

Using the CERN EDMS in the EGEE-II project

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Agenda

- 1 EDMS – General introduction
- 2 EDMS for EGEE – The basics
- 3 Working with the EDMS
- 4 Approval & Versioning
- 5 Access rights & Notifications
- 6 Demonstration & Questions

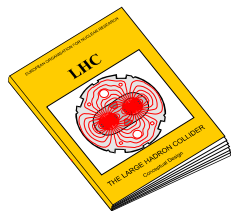
EDMS – General introduction

What is the CERN EDMS?

The CERN EDMS is the organization's official tool to store, organize and control administrative and technical data throughout the different phases of a project.



Main functionality:



EDMS for EGEE-II



HCQRLAB100-TB001234



EDMS No: 720066 ver 1

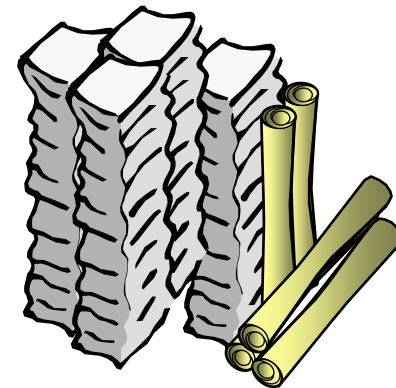
The EDMS Service at CERN

General info:

- The EDMS is a CERN wide service provided by the EDMS team. The service is free of charge for all officially approved projects, experiments and collaborations.

CERN EDMS in numbers:

- ~5000 registered users
- ~700.000 documents & drawings
- ~10.000 new documents / month
- ~140.000 file downloads / month
- ~500.000 equipment
- ~20.000 new equipment registered/month



Overview of the CERN EDMS

EDMS Web



MTF - Travellers



EDMS Common Layer

Axalant

Design data
Drawings & Documents

EDMS for EGEE-II

Datastream7i

Asset tracking
Work management

Other DBs

Parameters
Production data

EDMS No: 720066 ver 1

EDMS for EGEE – The basics

EDMS for the EGEE-II project

Scope of EDMS in the EGEE-II project:

The EDMS will be used for document management and will serve as a centrally safeguarded repository for EGEE-II documentation.

Two main types of documents:

- EGEE Documents
- EU Deliverables



A document in the EDMS

A document in the EDMS consists of meta data + one or several files.

Example:

The screenshot shows a document record in the EDMS system. The record is displayed in a table-like format with the following fields and values:

EDMS identifier	Version	Title	Status	Author(s)
589453	v.4	EGEE – providing a production quality Grid for e-Science	Released	
<i>EDMS Id</i> 589453				
Paper for: International Symposium on Emergence of Globally Distributed Data June 19-24, 2005, Sardinia, Italy				
Doc. page	IEEE_1.5	doc (269 kb) pdf (136 kb)	0 sub-doc 4 versions	Marc-Elian BEGIN, Fabrizio Gagliardi
				2005-05-10 EGEE Document

Labels pointing to the fields:

- EDMS identifier: 589453
- Version: v.4
- Title: EGEE – providing a production quality Grid for e-Science
- Status: Released
- Author(s): Marc-Elian BEGIN, Fabrizio Gagliardi
- File(s): IEEE_1.5 doc (269 kb) pdf (136 kb)
- Document type: EGEE Document
- Date: 2005-05-10

Searching for documents

Documents Projects Items
Mode : Simple Standard Advanced

Document Id 1) Any

Title,Keyw,Desc. All

Author Jones All

EQ. Code All

Status 2) Obsolete
Pub Approved
Rejected
Released Last version only

Type & Attr. 2) EGEE Document
EU Deliverable
Manual / Guideline
Technical Document

Props. & Vals. 2) All

Date Creation 2005-04-05 2006-04-05
 Modification

Below Node Publications (Active node)

Context EGEE-COST-CLAIMS: EGEE INTERNA
EGEE-EAC: EGEE EAC
EGEE-EIF: EGEE EIF
EGEE-GENERAL: EGEE General con

Global operator Any All

Search Clear

Project structure in EDMS

The screenshot displays the EDMS Web Navigator interface within a Microsoft Internet Explorer browser window. The browser title is "EDMS Web Navigator - Microsoft Internet Explorer provided by CERN". The interface is divided into several sections:

