

# What is EDMS and its impression

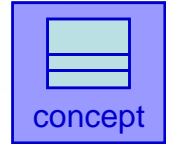
KEK-LC-ATF 荒木栄

MDI/Integration meeting  
Dec 10, 2007

# Agenda

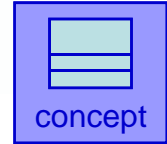
- Quick Start: My First Document Retrieval
- Thin Client Basics: Working with the Web Interface
- EDMS Workspaces: Teams and Projects
- Work Lists and Workflow Basics

# Document Management

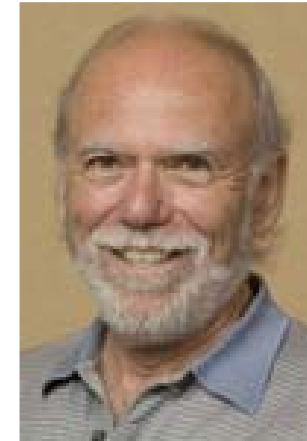


- 文書管理
  - indexing and retrieval
  - publication and dissemination
  - revision and version control
  - archiving

# Barry Barish defining EDMS



- In a generic sense, EDMS stands for “**Electronic Document Management System**”, and it is used for software systems that provide an orderly way of organizing a large number of documents over the lifespan of a project, providing mechanisms for revisions, traceability, searching, etc.
- In a more specific sense, this acronym means “**Engineering Data Management System**”. In this sense, such a system also provides the basic design tool environment (CAD/CAM etc.), document management system, and work flow that are needed to conduct and carry out a complex project design and implementation like the ILC.



# First Contact: Retrieving Documents

example

Example: Search for the EDR project management plan by using "EDR AND project AND plan"

1. search

The screenshot shows a search engine interface for 'international linear collider'. A red starburst callout labeled 'click' points to the search bar. Another red starburst callout labeled 'click' points to the search results table. A third red starburst callout labeled 'click' points to the document details page.

2. select

3. open

The screenshot shows an Adobe Acrobat Professional window displaying a PDF document titled 'The GDE Plan and Schedule'. The document includes a table of contents and a diagram illustrating the project schedule and design phases.

Table 2.0	11 Oct 2007
1.4 Subsequent Deliverables	18
2 Cost and Schedule for the ED Phase	19
3 Overview and Summary	19
3.1 ED Phase Overview	20
3.2 Funding Coordination	20
3.3 General Review Process	20
3.4 GDE Collaboration Workshops	20
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B. Appendix B: Change Management	23

