



# **Proposal for Unified ILC Agenda-ILC Doc-EDMS submission and search**

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# Project – Goal

- Final goal: design and implement a unified interface for the submission of electronic documents to the 3 ILC document systems: ILCagenda/ILCDoc/EDMS
- The interface will be accessible on the [www.linearcollider.org](http://www.linearcollider.org) web page
- To which system the document needs to go will be automatically determined, depending on user selections
  - **transparent to the user**
  - **need of defining a clear rule**
- Unified Up to Four Level Deep Tree with choices for sublevels contingent on root level selection
  - **User allowed to select one leaf only**
- Unified search across the 3 systems
  - **Search engine available from [www.linearcollider.org](http://www.linearcollider.org)**
  - **Search/browse by document type or by category**



# Project – First Phase

- The “Phase-I” interface will be implemented specifically for ILCDoc, but it will be designed for the further more general implementation (Second and Third Phase)
- The interface will be accessible on the [www.linearcollider.org](http://www.linearcollider.org) web page
- Unified search
  - Search engine available from [www.linearcollider.org](http://www.linearcollider.org)
  - Search limited to ILCagenda and ILCDoc in Phase-I



## Project – Second Phase

- Implementing the unified interface for the 3 systems ILCagenda/ILCdoc/EDMS
  - **Unified submission**
- Export EDMS metadata to ILCdoc (?)
  - **EDMS metadata will go into the ILCdoc “Engineering&Drawings” collection**
  - **Search could be done against ILCdoc only**



## Project – Third Phase

- Customizable metadata forms
- Files + metadata will be submitted directly to the selected system
- Unified user authentication (?)
- User customization, including preferred working group and document type/sub-type/category



## First Phase – Document submission

- 1) User clicks a “submit a document to the EDMS system” link or button
- 2) User gets a questionnaire. The shorter, the better

- **selection of “document type” from a list, ex. DOCUMENTATION**
- **selection of “document sub-type” from a list, ex. NOTE**

*At this point the system determines the ILC EDMS system where the document will go, ex. ILCDoc*

- **selection of category from a tree, ex. GDE-Management**
- **selection of “access right”, ex. PRIVATE**

*Last two selections could be inside the submission form*

- 3) User will have to fill the form with document metadata
- 4) Authentication done through the selected system



## Access Rights: Public, Internal or Private?

- Public/**Internal**/**Private** → Visible to the World/ **ILC users** /**ILC group**
- As a general rule, Access Rights should be automatically determined depending on the document type/sub-type/category, with few exceptions (see below)
  - **all the talks/meetings in ILC Agenda are "Public", unless the manager make them "Private"**
  - **a document in ILC Doc can be "Public" if it has been published somewhere else (ex. a "Preprint" or a "Publication") or if approved by Reviewers/Editors (ex. a "Report" or "Article"). All the other documents will be "Internal", unless the submitter make them "Private". Notice that access in Invenio is predefined by collection!**
- The documents should be "Internal" by default, with the possibility to make them "Private" (the group/user allowed to access the content will depend on the selected category. Event&Presentations will be an exception (always "Public", can be made "Private").
  - **Notice that a "Talk" submitted as a Work File (with the intent to get feedback and/or to go through a review process before releasing it) will follow the rule of Invenio-docs: "Internal" with a switch to make it "Private"**



# Search

- User will see a search form similar to the one at <http://ilcdoc.cern.ch>
- Phase-I will allow search across ILC Agenda and ILCDoc (already implemented)
- Search against ILCDoc collections (including “Conferences&Meetings” with metadata from ILC Agenda)
- Authentication
  - **No need of authentication to search “Public” documents**
  - **Authentication needed to search “Private” and “Internal” documents**





# References

- [Unified Category Tree](#)
- [Proposal for CDS Submission Categories](#)
- [Summary table of all the metadata used by ILC Agenda/ILC Doc/EDMS](#), with definitions and correspondent MARC tags → to be completed