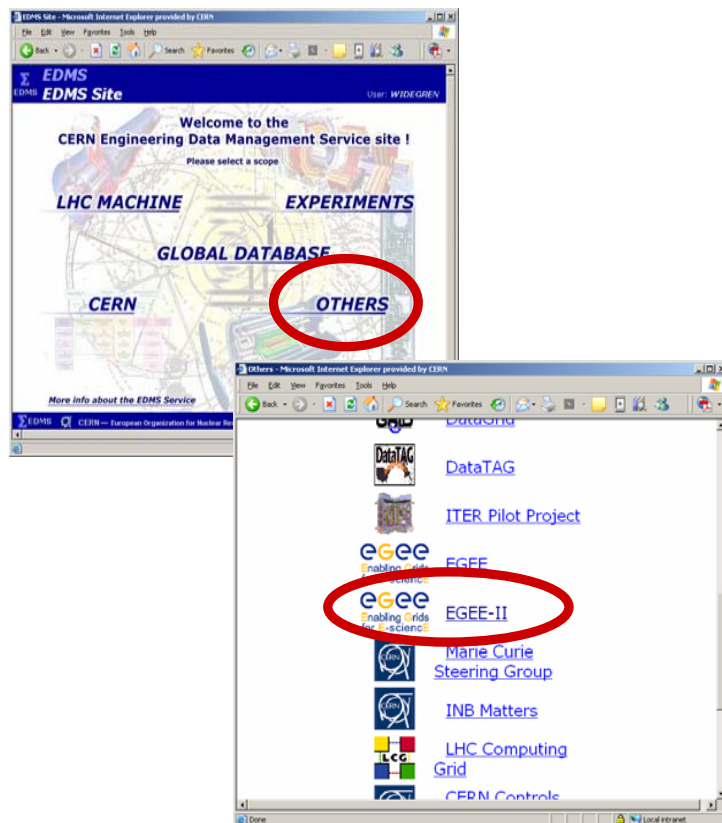
- Header:** "EGEE EDMS" logo with the tagline "Enabling Grids for E-science". Navigation links include Home, Navigator, Search, Help, EDMS Site, Caddie, and Logout. The user is identified as "User: WIDEGREN".
- Left Sidebar:** A tree view of the "EGEE-II Project" structure. The "Project reports" folder is highlighted. Other folders include Activities (NA1: Project Management, NA2: Dissemination/Outreach, NA3: User Training/Induction, NA4: Applications, NA5: Policy-IntCoop), Boards (PMB: Management Board, PEB: Execution Board, TCG: Technical Coordination Group), Deliverables, Presentations, Publications, Minutes, and Other.
- Main Content Area:** Displays "Project reports" for document "718724 v.1". The document title is "Example report" and its status is "In Work". The description states: "EDMS Id 718724. This report has been created to illustrate what a document looks like in the EGEE-II structure." A link for "Doc. page" points to "2006-Q1-1 pdf (17 kb)". Metadata shows "0 sub-doc" and "1 version" by "David WIDEGREN" on "2006-04-05".
- Footer:** "EDMS CERN" logo and version information: "EDMS 3.9.2 ©CERN - 2006.04.05 - 14:02:26".

Working with the EDMS

How to access the EGEE EDMS

Alternative 1:

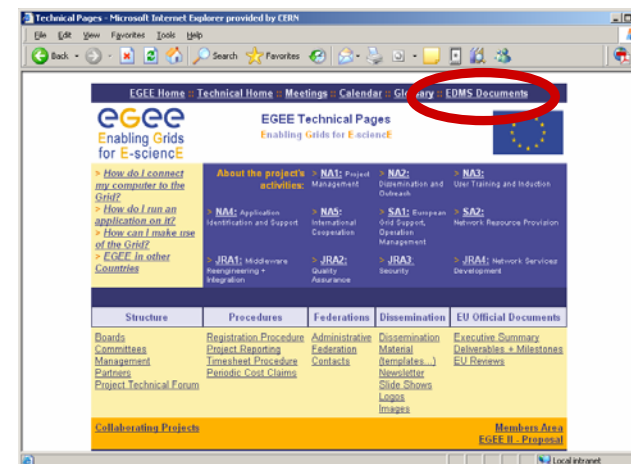
<https://edms.cern.ch>



EDMS for EGEE-II

Alternative 2:

<http://www.cern.ch/egee-intranet/>



Alternative 3:

Create your own bookmark!

(<http://edms.cern.ch/nav/CERN-0000066375>)

