e-mail, and you will then be able to Log In using the 'Username' and 'Password' fields on the upper right of the PASSCAL website home page.

The next few pages discuss the new features now available for PI's to make and track instrument requests.

**Getting Started - the PI Home Page**

The PI Home Page, www.passcal.nmt.edu/pihomepage, is the starting point for PI's to request accounts, examine experiment status, and more. To get started, you'll need to request an Account on the PASSCAL website. Go to the PI Home Page, either by visiting the link above, or by clicking “P.I. Home Page” on the left-hand-side Navigation Menu, under the heading “Expt. Schedule”. To request a user account, just click the “Request a User Account in the PASSCAL Website” button shown below.
Upon clicking the “Request an Account” button, you will be directed to a form which submits your name, email and other information to PASSCAL. This form includes a “CAPTCHA” question for prevention of SPAM submissions; in the example below, the submitter types “hll9We” into the code field before submitting the form.

Upon form submission, you will see the “thank you” message shown below, and you'll also receive an email copy of the request.

Upon your account is activated by PASSCAL, usually after just one or two days, you'll receive another email message, with details on how to log in (username and password), along with instructions on changing your password. To log in to PASSCAL, type your username and password into the login fields on the upper right of any PASSCAL website page. Usernames are your full email address.
After logging in, you’ll find that the PI Home Page changes appearance and is set for you to make or track instrument requests. If you don’t yet have any existing requests, the PI Home Page will look like the following example. While nothing is yet listed under “Experiment Selection,” you will be able to initiate a new Instrument Request, or update your contact information. Updating your contact information is the first thing you should do, as this information is used for Instrument Requests later on. Before you can go to mobilization, demobilization, or rebilling forms by clicking the appropriate buttons, you must first have an existing project, and you must first select that project for updating.

The situation is different for PIs who have a long history with PASSCAL. If and when these PIs get accounts on the PASSCAL website, their home page may show multiple experiments that have been supported over the years. Wherever possible, the data from older databases have been used to pre-populate the new scheduling database. For example, a typical PI’s home page will list several past experiments, even if his or her website account has just been created.
Additionally, many PIs having past projects with PASSCAL will find that their contact details (including addresses and phone numbers) have already been entered into the database. If this information was not available upon account creation, or old information needs correcting, please update your contact details for later use.

**Experiment Support - the Instrument Request Page**

Clicking the “Initiate New Instrument Request” button will bring up the Instrument Request form, as will clicking the menu item “Instrument Request Form” under the Forms navigation menu, sub-heading “pre-experiment.” Note: to access the Instrument Request form, you must have an account on the PASSCAL website, and you must be currently logged in to that account.

There are several tabs for various types of information regarding the Request. You should fill out all six tabs (Experiment Information, Instrument Support, Funders and Sponsors, Contact Information, Billing (Payer) Information, Ancillary Support) before clicking the Submit button (last tab on the right) for the first time. Additionally, please review all tabs before clicking 'Submit.' You will be informed if fields are missing or invalid. Note: Do Not navigate to another page until this form is submitted, or all your entries will be lost. When you submit this form, you (along with key IRIS and PASSCAL staff) will receive a confirmation e-mail.
The Experiment Information tab asks for details like the project name, location, and description. The details of instruments are included in the second tab, “Instrument Support.” The basic part of this form includes shipping dates for the equipment to leave from/arrive at the PASSCAL dock, number and type of three-channel dataloggers and sensors needed, as well as quantities of multi-channel (“Geode”) or single-channel (“Texas”) dataloggers, and a field for ancillary equipment questions or comments.

For most requests, only the main “Instruments” fieldset shown above needs to be filled out. This allows you to request three-channel dataloggers and sensors (or dataloggers alone), and/or also multi-channel or single-channel dataloggers, all for the same time period.

However, you may also make use of the optional phases appearing below the “Instruments” fieldset to request instruments of different types, or for non-contiguous or overlapping dates, as needed. To open the “Additional/Different Instruments/phase 2 for Project (Optional)” entry area, click on the collapsed heading to open the fieldset. If a third phase is needed, or simply if another different type of instrument is requested, click on the “Additional/Different Instruments/phase 3 for Project (Optional)” heading to open the third fieldset. Be sure to check the date fields for each fieldset – these need not be the same.

