



# 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
	<a href="#">xls-admin</a>	Static	CompactLight	XLS e-groups administrators
	<a href="#">xls-all</a>	Static	CompactLight	All participants in CompactLight EU Project
	<a href="#">xls-EDMS-admin</a>	Static	CompactLight	Admin group for XLS related EDMS
	<a href="#">xls-EDMS-approvalboard</a>	Static	CompactLight	Approval board for EDMS documents
	<a href="#">xls-wp-leaders</a>	Static	CompactLight	Work package leaders for XLS project
	<a href="#">xls-wp1</a>	Static	CompactLight	All participants in CompactLight WP1
	<a href="#">xls-wp2</a>	Static	CompactLight	All participants in CompactLight WP2
	<a href="#">xls-wp3</a>	Static	CompactLight	All participants in CompactLight WP3
	<a href="#">xls-wp4</a>	Static	CompactLight	All participants in CompactLight WP4
	<a href="#">xls-wp5</a>	Static	CompactLight	All participants in CompactLight WP5
	<a href="#">xls-wp6</a>	Static	CompactLight	All participants in CompactLight WP6
	<a href="#">xls-wp7</a>	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\*:  ?  ?

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Description:  ?

External reference:  ?

Keywords:  ?

Context\*:  ?

Type\*:  ?

Type attributes:  ?

Release procedure\*:  ?

Equipment code:  ?

Equipment code:  ?

Current visibility\*:  ?

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Associated links: 

