



Introduction to EDMS

What is EDMS?

EDMS - Engineering Data Management System

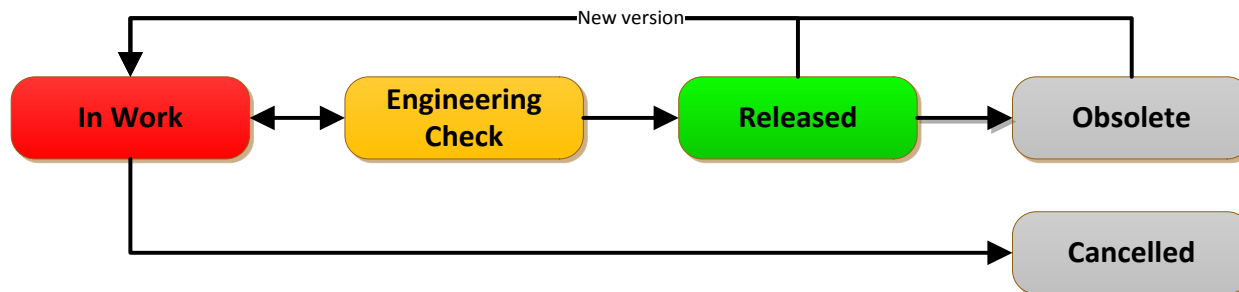
- EDMS is a computerized tool that is used to store, organize and control all engineering data throughout the design, manufacturing and maintenance phases.

Also called:

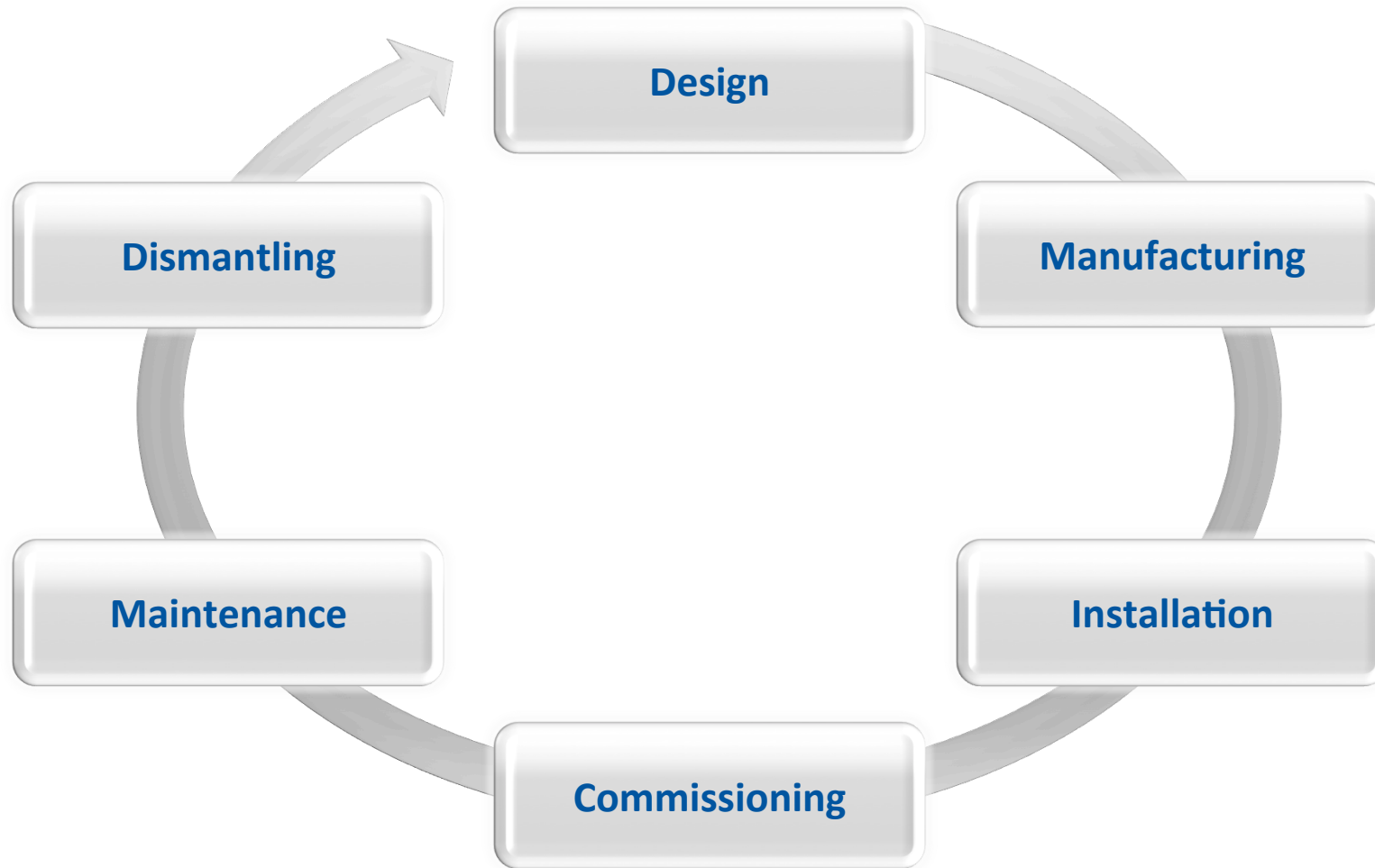
- PDM - Product Data Management Systems
- PLM - Product Lifecycle Management
- TIS - Technical Information Systems
etc..

Main Features in EDMS

- Document management
- Approval procedures
- Versioning handling
- Change control and log of all activities
- Managing various structures
- Configuration management
- Asset tracking (MTF/Infor EAM)
- Maintenance management (MTF/Infor EAM)



Product lifecycle and EDMS





Basic Concepts

Accessing EDMS

- Directly
 - <https://www.cern.ch/edms>
 - edms.cern.ch
- Through the CERN Directory
 - <https://www.cern.ch/directory/>

Applications

- | | |
|---------------|----------|
| ▪ ADAMS | ▪ CDS |
| ▪ book a room | ▪ CET |
| ▪ EDH | ▪ HRT |
| ▪ EDMS | ▪ IMPACT |

- Home
- Equipment
- Buildings & Sites
- Safety
- CAD



Browse



Search

News

May 25, 2014

Latest Features Added to EDMS 6

Plotting from the Caddie is now available
Sharing Read Access through the Caddie is now available

April 14, 2014

EDMS database upgrade
EDMS will be **unavailable** today (April 14th) between 18h00 and 24h00 due to a database upgrade operation

April 3, 2014

Introduction presentation of EDMS6 -
EDMS just got better than ever!

Dates:

- 8th April 2014 09:00-10:00 (30-7-018 - Kjell Johnsen Auditorium)
- 10th April 2014 14:00-15:00 (864-1-D02 - BE Auditorium Preussin)

March 25, 2014

EDMS uses Single Sign On

March 20, 2014

Possibility to show or hide documents in the structure

February 25, 2014

Other applications

CDD
MTF
Infor EAM

Other information

News

Account

Request an EDMS account
Forgot password?
Local administrators

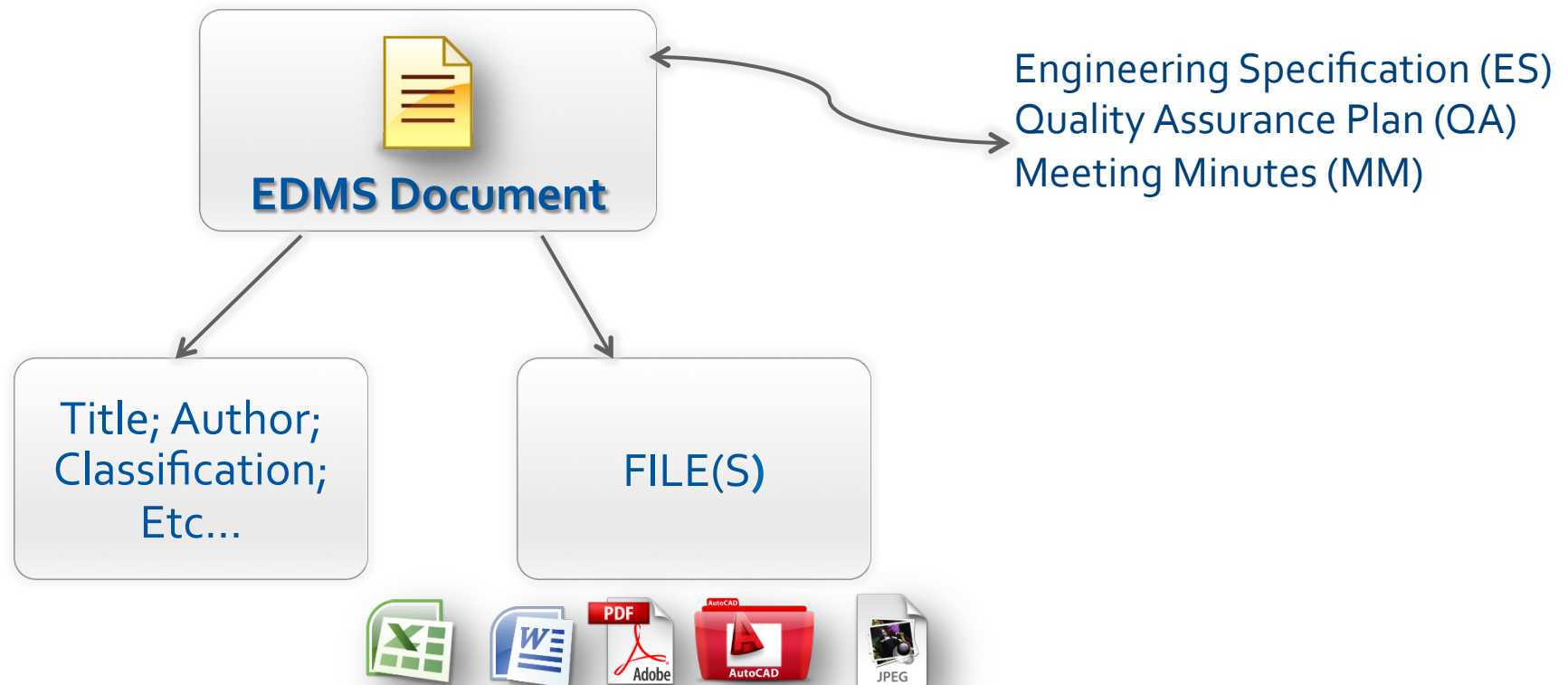
Support & Training

Help
EDMS training
Support pages



What is a document?

- A document in EDMS consists of two main parts:



A Document in EDMS

EDMS internal reference: 110709 v.6.8

Status: Released

Access: Public access

Author(s): by David Widegren

Document type: Manual / Guideline

date: 2012-04-16

Title: Introduction to the CERN EDMS

Description: Transparencies used for the course "Introduction to the CERN Engineering Data Management System".

