

User Manual

IDM Manual

This Manual describes the features and use of the IDM (ITER Document Management system) Manual. Please use only the latest approved version.

Approval Process			
	<i>Name</i>	<i>Action</i>	<i>Affiliation</i>
<i>Signatory</i>	Campbell J.	25-Mar-2011:signed	IO/DG/ADM/DGA/DOC
<i>Co-signatories</i>			
<i>Reviewers</i>	Carayon F. Patel V. Shute M.	25-Mar-2011:recommended 25-Mar-2011:recommended 01-Apr-2011:recommended	IO/DG/ADM/DFI/IT IO/DG/ADM/DFI/IT IO/DG/DIP/CIE/TI/SECM
<i>Approver</i>	Parravicini D.	04-Apr-2011:approved	IO/DG/ADM/DGA/DOC
Document Security: level 1 (IO unclassified) RO: Capuano Carlo			
<i>Read Access</i>	LG: Integration Approach Panel Additional Read Access, LG: 2009 Integration Approach Review Panel Members, LG: 2009 Integration Approach Review WRITE access, GG: MAC Writers, GG: MAC Members and Experts, GG: STAC Members , GG: Council Preparatory Working Group (CPWG), LG: [CCS] CCS-All, LG: [CCS] CCS-SectionLeaders, LG: [CCS] CCS-Doc Control, LG: [CCS] F4E, LG: ITER Documentation Write Access, GG: IO DDGs (and Senior Advisors), GG: IO Division Heads, GG: IO DG, DDGs, GG: DA Heads, Co-ordinators and Management, AD: ITER, AD: Only-staff, AD: External Collaborators, AD: Section - Document Control - EXT, AD: Section - Document Control, project administrator, RO, LG: ICP Team & Collaborators		

<i>Change Log</i>			
Version	Latest Status	Date	Description of Change
v5.12	Approved	25 Mar 2011	The following changes have been made to this version: • 7.1 Further modifications to highlight changes in uploading a document involving Document Type; • 9.22 Clarification of the availability of HTML format of a document.
v5.11	Approved	14 Feb 2011	The following changes have been made in this version: • 7.1 Modifications to text to highlight changes in uploading a document involving Document Type; • 9.12 Clarification of the feature, Folder Notifications; see also sections 9.10 and 9.11; • Corrections based on reviewers' comments of previous version.
v5.10	Approved	10 Jan 2011	The following changes have been made in this version: • 7.1 Uploading a document file and setting its metadata (selecting Document Type as the first step) • 9.5 Changing Document Type • 9.24 Modification to "Generated From" • 9.28 Next Expected Version Date
v5.9	Approved	13 Dec 2010	The following change has been made in this version: • 5.1.1 Correction of formatting error in text
v5.8	Signed	10 Dec 2010	The following changes have been made to this version: 5 Select coverpage template has been removed from folder setup as templates may now be related to the the document type 5.2.5 Folder ROs can set subscribers to a folder who will automatically receive email notification of additions and modifications within the folder 7.1 When uploading documents the mandatory fields may now be configured according to document type rather than the same configuration for all uploads 8.8 The role of the IDM project administrator included
v5.7	Approved	08 Nov 2010	The following changes have been made in this version: • 7.3 Pasting into Text fields (new item in Manual only); • 9.8 Send Mail; • 11.1 Giving Permissions to Groups
v5.6	Signed	28 Oct 2010	The following changes have been made in this version: • 5.2.2 Security note: project administrator; • 9.10, 9.11 Document notifications set on document types and folders; • 11.1 Changes to the set security page. Following reviewers' comments on the previous versions of this Manual, text and /or screen shots have been modified in the following sections: • 3 ICP Home Page; • 5.1.1 Main Folders (yellow); • 6.1 Creation of Hyperlinks; • 7.1 Uploading a document file and setting its metadata; • 8 Stakeholders and their Actions; • 9.1 Status of Documents; • 9.5 Changing Stakeholders; • 9.25 Modifying Change Description of New Version; • 10.1 Simple Search 10.2 Advanced Search.
v5.5	Approved	19 Aug 2010	In this version all page borders have been removed. Please also note the changes made for version 5.4: • 7.1 Uploading a document: selecting from a pre-determined list searching or by opening a tree structure; • 9.21 Documents can be linked via a new 'generated from' property when they are related but one does not supersede the other; • 9.25 Documents under configuration control do not need SECM approval for the 'Approve' action. Justification must be given to SECM for the creation of requests; • 10.2 Changes to the Advanced Search interface; Note: screen shots have been updated throughout the Manual.
v5.4	In Work	18 Aug 2010	Changes have been made to the following sections: • 7.1 Uploading a document: selecting from a pre-determined list searching or by opening a tree structure; • 9.21 Documents can be linked via a new 'generated from' property when they are related but one does not supersede the other; • 9.25 Documents under configuration control do not need SECM approval for the 'Approve' action. Justification must be given to SECM for the creation of requests; • 10.2 Changes to the Advanced Search interface; Note: screen shots have been updated throughout the Manual.

v5.3	Approved	04 Jun 2010	One change only, 8.5: Clarification of reviewer selection
v5.2	Approved	30 May 2010	There are 13 changes throughout this version of the IDM Manual. The itemised changes are listed on the first page of the document, Forward: What's changed since the last IDM update.
v5.1	Approved	15 Mar 2010	• 8.0 Document stakeholders – Communicator icons added • 8.6 Disapprove – mandatory comment required
v5.0	Approved	15 Feb 2010	9.23 Restricted Documents (new feature) 7.1 The field “Abstract or description of a document” becomes mandatory 9.7, 9.20 Only the approver can make obsolete or supersede an approved document 8.5, 8.6 Permissions checked before setting reviewers and approver of a document 9.8 New button captions for “Send Mail”
v4.1	Approved	07 Dec 2009	Correction of one typing error Document cover page converted to Forward, listing the release changes
v4.0	Signed	04 Dec 2009	In addition to all layouts changed to reflect new look / feel to IDM, 7.1 Layout of Add New Document is modified with metadata changes such as Customized Field, Contractual Information, OBS etc 8.1 List of approvers changed to line management (previously folder ROs) 8.5 Delegation of Reviewer added 9.22 Modify the Change Description of New Version
v3.20	Approved	22 Sep 2009	In this version the following sections have been added or modified: 5.2.4 IDM document type (new feature) 7.1 New document – added PBS property in screenshot 8.7 RO has project administrator rights locally for own folders (new feature) 9.1 Icon showing an obsolete document that has been superseded by another (new feature) 9.14 Project administrators can change review before, approve before dates (new feature) 9.20 Superseded by link screenshot changed, note added 9.22 Change version description 12.5 Delete version conditions added 13.4 Permission panel image changed, now if ITER and External Collaborator are selected, other group will not be shown (new feature)
v3.19	Approved	02 Jul 2009	In this version the following sections have been added or modified: 8.6 - Approver required to add comment if approval is without complete review 9.17 - Document version change log with cover page, obsolete watermark added 9.19 - A logo to see document in html instead of a link 9.20 - Superseded by link 9.21 - Clone metadata 10.1.1 Phrase Search 10.3 Include Full Text Search
v3.18	Approved	04 Jun 2009	
v3.17	Signed	29 May 2009	
v3.16	Approved	16 Apr 2009	
v3.15	Approved	01 Apr 2009	
v3.14	Approved	05 Mar 2009	
v3.13	Signed	13 Feb 2009	
v3.12	Approved	19 Jan 2009	
v3.11	Approved	20 Nov 2008	
v3.10	Signed	13 Nov 2008	
v3.9	Signed	10 Nov 2008	
v3.8	Approved	01 Oct 2008	
v3.7	Approved	30 Jul 2008	
v3.6	Approved	28 Jul 2008	
v3.5	In Work	24 Jun 2008	
v3.4	Approved	08 Apr 2008	
v3.3	Approved	03 Apr 2008	
v3.2	Approved	17 Jan 2008	

v3.1	Signed	16 Jan 2008	
v3.0	Approved	07 Jan 2008	
v2.3	Approved	29 Aug 2007	
v2.2	Signed	30 Jul 2007	
v1.12	Signed	30 Jul 2007	
v2.1	Signed	09 Jul 2007	
v2.0	Signed	18 Jun 2007	
v1.11	Signed	05 Jun 2007	
v1.10	Approved	18 Jul 2005	
v1.9	Approved	20 May 2005	
v1.8	Approved	18 Apr 2005	
v1.7	Approved	24 Jan 2005	
v1.6	In Work	17 Jan 2005	
v1.5	In Work	14 Jan 2005	
v1.4	Approved	08 Nov 2004	
v1.3	Approved	07 Oct 2004	
v1.2	In Work	06 Oct 2004	
v1.1	In Work	05 Oct 2004	
v1.0	In Work	04 Oct 2004	

Forward

What's changed since the last approved IDM Manual?

