

A Brief Tutorial for EDMS Viewers

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XFEL WP40

Meeting of In-Kind Contributors to WPG3
Hamburg, 27.01.2009

Agenda

- What is an EDMS
- Search and Find
- EDMS Key Concepts
- Navigating Team Environments
- Getting EDMS Accounts and Support
- Outlook

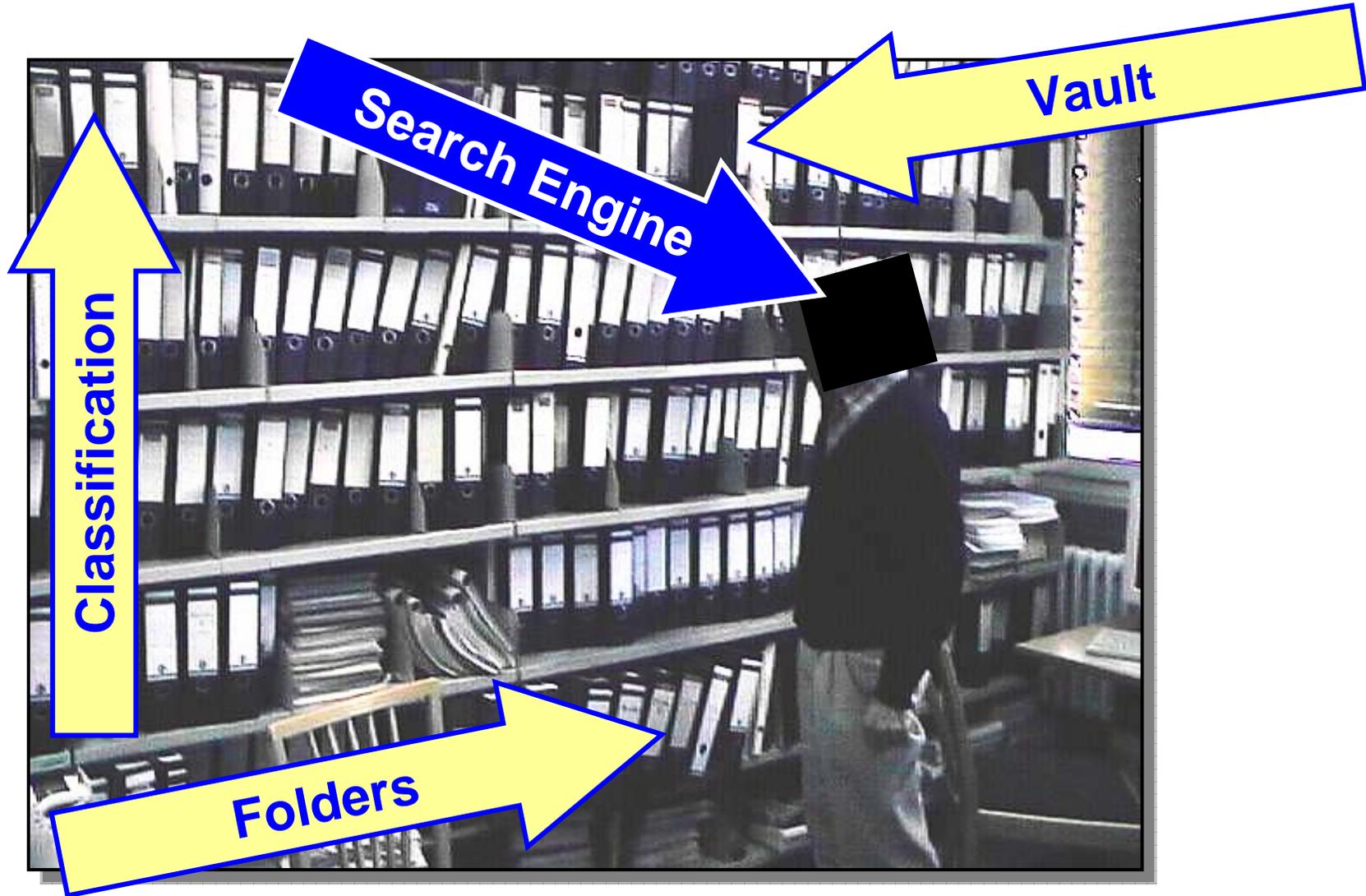
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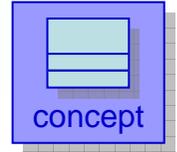
What's in Document Management?