Keywords: EDMS, training, introduction

Document Functions: Edit, Status, Share, More

Details:

- Associated Web link:
- Local Administrators: [List of Administrators](#)
- Context: EDMS-SERVICE-PUBLIC, EDMS Docs for UC and Admin, public if needed
- Equipment code:
- Release procedure: DOC-PE, Approval by Project Engineer

This page: <https://edms.cern.ch/document/110709/6.8>

Files:

#	Name	Size	Last modified date	Last modified by
10	EDMSIntroductionCourse20130516.pdf	12.1 MB	2013-05-16 08:55:20	Admin EDMS
20	EDMSIntroductionCourse20130516.pptx	6.0 MB	2013-05-16 08:55:21	Admin EDMS

Page 1 of 1 | Total: 2 (displaying 1 - 2)

Documents in EDMS

There are different document views in EDMS

Hiding obsolete documents

View mode

The screenshot shows the EDMS document list interface. At the top, there are tabs for 'Documents', 'Structure', 'Used in', 'Access rights', and 'History'. Below the tabs is a toolbar with buttons for 'Create new document', 'Attach document', 'Detach', 'Auto Link', and 'Export to Excel'. A 'Hide Obsolete' checkbox is checked. The 'Per page' dropdown is set to 20, and the 'View mode' is set to a list view. The main table displays three documents with columns for #, Id, Title, Files, Status, Created on, Author, and Document type. The bottom of the interface shows a pagination bar with 'Page 1 of 1' and a total count of 16 documents, with 3 displayed after filtering.












#	Id	Title	Files	Status	Created on	Author	Document type
10	110691 v.6.5	Exercises for the 1-day course "Introduction...	@ 4	Released	2012-04-16	EDMS Support	Manual / Guideline
30	110709 v.6.8	Introduction to the CERN EDMS	@ 2	Released	2012-04-16	David Widegren	Manual / Guideline
40	310793 v.2	Introduction to the CERN Engineering Data ...	@ 2	Released	2003-01-07	David Widegren	Agenda


Browsing through pages

Files in a document

Default number of documents shown per page

Documents in EDMS

Documents															
Structure															
Used in															
Access rights															
History															
Create new document		Attach document		Detach		Auto Link		Export to Excel		<input checked="" type="checkbox"/> Hide Obsolete		Per page 20		View mode:  	
#	Id / Title	Files	Status	Created on	Last modified										
10	110691 v.6.5   Exercises for the 1-day course "Introduction to the CERN EDMS"	@ 4 trainingexample01.docx (144.5 KB) trainingexample02.docx (681.5 KB) Intro-Exercises-v65_20120416.pdf (Intro-Exercises-v65_20120416.docx	 Released	2012-04-16 by EDMS Support	2013-05-16	<i>Manual / Guideline</i>									
30	110709 v.6.8   Introduction to the CERN EDMS	@ 2 EDMSIntroductionCourse20130516.p EDMSIntroductionCourse20130516.p	 Released	2012-04-16 by David Widegren	2014-08-18	<i>Manual / Guideline</i>									
40	310793 v.2   Introduction to the CERN Engineering Data Management System	@ 2 introductionprogram.doc (60.0 KB) introductionprogram.pdf (86.5 KB)	 Released	2003-01-07 by David Widegren	2003-08-05	<i>Agenda</i>									

Page 1 of 1  Total: 16, after filter: 3 (displaying 1 - 3)

General recommendations

- Only files describing the same contents should be put into the same document.
- Always put the native file format + a viewable/printable file format into the document. (Using the same file name for these.)



Searching for documents

EDMS uses a Google-like search throughout the entire system

- Every field in the document is searched (Author, EDMS ID, External Reference, Keywords, Description, Title, etc..)

Searching in EDMS

Search results for 'Einstein'

Einstein

Documents (26)

Locations (7)

Per page 10

Id	Name	Version	Status	Other info
1469 ★	1469=ROUTE A. EINSTEIN ET COUR...	VOI	Installed	
1469E ★	ROUTE EINSTEIN	VOIRIE	Installed	
1469C ★	ROUTE EINSTEIN	VOIRIE	Installed	
1469O ★	ROUTE EINSTEIN	VOIRIE	Installed	
1469D ★	ROUTE EINSTEIN	VOIRIE	Installed	
1469B ★	ROUTE EINSTEIN	VOIRIE	Installed	
1469A ★	ROUTE EINSTEIN	VOIRIE	Installed	

Page 1 of 1

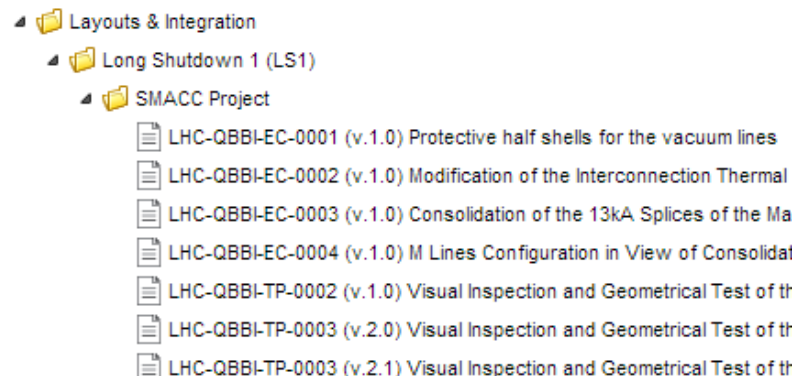
Total: 7 (displaying 1 - 7)

Functional positions (9)

Ok

Structuring the information

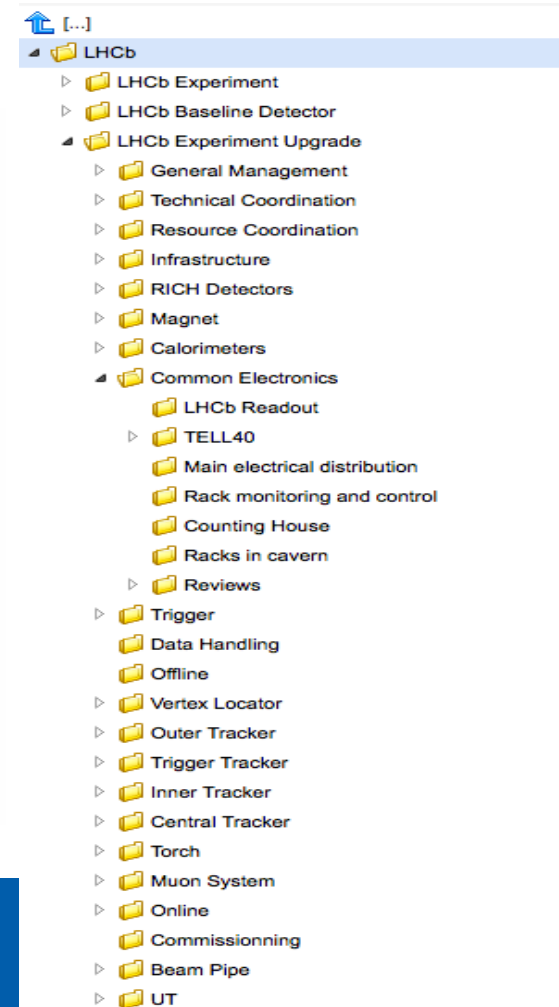
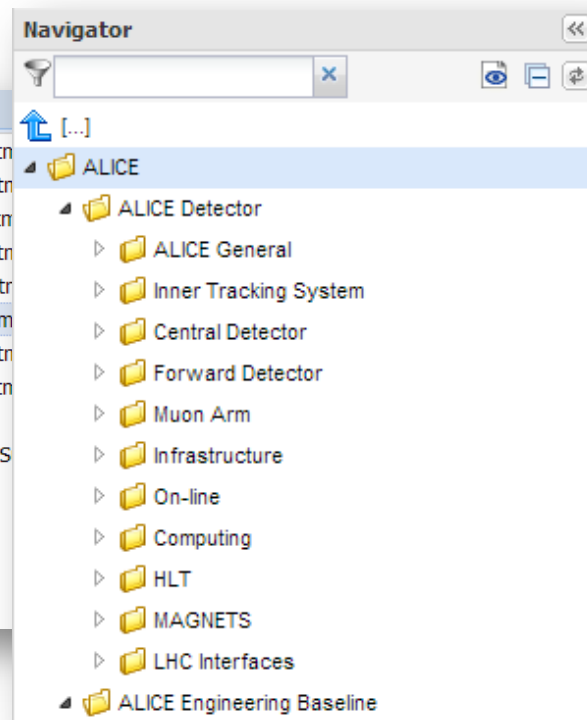
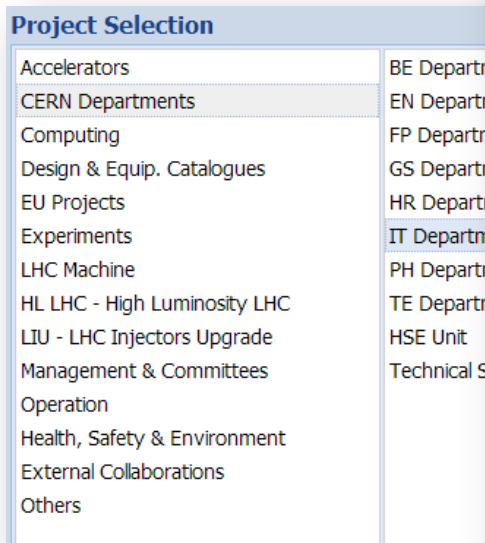
- These structure objects (nodes, folders) are called projects in EDMS



- When the amount of data grows it is convenient to structure the documents. This has several advantages:
 - Easier to find documents. (Structure + document meta data gives lots of search possibilities.)
 - Possible to group documents that are logically linked. (For example to collect all documentation concerning a certain project or a group's activities.)

Official project structures

- Most EDMS user communities at CERN have some official project structures to which all official and important documents should be attached







Working with EDMS









The screenshot displays the EDMS (Expert Data Management System) web interface. At the top, the CERN logo and 'Accelerating science' tagline are visible. The user is signed in as 'tkrastev' and can access 'Sign out' and 'Directory' options. The main navigation bar includes 'EDMS', 'Home', and 'Favourites'. A search bar is present with the text 'Portal search'. The left sidebar shows a 'Navigator' with a tree view of folders under 'LHC Machine', including 'LHC Project Management', 'LHC Hardware Baseline', 'Cryo Magnets in Common Arc Cryostats', and many others. The main content area shows the selected folder 'CERN-0000000355 TOP_LHC' with 'Public access' status. Below this, there are tabs for 'Info', 'Documents', 'Structure', 'Used in', 'Access rights', and 'History'. The 'Documents' tab is active, showing a table with columns: '#', 'Id', 'Title', 'Files', 'Status', 'Created on', 'Author', and 'Document type'. The table is currently empty, displaying 'No documents'. At the bottom of the table area, it says 'Page 1 of 1' and 'No data to display'.





