# PASSCAL's New Scheduling Database Utilities – a User's Manual for Principal Investigators

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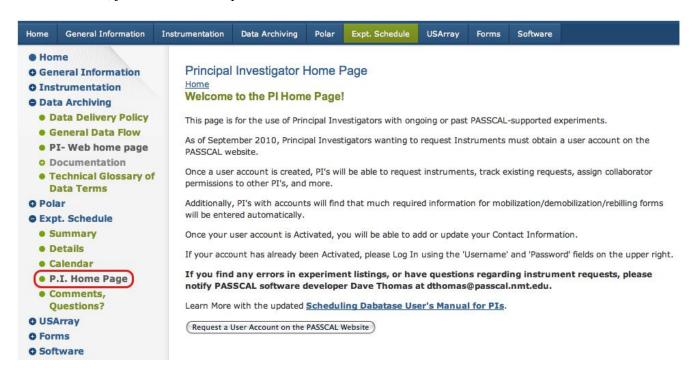
Starting in September 2010, Principal Investigators wanting to request Instruments from IRIS/PASSCAL must obtain a user account on the PASSCAL website. Once a user account is created, PI's will be able to request instruments, track existing requests, assign collaborator permissions to other PI's, and 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 be also be pre-creating new accounts for selected PIs 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 PIs 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.

Principal Investigato		
scheduleconfirm_form, action=askr	newaccount	
Welcome to PI Registra	ation!	
Your First Name: *	Your Last Name: *	
Albus	Dumbledore	
Your Institution: *		
Your institution:	Your Department: *	
Hogwarts  Principal Investigator's E-Mail: *	Dark Arts	
Hogwarts	Dark Arts	
Hogwarts  Principal Investigator's E-Mail: * dumbledore@hogwarts.edu	Dark Arts	
Principal Investigator's E-Mail: * dumbledore@hogwarts.edu inter your E-mail address -CAPTCHA	Dark Arts  er you are a human visitor and to prevent au	utomated spam submissions.

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

# Principal Investigator Home Page

- · scheduleconfirm\_form, action=asknewaccount
- . Thank You for submitting a request for a new User Account. You will be e-mailed when the account is made Active.

# Welcome to the PI Home Page!

Once 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 prepopulate 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.

# Instrument Request Form for Albus Dumbledore (dumbledore@hogwarts.edu) · welcome, prin\_invest, dumbledore@hogwarts.edu, 50 . Please fill out or update the information requested below for your instrument Request. Please fill out all six tabs (Experiment Information, Instrument Support, Funders and Sponsors, Contact Information, Billing Information, Ancillary Support) before clicking the Submit button for the first time. Please review all tabs before clicking 'Submit.' You will be informed if fields are missing or invalid. Do Not navigate to another page until this form is submitted, or all your entries will be lost. . When you submit this form, you will receive a copy, along with the appropriate IRIS and PASSCAL staff. Experiment Information Instrument Support Funders and Sponsors Contact Information Billing (Payer) Information Ancillary Support Submit the Form Experiment Short Name: \* OWLS 11 Enter the Experiment Short Name/Acronym Experiment Long Name: \* Observations of Wizardly Lucky Spells 2011 Enter the Experiment Long Name Location: \* Scotland Enter the Experiment Location Starting Longitude: \* Ending Longitude: \* 2 Use + for East. - for West, and decimal notation, Example: W105°30'30" would be entered as -105.508333 Ending Latitude: \* Starting Latitude: \* Use + for North, - for South, and decimal notation. Example: \$35°30'30" would be entered as -35.508333

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 could be lost.* When you submit this form, you (along with key IRIS and PASSCAL staff) will receive a confirmation e-mail.

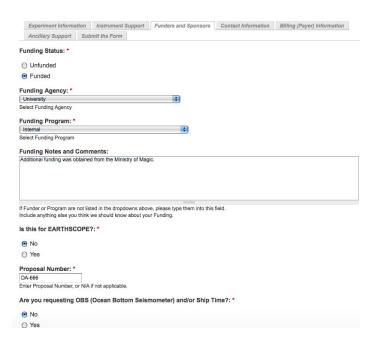
The Experiment Information tab asks for details like the project name, location, and description. The details of instruments are included in the second tab, "Instrument Support." The basic part of this form includes shipping dates for the equipment to leave from/arrive at the PASSCAL dock, number and type of three-channel dataloggers and sensors needed, as well as quantities of multi-channel ("Geode") or single-channel ("Texan") dataloggers, and a field for ancillary equipment questions or comments.

