



WP7: Data management (EDMS)

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EDMS Features implemented for XLS

- Contexts
- Limited selection of available documents
- New e-groups for administration
- Two release procedures
- Commenting
- "Public, restricted document " document visibility



EDMS context

- Is a predefined "framework" or "template" with allowed release procedures, documents and user groups
- Can be changed and modified at any moment
- New documents have automatically preselected the correct context



Two new e-groups for EDMS administration and approval

E-groups				
Goto 1-12 ▼				
	Name	Type	Topic	Description
	xls-admin	Static	CompactLight	XLS e-groups administrators
	xls-all	Static	CompactLight	All participants in CompactLight EU Project
	xls-EDMS-admin	Static	CompactLight	Admin group for XLS related EDMS
	xls-EDMS-approvalboard	Static	CompactLight	Approval board for EDMS documents
	xls-wp-leaders	Static	CompactLight	Work package leaders for XLS project
	xls-wp1	Static	CompactLight	All participants in CompactLight WP1
	xls-wp2	Static	CompactLight	All participants in CompactLight WP2
	xls-wp3	Static	CompactLight	All participants in CompactLight WP3
	xls-wp4	Static	CompactLight	All participants in CompactLight WP4
	xls-wp5	Static	CompactLight	All participants in CompactLight WP5
	xls-wp6	Static	CompactLight	All participants in CompactLight WP6
	xls-wp7	Static	CompactLight	All participants in CompactLight WP7



Limited preselection of documents:

New document in Project '03 - Linac2 and Linac3'

▼ Info

Title*: ?

Author: ?

Author email: ?

Creation date*: ? ?

Version*: ?

Description: ?

External reference: ?

Keywords: ?

Context*: ?

Type*: ?

Type attributes: ?

Release procedure*: ?

Equipment code: ?

Equipment code: ?

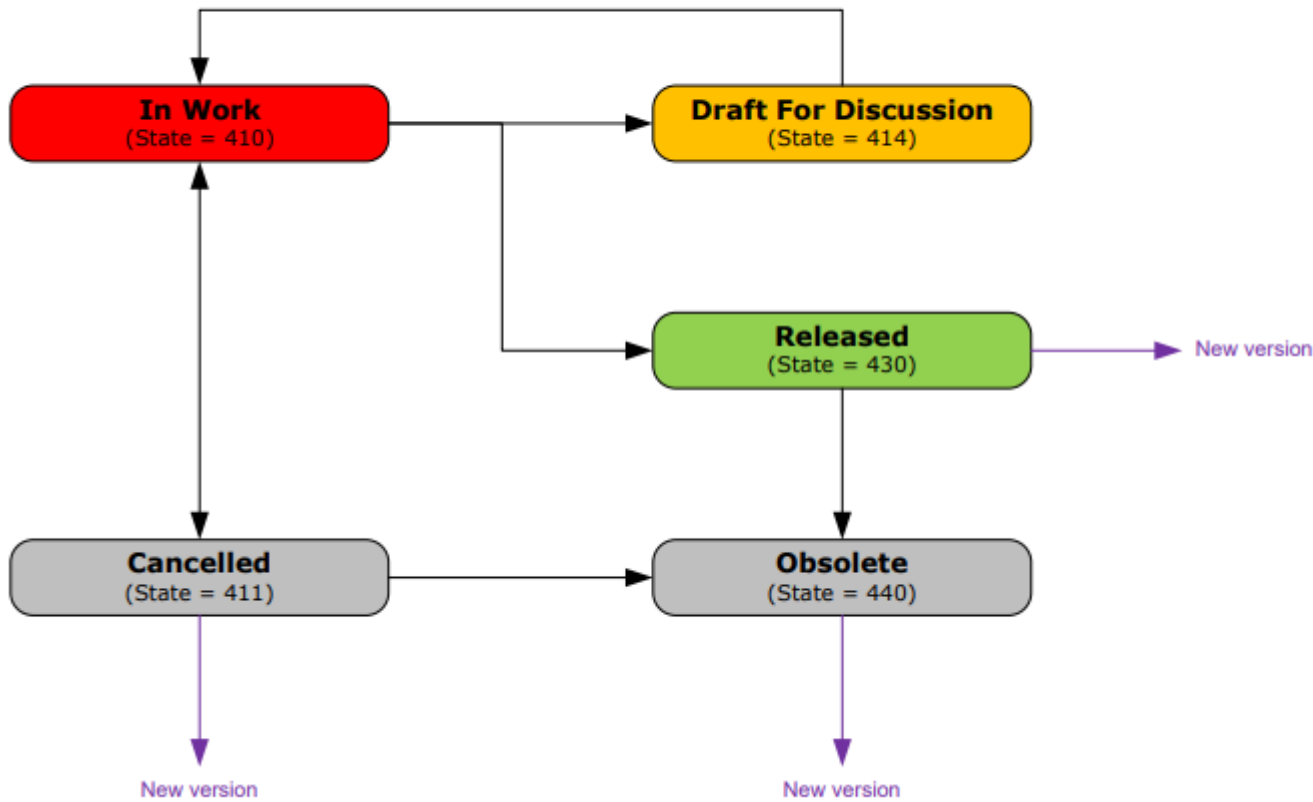
Current visibility*: ?

Associated links:	Text	Uri		?