Working with EDMS - Favourites

 **EDMSPC-000021**  Public access
EDMS Service
  Responsible: Christophe DELAMARE.

 **529695 v.1**  In Work  Restricted access
SC Safety Inspections in EDMS Status Report
 

529695 v.1	 	SC Safety Inspections in EDMS Status Report
107489 v.2	 	THE EDMS SERVICE 1999
343278 v.1	 	administrator read-only context web interface
107899 v.0	 	CERN ENGINEERING AND EQUIPMENT DATA MAN...

CERN Accelerating science

EDMS  Home  Favourites ▾

Home Safety CAD

- Recent
- Systems Operation
- 1234259 (v.1) Standard Label Templates and Sizes
- 766369 (v.4) Barcode Printing Request Template
- EDMS Courses Remove
- Introduction course
- Administration course
- HCQITESCXT-CR051050 Cryo Thermometer
- HCLBALA000-CR002342 Arc Dipole LBALA
- 112 112=ATELIER W1 SOUS STATION 59 & 74
- HCVSSBL003 (v.0) Test import fixed item id

Working with EDMS - Recents

CERN Accelerating science Signed in as: tkrastev [Sign out](#) [Directory](#)

EDMS [Home](#) [Favourites](#) [Caddie](#) [EDMS 5](#) [Help](#)

Recent

- Systems Operation
- 1234259 (v.1) Standard Label Templates and Sizes
- 766369 (v.4) Barcode Printing Request Template
- EDMS Courses
- Introduction course
- Administration course
- HCQITESCXT-CR051050 Cryo Thermometer
- HCLBALA000-CR002342 Arc Dipole LBALA
- 112 112=ATELIER W1 SOUS STATION 59 & 74
- HCVSSBL003 (v.0) Vacuum bellow, DN273, L=154mm
- 343278 (v.1) administrator read-only context web interface
- 114801 (v.2) EDMS Service 2000 - A status report

- TOP_LHC
- LHC Hardware Baseline
- 867 867 - 867=HALL DE MONTAGE+STAT ESSENCE
- PXMXNAEC01-SD000011 PXMXNAENCP MSXSE COIL
- Introduction course
- Course material
- 110709 (v.6.8) Introduction to the CERN EDMS
- User Training
- 1234259 (v.1) Standard Label Templates and Sizes
- Misc
- 1161680 (v.1) Documentation received during and after Psiam consulting session Sep. 2011
- 1284364 (v.2) INTRODUCING DEPARTMENT SECURITY IN THE INFOR EAM INSTALLATION AT CERN
- 1300636 (v.2) IM sub-project - specification pour les groupes techniques
- Spare Part Management
- Analysis and Reporting
- Document Management
- Planning and Scheduling
- Work Management
- Information Systems Development Project
- Reference Documentation

0000355

baseline

E MONTAGE+STAT ESSENCE

01-SD000011
XSE COIL

0011136

0009023

v.6.8
CERN EDMS

000025

v.1
emplates and Sizes

v.1
eived during and after Psiam

v.2
INTRODUCING DEPARTMENT SECURITY IN T

Document 1300636 v 2

Other applications

[CDD](#)

[MTF](#)

[Infor EAM](#)

Other information

[News](#)

[Statistics](#)

Account

[Request an EDMS account](#)

[Forgot password?](#)


[Local administrators](#)

Support & Training

[Help](#)

[EDMS training](#)

[Support pages](#)



Engineering & Equipment Data Management Service (EDMS) EDMS 6.0 (c) CERN | In case of problems please contact [EDMS Support](#)



Finding Documents in EDMS

- Searching
- Browsing a Project Structure
- Favourites
- Recents





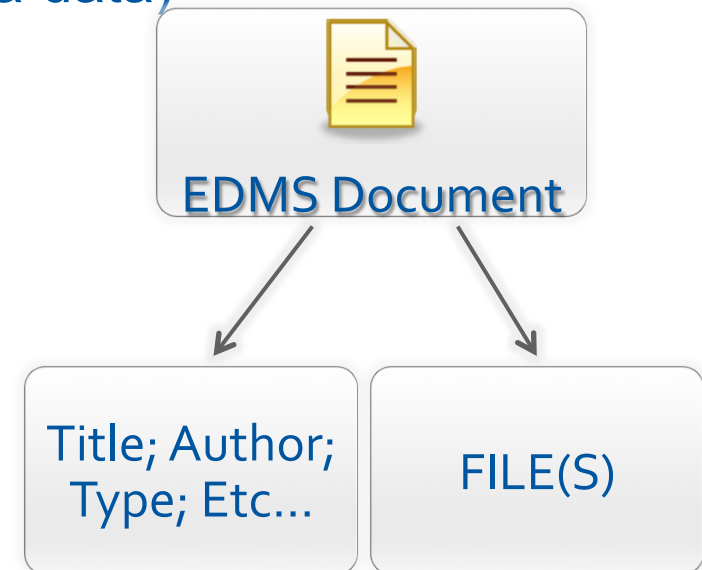
Creating Documents

Creating a document

To create a document in EDMS one needs to complete a document creation form and upload the corresponding files

- Enter the document information (meta data)
- Upload the file(s)

Step 1 and 2 do not have to be performed at the same time. For example, the document meta data can be filled in to indicate that the document exists and the file upload can be done later on.



Creating a document

- Either go to the project where you want to create the document and click on 'Create New Document'
- Or Right Click on the project in the navigator and select Create – New Document
- You will need to have 'write' access to the project in which you want to create a document.

Creating a Document

The screenshot shows the EDMS interface with the 'Create...' menu open. The 'Create new document' button is highlighted. Below the menu, a table of documents is displayed:

#	Id	Title	Files	Status	Created on	Author	Document type
10	LHCVCSD_0001 v.AA	MSD VACUUM CHAMBER - RACEWAY BEL...	@ 2	Released	2005-05-25	J. LACROIX	Drawing

Creating a Document

- Single document creation form
- Drag and drop files (can be added later)
- More complete metadata = easier to find
- Recommended to add EDMS doc number & version to files (visible when printed)

Creating a Document with Files

New document in project 'Barcode Service'


Release procedure :



Equipment code :

Current visibility*:

▶ Associated Web link

▼ Files

 Drop your files here or

	Label_test_for_MTF_August_2014	Rename
	Administration_v2.5.pptx	Rename

Ready to upload 2 file(s) of a total size of 13.2 MB.

Adding Files Later

CERN Accelerating science Signed in as: tkrastev [Sign out](#) [Directory](#)

EDMS [Home](#) [Favourites](#) [Caddie](#) [EDMS 5](#) [Help](#)

Navigator

- Barcode Service
 - Specifications
 - 766268 (v.1) BRADY Stickers Specifications -
 - 766273 (v.1) BRADY Stickers Specifications -
 - 766102 (v.1) BRADY Stickers Specifications
 - 980346 (v.2) Test
 - 766278 (v.1) BRADY Stickers Specifications -
 - 842878 (v.1) Labels Dimensions
 - Procedures
 - 766365 (v.0.1) Barcode Printing Procedure
 - 766376 (v.1) Barcode Printing Procedure
 - 844096 (v.1) CodeSoft templates and procedur
 - 844106 (v.1) CodeSoft templates for Electrical
 - 1002349 (v.1) Test document to show an appr
 - 1002349 (v.2) Test document to show an appr
 - Misc
 - 766369 (v.4) Barcode Printing Request Templat
 - 881880 (v.1) Barcode service: CERN customer
 - 1234259 (v.1) Standard Label Templates and S
 - 1235654 (v.1) Example of barcode for Function
 - 1252985 (v.1) Barcode Printing Proposition
 - 1403885 (v.1) Reviewing process
 - 1403885 (v.1.0) Reviewing process
 - Print Requests
 - HWC
 - AB
 - TS
 - LHCVCSD_0001 (v.AA) MSD VACUUM CHAMBER

1403885 v.1.0 ● In Work 🔒 Restricted access [Report](#)

Reviewing process by TSVETELIN KRASTEV 2014-08-19

[Edit](#) | [Status](#) | [Share](#) | [More](#)

Info

Description: Reviewing process document External reference:
 Keywords: Reviewing process, process, document

Details

Associated Web link: [List of Administrators](#) Equipment code:
 Local Administrators: EDMS-SERVICE-PUBLIC Release procedure: DOC-AL
 Context: EDMS Docs for UC and Admin, public if needed Approval by Approval Leader with Engineering Check

This page <https://edms.cern.ch/document/1403885/1.0>

Files

#	Name	Size	Last modified date	Last modified by
10	Label_test_for_MTF_August_2014_EDMS_1354526_V3.docx	3.9 MB	2014-08-19 11:09:45	Tsvetelin Krastev

Total: 1 (displaying 1 - 1)

More info

Sub-Documents [Used In](#) [Approval & Comments](#) [Access rights](#) [Versions](#) [History](#)

[Create subdocument](#) | [Attach document](#) | [Detach](#) | [Export to Excel](#) Hide Obsolete | Per page 20 | View mode: [List](#) | [Grid](#)

#	Id	Title	Files	Status	Created on	Author	Document type
No documents							



Cloning a Document

CERN Accelerating science

Signed in as: tkrastev Sign out Directory

EDMS Home Favourites

Navigator

Clone Document

Parent objects

Id	Name
ST-003202	Misc

Info

Title*: My New Document

Author(s): TSVETELIN KRASTEV

Author email: tsvetelin.krastev@cern.ch

Creation date*: 2014-07-30 Version*: 1

Description:

External reference:

Keywords: new document

Context*: EDMS-SERVICE-PUBLIC

Type*: Note

Type attributes (max. 4):

Release procedure*: DOC-OWNER

Equipment code:

Current visibility*: Public access

Clone Cancel

Report

2014-08-19

Status Share More

- Check out
- Check in
- New version
- Clone document
- Plot
- Make public
- Delete document

Per page 5

Last modified by

Tsvetelin Krastev

Total: 1 (displaying 1 - 1)

Per page 20 View mode

Author Document type

- 1 clone can be created at a time

Sub-Documents

Use sub-documents to 'link' a set of documents to considered as a whole.

- E.g. A Technical Specification with Drawings and QAP sub-documents

The screenshot displays a document management interface. At the top, there is a 'Files' section with a table listing documents. Below the table, there are navigation controls and a 'More info' section. The 'More info' section contains several tabs, with 'Sub-Documents' highlighted. Under the 'Sub-Documents' tab, there are two buttons: 'Create subdocument' and 'Attach document'. The 'Create subdocument' button is highlighted with a yellow border.

