



EDMS Basics

Introduction to EDMS

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Agenda

- Document Management Using EDMS
- Search and View Documents
- Working with Documents
- Discussion



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What does EDMS mean?



Engineering Data Management System

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Objective of EDMS

to make documentation easier and more reliable.

- to support the processes of information creation and administration,
- to provide information about the status of the document
- to grant a secure filing (even over long times),
- to provide effective search and navigation possibilities for easy finding of information
- to grant easy access from any desktop (even from outside DESY)

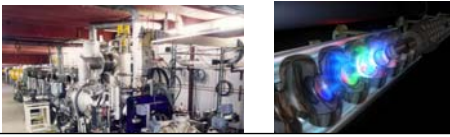
➤ EDMS is a strategic tool for collaborative work

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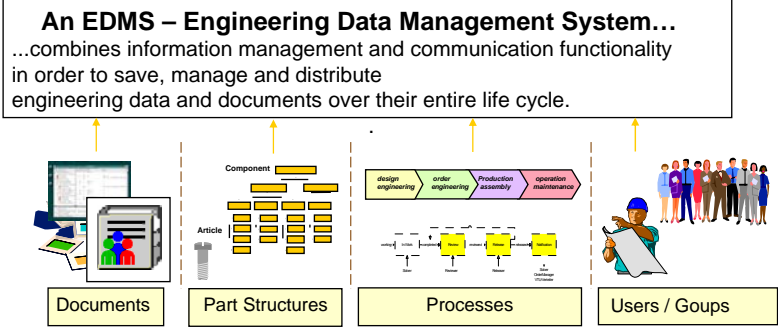
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What is EDMS ?



An EDMS – Engineering Data Management System...
 ...combines information management and communication functionality in order to save, manage and distribute engineering data and documents over their entire life cycle.



Documents Part Structures Processes Users / Groups

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Scope

- document management (drawings, meeting minutes, publications,...)
- standardized workflows for approval and notification
- product structure and part management
- configuration management (versioning)
- configurable workflows for guiding complex operational procedures

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Environment

- safe operation and secure data storage
- controlled access to information
- web access to information via web-based user interface <http://teamcenter.desy.de:2345/> world wide
- direct publication of information on the web, e.g.
<http://edmsdirect.desy.de/edmsdirect/file.jsp?edmsid=15921>
<http://edmsdirect.desy.de/edmsdirect/folder.jsp?edmsid=280938>
- DESY internal hotline, trainings and user support

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EDMS for document management

- ❑ Automatic creation of a presentation file
- ❑ No need to invent fancy file names
 - Full information available by attributes
- ❑ No need to maintain a structure in a home directory
 - Structured filing is possible by relations
 - The same document can be related to different structures without being copied
- ❑ Workflow to define the status of a document ("automated document release process")
 - Name of releaser, date of a release are stored in the system and are hence retrievable in the system
 - Changes can only be made to a new revision of the document
 - Version no. are automatically updated
 - Older versions still existing and marked "superseded"

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However ...

- ❑ **For reading** you have to learn a minimum of EDMS vocabulary and methodology:
 - There is a short user guide for EDMS-readers, which will be distributed in this meeting
- ❑ If you want to **make documents available** for others:
 - You need to know a bit more about EDMS
 - You need some time to define the metadata
 - You need some time for checking in the document to the system ...


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We help you

- ❑ <http://edms.desy.de>
 - Training
 - FAQ
- ❑ edmsteam@desy.de
- ❑ Hotline 040/8998-4655
 - Mo-Fr 9:00-12:00
 - Mo-Fr 13:30-15:30 (Fr - 14:00)


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Document and File

- Documents have a document type
- Documents have properties
- Documents are related to one file (and an additional viewing file).

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Navigating Relations

- Documents are related to each other

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Navigating Relations

Documents are related to folders

```

    graph LR
      Folder[Folder] -- includes --> Document[Document]
      Document -- attaches --> File[File]
      Document -- "relation is included by" --> Folder
  
```

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Same document in different Structures

```

    graph LR
      subgraph Part_Structure [part structure (bill of materials)]
        P1[ ] --> P2[ ]
        P1 --> P3[ ]
        P2 --> P4[ ]
        P2 --> P5[ ]
      end
      subgraph Project_Structure [01-PL]
        M1[Meetings] --> M2[ ]
        M1 --> M3[ ]
        M2 --> Min1[Minutes 1]
        M2 --> Min2[Minutes 2]
      end
      HPGL[HPGL] --> P1
      HPGL --> M1
      HPGL --> Min1
      HPGL --> Min2
  