Version 5.12

- 7.1 Further modifications to highlight changes in uploading a document involving *Document Type*
- 9.22 Clarification of the availability of HTML format of a document

Contents

1	<i>About this Manual</i>	5
2	<i>Logging in</i>	6
3	<i>ICP Home Page</i>	7
4	<i>Workplace Overview</i>	8
5	<i>Folders</i>	9
5.1	Navigation of the folder structure	9
5.1.1	Main folders (yellow)	9
5.1.2	Training (grey)	10
5.1.3	Recycle Bin	10
5.1.4	Applications Menu	10
5.2	Creation of new Folders	10
5.2.1	Setting the title and other standard fields for folders	10
5.2.2	Setting the security rights for folders	11
5.2.3	Restricting folder access	12
5.2.4	Restricting document type and default document type	13
5.2.5	Request subscribers	14
6	<i>Hyperlinks</i>	15
6.1	Creation of Hyperlinks	15
7	<i>Upload a Document</i>	16
7.1	Uploading a document file and setting its metadata	16
7.2	Add Attachment	18
7.3	Pasting into Text Fields	19
8	<i>Stakeholders and their Actions</i>	20
8.1	Author	20
8.2	Signatory	21
8.3	Co-authors and co-signatories	21
8.4	Contributors	22
8.5	Reviewers	22
8.6	Approver	24
8.7	Responsible Officer (RO)	25
8.8	Project Administrator	25
9	<i>Working with Documents</i>	26

9.1	Status of Documents	26
9.1.1	In work	26
9.1.2	Signed	26
9.1.1	Disapproved	27
9.1.1	Approved.....	27
9.2	Versions	27
9.2.1	Current version.....	27
9.2.2	Draft version	27
9.2.3	Obsolete version.....	27
9.3	Uploading a new version	28
9.4	Add Comment.....	30
9.5	Changing Document Type	31
9.6	Changing Stakeholders	31
9.7	Changing Metadata	32
9.8	Undo and Obsolete a Version	32
9.9	Send Mail.....	32
9.10	Subscribe	33
9.11	Document Type Notifications	33
9.12	Folder Notifications	34
9.12.1	Activating Folder Notifications	34
9.13	Show Path.....	35
9.14	View History	35
9.15	Export to Word.....	35
9.16	Add to Favorite	35
9.17	Scheduling of Workflow	35
9.18	Report on the Approval Process	37
9.19	Delayed Action Report.....	39
9.20	Cover Page Generation on Document Version	40
9.20.1	On Demand	41
9.20.2	System generated	44
9.21	Private for Stakeholder	44
9.22	View HTML format of document	45
9.23	Metadata links: Superseded By.....	45
9.24	Metadata Links: Generated From	46
9.25	Clone Metadata.....	47
9.26	Modifying Change Description of New Version	48

9.27	Restricted Documents	49
9.28	Next Expected Version Date	49
9.29	Documents under Configuration Control	50
9.29.1	New Version Requests	51
10	<i>Search</i>	52
10.1	Simple Search	52
10.1.1	Phrase Search	52
10.2	Advanced Search	54
10.3	Full Text Search	55
11	<i>Security Settings</i>	56
11.1	Giving Permissions to Groups	56
11.2	Local groups	58
11.3	Trusted Person	59
11.3.1	Trust-giver	59
11.3.2	Trust-receiver	59
12	<i>Move, Link, Convert and Delete</i>	60
12.1	Cut-and-paste for documents and folders	60
12.2	Create Shortcut for documents	60
12.3	Creating a shortcut to a folder	61
12.4	To convert a shortcut/document	61
12.5	Delete	61
12.6	Copy Folder Structure	62
13	<i>Miscellaneous</i>	63
13.1	Viewing your profile, and other users' profiles	63
13.2	Preferences	64
13.3	To Do	65
13.4	Permission Panel	65
13.5	Mass Download Utility	66
13.6	IDM Quick Navigation	68
13.7	What's New	69
13.8	Personal Notes	69
13.9	View Action Log	71
13.10	Security Report	72

1 About this Manual

This user manual serves as an introduction to the main features, and to the most commonly encountered document management tasks, of the ITER Document Management (IDM) system.

This manual is organised under the following main section headings:

Workplace Overview explains the most commonly used functions, and introduces basic document management concepts. ***New users should start here.***

Stakeholders and their Actions describes the roles of the various types of IDM user.

Upload a Document takes the user through the first steps for uploading a new file to IDM.

Working with Documents guides the user through the subsequent stages of the document management lifecycle: how to browse for new versions of a document, how to view old versions, and how to associate housekeeping information, or metadata, to a document.

Move, Link, Convert and Delete shows how to move folders and documents within the IDM system, how to create links to documents and folders in another area of IDM, and how and when to delete a document or folder.

Search describes the search functions that are provided by IDM, noting the options for full text search and advanced search.

Miscellaneous covers a number of IDM functions and features, including how to maintain personal contact information and user preferences.

Throughout this manual, hyperlinks (either within this manual or to other documents) are depicted by blue text, and can be clicked on by the user (control + left-click, when reading this document in Word).

Users may access IDM via any standard web browser. IDM was tested on Microsoft Internet Explorer and Mozilla.

2 Logging in

To log in to IDM, type the IDM server address, <https://user.iter.org/idm> in your web browser. Enter your username and password details in the dialog box, as shown in the following illustration, and click on the *Log On* button.



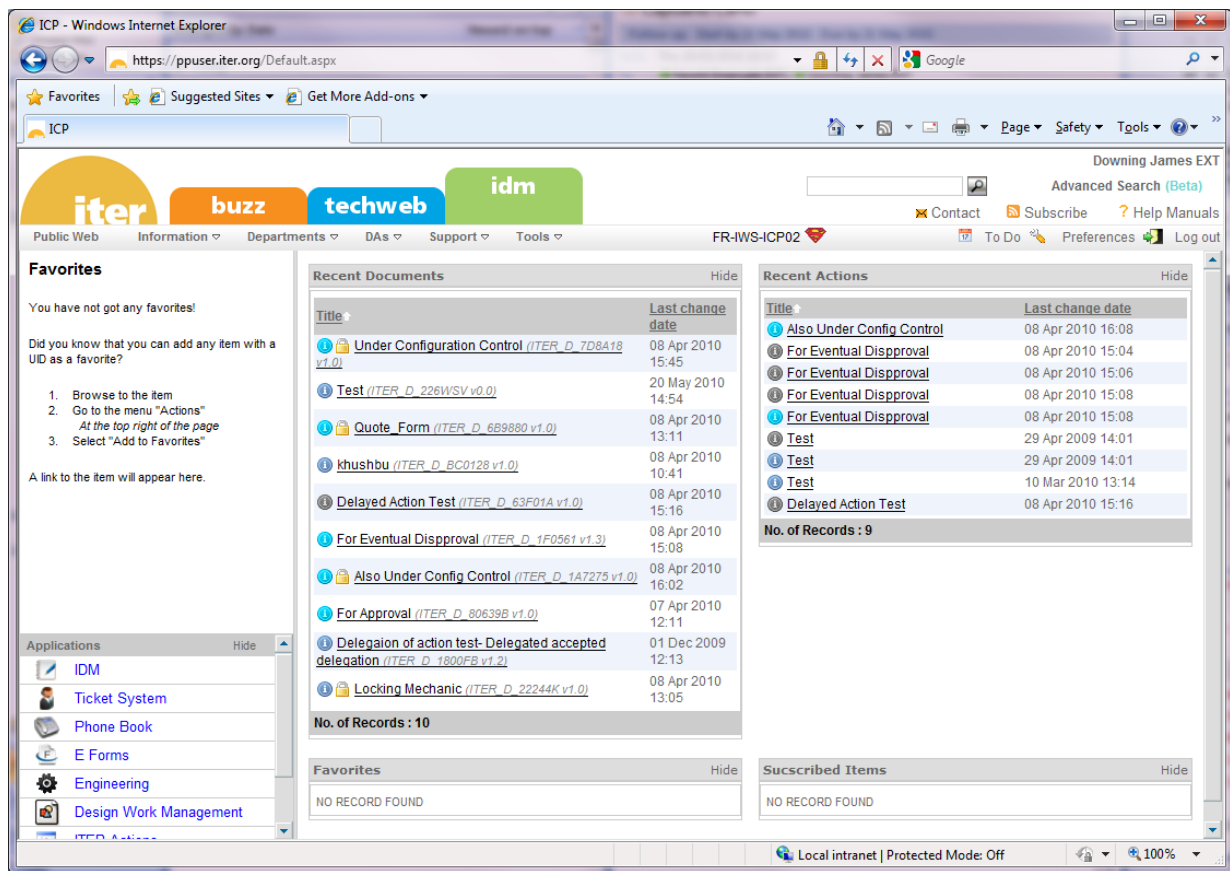
The illustration shows a login dialog box with a white background and a blue border. At the top left is the ITER logo, which consists of a yellow semi-circle above the word "iter" in white lowercase letters. To the right of the logo is the text "the way to new energy" in yellow. Below this, in smaller yellow text, are the words "china eu india japan korea russia usa". The dialog box contains two input fields: "User name:" followed by a text box, and "Password:" followed by a text box. To the right of the password box is a "Log On" button. Below the input fields, there is a link "Visit the [Self Admin](#) site to change your profile." and another link "[Forgotten your password?](#)".

If a user wishes to change his/her password, the mechanism that is described in the section [13.1 Viewing your profile, and other users' profiles](#) can be used.