EDMS No: 720066 ver 1

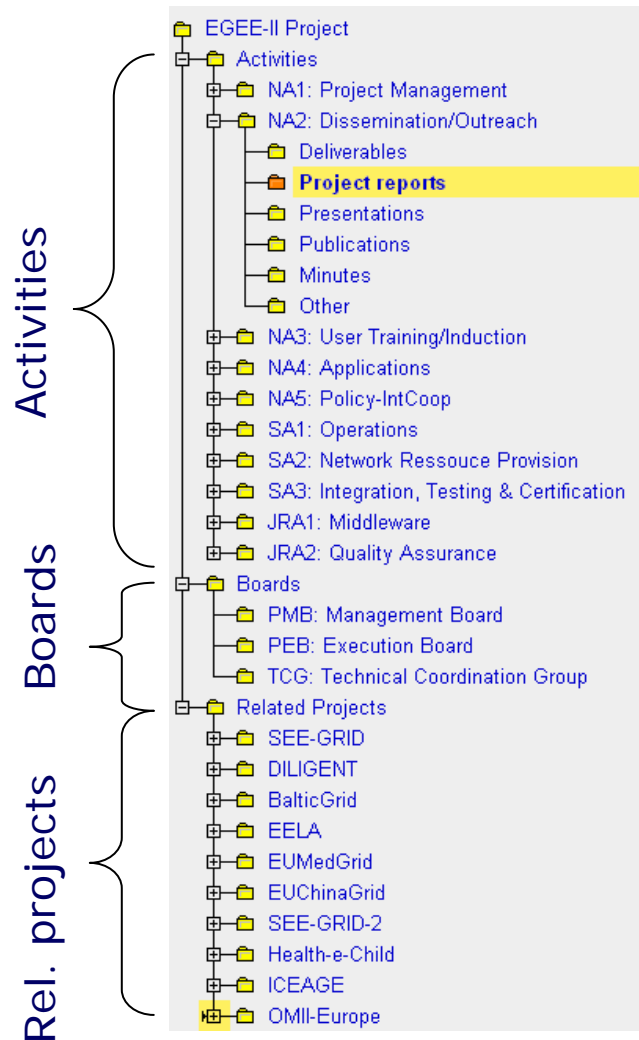
The EGEE-II structure

The screenshot displays the EDMS Web Navigator interface within a Microsoft Internet Explorer browser window. The browser title is "EDMS Web Navigator - Microsoft Internet Explorer provided by CERN". The interface is divided into several sections:

- Header:** "EGEE-II Project" with navigation links: Home | Navigator | Search | Help | EDMS Site | Caddie | Logout. The user is identified as "User: WIDEGREN".
- Left Navigation Panel:** A tree view showing the project structure:
 - EGEE-II Project
 - Activities
 - NA1: Project Management
 - NA2: Dissemination/Outreach
 - Deliverables
 - Project reports** (highlighted)
 - Presentations
 - Publications
 - Minutes
 - Other
 - NA3: User Training/Induction
 - NA4: Applications
 - NA5: Policy-IntCoop
 - SA1: Operations
 - SA2: Network Ressouce Provision
 - SA3: Integration, Testing & Certification
 - JRA1: Middleware
 - JRA2: Quality Assurance
 - Boards
 - PMB: Management Board
 - PEB: Execution Board
 - TCG: Technical Coordination Group

- Main Content Area:**
- Project reports** header with "Enabling Grids for E-science" logo.
- Metadata: Description: (empty), Eq. Code: (empty), EDMS Id: CERN-0000066424 v.0, Responsible: (empty).
- Display options: **Displayed** (Compact listing, Extended listing, Hide obsolete, Show obsolete), **Sorted by** (Default, Number, Creation Date, Status).
- Documents in this node: 1. Buttons: Create Doc., Advanced.
- Document details for "718724 v.1 Example report" (status: In Work):
 - EDMS Id 718724
 - Description: This report has been created to illustrate what a document looks like in the EGEE-II structure.
 - Doc. page: 2006-Q1-1 pdf (17 kb), 0 sub-doc, 1 version
 - Author: David WIDEGREN
 - Date: 2006-04-05
 - Category: EGEE Document
- Footer:** EDMS CERN logo, version "EDMS 3.9.2 @CERN - 2006.04.05 - 14:02:26".

The EGEE-II structure



EDMS for EGEE-II

The EGEE structure is divided into “Activities”, “Boards” and “Related Projects”.

For all activities and related projects a standard structure has been prepared.