You may enter funding, agency and program information on the third tab. If your specific Funder or Program are not listed in the dropdowns, please type their names into the “Funding Notes and Comments” field, along with anything else we should know about your Funding. Important: PASSCAL cannot schedule un-funded projects. Let us know as soon as your project gets funding approval, or if your project is funded internally (and your institution will be paying shipping costs).
The “Contact Information” tab should be pre-filled with your existing Contact Information. Review this tab, and make any changes (new addresses, etc.) before submitting the form.

The fifth tab is for Billing (Payer) information, which is required for Shipping. There are three questions to answer on this tab: the first is billing preference (email or snail mail). The second item regards who the Payer is. If you (the PI submitting the request) are to be the Payer, click the radio button “I am the Payer.” If another PI has this role, and this PI can be found in the dropdown list provided, then you should click the “Payer is selected in the dropdown list below” button, and then select that person in the dropdown list. If, however, the Payer does not appear in the dropdown, click the “Payer is specified in the Fields below” button, and fill in these fields as best you can.
The sixth tab asks for information on Ancillary Equipment and General Support (field support, field computer support, etc.). Here, you may identify yourself as a Lead or Co-PI, and also indicate Collaborator PIs, if they are listed in the dropdown selection field. Once the project has been submitted to the database by PASSCAL, you will be able to grant access or change grant status for these or additional collaborators. There are three types of Collaborator Access, one giving full rights to co-manage the project, another for Project Payer (shipping costs), and a third for granting browsing capability only.
After reviewing all six data tabs, open the Submit tab. Here, you will see radio buttons regarding your acceptance of IRIS/PASSCAL policy. Click “Yes” after reviewing the policy, and then click the Submit button.

After submission, you will see a detailed message onscreen, showing the details of your request. Additionally, you (along with relevant PASSCAL staff) will receive an email confirmation of your request.

Upon submitting a Request, your PI Home Page will now display this (and possibly other requests) for your review. Initial requests will appear as “My Pending Requests,” indicating that these have not yet been entered into the actual PASSCAL Scheduling Database.

If you click the “Review Pending Experiment Shown in Dropdown” button, you'll be able to review the details of your requests without changing anything, as shown. If you need to modify a pending request (say, if funding was recently approved), click the “Modify Pending Experiment Shown in Dropdown” button.

You will not be able to access the Mobilization/Demobilization/Rebilling forms until your project has been scheduled by PASSCAL, and has been selected by you on your PI Home Page.
“Review Pending Experiment Shown in Dropdown” shows you experiment details as submitted to PASSCAL.

After PASSCAL staff have had a chance to review your request, they can enter it into the actual Scheduling Database. *This process may take several days.* If you need a timely response, and have not heard back from PASSCAL, please email the PASSCAL scheduling team at <exp_schedule@passcal.nmt.edu> with a request for a status update.

Once PASSCAL staff have entered your request into the Scheduling Database, another email will be sent to all concerned. Experiments which have been submitted to the database might not yet be Scheduled (i.e. committed to be sent to the field). Once an experiment is Scheduled, it will be displayed to the public on pages such as Experiment Summary, Experiment Details, or Schedule
Calendar. Experiments cannot be Scheduled until Funding has been approved.

After your projects are entered into the database by PASSCAL, your PI Home Page will now display these requests under the “My Experiments” heading, as shown below. While the Public can only view Scheduled projects, you will be able to see your own projects, whether they are Scheduled or not.

You may select any of your experiments from the dropdown, and click the “Select Experiment Shown in Dropdown” to select that experiment for further review. Once an experiment has been Selected, you may opt to Review it, ask for modifications, or go directly to mobilization, demobilization, or rebilling forms. Here, your contact and experiment information will be used to pre-populate the forms.

If no experiment has been selected as yet, the PI Home Page will appear as shown here.

Once an experiment has been Selected, buttons providing new options will be displayed. Here, the PI can now choose to Review the selected experiment, add more collaborators, or ask for modifications to the request. Modifications will have to be considered and approved by PASSCAL.
Asking for a review of an experiment takes the user to the Schedule Details page, which has several tabs for various aspects of the experiment. The first tab shows basic experiment information, such as name, location, and description.

The second tab displays details of experiment support (e.g. Instrument Requests).

The “Collaborators” tab lists co-PIs for the project. If this project belongs to you, the logged-in PI looking at it, you can opt to add new collaborators by clicking the “Add Collaborator PIs to Experiment” button.

Upon clicking the “Add Collaborators” button, you will be taken to the PI Grants Page, which allows you to assign co-PI status to others. You can opt to give collaborators Full Rights to co-manage
to project, or Observe Only rights. You can also designate one PI as the “Payer” (the person who will receive shipping bills from IRIS). “Observe Only” collaborators will be able to see status reports normally available only to the main PI (such as details of unscheduled instruments), but won’t be able to modify requests directly.