#	Name	Size	Last modified date	Last modified by
10	Barcode_Printing_Procedure.pptx	595.3	2012-12-07 10:13:28	David WIDEGREN

Page 1 of 1 | Total: 1 (displaying 1 - 1)

Sub-Documents | Used In | Approval & Comments | Access rights | Versions | History

Create subdocument | Attach document | Detach | Export to Excel | Hide Obsolete | Per page >>

Sub-Documents

CERN Accelerating science Signed in as: tkrastev [Sign out](#) [Directory](#)

EDMS [Home](#) [Favourites](#) Portal search [Caddie](#) [EDMS 5](#) [Help](#)

Navigator

- Barcode Service
 - Specifications
 - 766268 (v.1) BRADY Stickers Specifications
 - 766273 (v.1) BRADY Stickers Specifications
 - 766102 (v.1) BRADY Stickers Specifications
 - 980346 (v.2) Test
 - 766278 (v.1) BRADY Stickers Specifications
 - 842878 (v.1) Labels Dimensions
 - Procedures
 - 766365 (v.0.1) Barcode Printing Procedure
 - 766376 (v.1) Barcode Printing Procedure
 - 844096 (v.1) CodeSoft templates and proces
 - 844106 (v.1) CodeSoft templates for Electric
 - 1002349 (v.1) Test document to show an ap
 - 1002349 (v.2) Test document to show an ap
 - Misc
 - 766369 (v.4) Barcode Printing Request Temp
 - 881880 (v.1) Barcode service: CERN custom
 - 1234259 (v.1) Standard Label Templates and
 - 1235654 (v.1) Example of barcode for Funct
 - 1252985 (v.1) Barcode Printing Proposition
 - 1403885 (v.1) Reviewing process
 - 1403885 (v.1.0) Reviewing process
 - 1406450 (v.1) New sub-document
 - 100100 (v.1.2) CDD 1.2 User's Manual
 - Print Requests
 - HWC
 - AB
 - TS

1403885 v.1.0 ● In Work 🔒 Restricted access [Report](#)

Reviewing process by TSVETELIN KRASTEVA 2014-08-19

[Edit](#) | [Status](#) | [Share](#) | [More](#)

Info

Description: Reviewing process document External reference:

Keywords: Reviewing process, process, document

Details

Associated Web link: [List of Administrators](#) Equipment code:

Local Administrators: EDMS-SERVICE-PUBLIC Release procedure: DOC-AL

Context: EDMS Docs for UC and Admin, public if needed Approval by Approval Leader with Engineering Check

This page <https://edms.cern.ch/document/1403885/1.0>

Files

#	Name	Size	Last modified date	Last modified by
10	Label_test_for_MTF_August_2014_EDMS_1354526_V3.docx	3.9 MB	2014-08-19 11:09:45	Tsvetelin Krastev

Total: 1 (displaying 1 - 1)

More info

Sub-Documents [Used In](#) [Approval & Comments](#) [Access rights](#) [Versions](#) [History](#)

[Create subdocument](#) | [Attach document](#) | [Detach](#) | [Export to Excel](#) Hide Obsolete | Per page 20 | View mode: [List](#)

#	Id	Title	Files	Status	Created on	Author	Document type
10	1406450 v.1	New sub-document		● In Work	2014-08-19	Tsvetelin Krastev	Form
20	100100 v.1.2	CDD 1.2 User's Manual	📄 3	● Released	2007-04-02	Ch. Delamare, St. P	Manual / Guideline

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Attaching Documents to Projects

The screenshot shows the EDMS interface with a sidebar on the left containing a tree view of folders like 'Barcode Service', 'Procedures', 'Misc', and 'Print Requests'. The main area displays a document list for project 'ST-003202' under the 'Misc' folder. The document list table is as follows:

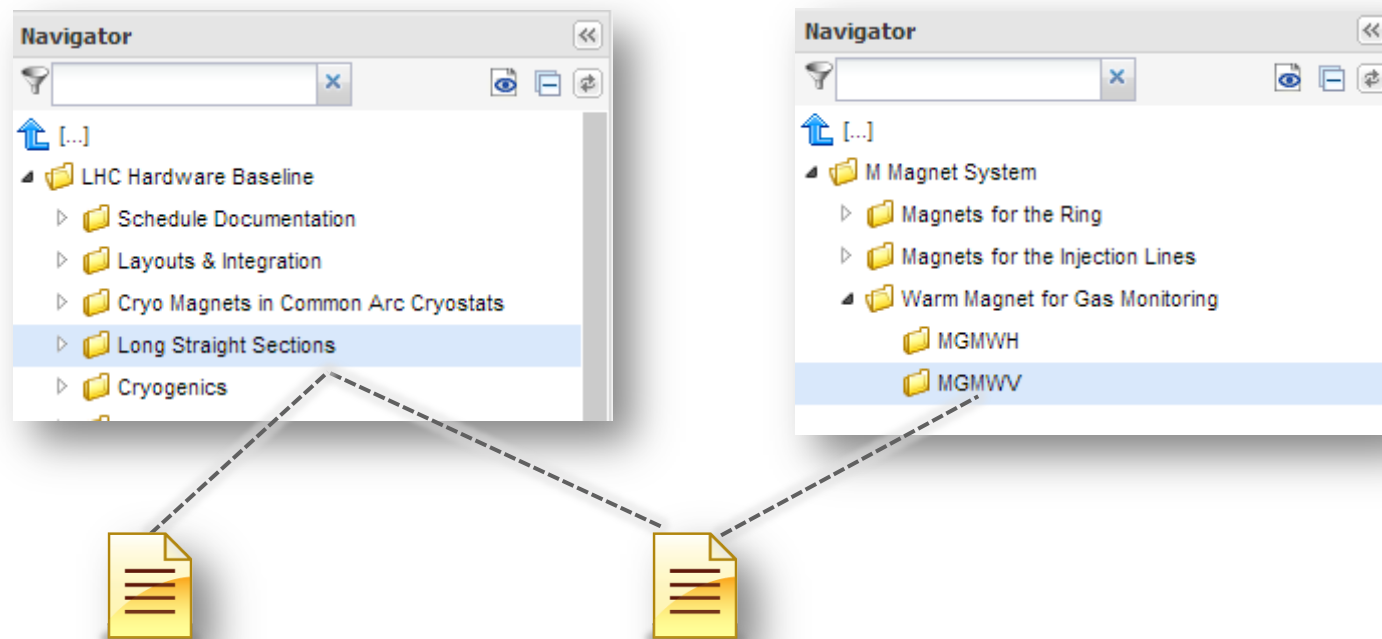
#	Id	Title	Files	Status	Created on	Author	Document type
10	766369 v.4	Barcode Printing Request Template	1	Released	2013-05-15	Sebastien Costa	Template
20	881880 v.1	Barcode service: CERN customers	1	In Work	2007-11-09	Sebastien Costa	Procedure
30	1234259 v.1	Standard Label Templates and Sizes	1	Released	2012-07-30	TSVETELIN KRASTI	Manual / Guideline
40	1235654 v.1	Example of barcode for Functional Position.	2	In Work	2012-08-13	David WIDEGREN	Presentation / P...
50	1252985 v.1	Barcode Printing Proposition	1	In Work	2012-11-16	TSVETELIN KRASTI	Presentation / P...
90	1403885 v.1.0	Reviewing process	1	In Work	2014-08-19	TSVETELIN KRASTI	Report
90	1403885 v.1	Reviewing process	2	Released	2014-08-01	TSVETELIN KRASTI	Report
...	100100 v.1.2	CDD 1.2 User's Manual	3	Released	2007-04-02	Ch. Delamare, St. P	Manual / Guideline

You must have at least READ access to do so



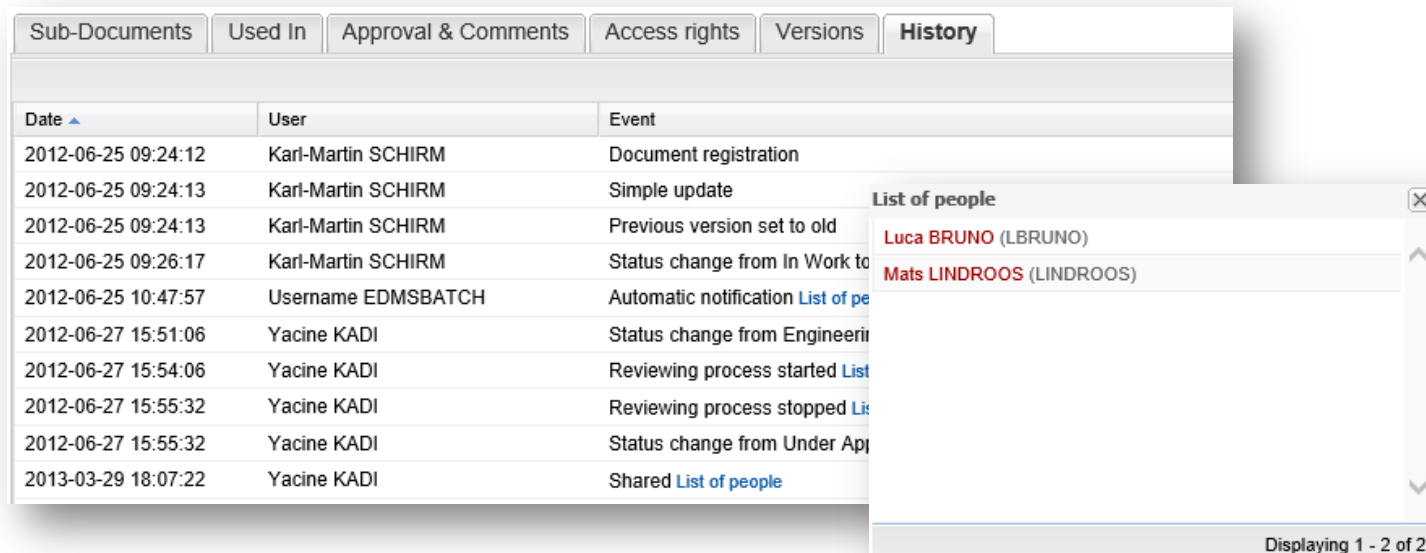
Documents in several projects

- A single document can be attached to several structures.
- There is still only one owner and group for the document.



The document history is kept

- All actions indicate who did what and when on a doc e.g.
- creation,
- file uploads
- status changes are logged and securely stored in the system.



The screenshot displays the 'History' tab of a document management system. It features a table with columns for Date, User, and Event. A 'List of people' popup window is open, showing a list of users: Luca BRUNO (LBRUNO) and Mats LINDROOS (LINDROOS). The status bar at the bottom of the popup indicates 'Displaying 1 - 2 of 2'.