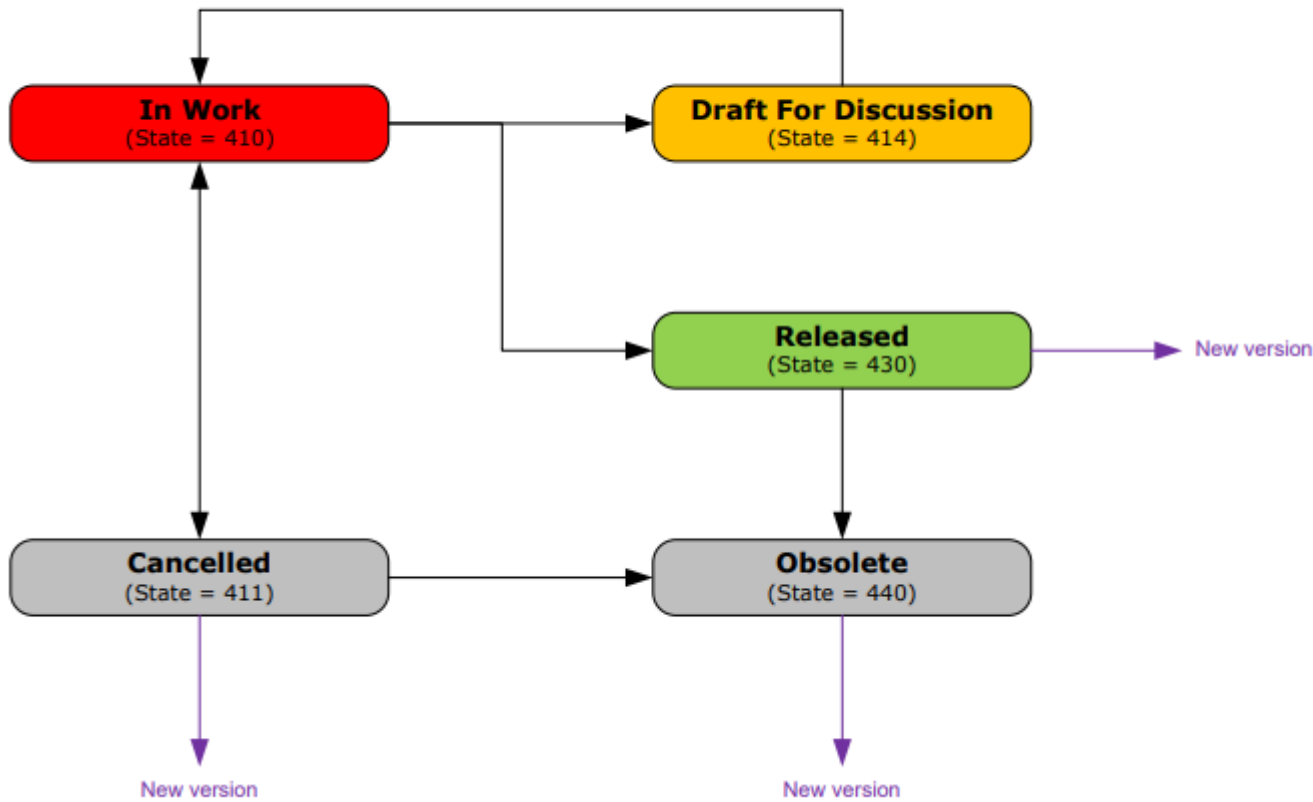
Text	Uri

 ?



# Release procedures general:

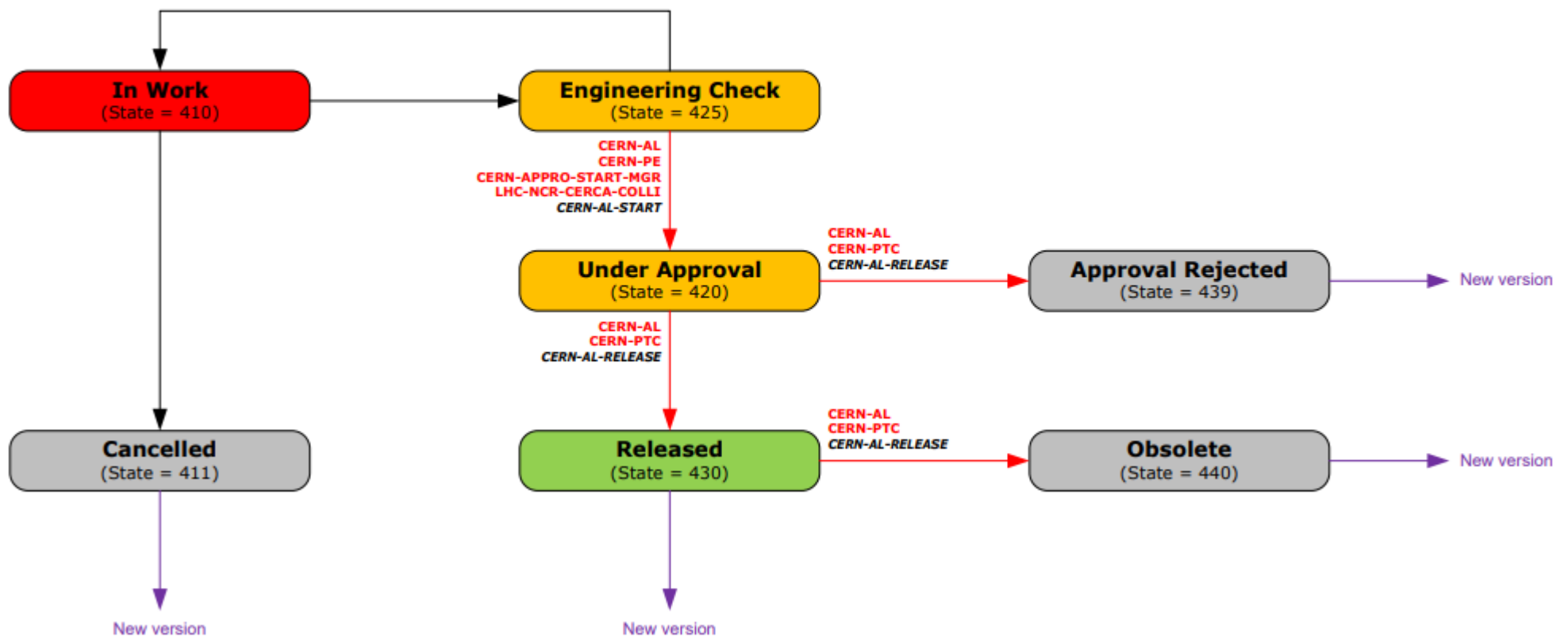
## DOC-OWNER





# 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**

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





## Commenting during approval process:

[https://edms.cern.ch/ui/file/1523542/LAST\\_RELEASED/How\\_to\\_give\\_comments\\_during\\_a\\_reviewing\\_process.pdf](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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