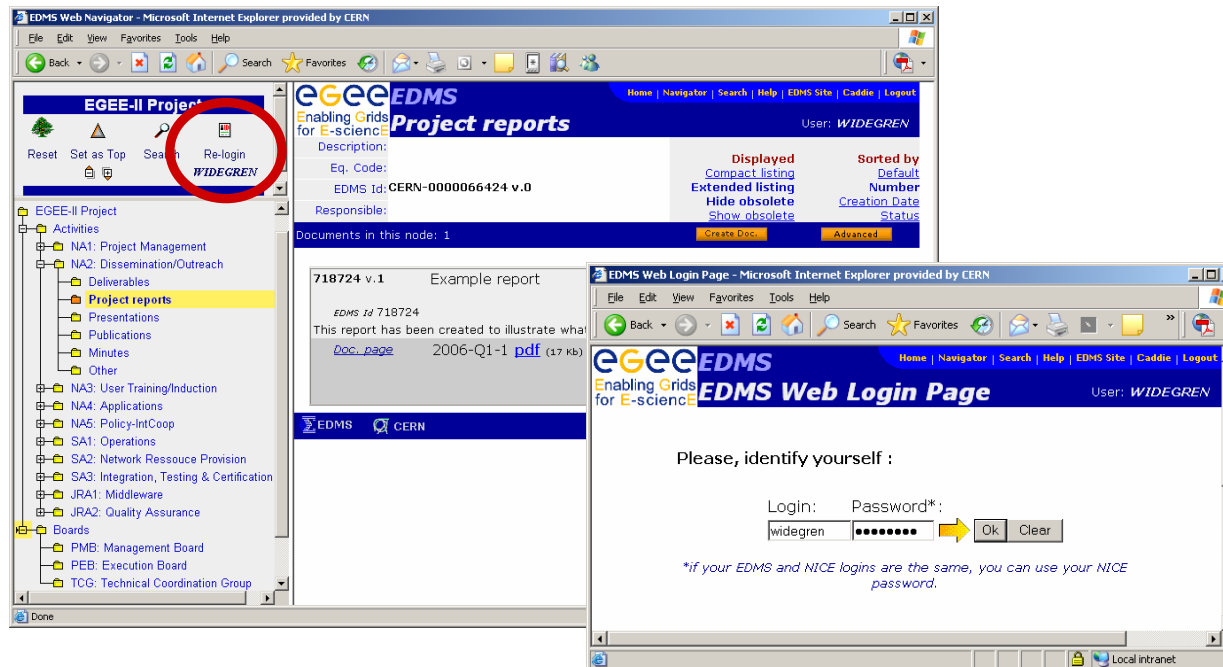
This structure can naturally be updated with additional project folders if needed.

Please note that documents created in the “Deliverables” folders are following special procedures!

EDMS No: 720066 ver 1

The EDMS login

It is required to login in order to use active actions and to retrieve documents with restricted access.



EDMS logins and access rights are managed by the local EDMS administrator in EGEE.

Creating a new document

EDMS Web Navigator - Microsoft Internet Explorer provided by CERN

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites Refresh Print Mail Stop

EGEE EDMS
Enabling Grids for E-science

Home | Navigator | Search | Help | EDMS Site | Caddie | Logout

User: WIDEGREN

Reset Set as Top Search Re-login
WIDEGREN

EGEE-II Project

- Activities
 - NA1: Project Management
 - NA2: Dissemination/Outreach
 - Deliverables
 - Project reports**
 - Presentations
 - Publications
 - Minutes
 - Other
 - NA3: User Training/Induction
 - NA4: Applications
 - NA5: Policy-IntCoop
- SA1: Operations
- SA2: Network Ressouce Provision
- SA3: Integration, Testing & Certification
- JRA1: Middleware
- JRA2: Quality Assurance
- Boards
 - PMB: Management Board
 - PEB: Execution Board
 - TCG: Technical Coordination Group

Description:

Eq. Code:

EDMS Id: CERN-0000066424 v.0

Responsible:

Displayed: Compact listing, Extended listing, Hide obsolete, Show obsolete

Sorted by: Default, Number, Creation Date, Status

Documents in this node: 1

Create Doc. Advanced

718724 v.1 Example report In Work

EDMS Id 718724

This report has been created to illustrate what a document looks like in the EGEE-II structure.

Doc. page 2006-Q1-1 pdf (17 kb) 0 sub-doc 1 version

David WIDEGREN
2006-04-05
EGEE Document

EDMS CERN

EDMS 3.9.2 ©CERN - 2006.04.05 - 14:02:26

Done Local intranet

Creating a new document

Create a new Document - Microsoft Internet Explorer provided by CERN

File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Favorites

eg ee EDMS
Enabling Grids for E-science

Home | Navigator | Search | Help | EDMS Site | Caddie | Logout

Create a new Document User: WIDEGREN

In Project reports

1 Context... 2 Doc.Type... 3 Type Att... 4 **Rel.Proc....** 5 Data... 6 Finished

Release Procedure

Please select a Release Procedure

Document restricted to activity/board members.

Public document.

Document restricted to EGEE-II members.

show guidelines

< Prev Cancel Next >

EDMS CERN - European Organization for Nuclear Research EDMS 3.9.2 ©CERN - 2006.04.05 - 14:14:40

Done Local intranet

In EGEE there are three levels of initial access right to select from:

- Public (default)
- Activity/Board members only
- EGEE members only

Additional people can be granted access later on.