3 ICP Home Page

After logging in, IDM either displays the 'My Area' page, as shown in the following illustration, or goes direct to the IDM Root page, as shown in the following section.

The following illustration of the ICP Home Page shows that it is composed of three frames: the Top Frame, the Navigation Frame down the left side (showing your top favourites), including the Applications on the lower left side (showing icons for the various applications), and the main Display Frame to the right. The display frame lists recently uploaded documents, actions (e.g. approval) that you have recently performed, your favorites and the list of items that you subscribe to. More information about these features is given in subsequent sections.



To move from *My Area* to IDM, click on the green tab:

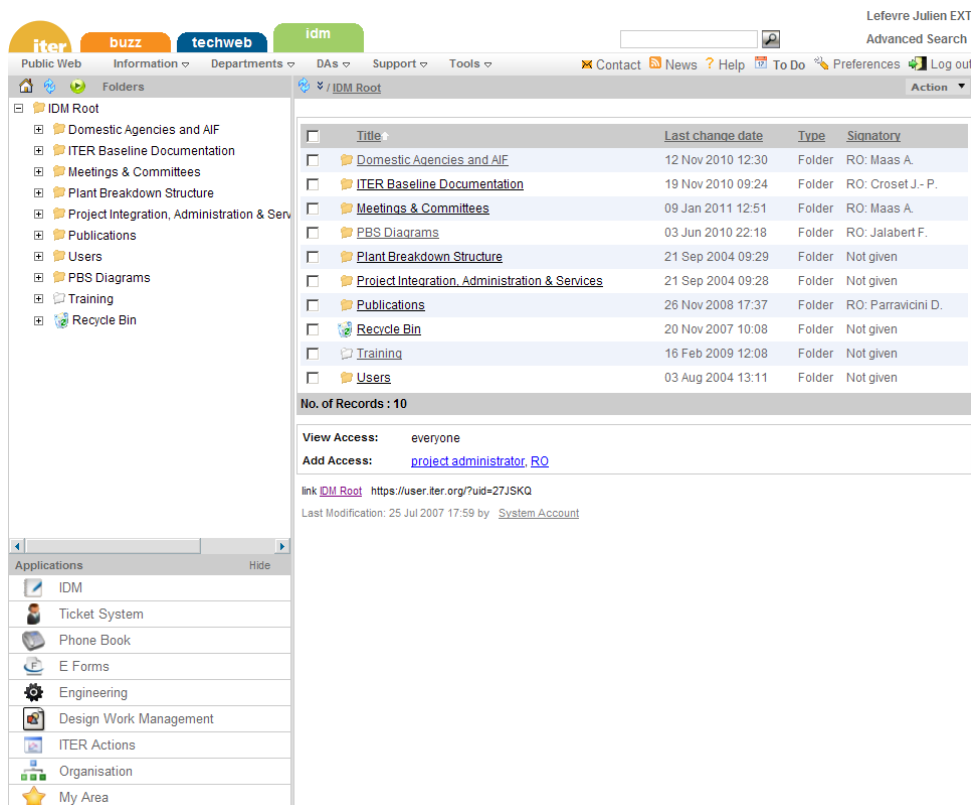


To move from IDM to *My Area*, click on *My area*, the last item under Applications in the lower part of the Navigation Frame:



4 Workplace Overview

The following illustration of the IDM Root page shows that it is composed of three frames: the Top Frame, the Navigation Frame on the left, which includes the Applications area on the lower left side (showing icons for the various applications), and the main Display Frame to the right.



The Top Frame contains the text box for the search engine, for finding files, folders (and so on) in IDM. It also displays the user profile (the user's name), and a link that leads to the online help feature (leading to the on-line version of this user manual). Note that many links and buttons in IDM display 'tool tips' when the mouse hovers over them. These 'tool tips' contain additional explanations about the functionality of the links and buttons in question.

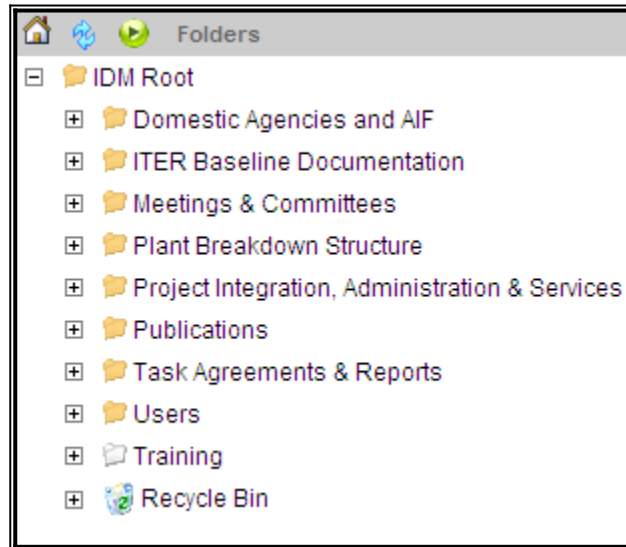
The Navigation Frame consists of two areas: the upper frame is labelled "Folders", and the lower is labelled "Applications". The Folders area is similar in appearance and operation to the navigation frame in Microsoft Explorer. Clicking on a document folder displays the folder's contents in the main Display Frame. Clicking on the + icon expands the view of the folder (showing its contents). Clicking on the – icon collapses the folder view. The Applications area shows the *Navigation Menu* for the various applications.

The Display Frame shows the content that is related to the folder, application or search that the user has just selected. It presents document information such as: the status of the document, title, the type of document, size, author and the date of the last modification. Any listed document can be downloaded by clicking on the link that includes the unique identifier (UID) ie 6 character "number", also called the IDM number(1A2B3C). To do other work with the document, click on the  icon and proceed as described in *Working with Documents*.

5 Folders

5.1 Navigation of the folder structure

At its root, IDM has the following folder structure:



Users can navigate by clicking on folders (either in the Navigation Frame, or in the Display Frame).

For further information on how to upload a document, see the section on [Upload a Document](#).

The first few top level layers of the folders (except the Users and Training folders) are pre-defined by the project management. Lower level folders are managed by a responsible officer (RO), who is in charge of setting the access rights to the folders and subfolders. These rights are then inherited by any subfolders that they contain, unless access is explicitly set otherwise.

5.1.1 Main folders (yellow)

Folders, and their ROs, are determined according to the project's organizational structure.

ROs can delegate authority, and define new responsible officers for each of the subfolders that are in their domains. Note that the original (parent folder) RO can always read and write in all folders and subfolders of his/her area, even when the RO role has been delegated to other people in the subfolders.



ROs can delete any documents from their areas, though this will not completely delete those documents from the system; documents always remain retrievable via the search function. (An exception to this rule is that documents in the training folder do not appear in search results and are truly deleted after three months).

Note: A cross on a folder indicates that it is empty.

The *Users* folder contains several subfolders, organised alphabetically according to the users' login IDs. Within a personal subfolder, each individual user manages the subfolders and documents, and sets the read/write access rights. A document uploaded into a user folder cannot have an approver.

If a user folder has not yet been created for a given user, the user can request its creation in [Preferences](#).

5.1.2 Training (grey)

The training folder is grey in colour, and is designed to allow users to practice their IDM skills. Within this folder, users have read and write access, can create new folders, and can assign read and write access to other users.

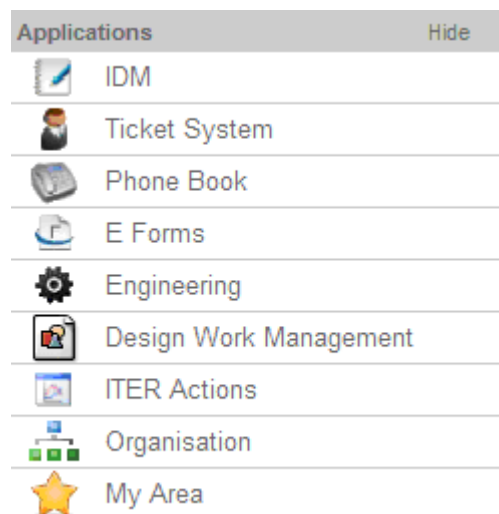
The items in this folder are not shown in search results and are deleted by the system after a period of three months.

5.1.3 Recycle Bin

This folder contains the documents that have been deleted by users. If a user wants to view the deleted document then he/she can view it in this folder, which is sorted according to the year and month of the date of creation.

5.1.4 Applications Menu

The Applications menu allows for easy navigation to a different ICP application.



5.2 Creation of new Folders

5.2.1 Setting the title and other standard fields for folders

/ IDM Root / Training						Action ▾	Add ▾	View ▾
☐ Title	Last change date ▾	Type	Signatory	Issue Date	Size	Add Document		
☐ bartels	24 Nov 2009 08:19	Folder	RO: Bartels H.- W.			Add Folder		
☐ oberhob	24 Nov 2009 08:18	Folder	Not given			Add Hyperlink		
☐ tavlor	24 Nov 2009 08:16	Folder	Not given			Add Note		

To create new folder (within a folder to which the user has appropriate access rights) place the mouse over *Add*, and then click on *Add Folder*. A form, requesting the title of the new folder, will appear, as shown in the following illustration. As the RO in the parent folder, the user may select a new responsible officer for the sub-folder. Fill in the applicable information and click on the *Save Folder* button. The new folder (presently empty) will be opened in the Display Frame.