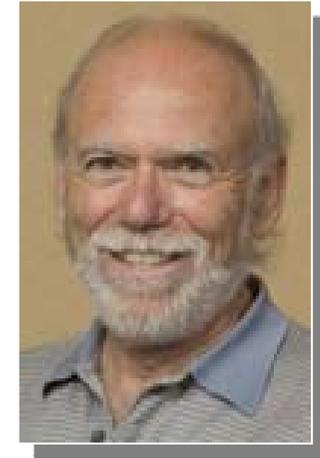
Most of us will start using EDMS for Document Management:



But EDMS is More Than Just That ...



- In a generic sense, EDMS stands for “**Electronic Document Management System**”, and it is used for software systems that provide an orderly way of organizing a large number of documents over the lifespan of a project, providing mechanisms for revisions, traceability, searching, etc.
- In a more specific sense, this acronym means “**Engineering Data Management System**”. In this sense, such a system also provides the basic design tool environment (CAD/CAM etc.), document management system, and work flow that are needed to conduct and carry out a complex project design and implementation like the ILC.



Taken from: Barry Barish, ILC Director's Corner, September 8, 2005
<http://www.linearcollider.org/cms/?pid=100082>

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First Contact: Retrieving Documents



1. search

click

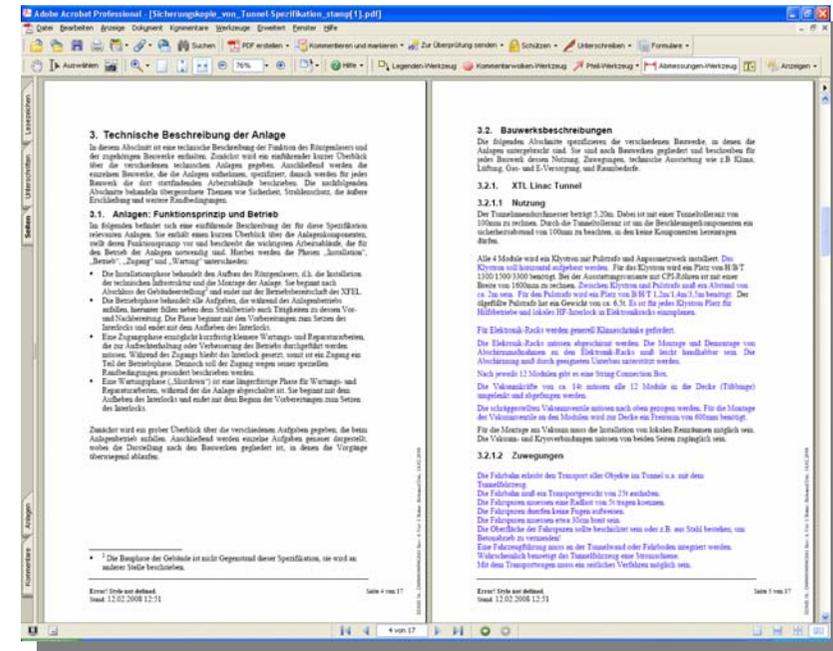
click

click

2. select

3. open

Example: Search by using
“xfel AND cavity AND specification”



▶ access document

Every information access can be achieved
by only three mouse-clicks

Search Results Display Main Document Information

Search Results - Windows Internet Explorer

http://teamcenter.desy.de/TC51PRD/controller/home

File Edit View Favorites Tools Help

Search Results

Search: technical AND coordination

Home Exit DESY

Advanced Search... Lars Hagge

Main Menu Explorer

History Submit Bookmark Subscribe Check Out to Team More Actions...