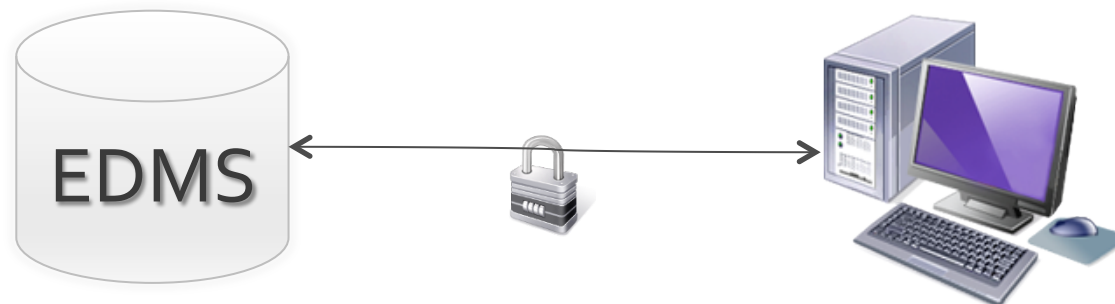
Date ▲	User	Event
2012-06-25 09:24:12	Karl-Martin SCHIRM	Document registration
2012-06-25 09:24:13	Karl-Martin SCHIRM	Simple update
2012-06-25 09:24:13	Karl-Martin SCHIRM	Previous version set to old
2012-06-25 09:26:17	Karl-Martin SCHIRM	Status change from In Work to
2012-06-25 10:47:57	Username EDMSBATCH	Automatic notification List of pe
2012-06-27 15:51:06	Yacine KADI	Status change from Engineeri
2012-06-27 15:54:06	Yacine KADI	Reviewing process started List
2012-06-27 15:55:32	Yacine KADI	Reviewing process stopped Li
2012-06-27 15:55:32	Yacine KADI	Status change from Under App
2013-03-29 18:07:22	Yacine KADI	Shared List of people



Access Rights & Visibility

Sharing and protecting work

- EDMS provides a secure and easily accessible environment where all engineering information can be stored.
- It must be possible to update data and to share information.
- To manage the access rights all objects stored in EDMS have an OWNER and belong to a GROUP.



EDMS groups

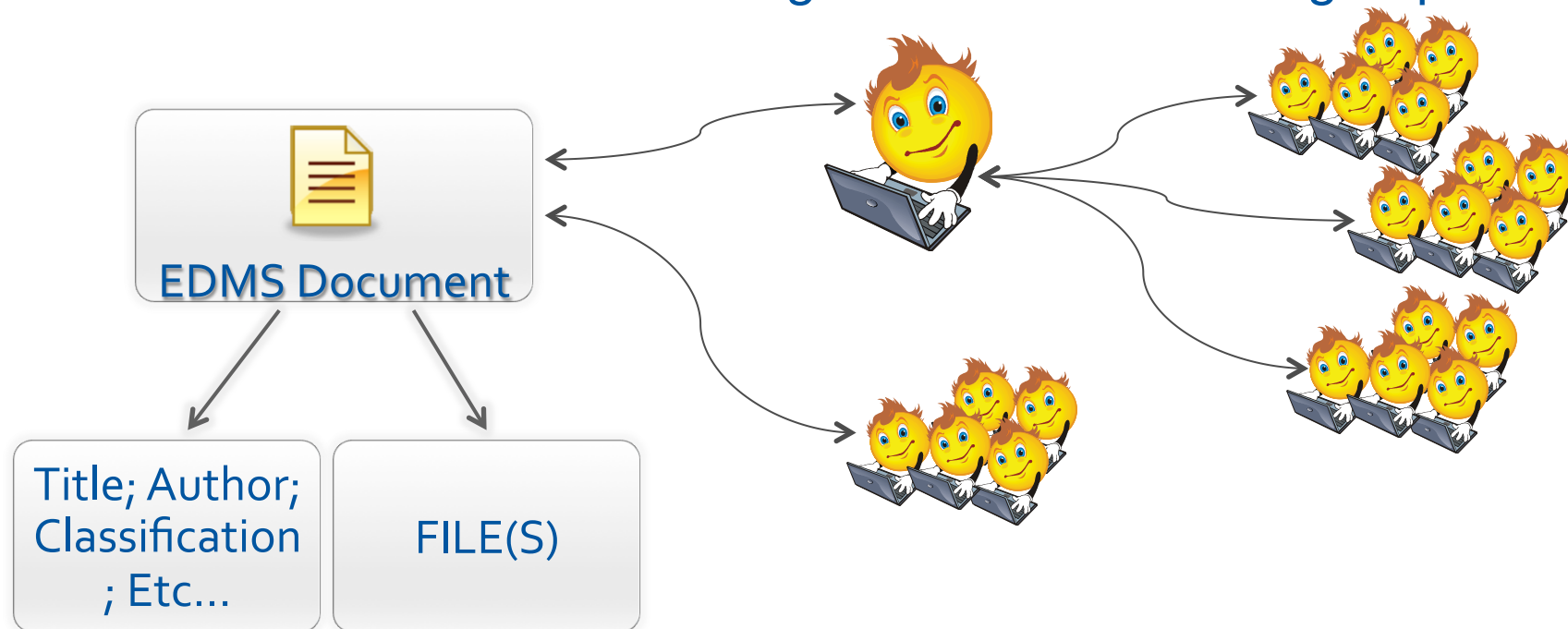
An EDMS group



- Is used to simplify and control access to EDMS and its content
- Contains a set of users
- Grants access to these users
- Can be automatically synchronized with an e-group, HR database or EDMS groups

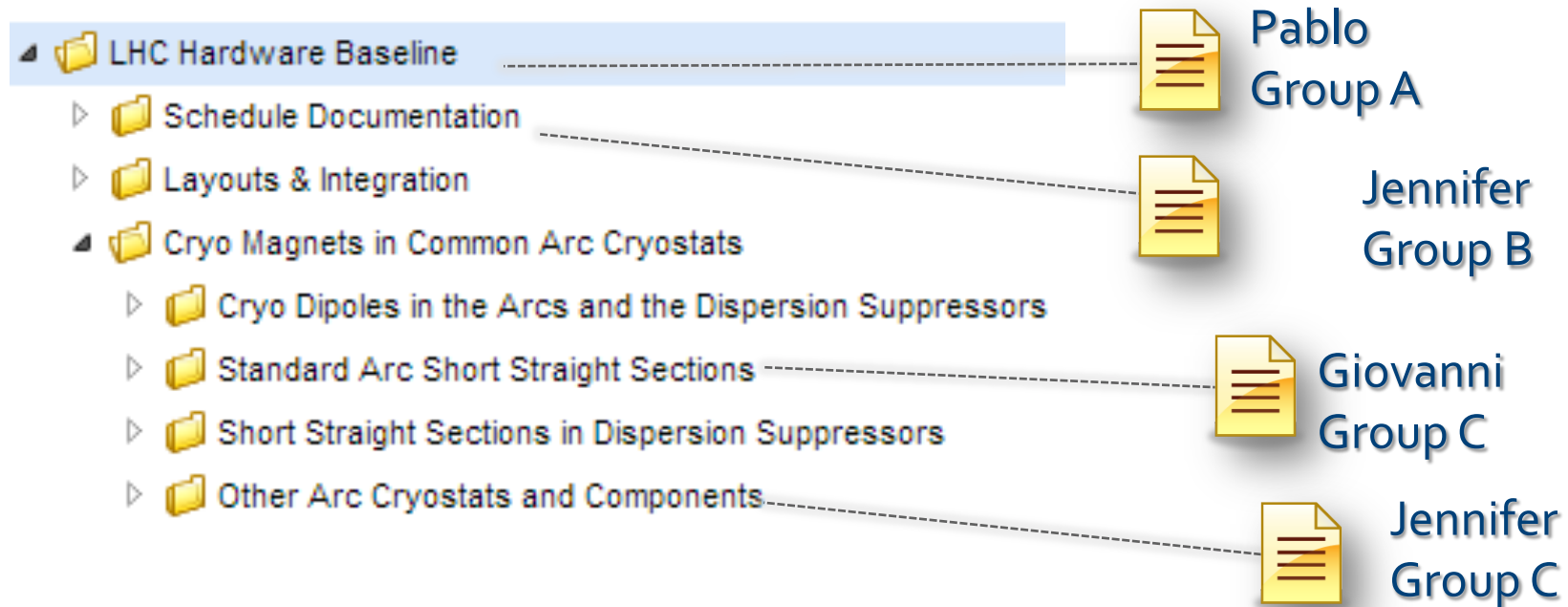
Owners and groups

- A document in EDMS belongs to an owner and a group






Ownership of projects

- Each project has an owner and belongs to a group.
- This defines who can view the contents of a project or can attach a document.



Who can view the documents?


Possible actions and by whom

		<i>Read:</i>	<i>Write:</i>	<i>Delete:</i>
Visibility mode	<i>Owner:</i>			
	<i>Group:</i>			
	<i>World:</i>			



This is just an example of a common configuration.

Ownership of documents


- The owner of a document is by default the user who creates it in EDMS. Note that this does not necessarily have to be the author.
- The group to which a document belongs is set according to the context used to create the document.