**The GDE Plan and Schedule**

2003 2006 2007 2008 2009 2010

Global Design Effort → Project

Baseline configuration → Reference Design → LHC Physics → Engineering Design

→ ILC R&D Program

→ Expression of Interest to Host

→ Int'l. Management

Figure 1: International Linear Collider Global Design Effort Plan and Schedule

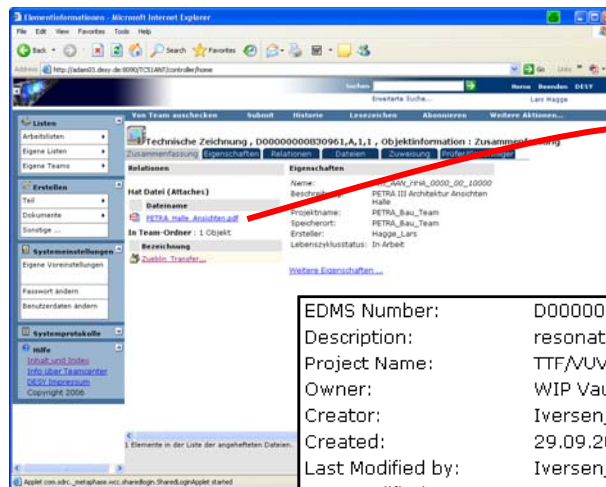
► access document

Every information access can be achieved by only three mouse-clicks

# Documents and Files

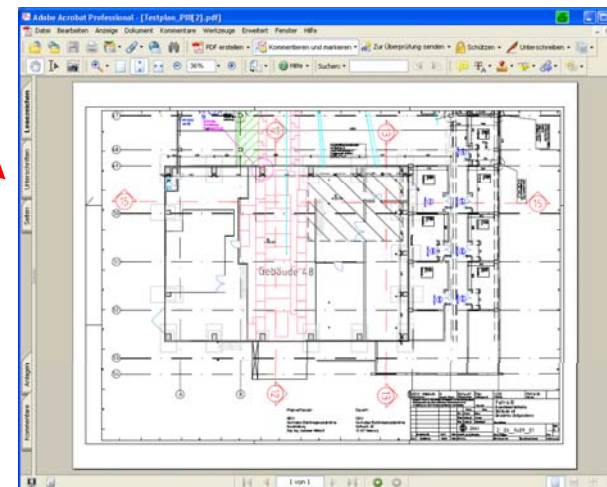
concept

- **electronic document (file)** : piece of information available as file, consisting of texts, graphics, figures, data ...
  - examples: DOC, PPT, XLS, DXF, JPG, TXT, TIF, CSV ...
- **document** : index card with metadata and reference to electronic document
  - examples: minutes, report, drawing, project plan, budget book ...



EDMS Number:	D00000000500216
Description:	resonator cavity for TTF
Project Name:	TTF/WUV-FEL
Owner:	WIP Vault
Creator:	Iversen_Jens
Created:	29.09.2005 08:42:28
Last Modified by:	Iversen_Jens
Last Modified:	29.09.2005 09:56:13
Life Cycle State:	Working

EDMS document is a catalog entry containing metadata



electronic document (file)

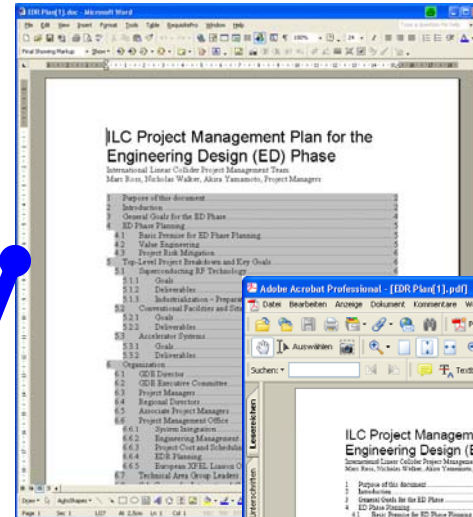
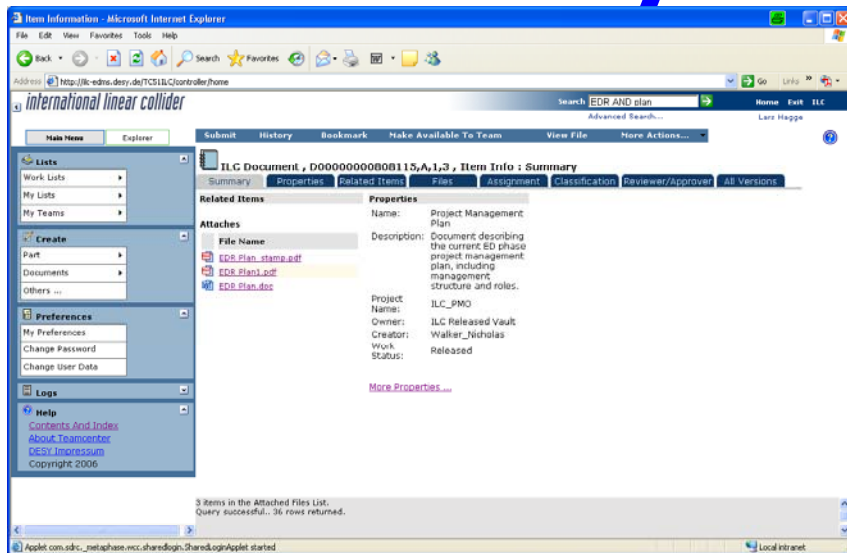
- use “**item**” inst. of “**document**” for general purposes

# Documents and Files

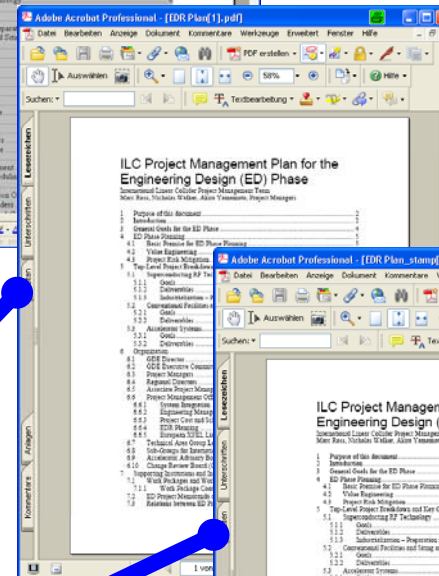


- One document can attach several files
  - with the same content
  - for different purposes