Search Results

EDMS ID	Name	Description	Work Status	Access Scheme in Use	Item Type
D00000001292351.B.1.1	Draft Template IKC Agreement, 07.01.2009	Draft Template Agreement concerning their collaboration on construction, commissioning and operation3 of the European X-ray Free-Electron Laser Facility, 10.03.2008	Released	Project: XFEL	Protokoll (ohne Vorlage) Pi
D00000001292351.A.1.1	Draft IKC Agreement, 07.01.2009	Draft Agreement concerning their collaboration on construction, commissioning and operation3 of the European X-ray Free-Electron Laser Facility, 10.03.2008	Released (Archive)	Project: XFEL	Protokoll (ohne Vorlage) Pi
D00000001292241.A.1.1	XFEL Accelerator Construction Agreement, 07.01.2009	AGREEMENT on the construction and commissioning of the Accelerator Complex of the European X-ray Free-Electron Laser Facility, 05.03.2008	Released	Project: XFEL	Protokoll (ohne Vorlage) Pi
D00000001292181.A.1.1	XFEL Convention Annex 5, 07.01.2009	Annex 5 to the XFEL Convention, 11.07.2006	Released	Project: XFEL	Protokoll (ohne Vorlage) Pi
D00000001292121.A.1.1	In-kind Contribution Regulations, 07.01.2009	Presentation K. Witte: In-kind Contribution Regulations and Rules F. Stephan (June 2008 Collaboration Meeting)	Released	Project: XFEL	Protokoll (ohne Vorlage) Pi
D00000001256411.A.1.1	PITZ status and plans	Minutes from the PITZ Collaboration Meeting (June 3-4, 2008) in Zeuthen	Working	Team: DESY_PITZ_Team	Talk, Lecture B
D00000001256251.A.1.1	June 2008 Collaboration Meeting Minutes	Minutes from the PITZ Collaboration Meeting (June 3-4, 2008) in Zeuthen	Released	Project: PITZ	Protokoll (ohne Vorlage) B
D00000001250041.A.1.1	XFEL: Technical design report	XFEL: Technical design report	Working	Team: XFEL_WP02_LLRF_Team	General Document A
D00000001249171.B.1.3	XFEL TGA Prüflauf Konzeptabstimmung mit MKK	Dokumentenstruktur, Projekte, Rollen und Teamorganisation zur Unterstützung des XFEL TGA Prüflaufs	Working (Updating)	Team: IPP_Intern	Talk, Lecture B
D00000001249171.B.1.2	XFEL TGA Prüflauf Konzeptabstimmung mit MKK	Dokumentenstruktur, Projekte, Rollen und Teamorganisation zur Unterstützung des XFEL TGA Prüflaufs	Outdated	Team: IPP_Intern	Talk, Lecture B
		RF External and Internal			

Query successful. 86 rows returned.
 Query successful. 26 rows returned.
 Query successful. 119 rows returned.
 Query successful. 10 rows returned.

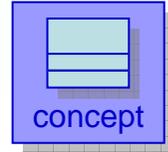
Applet com.sdrc._metaphase.wcc.sharedlogin.SharedLoginApplet started