Contact Information Billing (Payer) Inform	nation Ancillary Support	Submit the Forn
nstruments		
Date Equipment leaves PASSCAL dock: * Date	e Equipment returns to PASS	CAL dock: *
	2 \$\dag \dag 31 \dag \hat{\phi}	
HREE-CHANNEL DAS/SENSOR QUANTITY: *	SENSOR TYPE (Three-Chann	el ONLY): *
12	○ Broadband ○ Intermediate	Period
nter the number of 3-Ch. DAS/Sensor units needed	Short Period (1 and 2 Hz)	
	High Frequency (>= 4 Hz)	
	○ Accelerometer ○ DAS Only	(i
	Enter SENSOR Type, or DAS Only	
MULTICHANNEL (24 or 60 channel) DAS	TEXAN (Single-channe	el DAS) QUANTIT
QUANTITY: *	*	
0	0	
inter the number of Multi-channel DAS units needed	Enter the number of Texans	needed
typically Geode/24-channel or Stratavisor/60-channe	ai)	
ACCA STREET SERVICE SERVICE		
ncillary Equipment:		
ables and assessment		
ables and connectors.	place to tell us about it!	<u> </u>

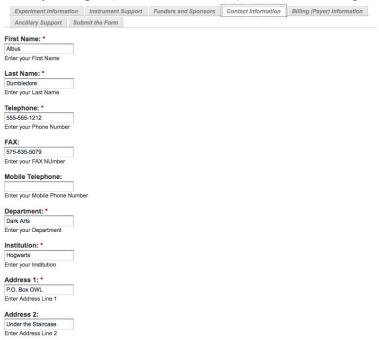
For most requests, only the main "Instruments" fieldset shown above needs to be filled out. This allows you to request three-channel dataloggers and sensors (or dataloggers alone), and/or also multichannel or single-channel dataloggers, all for the same time period.

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.

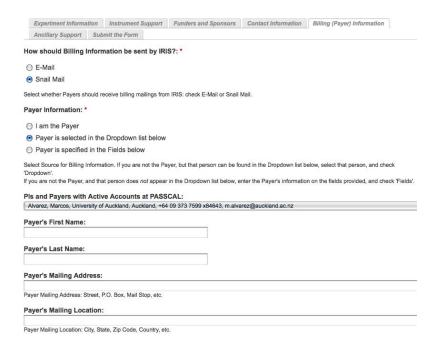
You may enter funding, agency and program information on the third tab. If your specific Funder or Program are not listed in the dropdowns, please type their names into the "Funding Notes and Comments" field, along with anything else we should know about your Funding. *Important*: PASSCAL cannot schedule 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).



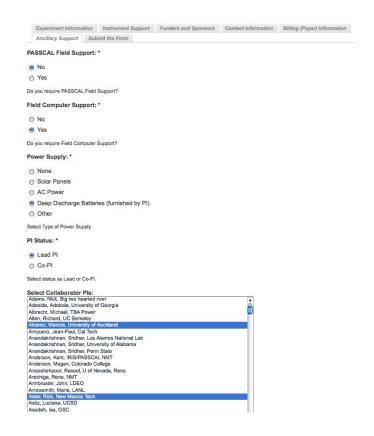
The "Contact Information" tab should be pre-filled with your existing Contact Information. Review this tab, and make any changes (new addresses, etc.) before submitting the form.



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.



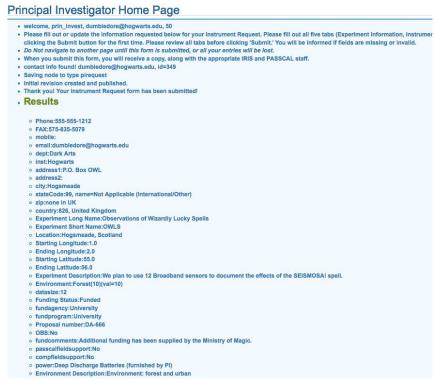
The sixth tab asks for information on Ancillary Equipment and General Support (field support, field computer support, etc.). Here, you may identify yourself as a Lead or Co-PI, and also indicate Collaborator PIs, if they are listed in the dropdown selection field. Once the project has been submitted 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 comanage 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.