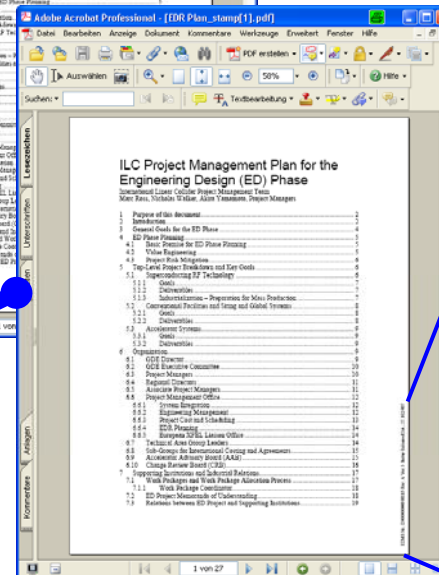
▼ document



◀ native file for downloads



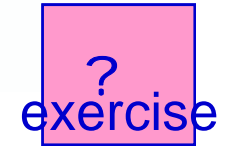
◀ PDF file for viewing



▲ PDF file with stamp for outside distribution

EDMS Nr.: D0000000808115 Rev. A Ver. 3 Status: Released Dat.: 27.10.2007

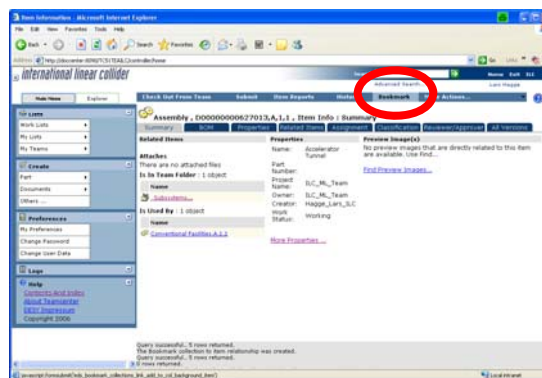
# Finding and Accessing Documents in EDMS



- familiarize yourself with the EDMS fast search

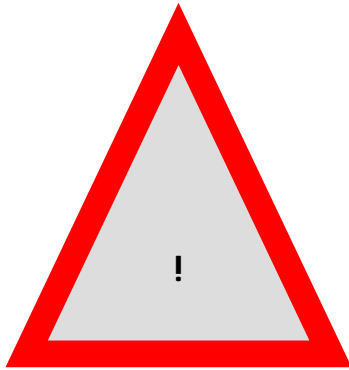
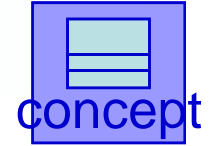


- Accessing the bookmarks
  - User select “My Lists → My Bookmarks”  
EDMS display bookmarks browser
  - User select item  
EDMS display item details page



Bookmark

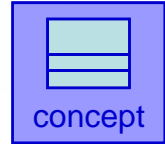




### Forward Reference Notice

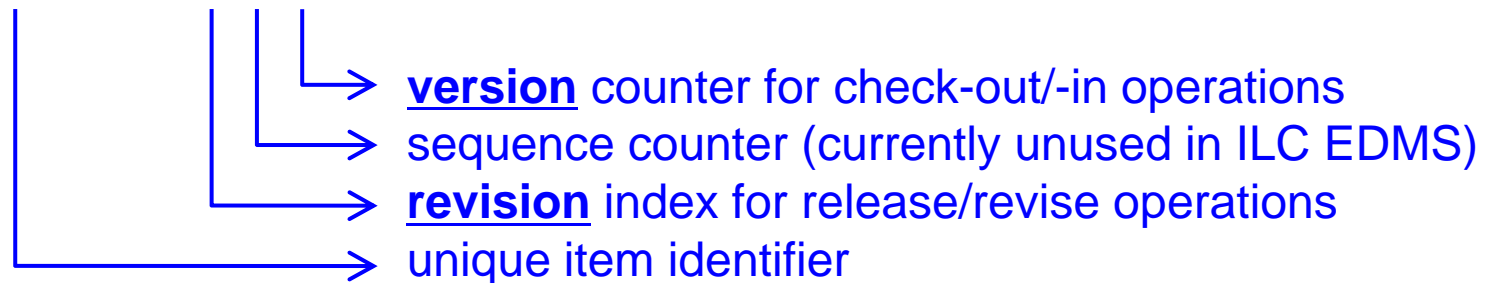
- the term “**document**” is ambiguous as documents are subject to change during their lifespan
- the terms “**document version**” or “**document revision**” are more precise as they refer to a document in a particular situation of its life
- both terms will be explained later in the context of updating documents, but for the purpose of providing accurate definition they may be used before that in the materials