Local intranet 100%

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Documents and Files

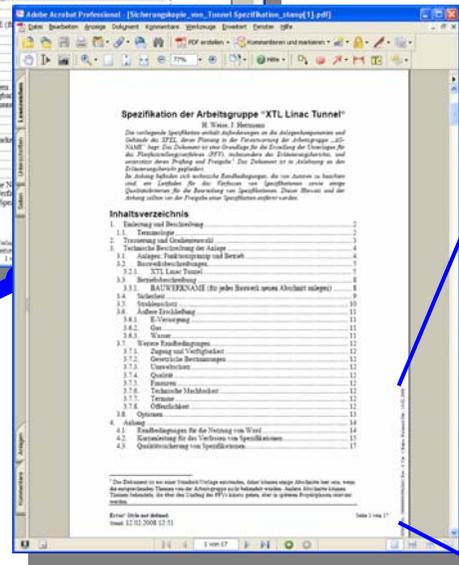
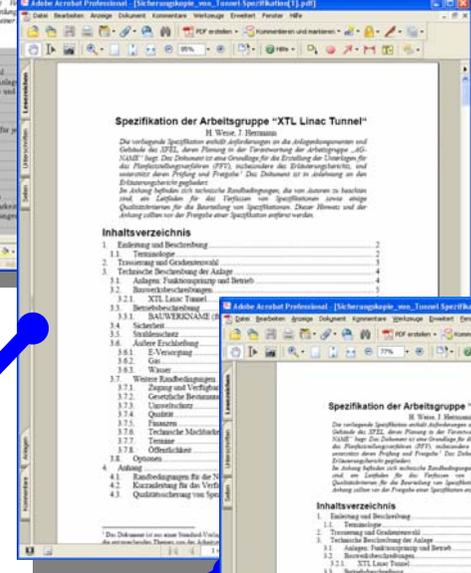
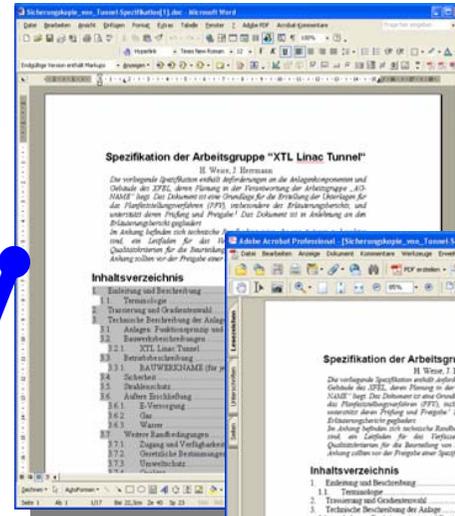
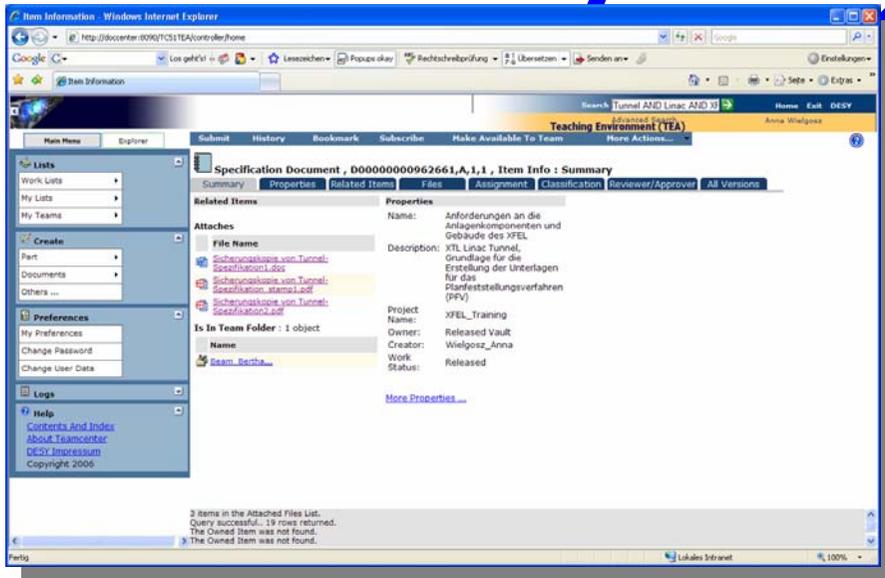


- One document can attach several files
 - with the same content
 - for differing purposes

◀ native file for downloads

◀ PDF file for viewing

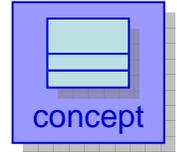
▼ document



▲ PDF file with stamp for outside distribution

EDMS Nr.: D0000000962661 Rev. A Ver. 1 Status: Released Dat.: 14.02.2008

Item Version States in EDMS



item states define item usability and reliability

Initial

- blue items are **currently being edited**

Working

- red items are **work in progress**

Released

- green items are **usable for follow-up activities**

Approved

- released → author says so
- approved → project manager says so

Reviewing

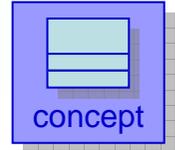
- yellow items are **currently being inspected**