Release procedures general:

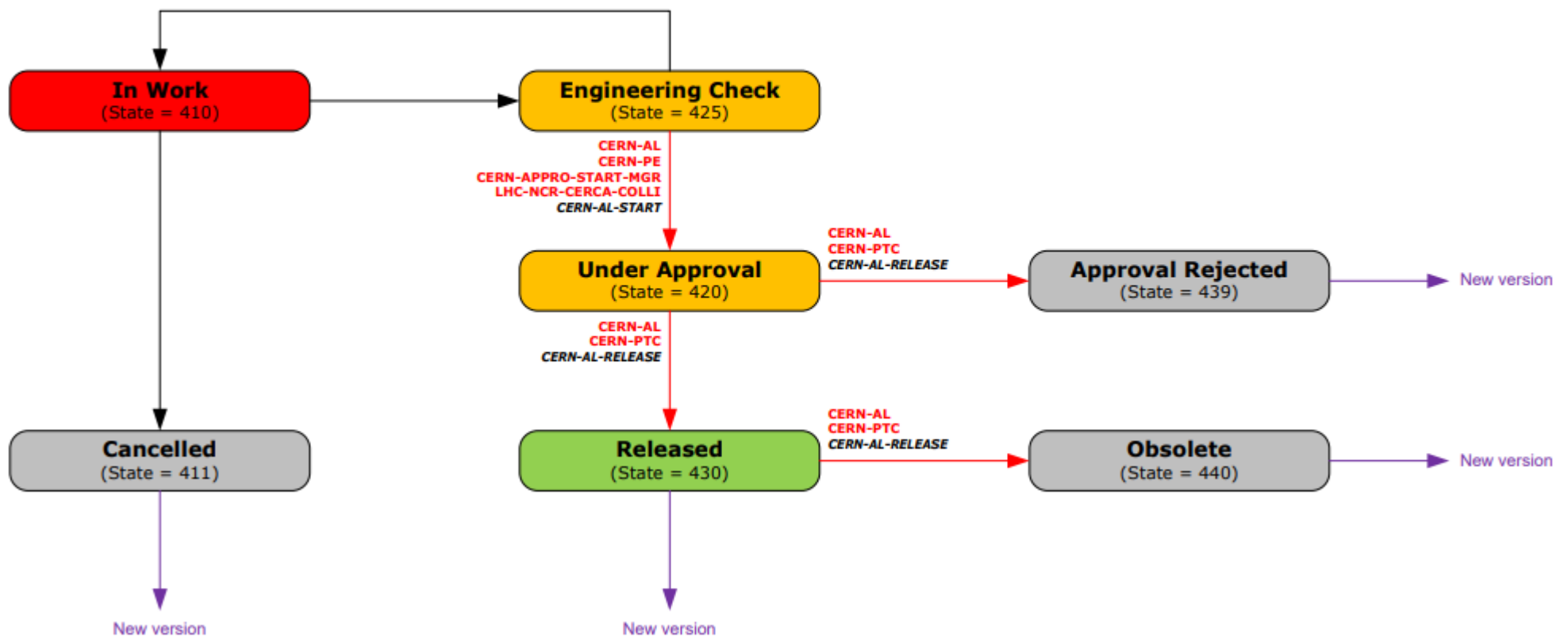
DOC-OWNER





Release procedures PBS:

DOC-AL





Review process PBS:

Start reviewing process for the document 2255755 (v.1)

Deadline*: 2019-10-29

Launch message:

Recipient List

Search

Use distribution lists Use previous versions list

Results: 1

Search results

- XLS Project Approval Board

Recipients selected: 10

Recipients
<input type="checkbox"/> AICHELER Markus (MAICHELE)
<input type="checkbox"/> AKSOY Avni (AAKSOY)
<input type="checkbox"/> CLARKE James Anthony (JCLARKE)
<input type="checkbox"/> D'AURIA Gerardo (GDAURIA)
<input type="checkbox"/> LATINA Andrea (ALATINA)
<input type="checkbox"/> ROCHOW-CARBONE Regina Alexandra (RROCHOWC)
<input type="checkbox"/> ROSSI Carlo (ROSSIC)
<input type="checkbox"/> SCHULTE Daniel (DSCHULTE)
<input type="checkbox"/> WUENSCH Walter (WUENSCHW)
<input type="checkbox"/> simone.dimitri@elettra.eu (EXA-5063)

Start process Cancel



Commenting during approval process:

https://edms.cern.ch/ui/file/1523542/LAST_RELEASED/How_to_give_comments_during_a_reviewing_process.pdf

1. Choose an action (mandatory)
2. Indicate which decision you take regarding the contents of the document:
 - ✓ **Accept:** you accept the document. You may give some additional information if needed.
 - ✗ **Reject:** there is something in the document you disagree with. You have to explain why you reject it (whether in the general comments or in the page comments). You have to explain the general reason in the general comments "Text" field.
 - **Seen:** indicates that you did read the document but have nothing special to say about it. You may add some comments to explain why you have nothing to say (!).
3. Type your general comments (mandatory) in the general comments "Text" field.
4. You may want to enter some precise comments on a page. Type the number of the page in the page comments "Page" field. Type your page comments in the page comments "Text" field. It is possible to enter many different comments related to the same page. If you want to add some other comments related to some other pages, click on the "Add" button.
5. Save all your comments (general + pages) (mandatory).



Commenting during approval process:

Add comment to 2255912 'test2' ✕

Action*: Accept
 Accept with Warning
 Reject
 Seen

General comment

[Add page comment](#)



Visibility of documents:

- **“public access”** (not available in PBS context)
 - not findable through external search engines but browsable and retrievable without CERN account
- **“restricted”** (default)
 - Findable without CERN account, but retrievable only for access group.
- **“sensitive”**
 - Not findable if you are not part of the access group



Thank you!

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