Once the Granting Level is set, collaborators selected in the dropdown can be added to the project with a click of the “Add PI from Database as Collaborator” button.

After a collaborator has been added, they will be listed in the table with the other PIs.

The Experiment Details Page Metadata Tab

The Metadata tab provides access to experiment details not normally displayed to the public, such as FDSN number. PI Collaborators will be able to view this Metadata tab, and collaborators with Full Rights to the project will also be able to Edit the metadata fields with a click of the button shown on the next page.
Upon clicking the “Edit Metadata” button, you will be able to edit several fields, including many shown on other tabs, such as Name, Location, and Description. The changes won't be kept unless you click the “Update Experiment Metadata” button at the bottom of the form.

If you are logged in, and have Selected an Experiment, the Mobilization, Demobilization, and Rebilling buttons will become enabled, and can be clicked to get to the needed form.
Information regarding the PI and project will be automatically pre-entered on forms such as Mobilization, Demobilization, and Rebilling.

Information on Multiple Projects - the Experiment Summary Page

There are several other utilities for inspection of the Instrument Schedule. The Experiment Summary page produces tables of projects for given calendrical periods. Optional searches may be focused on given Agencies or Programs, or for given Principal Investigators.
If you (the logged-in PI) clicks the “Retrieve MY Experiments” shown on the Summary Page above, a table of all your ongoing projects is presented.

### Experiment Summary

<table>
<thead>
<tr>
<th>Experiment Name</th>
<th>Experiment Number</th>
<th>Start Date</th>
<th>End Date</th>
<th>PI</th>
<th>Funding Agency</th>
<th>Funding Program</th>
</tr>
</thead>
<tbody>
<tr>
<td>OWLS</td>
<td>201657</td>
<td>2010-12-31</td>
<td>2011-01-01</td>
<td>Dumbledore, Albue</td>
<td>UNIV</td>
<td>UNIV</td>
</tr>
</tbody>
</table>

Clicking on the hyperlinked Project Number on a Summary page will take you to that project's Details page. The Details page can also be used stand-alone, and projects can be searched for by PI last name, experiment name, or experiment number.

If part of an experiment name is entered, such as “earth” in the figure above, and multiple results are found in the database, the user will be presented with a dropdown list that allows selection of the specific project being sought.

### Experiment Details

**Multiple Experiments Found (Experiment Name Contains earth): Please Choose One from Dropdown List.**

When a PI is examining projects managed by other PIs, they will not be able to see or edit Metadata, add collaborators, etc.
The “Calendar” utility allows inspection of the shipping schedule in calendrical format. Browsers can select start/stop periods, instrument types, and equipment pools (FA/PASSCAL /Both). Clicking the “Retrieve Calendar” button will produce a rendering of the current Schedule.

Once a calendar has been rendered, the schedule may be inspected as shown below. The Project Numbers on the table are hyperlinks, with each linking to the corresponding Details page for the given Project. The red fields indicate the start of a deployment, and the purple fields the end of the deployment. Row colors are alternated for readability.
On the bottom of a calendar display are buttons which allow the user to return to the calendar controls page, or to make a PDF file of the currently displayed calendar.

Once a calendar has been saved as a PDF file, it can be printed, archived, or emailed as needed.
Important - Changing your EMAIL

A single PI may have multiple entries in the Scheduling Database, say, for various institutions he or she has worked at. Generally, only one of these is attached to the user login account on the PASSCAL website. The unique database key for these user accounts is the user's email address. If you need to change your email address for your active PASSCAL account, please contact Dave Thomas (dthomas@passcal.nmt.edu) with the new information. While you will be able to change the “E-mail Address” field on your account details page, this will not change the Username, which is the critical identifier. Please contact PASSCAL to make this type of administrative change to your account. You may change your password at any time; click the “My account” link near the upper right of the screen, then click “Edit” to enter a new (and confirmation) password. If you are active at two institutions, you might consider getting two PASSCAL accounts to handle your projects.

Help is Available

If you have comments or questions regarding the new Scheduling Database utilities, or if you find any errors, missing requests, wrong dates, etc. in the existing database, please notify PASSCAL software developer Dave Thomas at <dthomas@passcal.nmt.edu>, or the PASSCAL scheduling team at <exp_schedule@passcal.nmt.edu>.