Experiment Information	Instrument Support	Funders and Sponsors	
Contact Information	Billing (Payer) Information	on Ancillary Support	Submit the Form
I have read and agree with	the PASSCAL Instrumen	t Center Policy:	
● No			
○ Yes			
Open a new Window/Tab to Review	v the PASSCAL Instrument Cente	Policy.	
Submit Form			

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.

▼ Experiment Selection	
You have no requests entered into the Sche	eduling Database at this time.
	Review Pending Experiment Shown in Dropdown
My Pending Requests: OWLS 11 2012-07-31	(Modify Pending Experiment Shown in Dropdown)
You may Select a pending request for review or mo These have not yet been added to the Scheduling I	
▼ Principal Investigator Home Page <b>Contro</b>	is
	Is ontact Information
	ontact information
(Initiate New Instrument Request) (Update Co	ontact information

"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 <<u>exp\_schedule@passcal.nmt.edu</u>> 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.

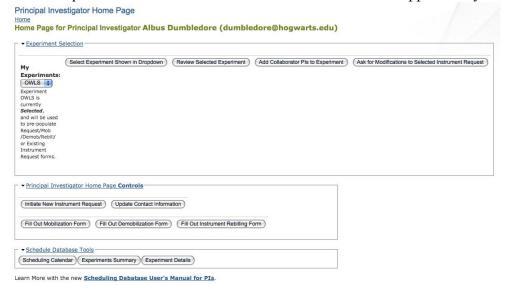
You may select any of your experiments from the dropdown, and click the "Select Experiment Shown in Dropdown" to select that experiment for further review. Once an experiment has been Selected, you may opt to Review it, ask for modifications, or go directly to mobilization, demobilization, or rebilling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

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

Principal Investigator Home Page

Experiment Selection		
IV Experiments:  OWLS :  To Experiment is currently Selected.  These an experiment has been Selected, parts of forms like Mobilization or Rebilling nay be pre-filled out for you, as will a foodification for an existing Instrument Request. Thouse an experiment from the dropdown menu, hen click the button at right to Select that experiment is currently Selected, your contact Info will be used to pre-fill-out footiop/Demoi/Rebil/Instrument Request forms.	Select Experiment Shown in Dropdown	
Principal Investigator Home Page <b>Contro</b>	contact information	
Fill Out Mobilization Form Fill Out Demobil	lization Form Fill Out Instrument Rebilling Form	

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.



## Information on Specific Projects - the Experiment Details Page

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).



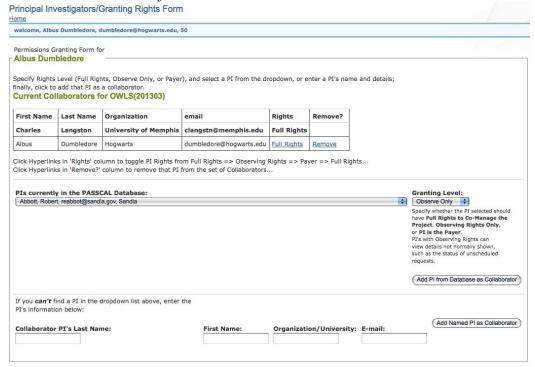
The "Collaborators" tab lists co-PIs for the project. If this project belongs to you, the logged-in PI looking at it, you can opt to add new collaborators by clicking the "Add Collaborator PIs to Experiment" button.



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

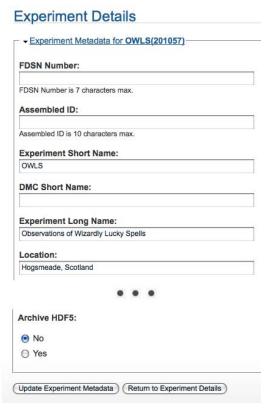
The Metadata tab provides access to experiment details not normally displayed to the public, such as FDSN number. PI Collaborators will be able to view this Metadata tab, and collaborators with Full Rights to the project will also be able to Edit the metadata fields with a click of the button shown on the next page.