# Item Versions



- EDMS is keeping track of all the updates which a document receives; it stores a new copy of the document after each check-in and increases the document's version counter

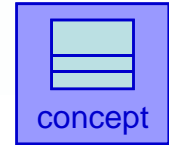
D1234567890123,B,1,4



- the term “**item**” is ambiguous and usually referring to the latest item version

There are no items in EDMS.  
There are only **item versions** and **item revisions**.

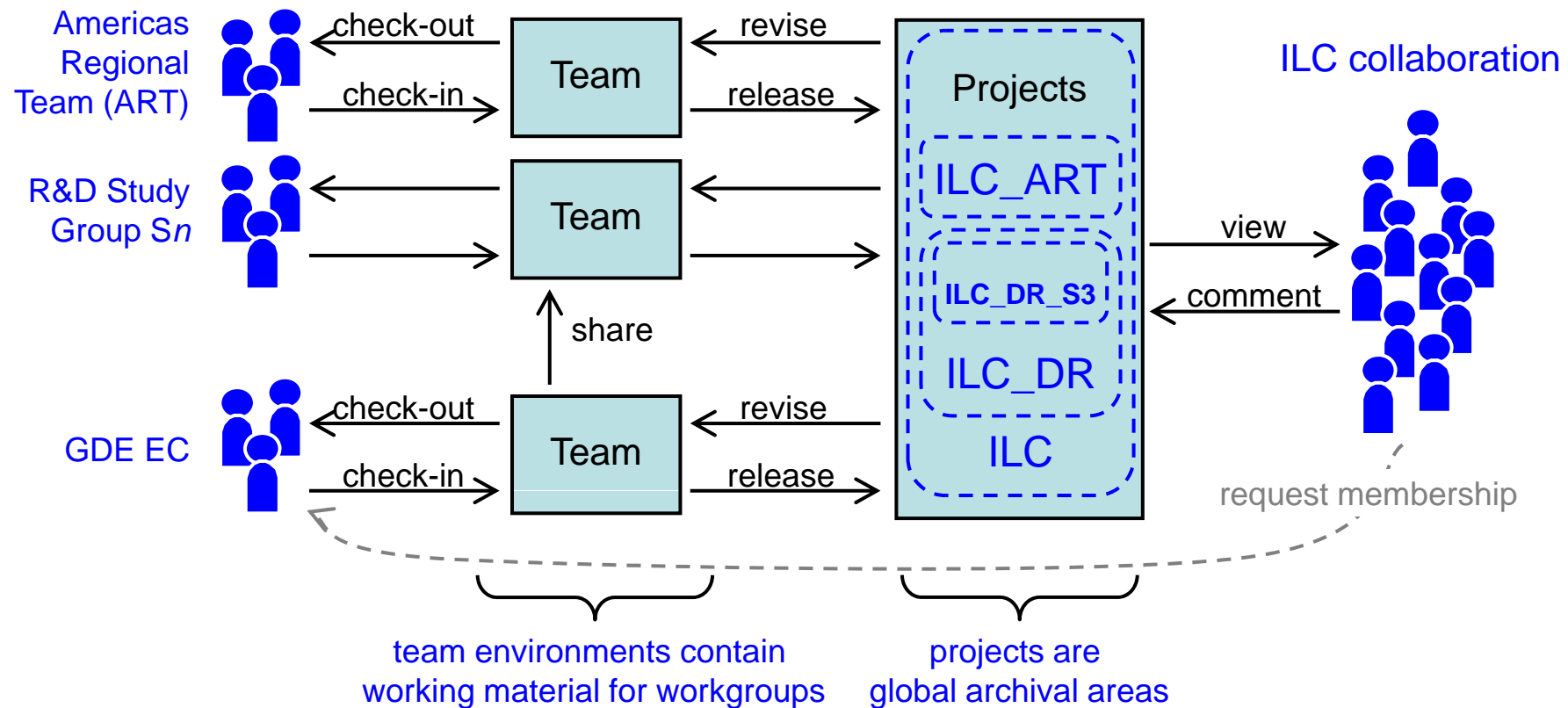
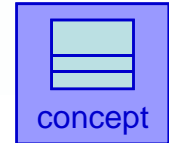
# Thin Client GUI