Add a Folder in Training	
Properties	
Uid	66A162 66A162
Title *	
Description	Source Font Size
Responsible Officer	
Wbs	
Folder Keywords	<--Select-->
Allow original file name download If checked allows the users to download the files of this folder with their original names	☐
Restrict Shortcut * If disallow shortcut is selected then no shortcuts will be allowed of this folder or the documents contained in it, and all the existing document and folder shortcuts will be deleted	same as parent folder
Request Subscribers	 Start typing a person's name to select them.
Document Type	
Allowed Document Types Only selected document types will be available for documents inside this folder	
Default Document Type Default document types will be available at document creation	

5.2.2 Setting the security rights for folders

ROs can define which read and write privileges in the folder are to be assigned to the various user groups by placing the mouse over *Edit*, and then clicking on *Set Security*.

To change the security settings, toggle the applicable radio button, and click on *Save* for your changes to take effect.

A user with appropriate access rights can also change the RO of the folder, by selecting the RO and then clicking on the *Set RO* button.

RO: Alice Weber

LDAP Group					Hide
Group	RO	Add	View	None	
AD: DA		☐	☐	☒	
AD: EFDA		☐	☐	☒	
AD: External Collaborators		☐	☐	☒	
AD: ITER		☒	☐	☐	
AD: only-staff		☐	☐	☒	

Local Group					Hide
Group	RO	Add	View	None	
LG: Local Group 1	Weber A.	☐	☐	☒	

Global Group					Hide
Group	RO	Add	View	None	
GG: TAC		☐	☐	☒	

Responsible Officer: [Alice Weber](#)

Clicking on *Reset Folder Security to Match Parent Folder* resets the current folder security according to the parent folder security.

Clicking on *Reset Subfolders Security to Match Current Folder* resets all the subfolders' security settings as per current folder's security.

Note: For all folders, view access is automatically granted to the security groups, *RO* and the *project administrator*. The *project administrator* security group allows access to those staff who have been specifically nominated in the role of Project Manager for IDM.

5.2.3 Restricting folder access

RO: Alice Weber

Action ▾ Add ▾ Edit ▾ View ▾

[Edit Folder](#)

[Set Security](#)

[Set Wbs](#)

ROs can change the data and certain settings for the current folder by placing the mouse over *Edit*, and then clicking on *Edit Folder*. (Alternatively, these data and settings can be made at the time that the folder is first created, as described in [Setting the title and other standard fields for folders](#)).

Allow original file name download If checked allows the users to download the files of this folder with their original names	☐
Restrict Shortcut * If disallow shortcut is selected then no shortcuts will be allowed of this folder or the documents contained in it, and all the existing document and folder shortcuts will be deleted	same as parent folder <--Select--> same as parent folder allow shortcut disallow shortcut
Request Subscribers	Start typing a person's nam

The RO can define whether shortcuts of the documents and folders inside the current folder are allowed.

If the user selects *disallow shortcut* for the *Restrict Shortcut* field, no shortcuts will be allowed to be made from the items in this folder, and in its subfolders; the *Copy Shortcut* button will simply not be made visible. Moreover, any existing document and folder shortcuts will be deleted, including those in any of the subfolders.

If the user selects *allow shortcut* for the *Restrict Shortcut* field, shortcuts will be allowed to be made from the items in this folder, and in its subfolders.

If the user selects *same as parent folder* for the *Restrict Shortcut* field, the setting for the current folder will be made the same as that for its parent folder.

A restricted folder (one in which the *disallow shortcut* option has been selected) will show the Create Shortcut Access comment as shown in the following illustration.

Search Filters Hide

Reset Filters

Status: All Signatory: All

☐	Title	Last change date	Issue Date	Type	Size	Status	Signatory
☐	1st doc (ITER_D_CBA50C.v1.0)	25 Nov 2009 12:11	27 May 2009	docx	223.33 KB	In Work	Weber A.

No. of Records : 1

Delete **Cut**

Create Shortcut Access : Creation of shortcuts of this folder and its content is restricted

View Access:

Add Access: [ITER, project administrator, RO](#)

link [Folder 2](#) http://localhost:1698/WP/?uid=6D557D

Last Modification: 25 Nov 2009 12:11 by [Alice Weber](#)

5.2.4 Restricting document type and default document type

RO: Alice Weber Action Add Edit View

Edit Folder

Search Filters

Set Security ide

Set Wbs

ROs can change the data and certain settings for the current folder by placing the mouse over *Edit*, and then clicking on *Edit Folder*. (Alternatively, these data and settings can be made at the time that the folder is first created, as described in [Setting the title and other standard fields for folders](#)).

The RO should define whether to allow only certain document types inside the current folder.

Allowed Document Types Only selected document types will be available for documents inside this folder	[Q]-QA Deviation, [Q]-QA Manufacturing Inspection Plan, [Q]-QA Non-Conformity, [Q]-QA Quality Description, [Q]-QA Quality Plan, [Q]-QA Release Note, [Q]-Working Instruction
--	--

As shown in the following illustration, only a restricted list of document types will be available for selection.

Document Type *	<--Select-->
Roles	<--Select-->
Author/Signatory * <i>author/signatory of the document</i>	[Q]-QA Deviation
Author *	[Q]-QA Manufacturing Inspection Plan
Co-author	[Q]-QA Non-Conformity
Reviewer	[Q]-QA Quality Description
	[Q]-QA Quality Plan
	[Q]-QA Release Note
	[Q]-Working Instruction

A default document type can be selected for the folder, so that the user does not have to select the explicit document type for each document of that folder. (The default document type can only be one of the allowed document types).

Default Document Type <i>Default document types will be available at document creation</i>	[Q]-QA Manufacturing Inspection Plan
--	--

The default document type will then be selected by default for each new document that is created inside that folder, as shown in the following illustration.

Document Type *	[Q]-QA Manufacturing Inspection Plan
------------------------	--

The file name extension of file can be pre-defined, by the Document Control Centre (CIE/ TI/DOC) based on the document types, so that only valid files will be uploaded for the given document type.

5.2.5 **Request subscribers**

The Responsible Officer of a folder can specify those users who need to be informed when the content of a folder changes, eg the addition of documents to a folder, or modifications to documents already uploaded.

Request Subscribers is used to make a list of those users who need to be informed, and an email notification will be sent to each person listed. Note; this subscription is independent of the email setting that may be selected by a user in *Preferences*.

Request Subscribers	 <i>Start typing a person's name to select them.</i>
----------------------------	---

6 Hyperlinks

6.1 Creation of Hyperlinks

A hyperlink to a relevant site, or document that is not part of IDM, can be included in an IDM folder. Hyperlinks can be used in order to have a complete set of information or documentation which may include documents (or intranet/ internet sites) not contained within IDM. Hyperlinks can also be deleted if they are no longer applicable.

Note: Hyperlinks should not be used to create links of documents stored within IDM. For that *Shortcuts* should be used, see sections 12.2 and 12.3.

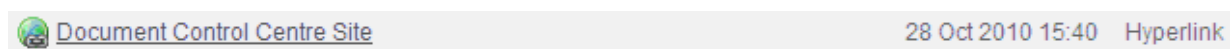
To create a new hyperlink, within a folder to which the user has appropriate access rights, place the mouse over *Add*, and then click on *Add Hyperlink*.



Fill in the required fields, and click on the *Save Hyperlink* button.

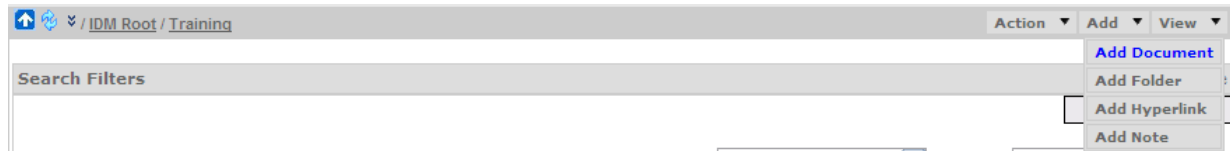
 A screenshot of the "Add a Hyperlink in taylorn" dialog box. The title bar says "Add a Hyperlink in taylorn" with "Save Hyperlink" and "Cancel" buttons. The main area is titled "properties" and contains two required fields: "Title *" and "Uri *". The "Uri *" field has the text "http://" entered. A note below the Uri field says "Uri should start with http:// or https://". At the bottom, there is a red asterisk note "* indicates required field" and "Save Hyperlink" and "Cancel" buttons.

The hyperlink is displayed as:

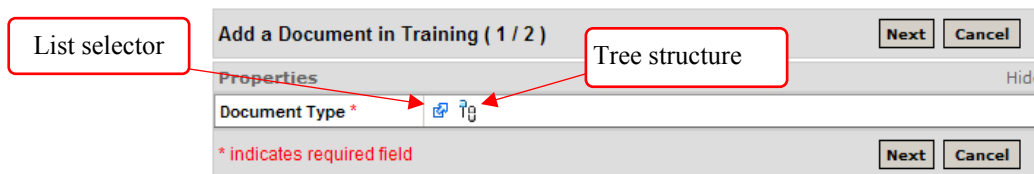


7 Upload a Document

7.1 Uploading a document file and setting its metadata



To upload a document, place the mouse over *Add*, and then click on *Add Document*. The *Add Document* wizard starts.