 **1292325 v.1.0 | HIE-RV-CI-0001 v.1.0** ● Released 🔒 Restricted access Technical Specification
(IT or DO)

Design, Manufacture and Testing of Cobalt Power Supplies for Quadrupole Magnets of the HIE-ISOLDE Project *by Stefano CENGARLE* 2013-06-18


▼ **General**



Visibility : Restricted access 

Owner: Julia DOUBLE (jdouble) Owning group: HIE-ISOLDE-BL


Access rights for documents



- Visibility: WORLD User: Anyone

 **90288 v.1.0 | LHC-PM-EP-0001 v.1.0** ● Released ● Public access Engineering Parameters
Parameters for LHC *by LHC Parameter and Layout Committee*
1997-12-02

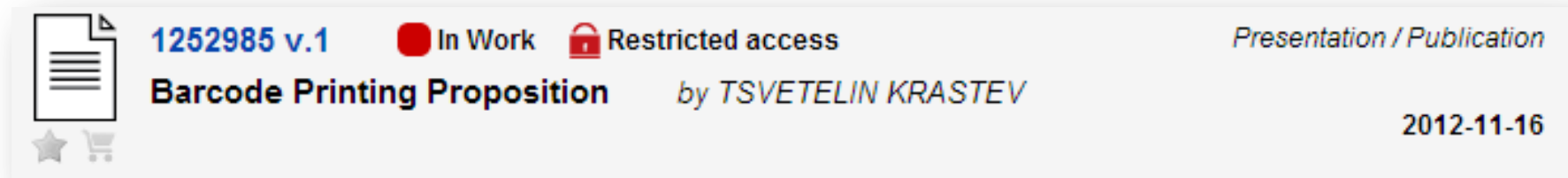
- Visibility: CERN Authenticated User: Anyone

 **766369 v.4** ● Released ● CERN Internal Template
Barcode Printing Request Template *by Sebastien Costa*
2013-05-15

Access rights for documents

- **Visibility: GROUP** **User: Member**



1252985 v.1 ● In Work 🔒 Restricted access *Presentation / Publication*
Barcode Printing Proposition *by TSVETELIN KRASDEV*
★ 🛒 2012-11-16

- **Visibility: GROUP** **User: Not member of group**



1252985 v.1 ★ 🛒 Barcode Printing Proposition @ 1 ● In Work 2012-11-16 TSVETELIN KRASDEV

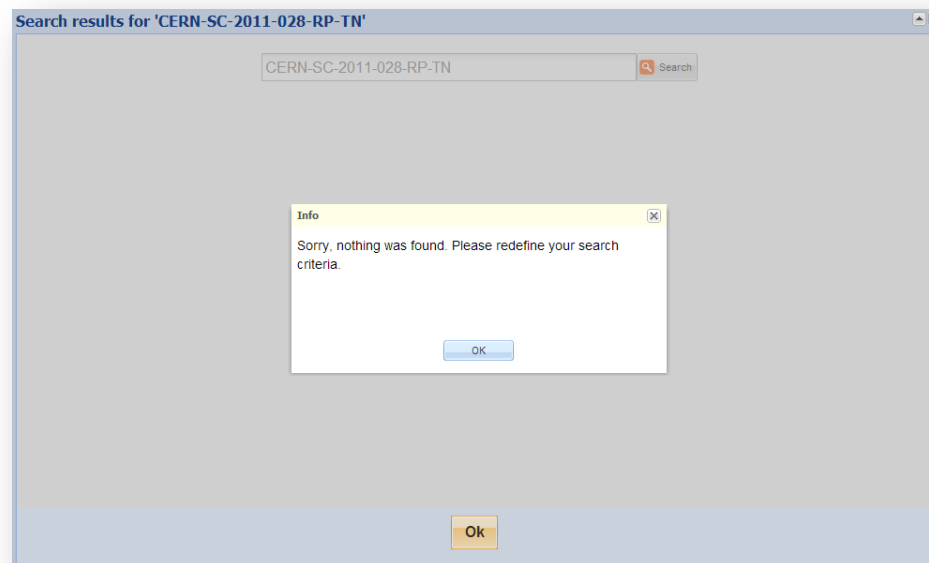
Strict Confidentiality

Strict confidentiality hides the very existence of a document from a non-authorized user.

 Released  Sensitive



Visibility: GROUP

User: Not member of group



Document Access Levels

Based on CERN's official access rights policies

 Restricted access	Document accessible to group members.
 Sensitive	Document accessible to group members. Hidden from everyone else.
 Public access	Document accessible to everyone.
 CERN Internal	Document accessible to CERN account holders.

Note: Document access rights depend on context and status

Share

- 'Share' is used for either granting Read or Write access to a person/group to a document or for distributing the given document.
- **Note** that an access grant is document version dependent and it does not propagate to new/old versions, cannot be revoked.



Share

CERN Accelerating science Signed in as: tkrastev Sign out Directory

EDMS Home Favourites 881880 EDMS 5

Navigator

- Misc
 - 766369 (v.4) Barcode Printing Request Template
 - 881880 (v.1) Barcode service: CERN customers
 - 1234259 (v.1) Standard Label Templates and Sizes**
 - 1235654 (v.1) Example of barcode for Functional P
 - 1252985 (v.1) Barcode Printing Proposition
 - 1403885 (v.1) Reviewing process
 - 1403885 (v.1.0) Reviewing process
 - 100100 (v.1.2) CDD 1.2 User's Manual

1234259 v.1 ● Released 🌐 Public access Manual / Guideline

Standard Label Templates and Sizes by TSVETELIN KRASTEV 2012-07-30

Edit | Status | Share | More

Context: EDMS-SERVICE-PUBLIC Approval by Project Engineer
EDMS Docs for UC and Admin, public if needed

▶ **This page** <https://edms.cern.ch/document/1234259/1>

▼ **Files**

#	Name	Size	Last modified date	Last modified by
10	Barcodes.pptx	454.7 KB	2012-07-30 14:42:30	Tsvetelin Krastev

Page 1 of 1 Total: 1 (displaying 1 - 1)

▼ **More info**

Sub-Documents | Used In | Approval & Comments | Access rights | Versions | **History**

Date	User	Event
2012-07-30 14:42:20	Tsvetelin Krastev	Document registration
2012-07-30 14:42:31	Tsvetelin Krastev	Initial check-in Barcodes.pptx
2012-07-30 14:42:31	Tsvetelin Krastev	Insert Barcodes.pptx
2012-07-31 12:19:16	David WIDEGREN	Status change from In Work to Engineering Check
2012-07-31 12:19:20	David WIDEGREN	Status change from Engineering Check to Released
2012-11-08 15:38:10	Admin EDMS	Simple update
2014-02-26 13:17:47	Rachel BRAY	Shared List of people
2014-04-10 15:05:33	Rachel BRAY	Shared List of people
2014-08-19 16:49:20	Tsvetelin Krastev	Read access shared with Rachel BRAY

Page 1 of 1 Total: 9 (displaying 1 - 9)



Release Procedures

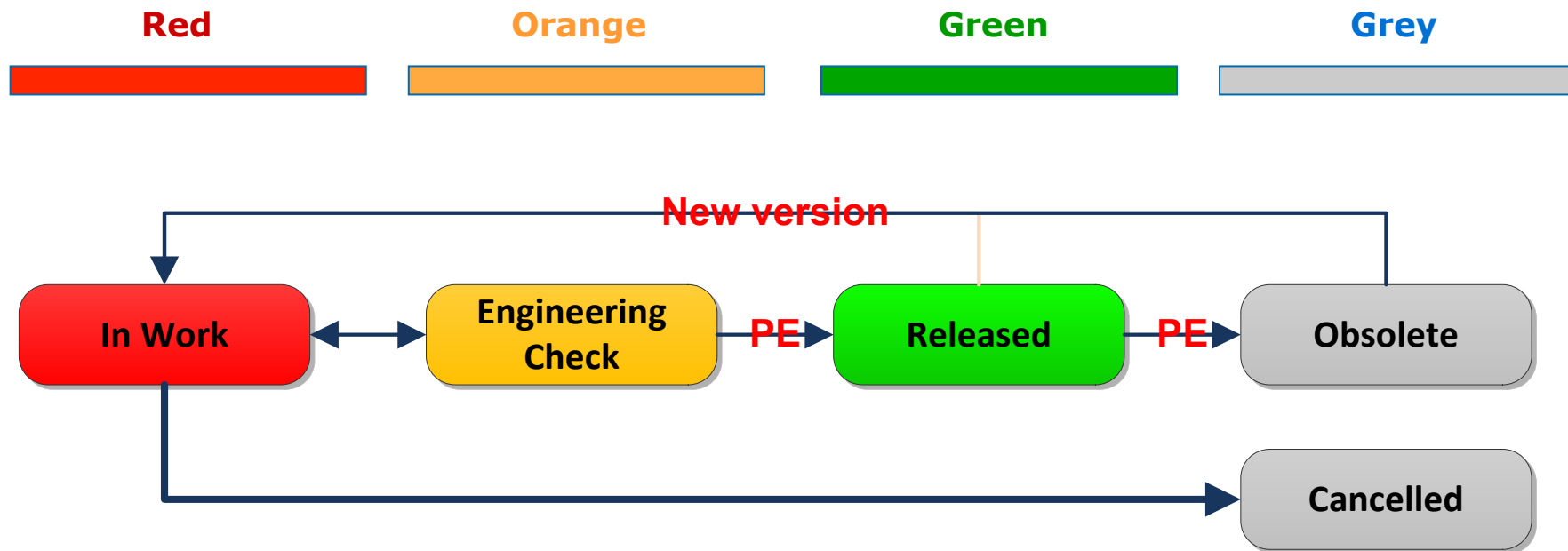


Release procedures

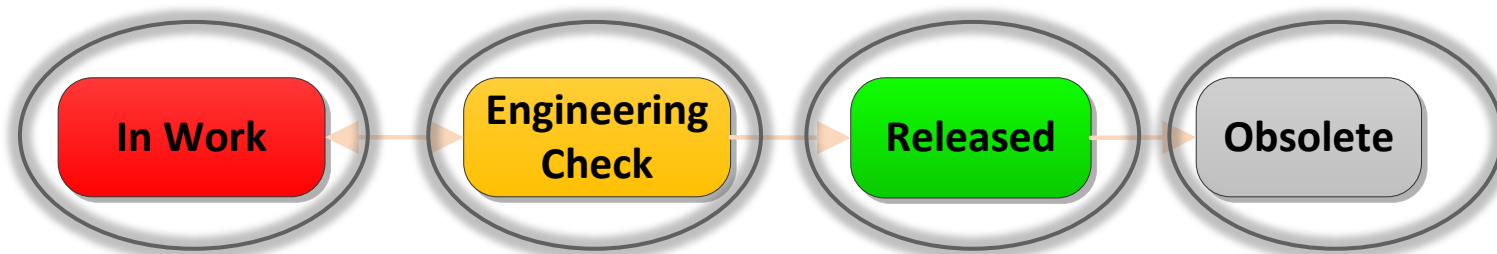
- A release procedure is the lifecycle of a document. It indicates the status transitions and the roles required to be able to change status.



Release procedures



What is allowed when?



When in status **In Work** – Possible to edit the document, insert and delete files in it.