The screenshot shows a web application interface for the International Linear Collider (ILC). The browser window is titled "Search Results - Microsoft Internet Explorer". The application header area includes the text "international linear collider" and a search bar containing "EDR NOT ART". A navigation bar on the left contains sections for "Lists", "Create", "Preference", "Logs", and "Help". The main content area displays a table of search results with columns for "EDMS ID", "Name", "Description", "Work Status", and "Project Name". A status bar at the bottom indicates "Query successful... 23 rows returned." Annotations in red boxes highlight the "selector", "navigation bar", "detail pages and browsers", and "status bar" components.

EDMS ID	Name	Description	Work Status	Project Name
<a href="#">D00000000801815.B.1</a>	x.4 Work package overview	Program overview for FY08-09 - Work scope period: FY08-09 - Positron System Design and R&D - J. Gronberg LLNL and J. C. Sheppard SLAC Rev: 4: April 6, 2007	Released	ILC_ART_internal
<a href="#">D00000000801815.A.1</a>	x.4 Work package overview	Program overview for FY08-09 - Work scope period: FY08-09 - Positron System Design and R&D - J. Gronberg LLNL and J. C. Sheppard SLAC Rev: 2: January 22, 2007	Released (Updating)	ILC_ART_internal
<a href="#">D00000000801715.A.1</a>	x.3 Work package overview	Overview of FY08-09 plans - Work - Electron Source Design and R&D - Axel Brachmann - SLAC JLAB - Date: March 28 2007	Working	ILC_ART_Team
<a href="#">D00000000796115.A.1</a>	BNL Technical progress report FY07, 1Q-2Q	ILC-Americas FY07 Work Package Technical Progress Report for Brookhaven National Laboratory BNL Work scope period October 1 2006 , April 1 2007 1Q and 2Q - Submitted April 16 2007	Released	ILC_ART_internal

# Relation of Teams and Projects



- Items are created and updated exclusively in well-organized and intuitive to use team environments.
- Lifecycles are used to move items between team environments and project archives

# Accessing Items



Name ▼	Description	Work Status	Project Name
Addenda FY06	Collection of FY06 Addenda to Memoranda of Understanding	Released	ILC_ART_internal
Financial Reports FY07 1Q-2Q	Collection of Financial Reports for FY07 1Q and 2Q	Working	ILC_ART_Team
Financial Reports FY07 4Q	Collection of Financial Reports for FY07 4Q	Working	ILC_ART_Team
Financial Reports FY07 Q3	Collection of Financial Reports for FY07 3Q	Working	ILC_ART_Team
FY06 Overall program budget summary	Summary of ILC R&D budgets in the Americas region in FY06 - May 20, 2006	Released	ILC_ART_internal

- ▲ team environments provide access to team items plus additional items from projects which are required for work

## users should perform interactive work in team workspaces

- all the items which are stored in a team vault are accessible through the corresponding team environment
- additionally, the team environment can make available (or share) items which are stored in project or other team vaults if they are useful for the team

# Navigating the Team Environment



## My Teams Browser

The screenshot shows the 'My Teams Browser' interface. On the left, there are navigation options: 'Direct Teams', 'Shared Teams', and 'Request Team Membership'. The main area displays a table of teams with columns for Name, Description, Project, Created Date, and Modified Date. A red box highlights the 'ILC ML Team' entry in the table.

[ILC ML Team](#)

You are here: [ILC ML Team](#): [WP01](#): [Lattice](#)

## Team Folder Browser

The screenshot shows the 'Main Folder Browser' interface for the 'ILC ML Team'. It displays a tree view of folders. A red box highlights the 'WP01: Lattice' folder.

[WP01: Lattice](#)

## Main Folder Browser

The screenshot shows the 'Team Folder Browser' interface for the 'WP01: Lattice' folder. It displays a list of files and folders. A red box highlights the file 'D00000000815145\_A,1,1 Magnet Counts'.

