

## INSTRUCTIONS FOR USING THE GROUP-SPECIFIC ENGINEERING DOCUMENT MANAGEMENT PLAN TEMPLATE (ICMS Content ID: [APS 1423690](#))

Use the template contained in ICMS document [APS 1423690](#) along with the instructions given below to create an engineering document management plan for your group. If you have any questions, please email [EDPHelp@aps.anl.gov](mailto:EDPHelp@aps.anl.gov).

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**Header and Footer information:** Delete the procedure number in the header and the numeric part of the ICMS content ID number in the footer; these will be assigned by the Policy and Procedure (P&P) Administrators and ICMS.

**Title:** The title appears on pages 1 and 3. Delete all the **GREEN** text in square brackets: “[Template.....]” on page 1; and replace the **RED** words “Group-specific” with the name of your group **on both pages 1 and 3**. For example, the RF Group title would be: RF Group Engineering Document Management Plan.

**Changes made in this revision:** Original version has “N/A (new revision)” as a bullet. Subsequent revisions should have a bulleted list of revisions made in the latest version.

**Prepared by:** “Author name, division acronym/group acronym” of each author.

**Reviewed by:** and **Approved by:** In addition to the author(s) listed above, the “Reviewed by” thread for group-specific policies must include 1) the Group Leader, 2) the group’s Division QAR, and 3) the group’s Associate Division Director(s). The “Approved by” thread contains only the group’s Division Director (for AES and ASD) or the group’s Deputy DD (for XSD). Whenever possible, use acronyms for divisions and groups rather than names, as shown in the template.

**Table of Contents:** This will be updated by the P&P Administrators.

- 1 Introduction:** The **RED** text in square brackets in the second sentence should be replaced with the group’s name.
- 1.1 Related Documents:** The four documents listed should stay in the procedure. Add other related documents, as required, including the ICMS content ID or other hyperlinks.
- 2 Repository Use and Revision Tracking for Engineering Documents:** Table 1 is included in this procedure *for reference only and should not be modified*. The **GREEN** text in square brackets in the paragraphs directly above and below Table 1 are for instructional purposes when preparing the procedure and should be deleted from the final version. In the paragraph above Table 2, replace the text **[insert NAME]** with the group’s name and, in the final version, delete the last two sentences of that paragraph (in **GREEN**, for instructional purposes only).

Table 2 must be modified to make it group-specific, i.e. provide guidance on how a group manages their engineering documents. The left column of Table 2 should list the types of documents generated by the group in its routine operation. (ALL text in **BLUE** are example categories and should be edited or deleted to represent your group’s actual need). The rest of the table gives guidance on which workflow and repository should be used for each type of document. The DEFAULT criterion is applied to any document not covered by the listed categories.

An additional column directs when the APS Design and Drafting Drawing Standard must be utilized (see Related Documents section, above).

Additional guidance to the group for workflow/repository use (that did not fit the table) may be listed below the table under “Additional Guidance.” If none is needed, remove that heading.

- 3 *Group-shared File Systems and Revision Control Systems (RCS):*** Delete the text in **GREEN**, and, if applicable, replace the **BLUE** text with the information requested. Otherwise, delete all the text in this section and enter “Not applicable.”
- 4 *Document/Drawing Requirements:*** Delete the text in **GREEN**, and, if the group wants to specify certain requirements for the drawings to provide consistency within the group and with other groups, edit the **BLUE** text in the table, as necessary, and add or delete rows as needed. Otherwise, delete the existing text and table and enter “Not applicable.”
- 5 *Software Tools:*** If the group wants to standardize on certain software applications for certain engineering drawing requirements, describe them in this table by replacing the **BLUE** text, as needed, and remove extraneous rows. Otherwise, delete the existing text and table and enter “Not applicable.”
- 6 *Alias Project Naming Convention (if any):*** If the group has one or more project naming conventions that it wants to continue to use as aliases to the Engineering Document Portal (EDP) Collection #, describe them here. Replace **BLUE** text with applicable information; otherwise, delete the existing text and enter “Not applicable.”
- 7 *Alias Drawing Naming/Numbering Convention (if any):*** If the group has a drawing naming convention that it wants to continue to use, replace the **BLUE** text with that information in this section. Otherwise, delete the existing text and enter “Not applicable.”
- 8 *Group-specific EDP Collection Browse Categories:*** Delete the text in **GREEN**. Group-specific tags have been implemented by some groups in the EDP—the RF group is a good example. In the EDP “Staging” area, if you select the ASD/RF group, GroupMenu1 will appear with Machine as its title and LINAC | PAR | Booster | SR | SPX as items. If you select LINAC, then GroupMenu2 will appear with LINAC Sector as its title and L1 | L2 | L3 | L4 | L5 | L6 as items. Selecting SR will give a different GroupMenu2.

The main points of these menus are:

- 1) they are group-specific,
- 2) cascaded menus (GroupMenu2, GroupMenus3) may be different for each item from the previous menu, and
- 3) they can be edited for a group by individuals that have “Group Admin” privileges assigned to them.

Replace the **BLUE** text with your group-specific EDP collection browse categories, following the format of the examples provided. Otherwise, delete the existing text and enter “Not applicable.”

- 9 *Feedback and Improvement:*** Leave as is.