When in status **Engineering Check** – document is frozen until the check is done, it is either Released or put back to In Work

When in status **Released** or **Obsolete** – the document is frozen and only a new version can be created

Changing Statuses

Checks:

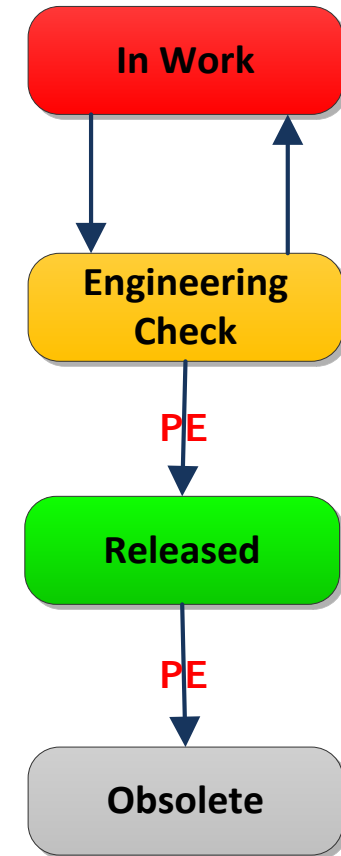
To be able to perform a status transition you have to fulfil the following criteria:

- the document must belong to a group of which you are a member
- you must have at least write access for that document
- you must have an appropriate role assigned to you in the system if required

Common roles:

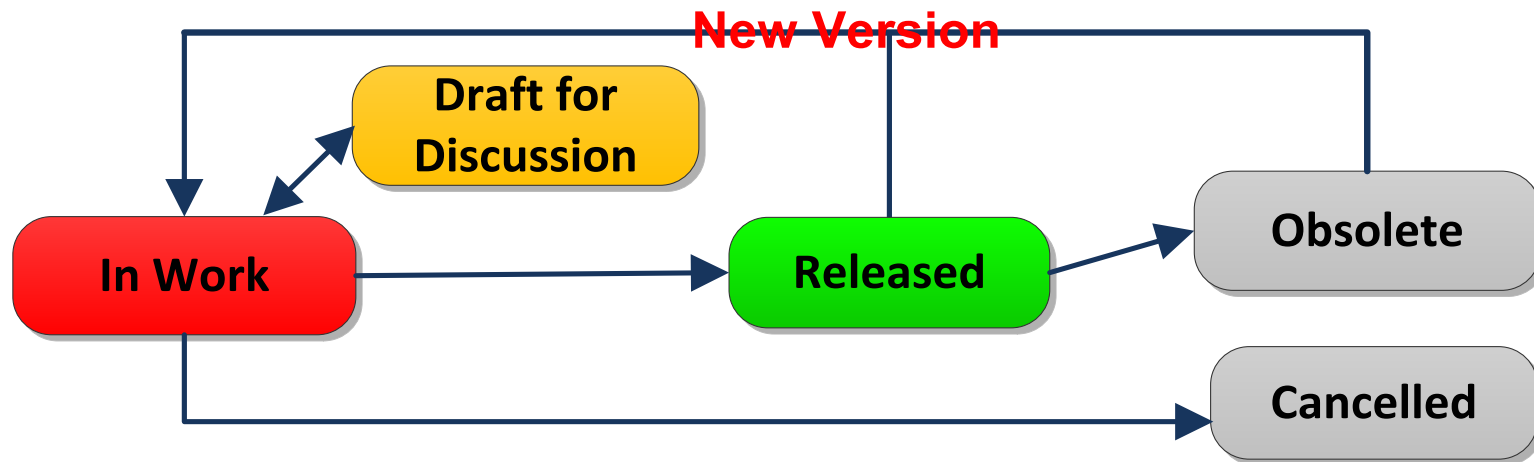
PE - Project Engineer

AL - Approval Leader



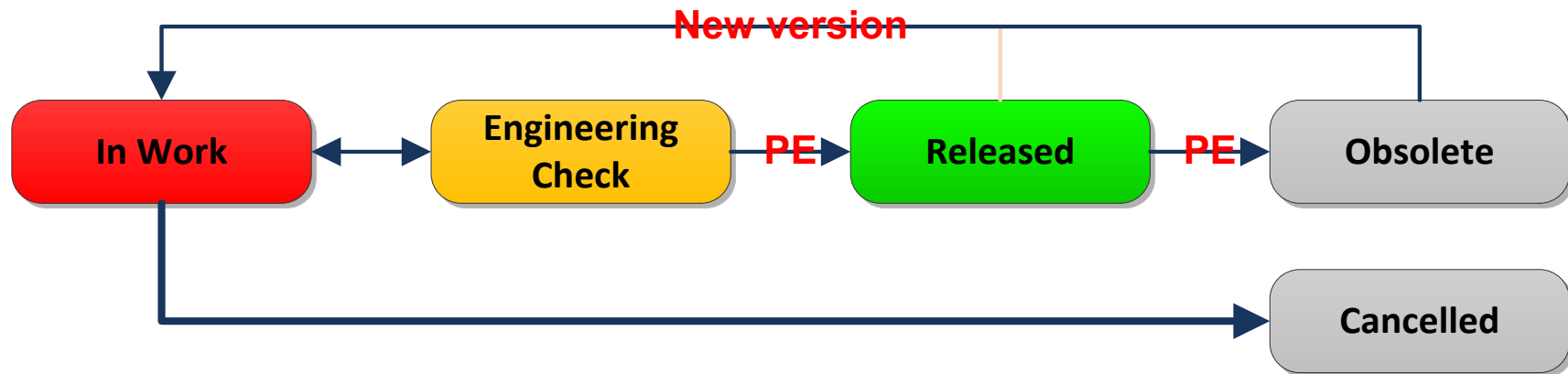
Standard release procedures

Example 1: Owner Approval (DOC-OWNER)



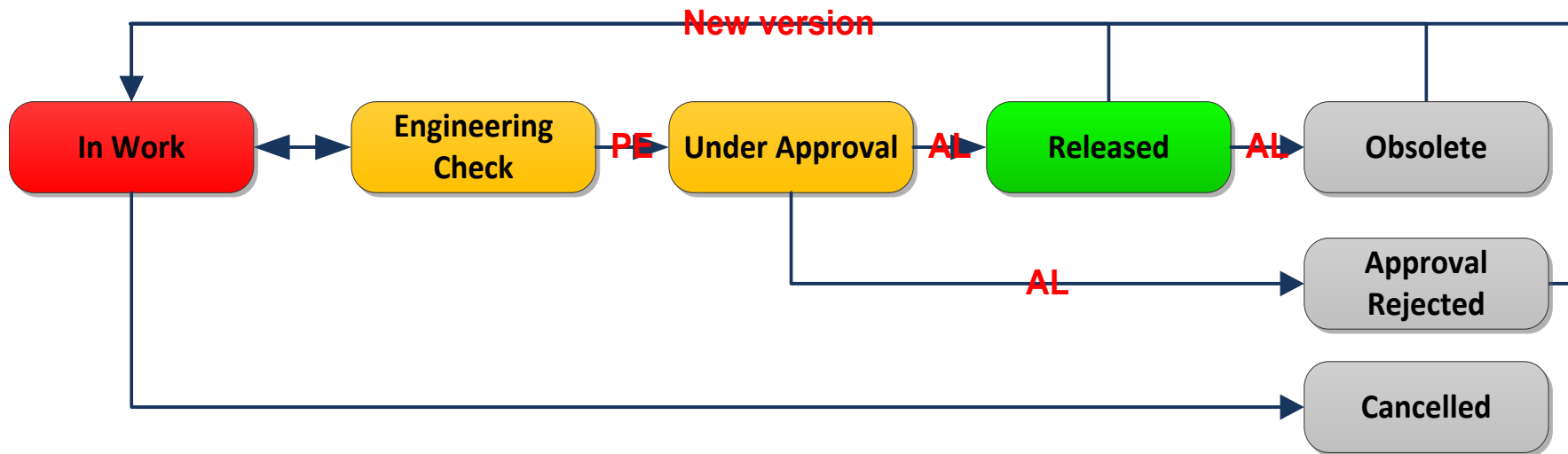
Standard release procedures

Example 2: Project Engineer Approval (DOC-PE)



Standard release procedures

Example 3: Eng. Check & Reviewing process (DOC-AL)



Different Levels of control

DOC-AL (Formal)

Examples of documents:

- Specifications
- Project reports
- Planning documents
- Quality assurance doc.

Project documentation

DOC-OWNER (Informal)

Examples of documents:

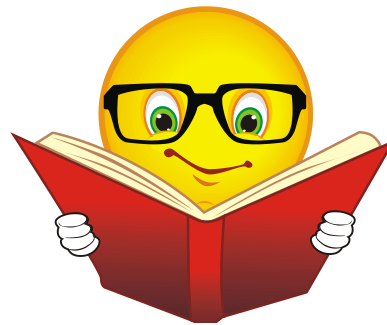
- Meeting Minutes
- Reports
- Notes

Group/sect. documentation

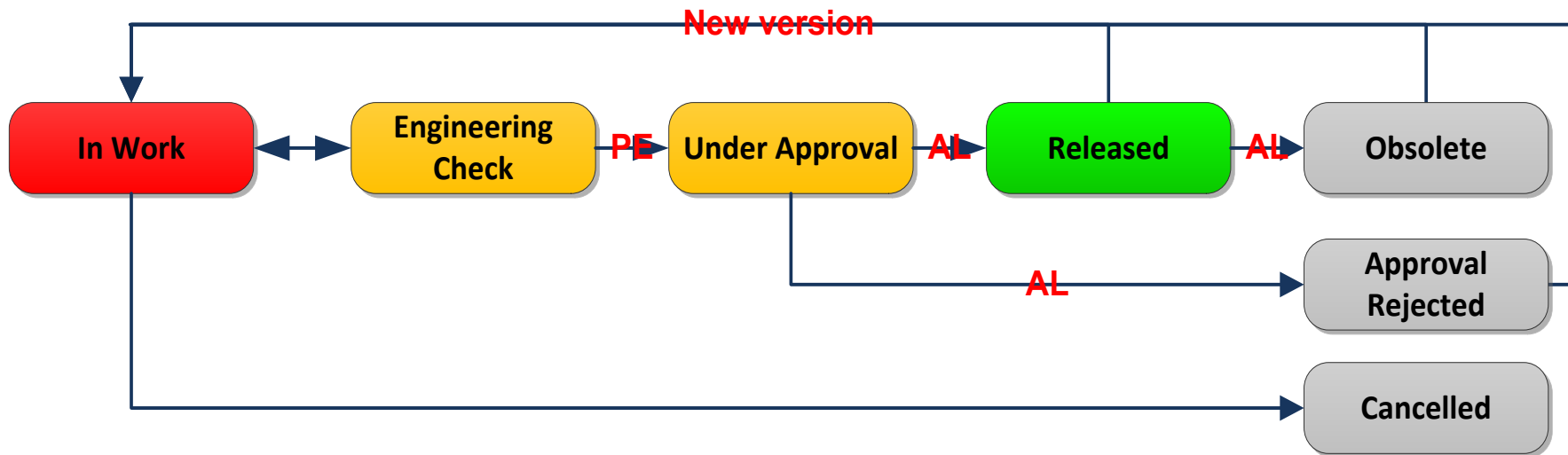
Note! In the QAPs of your project/department/collaboration there are most likely rules for what type of document that should follow which release procedure. This list above is an example!

Reviewing process

In the following slides you are going to see some of the steps in a commonly used formal reviewing process; DOC-AL.