Creating a new document

Create a new Document - Microsoft Internet Explorer provided by CERN

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites

EGEE EDMS Home | Navigator | Search | Help | EDMS Site | Caddie | Logout
Enabling Grids for E-science **Create a new Document** User: WIDEGREN

In Project reports

1 Context... 2 Doc. Type... 3 Type Att... 4 Rel. Proc... **5 Data...** 6 Finished

Document Data

Please input the requested data (*mandatory field)

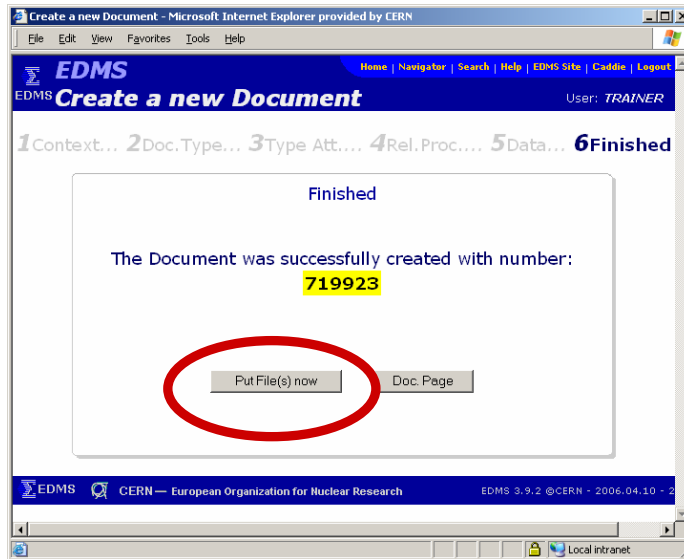
Title *	<input type="text" value="Title of the document"/>
<small>Max. 150 char.</small>	
Description	<input type="text" value="Description or Abstract"/>
<small>Max. 1000 char. Filling this field is recommended</small>	
Version	<input type="text" value="1"/>
Ext. Ref.	<input type="text"/>
Keywords	<input type="text"/>
<small>Filling this field is recommended</small>	
Creation Date	<input type="text" value="2006-04-05"/>
<small>Format: YYYY-MM-DD</small>	
List of Authors	<input type="text" value="David WIDEGREN"/>
Contact Person email	<input type="text" value="David.Widegren@cern.ch"/>
Associated URL	<input type="text"/>
<small>CDD Folders etc...</small>	
text to show	<input type="text"/>
clickable text	<input type="text"/>

< Prev Cancel **Finish!**

Finally the document meta data needs to be filled in.

The title is the only mandatory field but adding more information facilitates obviously the searching afterwards.

Creating a new document



Up to three files can be uploaded at a time.

Maximum recommended file size is 100 MB per file.

Once the meta data is stored, one or several files can be uploaded into the EDMS document.

The screenshot shows the 'File selection' form in the EDMS interface. The form is titled 'File selection' and includes the instruction 'Please indicate the File(s) you wish to put in the Document' and 'Max. size: 100 Mb'. The form contains three rows for file selection, labeled 'File 1', 'File 2', and 'File 3'. Each row has a 'File' input field, a 'Save as' input field, and a 'Browse...' button. At the bottom of the form, there are 'Put File(s)' and 'Cancel' buttons. The top navigation bar includes 'Summary', 'Sub-Documents', 'Approval & Comments', 'Used in', 'Access Rights', and 'Versions & other info'. The current action is 'Action: Put File'.

An EGEE document in EDMS

The document information page of a complete document!

The screenshot shows a web browser window titled "EDMS: Example report - Microsoft Internet Explorer provided by CERN". The browser's address bar and menu bar are visible. The page header includes the EDMS logo, the title "EDMS Document Information Page", and a navigation menu with links for Home, Navigator, Search, Help, EDMS Site, News, Caddie, and Logout. The user is identified as "WIDEGREN".

The main content area displays document details in a table-like format:

Number:	718724	ver. 1
EDMS Id:	718724	
In Work		

Additional information includes:

- Example report** by [David WIDEGREN](#)
- EGEE Document* dated 2006-04-05
- A green stamp that reads "PUBLIC".

Below the document information, there are several tabs for navigation: Summary (selected), Sub-Documents, Approval & Comments, Used in, Access Rights, and Versions & other info. Under the Summary tab, there are action buttons: Edit, Put File, Delete File, Delete Doc, Add to caddie, Notify, and Clone.