```

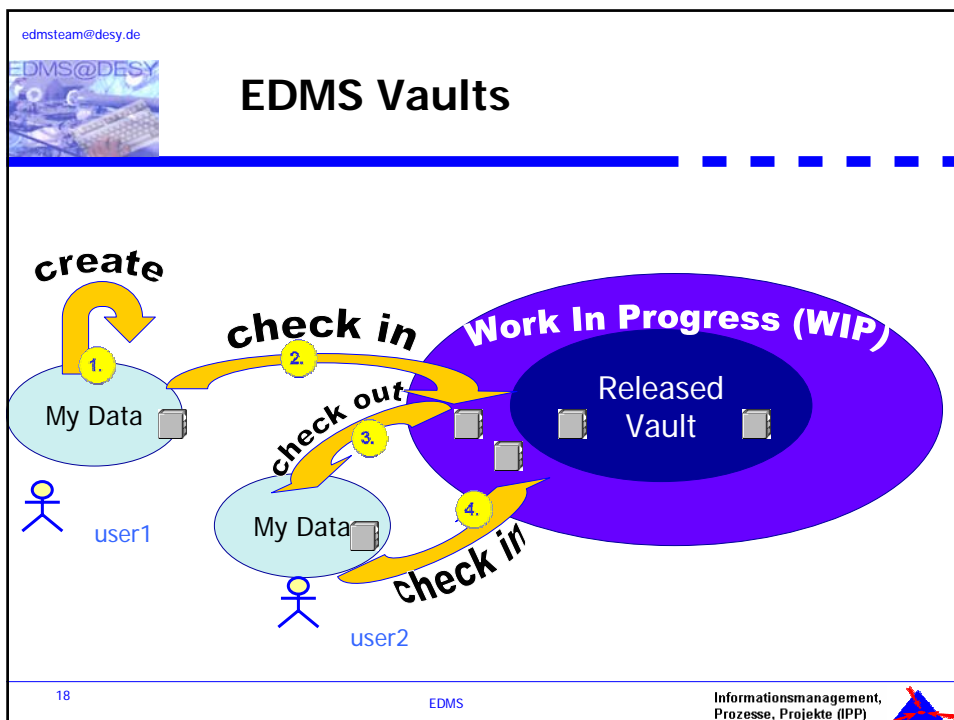
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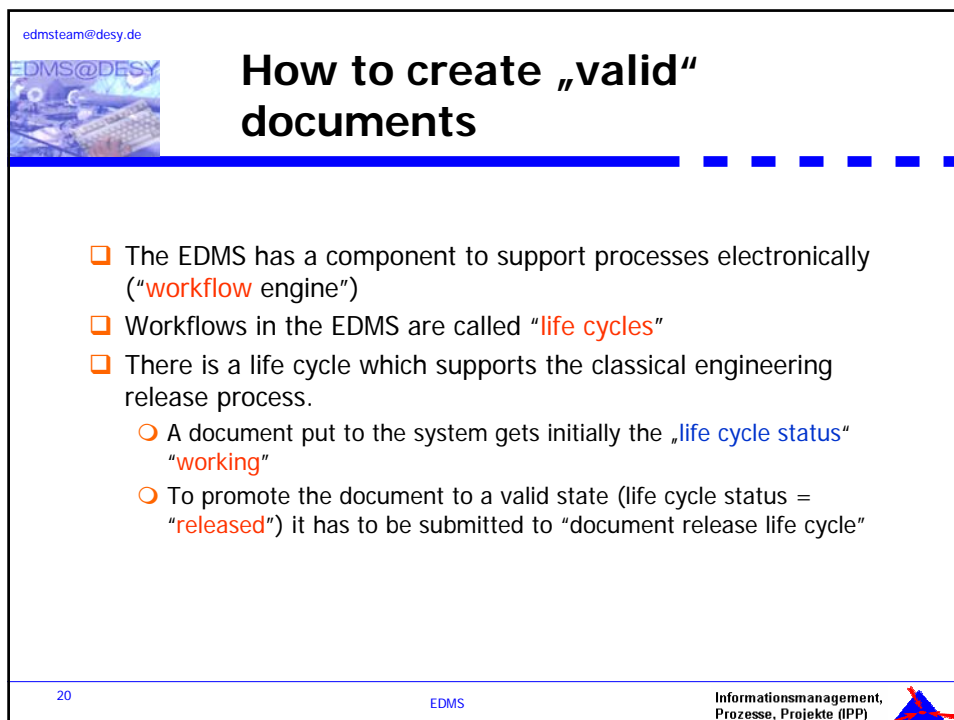
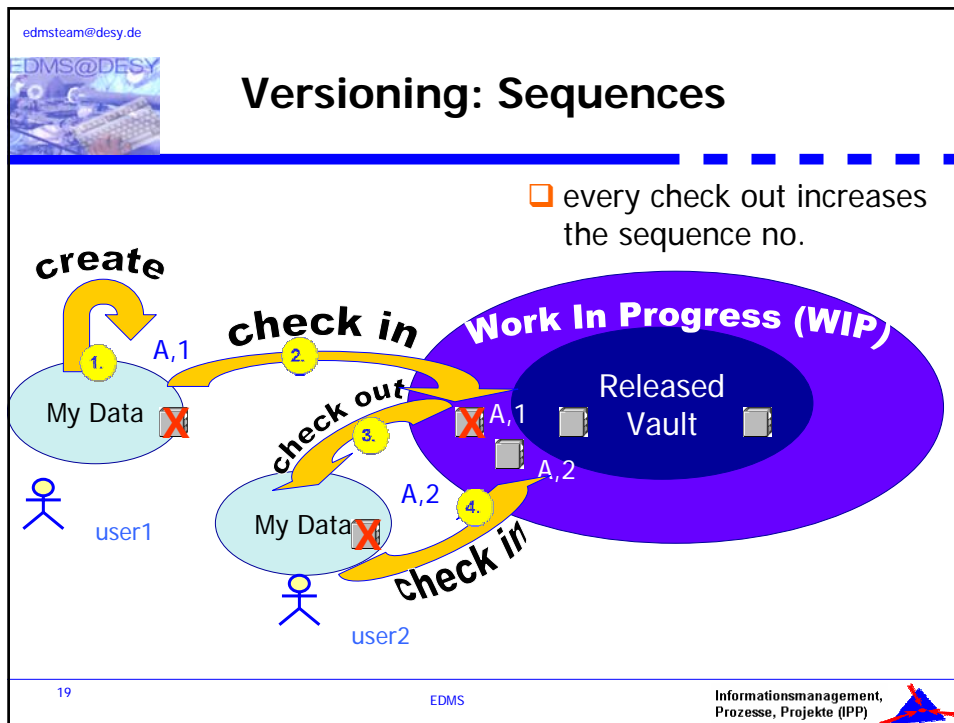