Reviewing process



Reviewing process: start

CERN Accelerating science

Signed in as: tkrastev Sign out Directory

EDMS Home Favourites

Portal search Caddie EDMS 5 Help

1403885 v.1.0 Under Approval Restricted access Report

Reviewing process by TSVETELIN KRASTEV 2014-08-19

Edit | Status | Share | More

EDMS Docs for UC and Admin, public if needed

This page <https://edms.cern.ch/document/1403885/1.0>

Files

#	Name	Size	Last modified date	Last modified by
10	Label_test_for_MTF_August_2014_EDMS_1354526_V3.docx	3.9 MB	2014-08-19 11:09:45	Tsvetelin Krastev

Page 1 of 1 Total: 1 (displaying 1 - 1)

More info

Sub-Documents Used In **Approval & Comments** Access rights Versions History

Add Comment Stop reviewing process Collapse all Expand all

- In Work status** - Tsvetelin Krastev - 2014-08-19, 11:08
- Engineering Check status** - Tsvetelin Krastev - 2014-08-20, 11:22 (no comments)
- Under Approval status** - Tsvetelin Krastev - 2014-08-20, 11:29
 - Process details**

Started on:	2014-08-20, 11:35	Stopped on:	
Started by:	Tsvetelin Krastev	Stopped by:	
Deadline:	2014-09-03	Stop message:	
List of people:	See list		
Launch message:	Please comment before the deadline		



Reviewing process: comments

People involved in the approval process receive a reminder to give comments, if they haven't done so, 1 week before the deadline.

The approval leader receives a reminder 1 day before the deadline.

Reviewing process: comments

CERN Accelerating science Signed in as: tkrastev Sign out Directory

EDMS Home Favourites Portal search Caddie EDMS 5 Help

Navigator **1403885 v.1.0** ● Under Approval 🔒 Restricted access Report

Reviewing process by TSVETELIN KRASTEV 2014-08-19

Edit | Status | Share | More

More info

Sub-Documents | Used In | **Approval & Comments** | Access rights | Versions | History

[Add Comment](#) | Stop reviewing process Collapse all Expand all

- ▶ ● **In Work status** - Tsvetelin Krastev - 2014-08-19, 11:08
- ▶ ● **Engineering Check status** - Tsvetelin Krastev - 2014-08-20, 11:22 (no comments)
- ▼ ● **Under Approval status** - Tsvetelin Krastev - 2014-08-20, 11:29
 - ▼ **Process details**

Started on:	2014-08-20, 11:35	Stopped on:	
Started by:	Tsvetelin Krastev	Stopped by:	
Deadline:	2014-09-03	Stop message:	
List of people:	See list		
Launch message:	Please comment before the deadline		
 - Sort by ▼
 - ✔ **Accepted** by Tsvetelin Krastev 2014-08-20, 11:45

Great specification!

 - ▼ **Page comments**
 - Page 4**

Please put a higher resolution graph



Reviewing process: stop

CERN Accelerating science

Signed in as: tkrastev Sign out Directory

EDMS Home Favourites

Portal search Caddie EDMS 5 Help

1403885 v.1.0 Approval Rejected Restricted access Report

Reviewing process by TSVETELIN KRASTEV 2014-08-19

Sub-documents Use in Approval & Comments Access rights versions history

Add Comment Collapse all Expand all

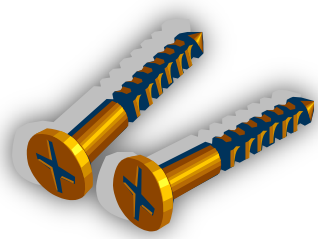
- In Work status - Tsvetelin Krastev - 2014-08-19, 11:08**
- Engineering Check status - Tsvetelin Krastev - 2014-08-20, 11:22 (no comments)**
- Under Approval status - Tsvetelin Krastev - 2014-08-20, 11:29**
 - Process details**

Started on:	2014-08-20, 11:35	Stopped on:	2014-08-20, 13:54
Started by:	Tsvetelin Krastev	Stopped by:	Tsvetelin Krastev
Deadline:	2014-09-03	Stop message:	The document needs to be finalised
List of people:	See list		
Launch message:	Please comment before the deadline		
 - Sort by
 - Accepted by Tsvetelin Krastev** 2014-08-20, 11:45
Great specification!
 - Page comments**
 - Page 4**
Please put a higher resolution graph
- Approval Rejected status - Tsvetelin Krastev - 2014-08-20, 13:54**

Practical example of an Reviewing process

- In practice, when the document reaches the Final Decision stage and it needs to be edited, at first it is set to **Approval Rejected** status by the Approval Leader without notifying people from the approval list.
- After editing, the Approval Leader creates a new version of the document and sets it to **Released** status without an official approval process. Before releasing the document he/she notifies everyone from the approval group that this is the edited version.

Main objects in EDMS



Item

- Represents the design of components or assemblies of a certain type.

Document

- Represents information about or connected to items or projects in any format.

Project

- Represents a grouping of items, projects and documents.

Best practices

- Put files in their native format and a printable format (pdf)
- Include the EDMS document ID and version # in files
- A document has one owner but can have many authors
- Documents can be attached to many other objects
- Released documents cannot be edited
- Documents undergoing a reviewing process cannot be edited



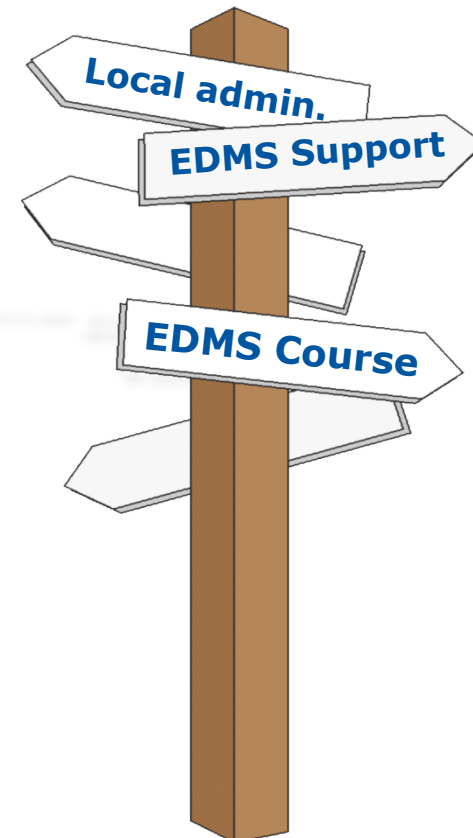
Support Organization

Central Support

- EDMS.Support@cern.ch
- Hotline 77777
- Training
- Consultancy
- Support

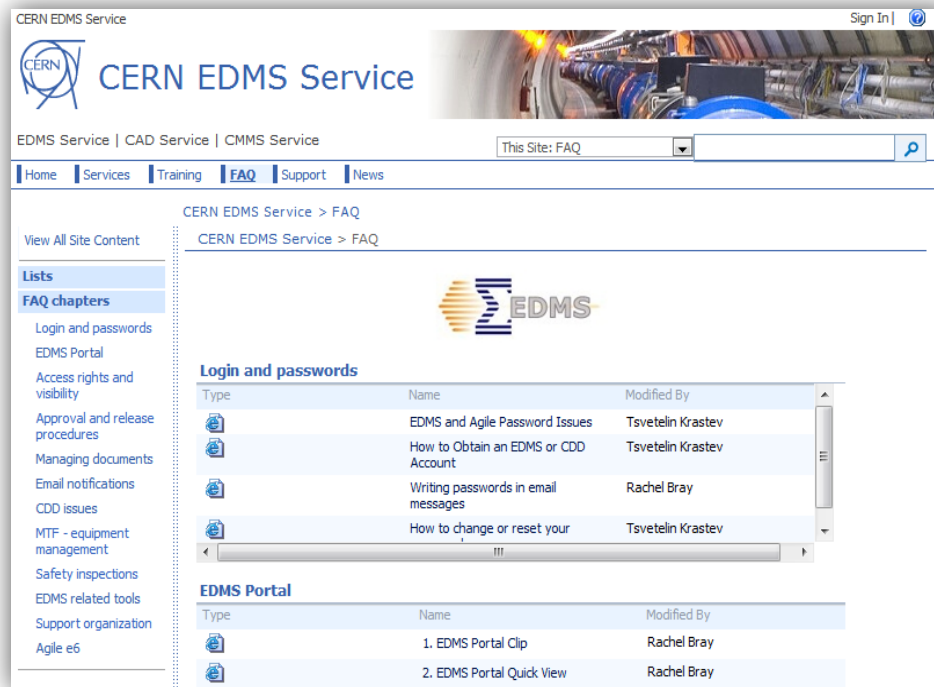
Local Support

- EDMS Local Administrators
(management of users, access groups, structures, contexts and roles)



EDMS documentation and FAQs

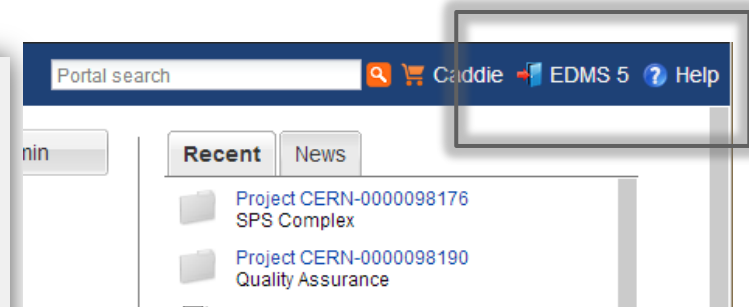
- A set of Guidelines, Tutorials, Registration Forms and useful information is available through the EDMS Service Site. You can access it through the 'Help' link from any EDMS page.



The screenshot shows the CERN EDMS Service website. The header includes the CERN logo and 'CERN EDMS Service'. Below the header, there are navigation links: Home, Services, Training, **FAQ**, Support, and News. The main content area is titled 'CERN EDMS Service > FAQ' and 'CERN EDMS Service > FAQ'. It features the EDMS logo and a section titled 'Login and passwords' with a table of links. Below that is an 'EDMS Portal' section with a table of links.

Type	Name	Modified By
	EDMS and Agile Password Issues	Tsvetelin Krastev
	How to Obtain an EDMS or CDD Account	Tsvetelin Krastev
	Writing passwords in email messages	Rachel Bray
	How to change or reset your	Tsvetelin Krastev

Type	Name	Modified By
	1. EDMS Portal Clip	Rachel Bray
	2. EDMS Portal Quick View	Rachel Bray



The screenshot shows the top navigation bar of the EDMS Service Site. It includes a 'Portal search' field, a 'Caddie' icon, 'EDMS 5', and a 'Help' link. Below the search bar, there are 'Recent' and 'News' tabs. The 'Recent' tab shows a list of projects: 'Project CERN-0000098176 SPS Complex' and 'Project CERN-0000098190 Quality Assurance'.



Thank you for your attention!

Video : <https://espace.cern.ch/edms-services/EDMS6/EDMS%20%20Tutorials.aspx>

Complete course : <https://edms.cern.ch/document/110709>