You are first asked to select a *Document Type*. This selection will be used to display fields, specific and mandatory, applicable to the document type.

If the folder is configured with a default document type this first step is omitted and the default document type is used.

If the folder is configured with a list of allowed document types, only the *List selector* will be displayed.

This feature allows document types to be used for various business purposes within ITER.

Please ensure that the correct applicable document type is selected. Click the *Next* button.

Fill in all applicable information (the metadata), browse for the appropriate file on your computer, and click either the *Save Document* or the *Save + Load Next* button.

Add a Document in lefevrj

- Please select the file or enter title.
- Abstract or description of the document is required

Properties	
Uid	43NJKG ITER_D_43NJKG
Title	
Abstract or description of the document *	Source Font Size
Upload File	upload primary file
Document Type *	BI-PCR Interface Sheet for Acceptance

Note:

The red asterisks indicate that certain information is mandatory. The mandatory fields for any given document type are managed by a document type's responsible officer. For example, in the screen shot above, the *Title* while initially not appearing as mandatory becomes mandatory with the selection of the document type. The alert to fill in the *Title* is shown only once you try to save for the first time.

Document categories and types can be found in the IDM folder, IDM Configuration: <https://user.iter.org/?uid=47KERQ>.

When saving, you can click on the *Save Document* button to save the new document on IDM, or on the *Save + Load Next* button to save the new document and to go on to upload another document starting with selecting the *Document Type* (1/2).

The menu (to add a new document) will only be offered, though, if the user has the necessary privileges to upload a document to the given folder.

After an upload has been successfully completed, the document link will appear in the selected folder.

Note: Several properties: Document Type, WBS (Work Breakdown Structure) and PBS (Plant Breakdown Structure) can be selected either by searching  or by opening a tree structure  containing the complete list available elements of the property.

Add a Document in Training		Save Document	Save + Load Next	Cancel
Properties Hide				
Uid	3NRT7C ITER_D_3NRT7C			
Title				
Abstract or description of the document *	Source Font Size B I U abc x' x'			
Upload File	Browse... Delete			
Document Type *				

Roles		Hide
Author/Signatory *	author	
Author *	Alice Weber  	
Co-author		Start typing a person's name to select them.
Reviewer		Start typing a person's name to select them.
Approver	<--Select-->	
Contributors	Source Font Size B I U abc x' x'	

Additional Information		Hide
Issue Date *	05 Aug 2010	
Comment Description <i>Author's Comment</i>	Source Font Size B I U abc x₂ x² Ω ab	
Keywords <i>additional keywords for search</i>		
External Number <i>any external (ie other than IDM) reference number</i>		
Private For Stakeholder?	☐	
Contractual Information <i>Enter Purchase Request Number / Purchase Order number / Task Agreement Number / Task Order Number</i>		
Generated From		

Configuration		Hide
Auto Generate Cover Page?	☐	
Wbs		
PBS		
All registered IDM users can add comments	☐	
Sign Document	☐	
Send Mail	☐	
Folder Keywords		
Is this document restricted? <i>To view restricted document, user must be member of IO Restricted group</i>	☐	
Next expected version date <i>This date indicates when a new version of this document shall be produced</i>		

* indicates required field

Save Document Save + Load Next Cancel

7.2 Add Attachment

By clicking on the *Add Attachment* button, the user can attach related documents, or the same document in alternative formats, to the current version of the document.

To upload an attachment, click on the  icon to open the metadata page for the document version. From here, place the mouse over *Add*, and then click on *Add Attachment*.

IDM Root / Training / Folder 2		Action	Add	Edit	View
ITER_D_CBA50C v1.0 - 1st doc		Add Attachment Add Comment Add Note New Version In Work Signed Approved			
Properties		Hide	WorkFI		Hide
Document Title	1st doc (CBA50C v1.0) (current)				
Current Version	 v1.0				
Description of the document	test desc				

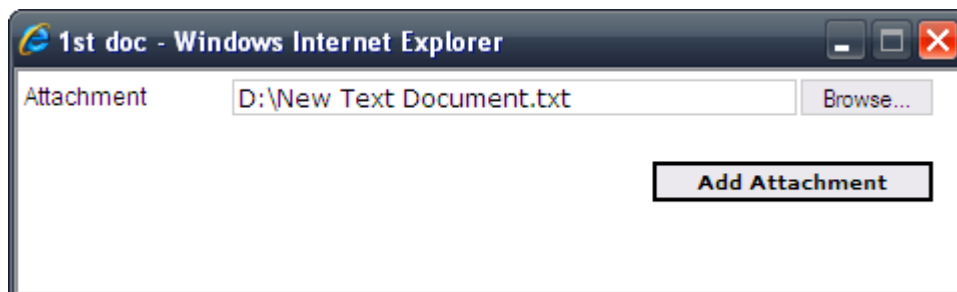
Alternatively, click on the *Add Attachment* button (towards the bottom of the document's metadata page as shown in the following illustration).



Attachment Hide

Add Attachment

Browse for the appropriate document, filling in all applicable information fields and click on the *Add Attachment* button to upload the new attachment file.



1st doc - Windows Internet Explorer

Attachment

Add Attachment

The link to the attached file will be shown in the metadata of the given version the document. Repeat the whole process if there is more than one file to be attached.

To delete an attachment, click on the  icon.



Attachment Hide

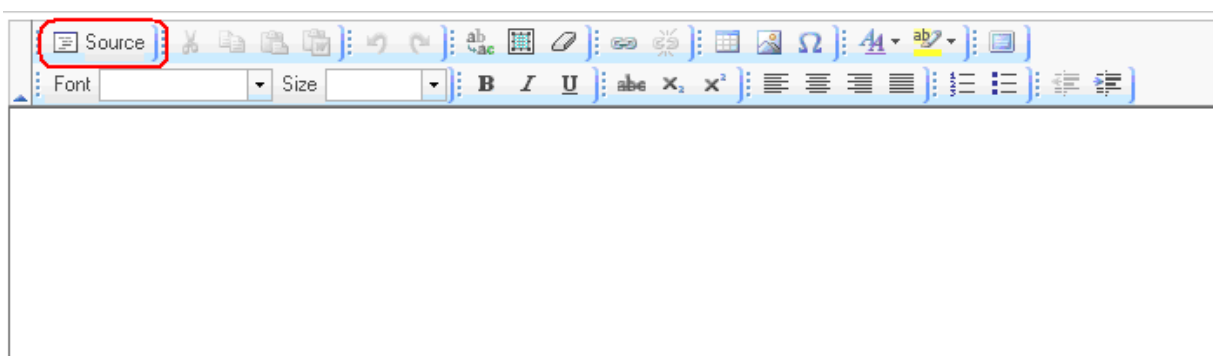
Add Attachment

Title

 [New Text Document.txt](#)

7.3 Pasting into Text Fields

IDM has a number of text fields, eg uploading a document, version change description, comment, Send email, see example:



Source

Font Size

B *I* U                        

Text may be typed into the field or copy/paste can be used. To ensure that the text is in a suitable format (eg correct size of font, spacing) after copying the required text but **before** pasting, click on *Source*, paste the text in the field, and then click *Source* a second time. This will remove all font formats, spacing etc and allow you to reformat the text according to your needs, eg numbering etc.

8 Stakeholders and their Actions

Generally, the status of a document version can be:

In work (this is the initial status after upload into IDM)

Signed

Approved

In the workflow process of IDM, various stakeholders are assigned to perform the various actions, as described in the following sections. (All stakeholders (that is, authors/signatories, co-authors/co-signatories, reviewers, approvers) must be registered IDM users).

All stakeholders for any given document have a Communicator icon (and link) prefixing their names in the metadata of that document. Any email sent by clicking on this icon will be recorded in Outlook, not in IDM history.

The current stakeholders of the document (those of its most recent version) are listed on the metadata page, in the section entitled “Document Roles”. These are the stakeholders who can sign, review and approve new and draft versions.

Document Roles	
Author/Signatory	 Campbell Judith
Reviewer	 Carayon Frederic  Patel Vijay  Shute Malcolm EXT
Approver	 Parravicini Daniele
Contributors <i>e.g. external contributors who do not have IDM access</i>	Nihdi Mehta, Semaphore Software, IN

The stakeholders who worked on a version, along with their actions, are displayed in the section entitled “Version Signatures”. These are the stakeholders who performed the actions on the particular version of the document, and may not be the same as the current stakeholders.

Version Signatures	
Signatory	 Campbell Judith ✓ has signed: 19 Aug 2010 17:51
Reviewer(s)	 Carayon Frederic ✓ has recommended: 23 Aug 2010 16:59  Patel Vijay ✓ has recommended: 30 Aug 2010 10:55  Shute Malcolm EXT has reviewed: 01 Sep 2010 15:40
Approver	 Parravicini Daniele ✓ has approved: 01 Sep 2010 16:19

8.1 Author

An author can upload new versions of his existing documents. He/she can only upload the initial version of a document if he/she has the necessary access rights in the chosen folder.