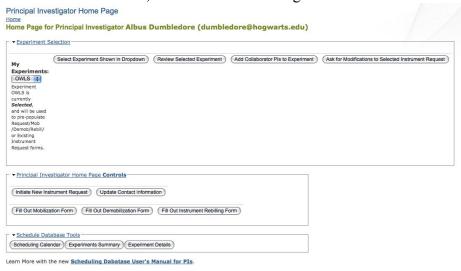
•••

Archive Status	active
Archive Notes	
Archive SEED	0
Archive SEGY	0
Archive hdf5db	0

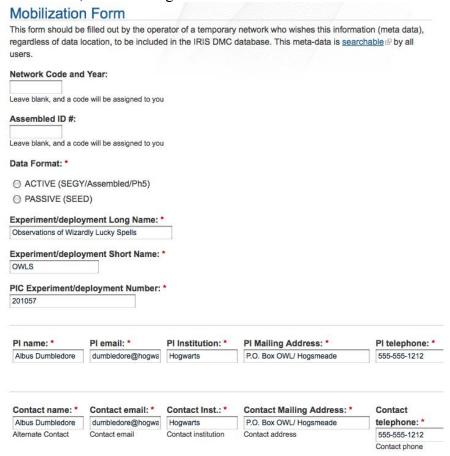
Upon clicking the "Edit Metadata" button, you will be able to edit several fields, including many shown on other tabs, such as Name, Location, and Description. The changes won't be kept unless you click the "Update Experiment Metadata" button at the bottom of the form.



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.

Funding Agency Acronym:	Funding Program Acronym:	Principal Investigator Last Name:	
Specify Start Date:  2009 Cot 6 6	Specify End Date:  2011 Oct 8 8	Sort By:  • Modified Date  • Experiment Number  • Start Date	Reset Fields
lumber to Display per Page:			
○ 10 • 20 ○ 50 ○ All			
Retrieve Summary of Experiments	Retrieve MY Experiments Return to	o PI Homepage	
▼ Schedule Database Tools			
(Scheduling Calendar) (Experime	nt Details		

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.



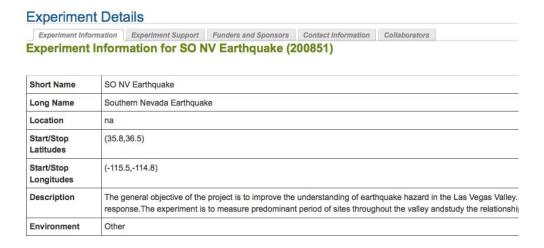
Clicking on the hyperlinked Project Number on a Summary page will take you to that project's Details page. The Details page can also be used stand-alone, and projects can be searched for by PI last name, experiment name, or experiment number.

Experiment Details		
→ Experiment Details Tools		
Principal Investigator Last Name:	Experiment Name:	Experiment Number:
	earth	
Enter All or Part of a PI's Name.	Enter All or Part of an Experiment Name.	Experiment Number takes precedence over Experiment Name, if both are entered.
Retrieve Details for Selected Experiment	Return to PI Homepage	
▼ Schedule Database Tools		
Scheduling Calendar Experiments Sun	nmary	

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.

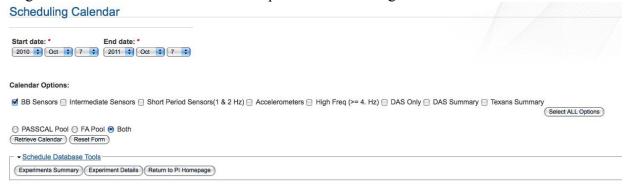


When a PI is examining projects managed by other PIs, they will not be able to see or edit Metadata, add collaborators, etc.

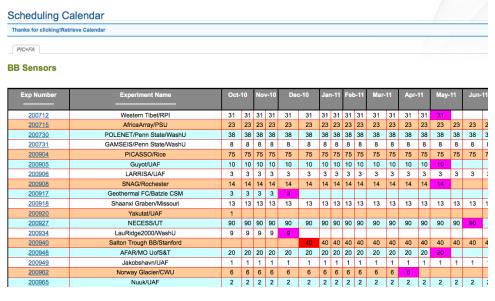


## Information on Project Schedules - the Experiment Calendar Page

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.