Under Approval

Rejected

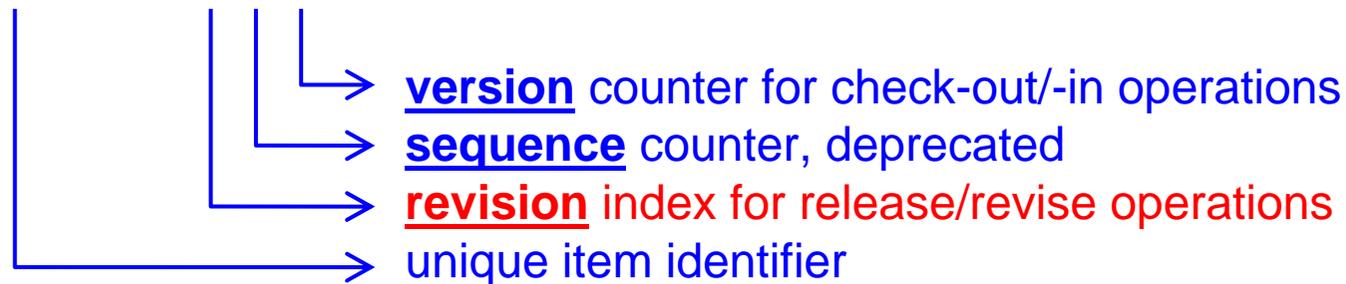
- grey items are **kept for history tracking**
 - they should no longer be used

EDMS-Id: Item Versions and Revisions



- EDMS is keeping track of all the updates which a document receives; it stores a new copy of the document after each check-in and increases the document's version counter

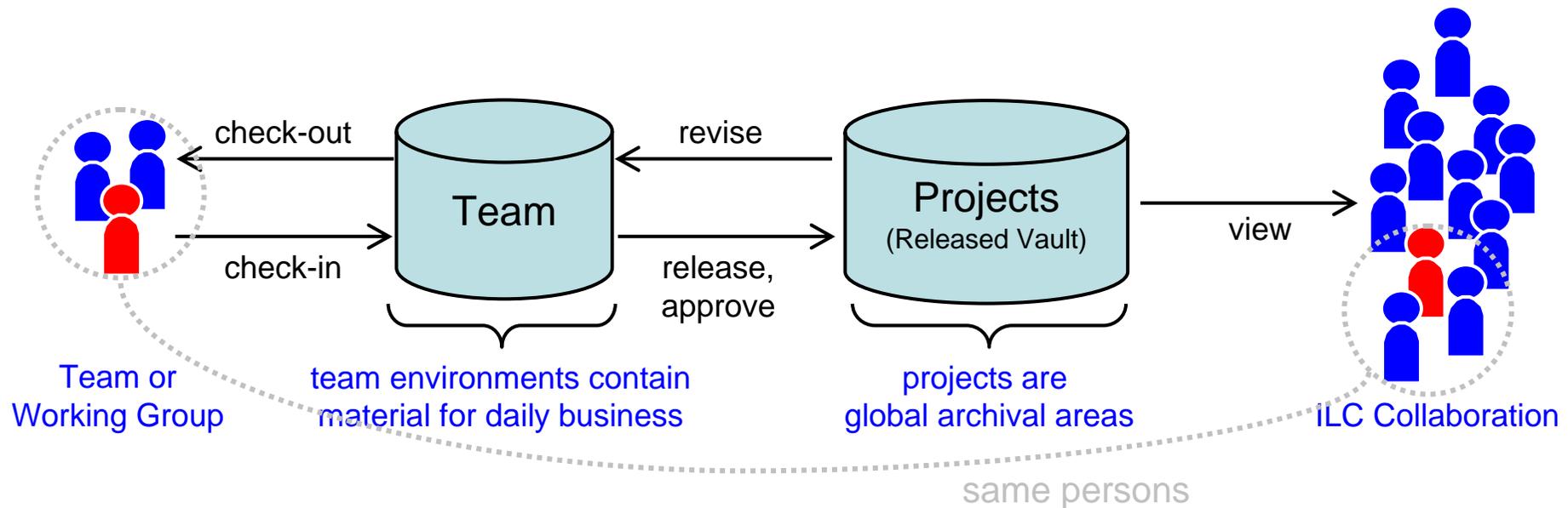
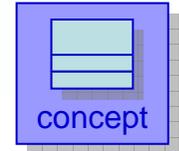
D1234567890123,B,1,4