Provided that no action has been performed on the document version (such as being signed), the author can still undo the upload, and completely delete the document version from IDM. After an action has been performed, though, the possibility to delete the file from IDM is no longer available.

An author can add or remove:

Co-authors

Contributors

Reviewers

Approver.

When a document is initially created, only a restricted list of potential approvers is offered, typically from the author's line management. A fuller list is offered later, after the document has been initially created, by going to its metadata page, and clicking on *Change Approver* from the *Edit* menu.

When the Author has Signed (by clicking on the *Sign* button, or by placing the mouse over *Action*, and then clicking on *Sign*) the current version of his/her document, the date and time are shown on the metadata page as shown here:

Author	 Alice Weber ✓ has signed: 25 Nov 2009 09:34
--------	---

As a general rule, an *Author* (or *Co-author*, *Signatory*, *Co-signatories*) of a document **should not** be a *Reviewer* or *Approver* of that document. If, exceptionally, an *Author* or *Co-author*, is required to also be a *Reviewer*, the document should be uploaded and saved without the *Author* or *Co-Author* being selected as a *Reviewer*. Only then can the list of reviewers be changed to include the *Author* or *Co-Author* by clicking on *Edit*, *Change Reviewer* and selecting the author's or co-author's name.

8.2 Signatory

An IDM user can also upload a document on behalf of its real author (who might or might not be a registered IDM user).

Such a person is a signatory, and can add or remove:

Co-signatories

Contributors (in which the name of the real author is usually included)

Reviewers

Approver.

When a document is initially created, only a restricted list of potential approvers is offered, typically from the signatory's line management. A fuller list is offered later, after the document has been initially created, by going to its metadata page, and clicking on *Change Approver* from the *Edit* menu.

When the Signatory has Signed (by clicking on the *Sign* button, or by placing the mouse over *Action*, and then clicking on *Sign*) the current version of the document, the date and time are shown on the metadata page as shown here (but note, that the signatory might be listed as being the author at this stage):

Author	 Alice Weber ✓ has signed: 25 Nov 2009 09:34
--------	---

As signatory is not the author of the document, they may be set as "Reviewer" or "Approver".

8.3 Co-authors and co-signatories

A co-author can add or remove:

Author

Co-authors

Contributors

Reviewers

Approver.

A co-signatory can add or remove:

- Signatory
- Co-signatories
- Contributors
- Reviewers
- Approver.

When a document is initially created, only a restricted list of potential approvers is offered, typically from the user's line management. A complete list of IDM users is offered later, after the document has been initially created, by going to its metadata page, and clicking on *Change Approver* from the *Edit* menu.

All of a document's co-authors (plus the Author), or all of its co-signatories (plus the Signatory) must sign the document electronically before IDM will change its status to *Signed*. When the co-author has signed (by clicking on the *Sign* button, or by placing the mouse over *Action*, and then clicking on *Sign*) the current version of the document, the date and time are shown on the metadata page as shown here:

Co-author	 Alice Weber ✓ has signed: 25 Nov 2009 09:34
-----------	---

8.4 Contributors

Contributors have no influence on the workflow (and might not even be registered IDM users). Contributors are listed only to acknowledge their contributions. Contributors do not sign.

8.5 Reviewers

Reviewers can give comments (when the status of the document version is *Signed*). As a general rule, a *Reviewer* of a document **should not** be an *Author*, *Co-author* or *Approver* of that document. If, exceptionally, an *Author* or *Co-author* is required to also be a *Reviewer*, the document should be uploaded and saved without the *Author* or *Co-Author* being selected as a *Reviewer*. Only then can the list of reviewers be changed to include the *Author* or *Co-Author* by clicking on *Edit*, *Change Reviewer* and selecting the author's or co-author's name.

Reviewers can click on *Recommend* to indicate that they recommend the current version of the document for Approval. The date and time are shown on the metadata page as shown here:

Reviewer	 Alice Weber ✓ has recommended: 25 Nov 2009 10:02
----------	--

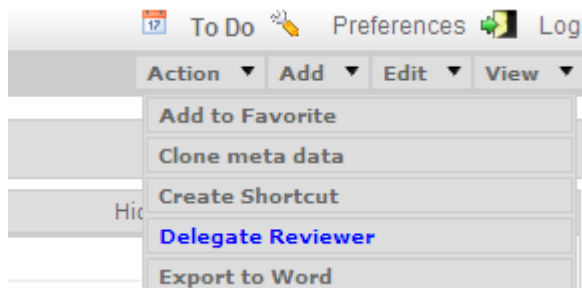
Reviewers can click on *Review with comment* to indicate that they do not want to recommend for approval, or that they want to consider recommending it later. In this case, a dialog box will appear in which the *Reviewer* has to put his/her comments (typically giving his/her reasons for not being prepared to recommend the document version for the present), and subsequently the document will be removed from the reviewer's To Do list. The date and time are shown on the metadata page as shown here:

Reviewer	 Alice Weber ■ has reviewed: 25 Nov 2009 13:53
----------	---

A Tooltip containing the reviewer's comment can be displayed, by hovering the mouse over the reviewer's signature, as shown here:

Reviewer	 Alice Weber has reviewed: 25 Nov 2009 09:35
Additional Information	Comment This document is not written properly.
Type	txt

A *Reviewer* can also delegate his/her review task to another IDM user. A *Reviewer* can use the *Delegate Reviewer* action, which is available in *Action* menu.



The *Reviewer* uses the selection screen to select the person to whom he/she delegates his/her responsibility to review the document, with the option of sending an e-mail to inform the delegate. The stakeholder information (roles) displays the delegated person, as shown in figure below:

Version Signatures		Hide
Author	 Alice Weber ✓ has signed: 02 Dec 2009 15:02	
Reviewer	 Alice Weber has delegated to  John Smith	
Approver	 Alice Weber	

Once the *Reviewer* delegates the task, the *To Do* list of the delegated person shows the task to review the document, and the original reviewer's *To Do* list no longer displays the task.

Current Status
Signed
Change Status
Recommend
Review with comment
Refuse Delegation

The stakeholder information (roles) will show the action performed by the delegated reviewer in case of *Recommend/ Review with comment* as shown in figure below:

Version Signatures		Hide
Author	 Alice Weber ✓ has signed: 02 Dec 2009 15:02	
Reviewer	 John Smith ✓ has recommended: 02 Dec 2009 15:55 on behalf of  Alice Weber	
Approver	 Alice Weber	

The delegated *Reviewer* then has the *Review/Recommend* action for the document along with option to refuse the delegation. The delegation can be refused by clicking the *Refuse Delegation* button. The original reviewer's *To Do* list will once again display the task if the delegation is refused. Consecutively, the task will be removed from the delegated reviewer's *To Do* list. In the same way that the stakeholder information is displayed in the metadata, the review report and, if selected, the cover page generated for the document will show the delegated reviewers' actions.

Note: When selecting reviewers the system will automatically check that those reviewers have access to the document.

8.6 Approver

When the status of the document version is *Signed*, the approver can *Approve* the current version of the document, or *Disapprove* it.

An *Approver* can change the approver (delegation of authority).

An *Approver* can change the author (and any co-authors).

An *Approver* can add and remove reviewers.

An *Approver* can make comments (when the status of the document is *Signed*).

Only the *Approver* is allowed to make obsolete an approved document.

Only the *Approver* and IDM manager can supersede an approved document.

An *Approver* should **not normally** be an *Author/Signatory*, a *Co-author/Co-signatory* or a *Reviewer*.

After *Disapprove* has been selected, the stakeholder information will be indicated on the metadata page as shown here:

Approver	 Alice Weber ✗ has disapproved: 25 Nov 2009 10:03
----------	--

After *Approve* has been selected, the stakeholder information will be indicated on the metadata page as shown here:

Approver	 Alice Weber ✓ has approved: 25 Nov 2009 10:05
----------	---

An *Approver* can approve a document without it having been recommended by all reviewers, but he/she must then add a comment explaining why the approval action was taken without waiting for the complete review process. A dialog box will appear in which the approver writes the explanation.

When an *Approver* disapproves a document it is mandatory for the approver to add a comment explaining why the document has been disapproved.

A tooltip containing the approver's (or disapproved) comment is displayed, by hovering the mouse over the approver's signature in the metadata, as shown here:

Approver	 Alice Weber ✓ has approved: 25 Nov 2009 10:05
Additional Information	Comment I am approving this document because it is really required to complete the process
Type	txt

When selecting the approver the system will automatically check that that *Approver* has access to the document.

8.7 Responsible Officer (RO)

A Responsible Officer (of a folder) can:

Define the access rights (read/write) in that folder (and its subfolders).

Define new ROs in subfolders (delegation of responsibility).

Delete documents (links) in the folder of his/her responsibility.

Cut and paste documents to other folders where he/she is also the RO.

Change the approver (delegation of authority).

Change the author, and any co-authors.

Add and remove reviewers.

Make only a non-approved version obsolete.

Make a draft version as a current version.

Convert a document shortcut to a document.

Supersede a non-approved document by other one or more documents.