[D00000000815145\\_A,1,1](#) Magnet Counts

Is In Team Folder : 1 object

Name
<a href="#">WP01: Lattice...</a>

The screenshot shows the 'Item Details Page' for the file 'D00000000815145\_A,1,1 Magnet Counts'. It displays various properties such as Name, Description, Project, and Creator. A red box highlights the 'Is In Team Folder : 1 object' property.

## Item Details Page

- use the available hyperlinks to navigate the team environment intuitively

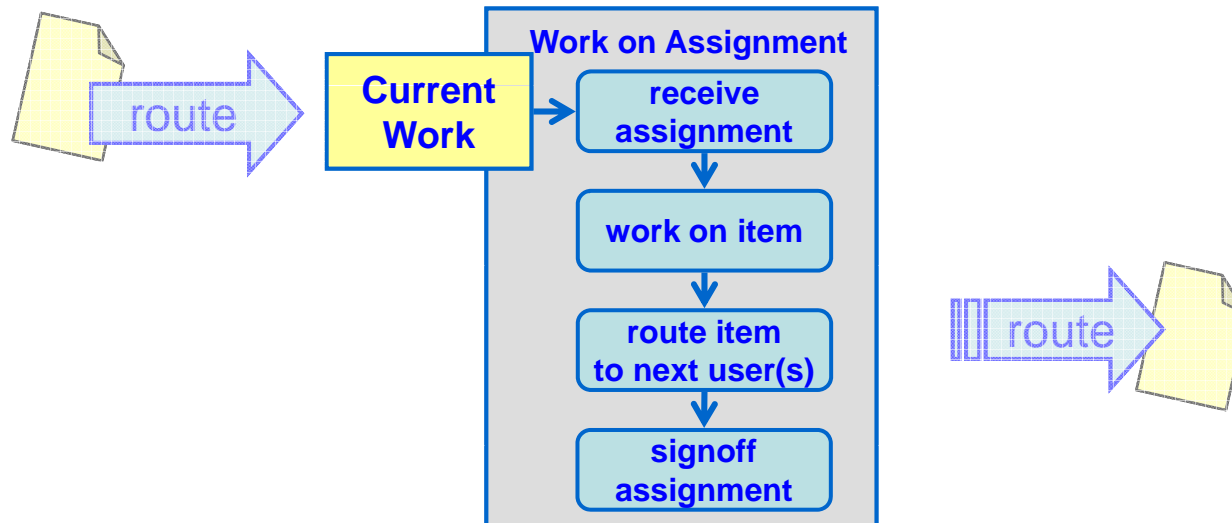
# Routing Items



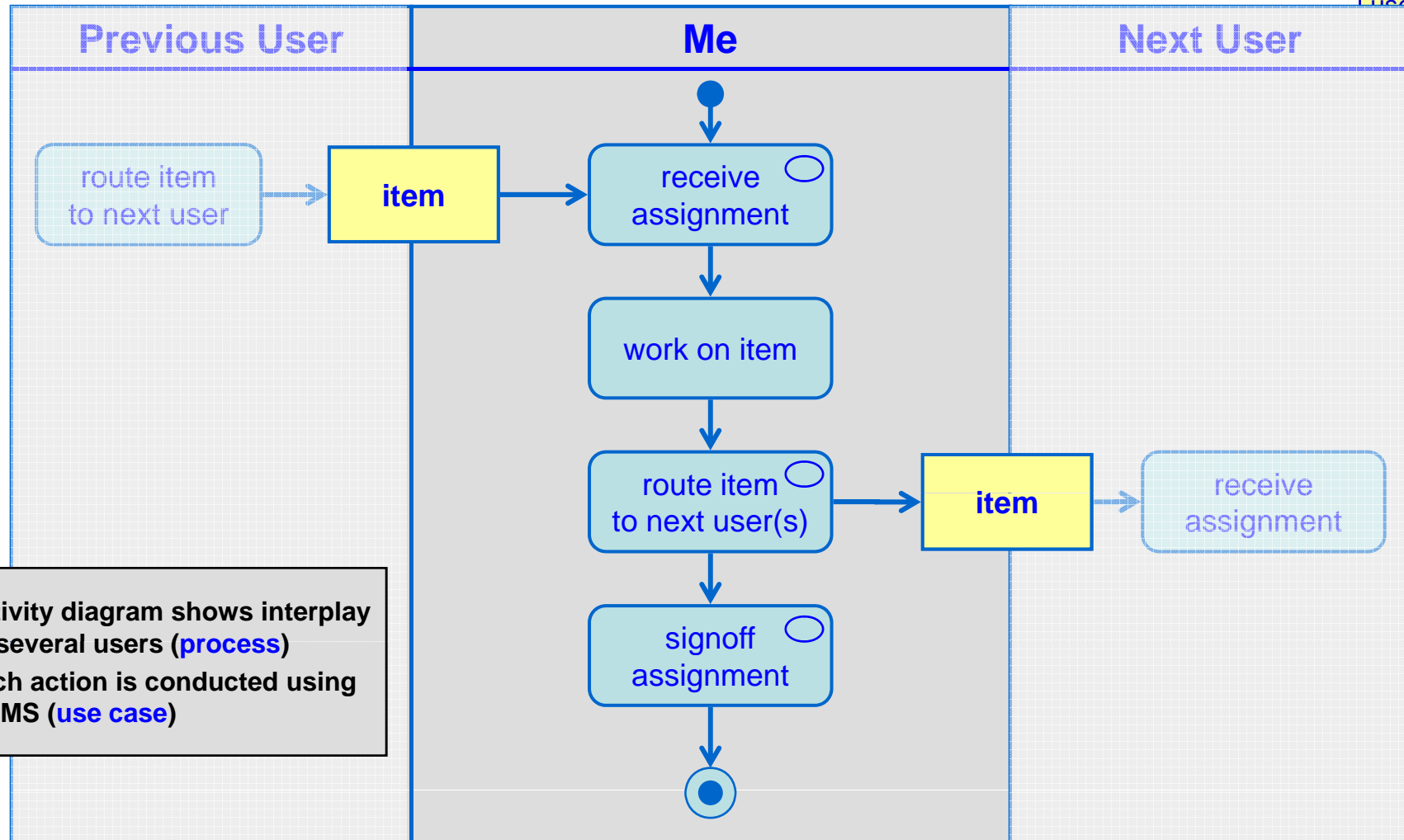
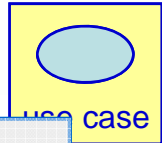
- most items are subsequently processed by several workers



- use EDMS to route and assign items to subsequent workers
  - individual perspective: receive, work, forward item, signoff



# Working on Assignments

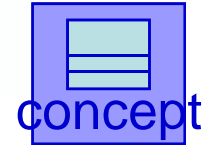


- activity diagram shows interplay of several users (**process**)
- each action is conducted using EDMS (**use case**)

- ad-hoc workflows comprise three EDMS use cases:
  - route item to next user, receive assignment, signoff assignment



# CAD-Parts Representing Parts



- part breakdown structures for mechanical engineering are usually created with 3D CAD packages