- the term “item” is ambiguous and usually referring to the latest item revision which has been released or approved

There are no items in EDMS.
There are only **item versions** and **item revisions**.

Accessing Items in EDMS



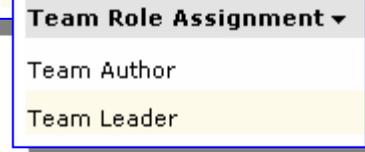
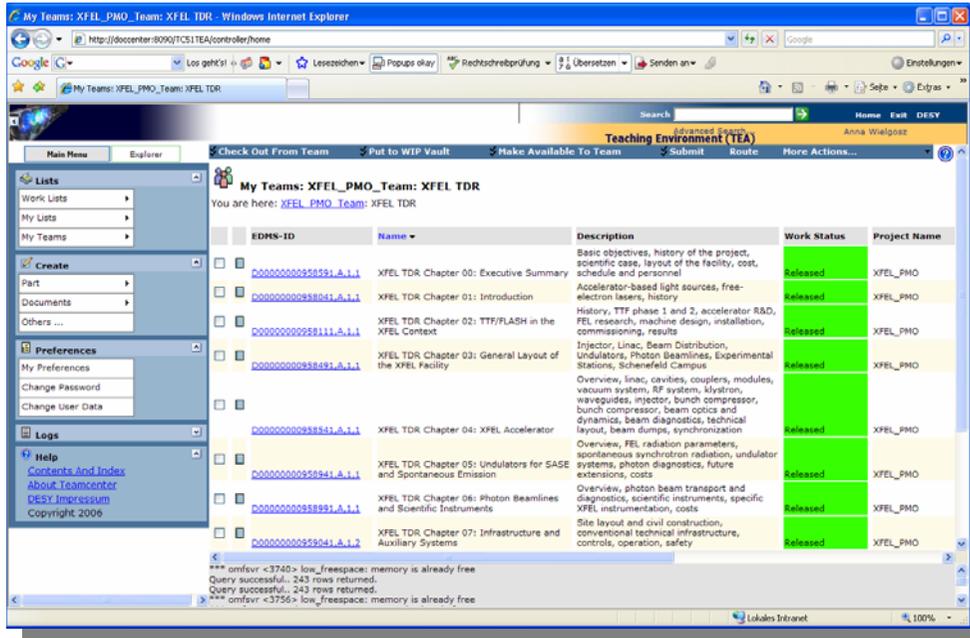
- team environments offer structured access to those items which team members need for their work
- projects are global archival areas with specific access policies which are used for publication, data exchange and archival purposes
- lifecycles transfer items between teams and projects

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Team Workspaces

team folder listings ▼▶



team members ▲

and team role assignments ▶

- teams provide work spaces for the daily interactive work of work packages, working groups, committees, boards etc.
- teams **work like shared file spaces** – self-administrated units with items organized in local folder structures

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Getting EDMS User Accounts

- Request an EDMS account by e-mail to your work package leader – the WPL will contact the EDMS admins, who will provide the account for you
 - need WPL approval to create accounts and access rights
- WP40 provides support and training – contact us for details at ipp-support@desy.de, or call us at DESY at (9)4655

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EDMS for Specific Target Groups



- Your working group wants to make a set of documents available to a specific target group, such as XFEL or PETRA III Project Meetings or ILC Main Linac working group
- Use EDMS *direct* to provide URLs to released EDMS items and to execute EDMS searches
 - ➔ or, write your own program and call our “EDMS web services” to work with EDMS from your own applications