8.8 Project Administrator

The individuals who are part of the project administrator group are able to access all folders and documents within IDM. All actions by the project administrators are recorded locally in the history, ie *View History*. The roles and rights of the project administrator within all folders in IDM emulate the roles and rights of folder ROs.

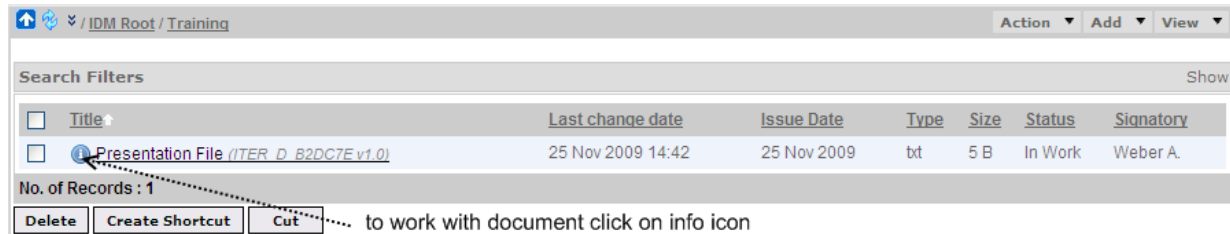
This access is indicated in each folder:

View Access: [AD: ITER](#), [AD: External Collaborators](#)

Add Access: [project administrator](#), [RO](#)

9 Working with Documents

There is, of course, a correlation between the workflow and the stakeholders, and a consequent effect on uploading new versions of a document.



9.1 Status of Documents

The present status of a document is either: *In work*, *Signed* or *Approved*. This is indicated by the colour of the metadata information icon. There are also other icons which give other information. The metadata information icons are:

Colour Code	Status
grey	Obsolete
blue	In work or Signed
cyan	Approved
red	Disapproved
green	Draft Version
pink	Superseded document
pointer	Shortcut link to a document stored elsewhere on IDM

9.1.1 *In work*

A document version has the *In work* status if a new file (or new version) has been uploaded, and has not yet been signed (by the author and/or all co-authors). It is indicated with a blue icon.

By ticking the *Send Mail* box, when uploading a new version of the document, an email notification can be sent to selected recipients (for example, the co-authors), thereby requesting their signatures. The draft of the email that IDM proposes contains the link to the version of the document.

9.1.2 *Signed*

A document version changes to the *Signed* status if it has been signed by the author and all of the co-authors (if any). It is indicated with a blue icon.

By ticking the *Send Mail* box, at the moment that the last of the author/co-authors signs a document version, an email notification can be sent to selected recipients (for example, to each of the reviewers). This can be used to request them to review, and/or to request the approver to approve the document version. The draft of the email that IDM proposes contains the link to the version of the document.

9.1.1 Disapproved

A document version has the *Disapproved* status if the approver has disapproved the document. It is indicated with a red  icon.

9.1.1 Approved

A document version has the *Approved* status if the approver has approved the document. It is indicated with a cyan  icon.

9.2 Versions

9.2.1 Current version

A new version becomes the current version if the status (*In work*, *Signed* or *Approved*) is equal to or higher than that of the previously current version. (*In work* is the lowest status, *Approved* is the highest).

9.2.2 Draft version

A new version becomes a draft version if the status is lower than that of the previously current version. Draft versions of a document are indicated with a green  icon.

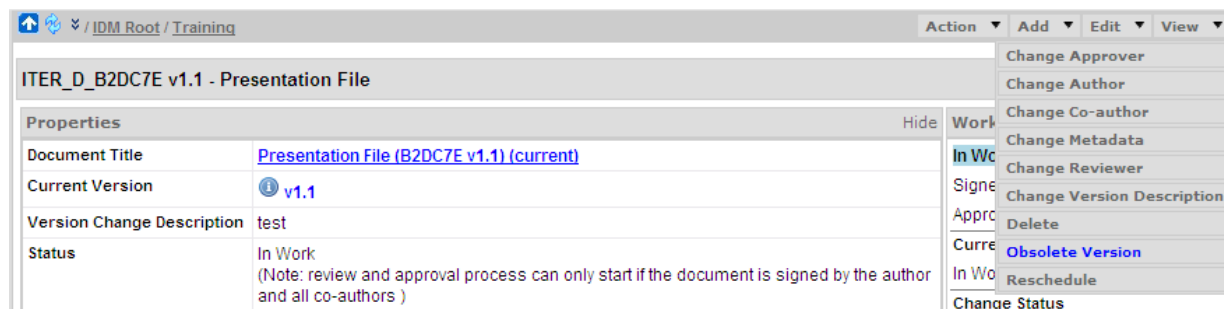
9.2.3 Obsolete version

A version becomes obsolete:

If it is superseded by a new current version.

If it is made obsolete by the author, co-author or approver. To make a version obsolete, go to the metadata of the document, and place the mouse over *Edit*, and then click on *Obsolete Version*. *Only the approver of an approved version can make that version obsolete.*

Obsolete versions of the document are indicated with a grey  icon.



The screenshot shows the 'IDM Root / Training' interface. The document title is 'ITER_D_B2DC7E v1.1 - Presentation File'. The 'Properties' table shows:

Properties		Hide
Document Title	Presentation File (B2DC7E v1.1) (current)	
Current Version	 v1.1	
Version Change Description	test	
Status	In Work (Note: review and approval process can only start if the document is signed by the author and all co-authors)	

An action menu is open, showing options: Change Approver, Change Author, Change Co-author, Change Metadata, Change Reviewer, Change Version Description, Delete, **Obsolete Version**, Reschedule, and Change Status.

Note: if a current version is made obsolete, the latest draft version (if there is one) automatically becomes the new current version, even if it does not supersede the obsolete version in terms of its status.

An attempt to access an obsolete version of the document will cause a new screen page to appear, as shown in the following illustration.

Warning: you are accessing an obsolete version Download here: For Eventual Disapproval (1F0561 v1.2) Current version:  v1.3	
Version Change Description Hide	
Guess what, this will be disapproved too!	
Version Signatures Hide	
Author	 Allen Charles EXT  has Sign: 08 Apr 2010 15:06
Approver	 Downing James EXT  has Disapproved: 08 Apr 2010 15:06
Comments Hide	
Still not good enough, Downing James EXT 08 Apr 2010 15:06	

The user can download the obsolete version of the document by clicking on the *Download Here* link. This is done as a means of getting the user to confirm that he/she really does want to download the obsolete version, and at the same time providing information about the current version.

Alternatively, the user can choose to access the current version of the document by clicking on the coloured  or  icon, or on the text that follows it.

This screen page also shows the Signature Information of all users who have performed actions on that version, and any comments, and attachments, that have been added prior to the document becoming obsolete.

9.3 Uploading a new version

To upload a new version, click on the  icon (any colour) of the document that is to be revised. Only an author, co-author, signatory or co-signatory of a document can upload a new version, via the metadata and variety of action buttons that are displayed on their screens. Position the mouse on *Add*, and then click on *New Version* from the menu, as depicted below.

 /  / IDM Root / Training		Action ▾ Add ▾ Edit ▾ View ▾
ITER_D_F2A71F v1.1 - Presentation File		
Properties Hide	WorkFI	Add Attachment Add Comment Add Note New Version
Document Title	Presentation File (F2A71F v1.1) (current)	In Work

To indicate the significance of the changes that have been performed on the new version, tick either *Minor* or *Major*. The decision will be reflected in the numbering of the version:

A minor change will result in incrementing the fractional part of the number (if the old version was 1.4, the new version would be 1.5).

A major change will result in incrementing the integer part of the number, and resetting the fractional part (if the old version was 1.4, the new version would be 2.0)

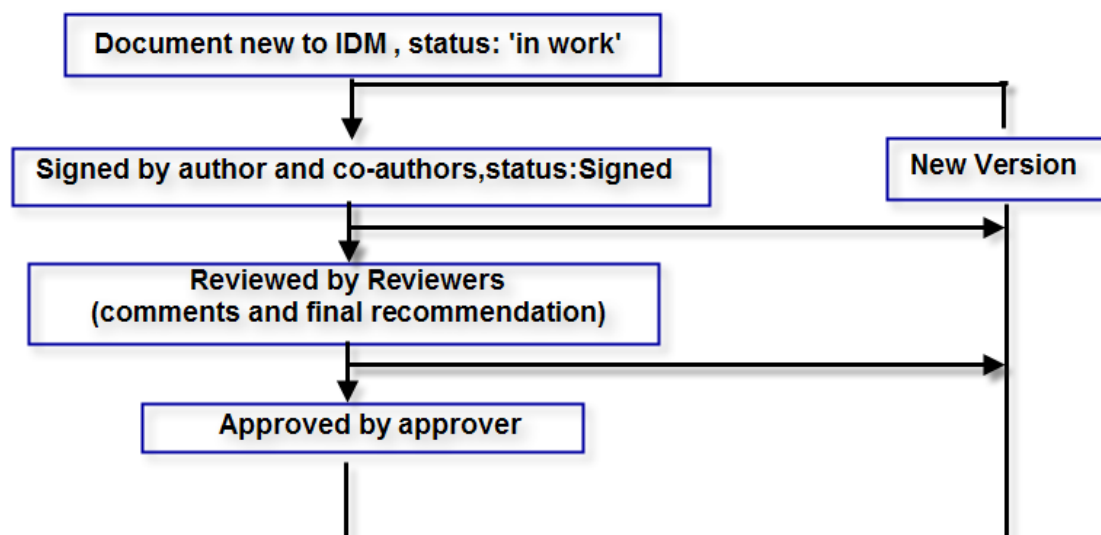
If the status of the new version is to be signed immediately, tick the checkbox labelled *Sign new version*.