The page is divided into sections:

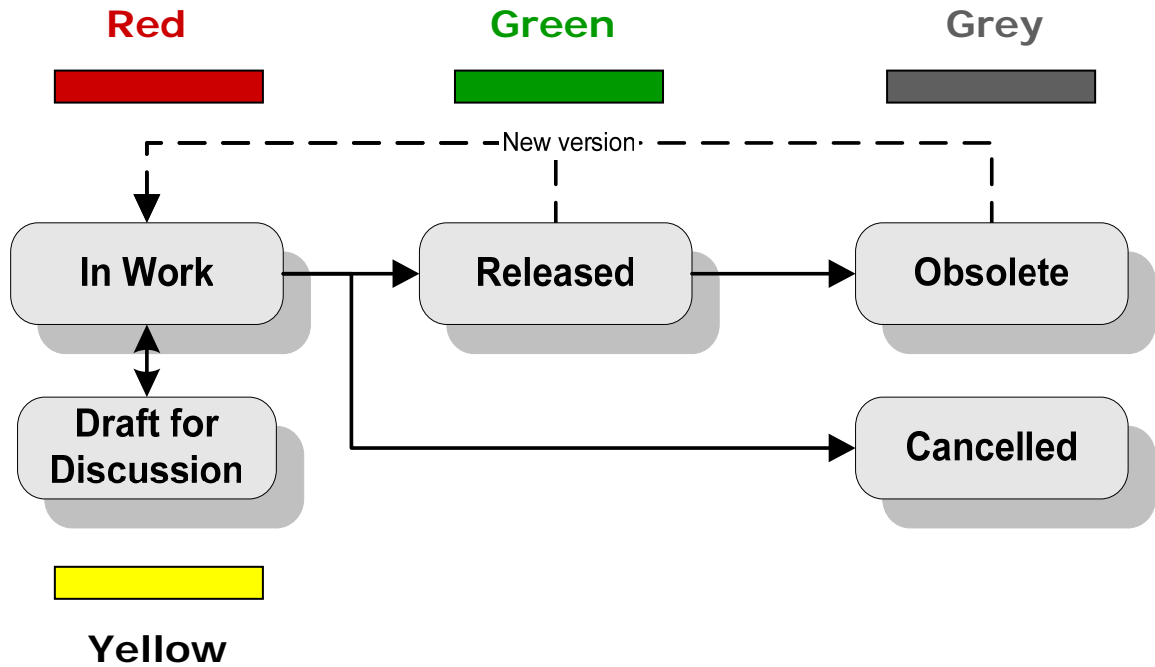
- Description, External Reference and Keywords:**
 - Description:** This report has been created to illustrate what a document looks like in the EGEE-II structure.
 - External Reference:**
 - Keywords:**
- Files of the Document:** 2006-Q1-1 [pdf](#) (17 Kb)
- Sub-Documents:**
- Associated URL (CDD Drawing Folder, Library...)**
- Context:**

The browser's status bar at the bottom shows "Done" and "Local intranet".

Approval & Versioning

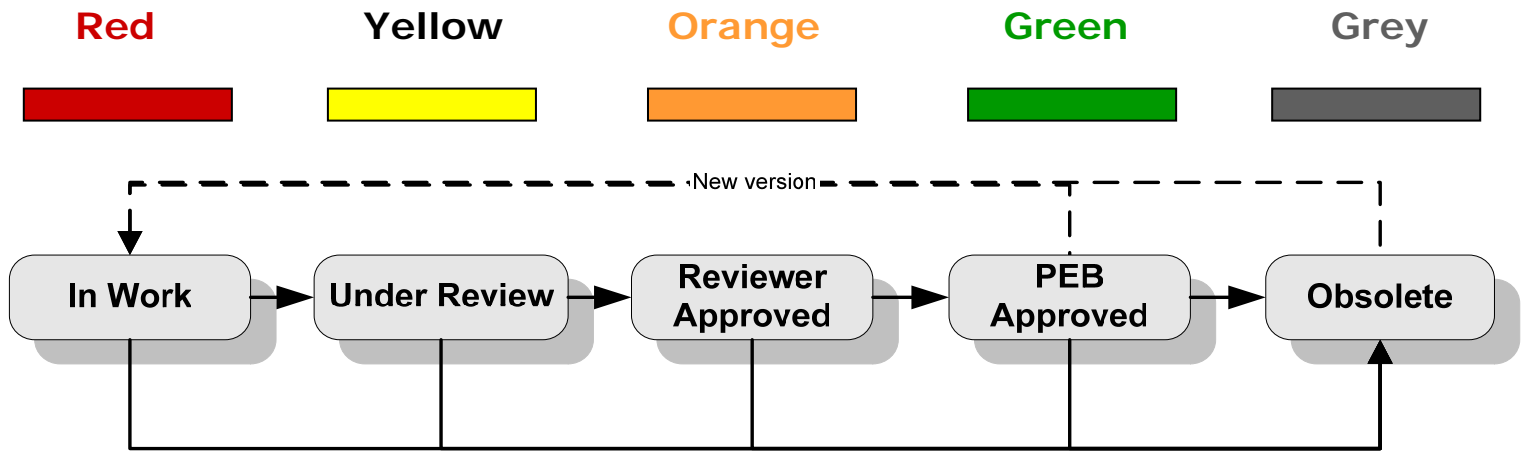
EGEE-II release procedures

Example 1: **EGEE-II Documents**



EGEE-II release procedures

Example 2: **EU Deliverables**



Changing document status

The screenshot shows the EDMS Document Information Page for document 718724 ver. 1. The document is currently in the 'In Work' status. The 'Actions' menu is open, and the 'Change Status' option is highlighted. A modal dialog titled 'Action: Change Status' is displayed, prompting the user to select a new status for the document. The dialog lists three options: 'Cancelled', 'Draft For Discussion', and 'Released'. The 'Released' option is selected. The dialog also includes 'Sign' and 'Cancel' buttons.