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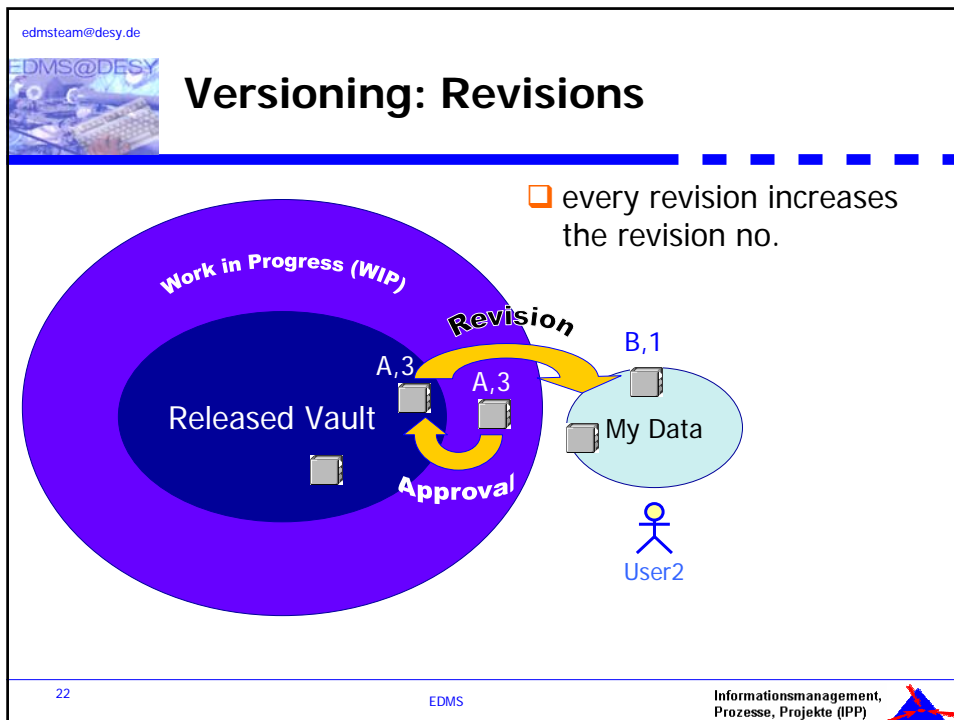
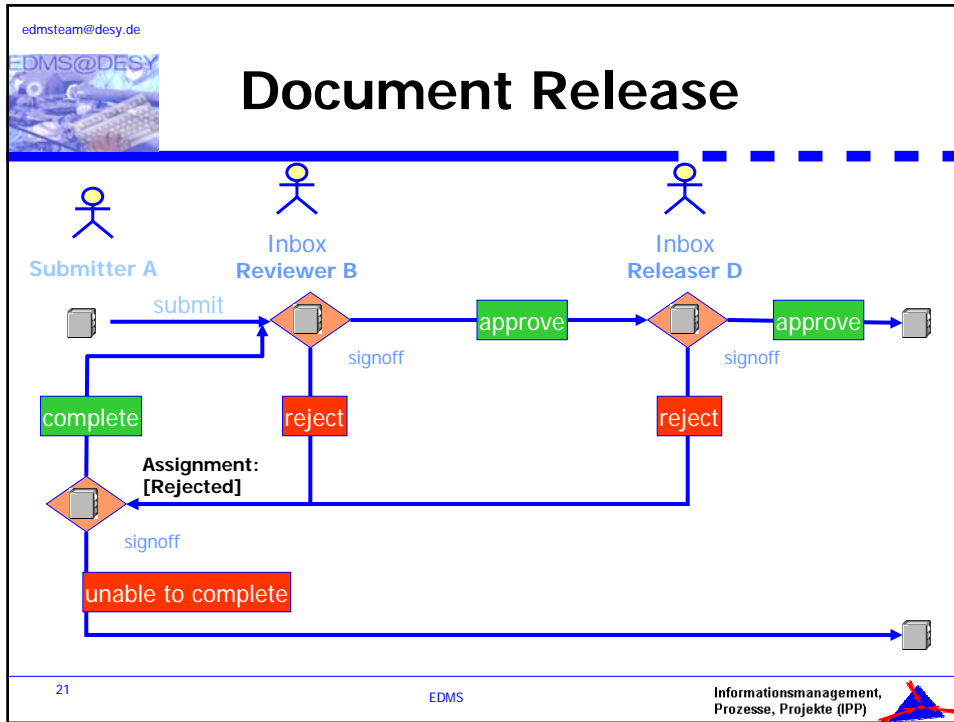
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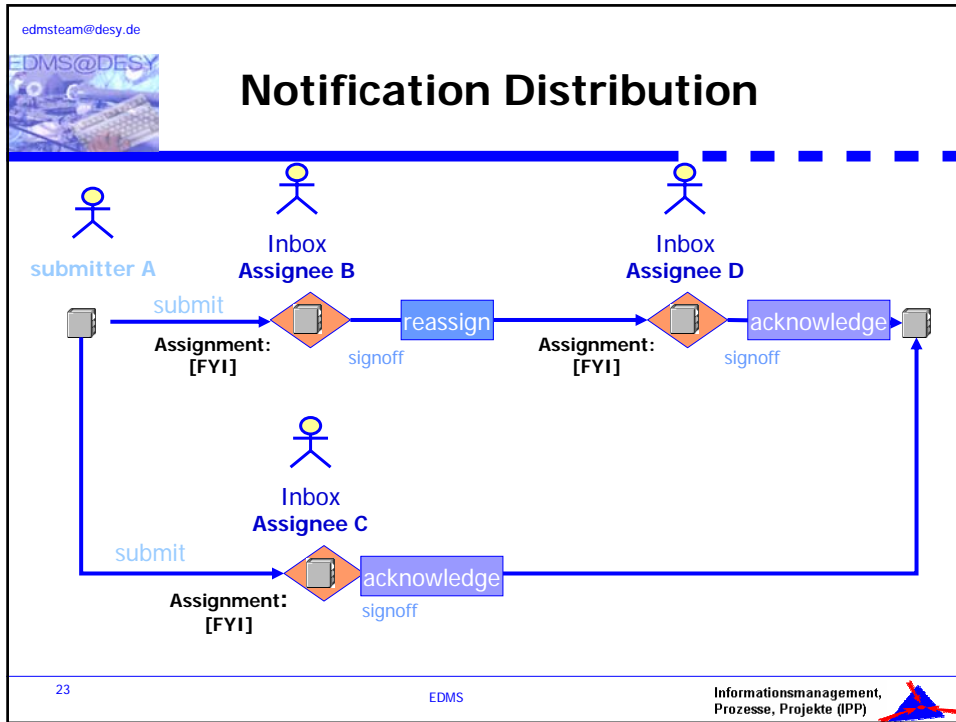
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- ## Discussion
- Migration Scenarios from TUOVI
 - ...
 - ...
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