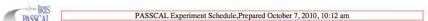


On the bottom of a calendar display are buttons which allow the user to return to the calendar controls page, or to make a PDF file of the currently displayed calendar.

# **FA BB Sensors**

Exp Number	Experiment Name			
200609	CAFE/UW			
200729	COLZA/OSU			
200816	SIEDCAR/UTA			
200910	NE-NV BB/Stanford			
200911	Big Horn/UC Boulder			
201028	Basin and Range Normal Faults			
201030	Chile RAMP			
201038	SEAM/Brown			
201038	SEAM/Brown			
201055	PBO			
201102	W Idaho Shear Zone BB/UF			
201116	SPREE			
	Committed			

Once a calendar has been saved as a PDF file, it can be printed, archived, or emailed as needed.



Number	BB Sensors (PASSCAL)	Oct-10	Oct-10	Nov-10	Nov-10	Dec-10	Dec-10	Jan-11	Jan-
200712	Western Tibet/RPI	31	31	31	31	31	31	31	31
200715	AfricaArray/PSU	23	23	23	23	23	23	23	23
200730	POLENET/Penn State/WashU	38	38	38	38	38	38	38	23 38
200731	GAMSEIS/Penn State/WashU	8	8	8	8	8	8	8	8
200904	PICASSO/Rice	75	75	75	75	75	75	75	75 10
200905	Guyot/UAF	10	10	10	10	10	10	10	10
200906	LARRISA/UAF	3	3	3	3	3	3	3	3
200908	SNAG/Rochester	14	14	14	14	14	14	14	14
200917	Geothermal FC/Batzle CSM	3	3	3	3	3			
200918	Shaanxi Graben/Missouri	13	13	13	13	13	13	13	13
200920	Yakutat/UAF	1							
	NECESS/UT	90	90	90	90	90	90	90	90
	LauRidge2000/WashU	9	9	9	9	9			
	Salton Trough BB/Stanford	7	- 60	100		1 1	40	40	40
	AFAR/MO UofS&T	20	20	20	20	20	20	20	20
	Jakobshavn/UAF	1	1	1	1	1	1	1	1
	Norway Glacier/CWU	6	6	6	6	6	6	6	6
200965	Nuuk/UAF	2	2	2	2	2	2	2	6 2 17
	ESVSME/USGS	17	17	17	17	17	17	17	17
	CDPapua/BU	31	31	31	31	31	31	31	31
	PLUTONS/UAF	16	16	16	16	16	16	16	16
	CAUGHT/UofA	50	50	50	50	50	50	50	50
201015	San Jacinto/UCSD	33				1 1			
	Montana Field/Indiana	1	1	1	1	1	1	1	1
	Tide Water Gl/CRREL	1	1	1	1	1	1	1	1
201035	Whillans/UCSC	6	6	6	6	6	6	6	6
	PULSE/UNC	10	10	10	10	10	10	10	10
201108	Carbon Sequestration								
	Committed	479	478	478	478	478	506	506	506
	Committee	4/17	4/0	4/0	470	470	500	500	300
Number	BB Sensors (Flex Array)	Oct-10	Oct-10	Nov-10	Nov-10	Dec-10	Dec-10	Jan-11	Jan-
200609	CAFE/UW	7	7	7	7	7			
200729	COLZA/OSU	4	4	4	- 77				
	SIEDCAR/UTA	5	5	5	5	5	5	1,,,,,,,,,	
	NE-NV BB/Stanford	50	50	50	50	50	50	50	50
	Big Horn/UC Boulder	39	39	39				1000000	
	Basin and Range Normal Faults			33	33	33	33	33	33
	Chile RAMP	60	100						
	SEAM/Brown	6	6	6	6	6	6	6	6
	SEAM/Brown						1		
	PBO	1	1	1	1				
	W Idaho Shear Zone BB/UF					1 9	1		
201116	SPREE								
100000000000000000000000000000000000000									
	Committed	172	112	145	102	102	94	89	89

#### **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 (<a href="mailto:dthomas@passcal.nmt.edu">dthomas@passcal.nmt.edu</a>) 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 <<u>dthomas@passcal.nmt.edu</u>>, or the PASSCAL scheduling team at <<u>exp\_schedule@passcal.nmt.edu</u>>.