EDMS Document Information Page
User: WIDEGREN

Number: 718724 ver. 1
EDMS Id: 718724
Example report
David WIDEGREN
EGEE Document
2006-04-05
PUBLIC

Actions: **Change Status**

Current situation & next steps Hide
Current status of this Version is **In Work**.
Change Status action expected from the originator, once all uploaded.

Files of the document and associated URL
2006-Q1-1 pdf (17 Kb)

Status History & Comments
Created by David WIDEGREN on 2006-04-05, 14:01

EDMS Hyperlinks
This page <https://edms.cern.ch/document/718724/1/TAB3>

Action: Change Status Cancel

Change Status
Please select the new Status of the Document

- Cancelled
- Draft For Discussion
- Released

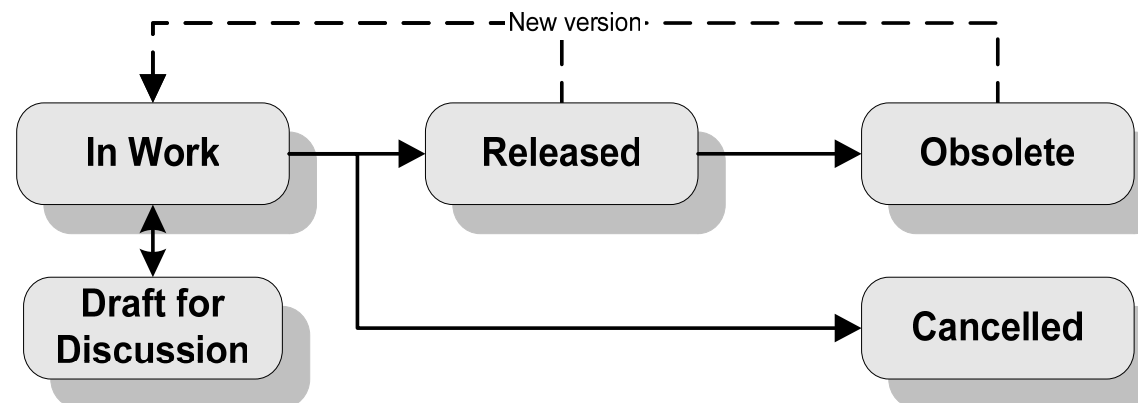
Sign Cancel

Versioning



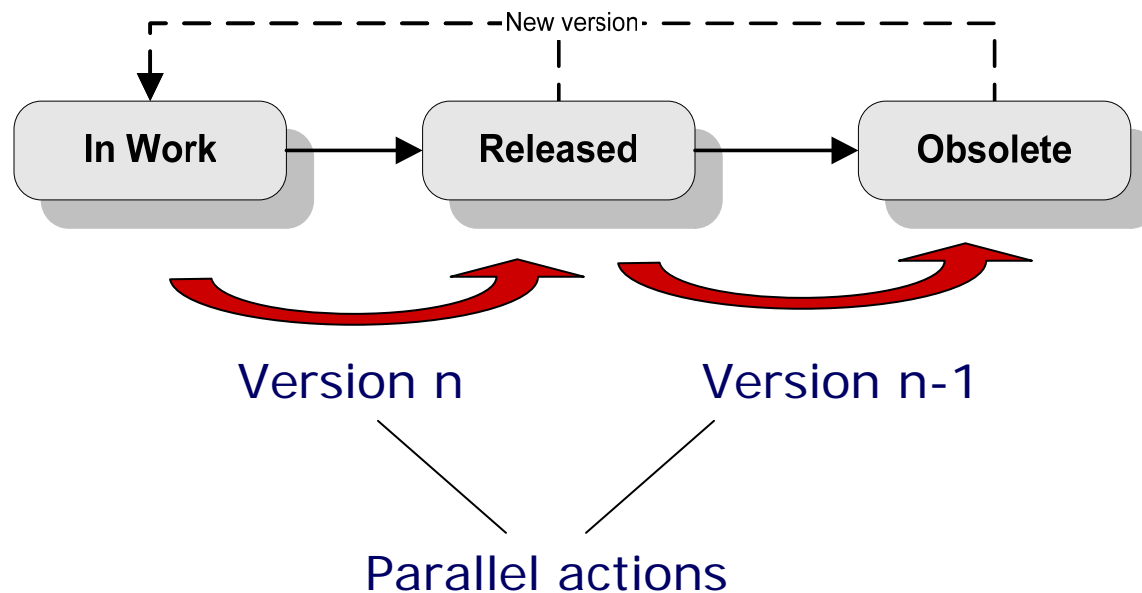
Once a document is either in the "Released" or "Obsolete" state, it is frozen and cannot be changed.