  - Teambrowser connects EDMS with CAD-Package I-deas and uses PBS from CAD model → specific session
- in a generic sense, CAD items such as geometric models, FEM calculations or NC programs, are also documents representing parts
  - CAD data management seamlessly integrated into EDMS
- from an outside perspective, CAD parts are handled only as entire units and thus treated as items representing parts
  - specific relation: CAD part **Represents Generic Part ▶**, or part **◀ Is Represented by CAD Part**

Uses : 3 objects	
Name	
<a href="#">DESY BARBELL WELDMENT ASSY--439173,A,1,1</a>	
<a href="#">DESY SHORT HALF CELL ASSY--439180,A,1,1</a>	
<a href="#">FNAL LONG HALF CELL ASSY,A,1,1</a>	

Related Items	Properties	Preview Image(s)
<b>Attaches</b> There are no attached files	Name: FNAL_RF_CAVITY_ASSY	
<b>Represents Generic Part</b> : 1 object	Part Number:	
<b>Name</b>	Project Name: ILC_Cavity_Team	
<a href="#">Cavity.A,1,1</a>	Owner: ILC_Cavity_Team	
<b>Is In Team Folder</b> : 1 object	Creator: Herz_Andreas_ILC	
	Work Status: Working	
	<a href="#">More Properties...</a>	
<b>Uses</b> : 3 objects		
<b>Name</b>		
<a href="#">DESY BARBELL WELDMENT ASSY--439173,A,1,1</a>		
<a href="#">DESY SHORT HALF CELL ASSY--439180,A,1,1</a>		
<a href="#">FNAL LONG HALF CELL ASSY,A,1,1</a>		

- まだ、ほんのさわりです。  
つづく・・・・・・・・。