23rd January 2008: 175. Meeting

- Minutes
- A. Matheisen: [Commissioning of the HPR set-up at Desy](#)
- W.-D. Moeller: [Summary of the power coupler workshop 5./6. Nov. 2007](#)

<http://edmsdirect.desy.de/edmsdirect/file.jsp?edmsid=1033461>

XFEL Project Meeting - Mozilla Firefox

XFEL The European X-Ray Laser Project XFEL

XFEL Project Meeting

Time: Wednesday, 12:00 - 14:30

Location: Building 308, Room 459 at DESY

Search meeting minutes in EDMS

Minutes and Agenda

- 20th February 2008: 175. Meeting
 - Minutes
 - HPR Status XFEL naming convention
 - T. Tenbrunser: Summary of the 2nd XFEL Users meeting, 23./24. Jan. 2008
 - HPR Proposal for the installation of the XFEL Accelerator Commissioning
- 13th February 2008: 177. Meeting
 - Minutes
 - J. Dimpfer: Unplanned demagnetisation due to radiation losses at FLAIR
- 30th January 2008: 175. Meeting
 - Minutes
 - W. Gress: Proposed change required for a possible modification of the future geometry STG1.2
 - L. Hager: [EDMS in JRC](#)
- 23rd January 2008: 175. Meeting
 - Minutes
 - A. Matheisen: [Commissioning of the HPR set-up at Desy](#)
 - W.-D. Moeller: [Summary of the power coupler workshop 5./6. Nov. 2007](#)
- 16th January 2008: 174. Meeting
 - Minutes
 - T. Tenbrunser: Update HPR-3 structure
 - G. Sommer: Summary of the LARP review, 3. Dec. 2007
 - link to [glossary.mta.de](#)

Search meeting minutes in EDMS

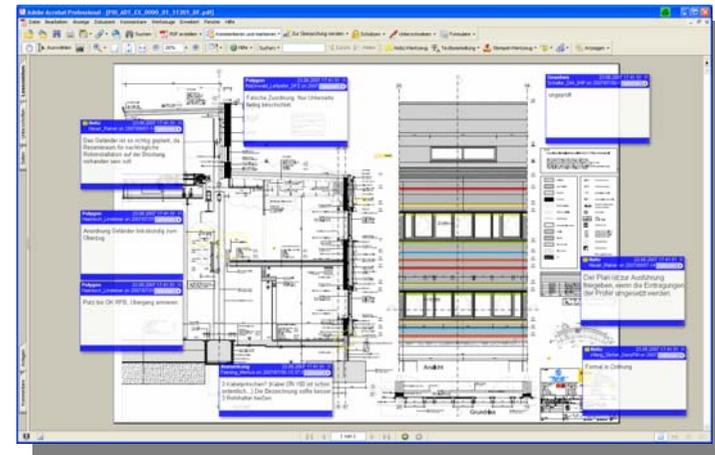
Search the EDMS: Search

EDMS for Reviewers



- You are a reviewer or approver who is supposed to comment on an item, e.g. a paper, drawing or CAD model
- Receive an E-mail with work instructions + hyperlink to item
- View the item and add mark-ups ...

```
A new item has been added to your work list in the EDMS:  
  
Assignment : Please review  
Name       : D00000001003571,A,1,10  
Name       : Engineering Data Management I  
Description: DESY / XFEL EDMS User Training Module 1: Search, Navigation, Teams, Doc  
  
Please proceed as follows:  
  
1. Select the link - after login to the EDMS, you will be transferred to the item  
2. Check the item properties  
3. Check the item using the "view" or "open" commands  
4. select "signoff" and complete the assignment  
  
This is a generated message from the EDMS. Please do not respond to this message.  
In case of questions, please contact the EDMS support team.
```



... using Acrobat Professional for documents and drawings, or iSeries for 3D models → *separate training modules*

Accessing and Reviewing 3D Models