In order to modify it a new version must be created!



Versioning

At a given moment in time there can only be **one** version of a document in the “Released” state.



Access rights & Notifications

Access rights & Visibility

EDMS: NA1 - Overall QR, Q1 - Microsoft Internet Explorer provided by CERN

EGEE EDMS
Enabling Grids for E-science

Document Information Page

User: EDMS_MGR

Number: 485701 ver.3
EDMS Id: 485701
Released

NA1 - Overall QR, Q1
[Anna COOK](#)
EGEE Document
2004-08-17

RESTRICTED

Summary | Sub-Documents | Approval & Comments | Used in | **Access Rights** | Versions & other info

View: Overview | Detailed rights | Basic rights

Individual access rights

Name	Read	Write	Delete	Change status to
Ratnadeep ABROL (RABROL)	✓	✗	✗	
Esther ACCION GARCIA (EACCIONG)	✓	✗	✗	
Mehran AHSANT (MAHSANT)	✓	✗	✗	
Osman AIDEL (OAIDEL)	✓	✗	✗	
Alberto AIMAR (AIMAR)	✓	✗	✗	
Maria ALANDES PRADILLO (MALANDES)	✓	✗	✗	
Andreas ALEXOPOULOS (AALEXOPO)	✓	✗	✗	
Virginia ALIZIOTI (ALIZIO)	✓	✗	✗	
Jose Miguel ALONSO (JALONSO)	✓	✗	✗	
Fernando ALVARRUIZ (GRYCAPEG)	✓	✗	✗	
Csaba ANDERLIK (ANDERLIK)	✓	✗	✗	
Paolo ANDREETTO (PANDREET)	✓	✗	✗	
Ali ANJOMSHOAA (AAN)	✓	✗	✗	
Miguel ANJO (MANDO)	✓	✗	✗	
Torsten ANTONI (TANTONI)	✓	✗	✗	
Christos APOSKITIS (CAPOSKIT)	✓	✗	✗	
Owen Robert APPLETON (APPLETON)	✓	✗	✗	Obsolete
Jan ASTALOS (ASTALOS)	✓	✗	✗	
Emanouil ATANASSOV (EATANASS)	✓	✗	✗	

Local intranet

All information about access rights, visibility and approval privileges can be found under the "Access Rights" tab.

To get help modifying your privileges, please contact your EDMS administrator in the EGEE-II project.

Sending notifications

EDMS: NA1 - Overall QR, Q1 - Microsoft Internet Explorer provided by CERN

File Edit View Favorites Tools Help

eggee EDMS
Enabling Grids
for E-science

Home | Navigator | Search | Help | EDMS Site | Caddie | Logout

User: ACOOK

Document Information Page

Number: 485701	ver. 3
EDMS Id: 485701	

Released

NA1 - Overall QR, Q1
[Anna COOK](#)

EGEE Document
2004-08-17

RESTRICTED

Summary Sub-Documents Approval & Comments Used in Access Rights Versions & other info

Actions: | New Version | Add to caddie | **Notify** | Done

Description, External Reference and Keywords

Description This document summarises all activity reports for the EU.

External Reference

Keywords

Files of the Document

EGEE-DNA1.1.1-485701-EUQR1-v1-6 [doc](#) (948 Kb)

Sub-Documents

The "Notify" function allows you to send email notifications about documents to individual users or lists/groups.

Such email notifications also automatically grant read access to the concerned document(s).

Doc. notification : NA1 - Overall QR, Q1 (2006-04-11 09:59:06)

Dear Colleague,

This is an automatic message sent by the EDMS Notification System.
Please find below following EDMS document(s).

EGEE Document Document 485701 ver.3 Released
"NA1 - Overall QR, Q1"
by Anna COOK
<https://edms.cern.ch/document/485701/3>

Best regards,
EDMS TEAM
on behalf of Anna COOK

Demonstration & Questions

1) Demonstration of EDMS

Accessing & Browsing the EDMS.
Searching for documents.
Creating a document.
Approving & Versioning of doc.
Sending notifications.



2) Questions!

Technical questions later on:
EDMS.Support@cern.ch



How to get more help?

Central Support:

- Hotline: EDMS.support@cern.ch
- General EDMS courses

Local Support & Administration

EGEE EDMS administrators help with creation of accounts, management of groups, approval privileges, etc.

Email:

Marie-Laure.Bourgeois-Schutz@cern.ch

