

Report from Engineering Management Group to GDE EC 2007/12/12

Report by N.Toge

Priorities and Strategies

- **Priority #1**

- Have all GDE EDR members start using EDMS in the sense of start uploading existing pile of documents, under an approximately correct category structure, and with a reasonably workable authoring / approving (not CC!) roles assigned to each of the team members.
- Goal: ASAP, e.g. before Christmas

- **Priority #2**

- Implement the CC protocol
- Goal: Early 2008.

- **Note:**

- EDMS will likely need some reviews and revisions as we proceed toward Sendai Meeting, and they will have to be part of our plan.

EDMS Training

- **ILC EDMS Power-User Training**
 - held at DESY November 26-30, 2007.
Approximately 17 participants
 - Organized to teach the necessary skills and background information for becoming an ILC EDMS Power User.
 - URI: http://ilc-edms-put.desy.de/index_eng.html.
- **Follow-up actions to take**
 - Upload the related materials on the web
 - Additional user courses (remote via webex, at DESY, locally at non-DESY labs such as FNAL)

EDMS Category Structure:

- **A “category”**
 - (also called “identifier” or “keyword”) is a sort of an identifier for a set of documents whose content deals with common subject matters. A document in EDMS is always assigned to at least one "category".
- **An initial draft (Excel tables) Category List**
 - has been circulated within PMEDR on October 31. More than a few feedback comments have been received.
- **Revised Category List,**
 - has been worked out, as a result, by Walker, Hagge and Toge, and is currently being implemented in the ILC EDMS by the team under L.Hagge.
- **ETA:**
 - Before Christmas, 2008

EDMS Implementation (Cont)

- **Teams**
 - Team is a group of folks who share the tasks of authoring / updating the documents related to a set of categories (e.g. PM_Team, TAG_Leaders_Team, Cryomodule_Team) etc.
- **A draft “Team list”**
 - is being implemented in EDMS, together with the initial category list by the team under Hagge.
- **Assignments are also being made**
 - for “team leaders”, authoring privileges and access privileges.
- **ETA:**
 - Same as “Category list”,. Including implementation. i.e. Before Christmas, 2007.
- **In addition:**
 - Preparation of “Bills of Materials” (BOM), and “Project” being initiated.

Configuration Control

- **CC request form:**
 - A draft of the CC request form to submit with each EDMS change request has been circulated within PMEDR on November 27.
 - Besides feedback from PMEDR members, critical consultation and approval of PMs are required before its finalization and formal use.
- **At present,**
 - all conceptual issues have been cleared,
 - leaving implementation issues, including the revised form and interfacing with EDMS, and preparation of explanatory documents.
 - For instance, Appendices of EDR Planning Doc needs some touch ups.
 - ETA: the end of 2007 or early January, 2008.

Others

- **Consolidation of All Numerical Tables from RDR:**
 - To facilitate cross-examination of numerical statements and preparatory work toward full-fledged system design activities, all the Tables that appeared in RDR have been consolidated into an Excel book.
 - ETA: Ready for review by PMEDR.
- **In-depth discussions with TAGLs and TAG members.**
 - These interactions before/during EDMS implementation + usage will be essential. They have not yet taken place very systematically. They will have to.