Browse for the file on your computer. In the mandatory Change Description field, on uploading a new version of an existing document, indicate clearly and concisely the changes in the new version of the document compared to the previous version. **Note:** The Change Description can be modified only while the new version remains *In Work*, see section 9.25.

Click on the *Submit* button, when the fields have been completed, to upload the new version.

Upload New Version		Submit Cancel
ITER ID	ITER_D_F2A71F v1.1 (Presentation File)	
Upgrade Version	☒ minor v1.2 ☐ major v2.0	
Sign new version	☐	
File *	Browse... Delete	
Change description on new version *	Source Font Size B I U abc x₂ x² List Table Link Image Media Help Please explain the reason for a the new version, what comments had been addressed from the previous version	
Issue Date	25 Nov 2009 Calendar	
Send Mail	☐	
* indicates required fields		Submit Cancel

The following figure shows the workflow of documents and their versions.



One problem that users frequently encounter is that they know that a new version of a document has been uploaded to IDM, but they only seem to be able to find the old version. This usually happens because the new version is still only a Draft version (missing the signature of at least the author or one co-author). As a result, the old version continues to be the

Current version, and hence the one that IDM users find when they navigate to the document round the folder structure.

Normally, users are first made aware of the availability of a new version via an email that was sent out from IDM. Clicking on the link in that email takes the user directly to the metadata page of that version, even if it is still only a draft version.

Alternatively, it is still possible to navigate to a newer, draft version of a document. Having navigated to the current version, the user clicks on the icon to see its metadata page, and then scrolls to the bottom of this page. The icon for the newer, draft version can be seen at the bottom left of the metadata page.

9.4 Add Comment

To add comments, click on the *Add Comment* button on the document's metadata page (at the bottom). A pop up page for the comment will open. Type the comment in the large box. Comments can be added by stakeholders of the given document, or any IDM user if the author has selected *All registered IDM users can add comments* in the metadata change page.

If an attachment needs to be added at the same time, then *Browse* for the file. To save the comment, click on *Save Comment*.

Note: The *Save Comment* button will only appear once a comment has been typed or an attachment has been selected.

The comment is displayed on the metadata page of the document, as shown below.

The icon  allows an *Answer* to be added to the comment, as shown below, by the stakeholders (or by others, if allowed, as described in the first paragraph of this section).

Comments Hide

Add Comment

Comments

Alice Weber 25 Nov 2009 15:32

Answer :
answer typed here

Alice Weber 25 Nov 2009 15:34

9.5 Changing Document Type

Move your mouse over the *Edit* menu and select the *Change of Document Type*.

Add ▾ Edit ▾ View ▾

Change Approver

Change Author

Change Co-author

Change Document Type

Change Metadata

Change Reviewer

Obsolete Version

Select the *Document Type* and click the *Save* button.

↑ ↻ / IDM Root / Training

Edit Document Type Hide

Document Type * ID-Memorandum / Note

* indicates required field

Save **Cancel**

9.6 Changing Stakeholders

↑ ↻ / IDM Root / Training

ITER_D_F2A71F v1.1 - Presentation File

Properties		Hide
Document Title	Presentation File (F2A71F v1.1) (current)	
Current Version	v1.1	
Version Change Description	test	
Status	In Work (Note: review and approval process can only start if the document is signed by the author and all co-authors)	

Action ▾ Add ▾ Edit ▾ View ▾

Change Approver

Change Author

Change Co-author

Change Metadata

Change Reviewer

Change Version Description

Delegate Reviewer

Delete

Obsolete Version

Reschedule

To change any of the stakeholders of the document (assuming that you have the appropriate access rights to do so), position the mouse on *Edit*, and then click on the appropriate entry from the menu (such as *Change Author*, *Change Co-author*, *Change Reviewer* or *Change Approver*).

This can also be managed (assuming that you have the appropriate access rights to do so) within *Edit*, *Change Metadata*, see next section.

9.7 Changing Metadata

An author, co-author, signatory or co-signatory can change the metadata of a document. To change the metadata (such as its title or description) position the mouse on *Edit*, and then click on *Change Metadata* from the menu. The metadata change page will appear, on which the user can change the contents of fields as required. Click on *Save Document* when all of the required changes have been entered.

9.8 Undo and Obsolete a Version

To undo a document version, position the mouse on *Edit*, and then click on *Delete* from the menu. Only an author, co-author, signatory or co-signatory can undo a version.

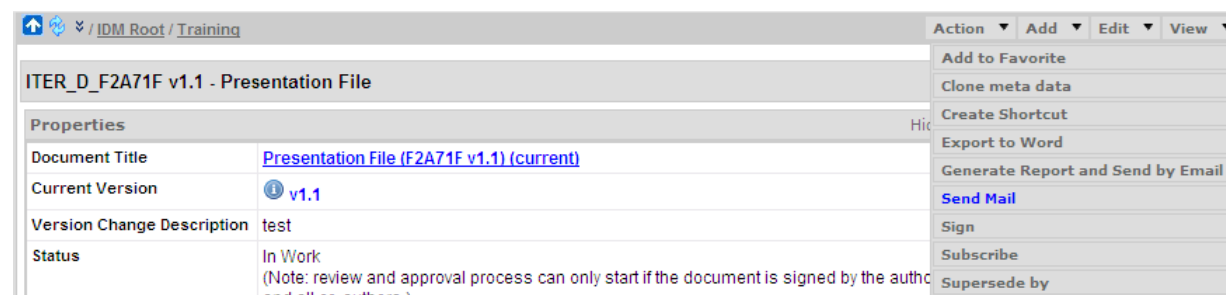
Undoing a version is only possible under the following conditions:

- No Action has been performed on the version (Sign, Recommend, Approve...)
- The version is not more than a week old
- Latest version only can be undone (meaning only the last uploaded version)
- No mail for this version has been sent
- No one other than the author, co-author, signatory or co-signatory has downloaded the file for viewing.

In order to make a document explicitly obsolete, position the mouse on *Edit*, and then click on *Obsolete Version* from the menu.

Note: only the approver of the approved version of a document is allowed to obsolete that version.

9.9 Send Mail



To send mail, position the mouse on *Action*, and then click on *Send Mail* from the menu. This will open the compose mail page. Here, the user can change the subject line and the body of the mail (by default, the latter contains a link to the document or folder).

Select the users, or groups, in the *Receivers* field. Extra recipients can be added to the To field, and the CC field. (Indeed, the To field should always be checked, that it does not still contain the list of recipients of the previous email that IDM sent out for this version of the document). Click on the *Send Mail* button when the message is ready to be sent.

/ [IDM Root](#) / [Design](#)

ITER_D_2293F4 v1.0 - test

Select Receivers

Receiver Type	☐	Receiver	Mail
author	☐	Portal A.	james.downing@iter.org

properties
Hide

To

Start typing a person's name to select them.

CC

Start typing a person's name to select them.

Group

Start typing a content's name to select them.

Subject *

IDM Document : test (ITER_D_2293F4)

Body *

Source

Font

Size

B

I

U

abc

x₂

x*

≡

≡

≡

≡

Title : test

Link : <https://ppuser.iter.org/?uid=2293F4&version=v1.0>

	Name	Action	Affiliation
Author	Portal A.		

Copy message to me

The system will CC the message to you.

☐

Send Email

Cancel Email

When changing stakeholders or *Uploading a new version* of the document, IDM offers the option to “Send mail”. This is a separate, though related, mechanism to the one described above, and merely entails checking the *Send mail* check box, and editing the pre-prepared email text that is offered by IDM. The user is also prompted to select the recipients for the email message, by checking the appropriate check-boxes.

9.10Subscribe

As described in the previous paragraph, stakeholders can be notified of changes to those documents that are relevant to them, conditional on the author, co-author or approver having decided to send out an email to them following each operation.

If users (with access) wish to be certain that they will be notified of all changes, not just those users chosen by the stakeholder making the change, the user can use the *Subscribe* feature.

To *Subscribe* to a document, position the mouse on *Action*, and then click on *Subscribe* from the menu, and then on *Yes*. A summary e-mail will be sent (daily or weekly according to the user's preference) containing a list of changes to their subscribed documents, ***that they have not already viewed since the changes***. The appropriate box *Content changes notification* in *Preferences* should also be adjusted to the individual's requirements for the frequency of emails received (daily or weekly).

9.11 Document Type Notifications

The IDM manager (currently IO/ ADM/ DOC Section Head) can set up a list of subscribers (users or groups) to changes in workflow or version on documents with a particular document type. The settings for these notifications are separate to your own subscriptions (see section

9.10 above). You cannot unsubscribe from document type notifications, but instead should contact the IDM manager.

9.12 Folder Notifications

The RO of a folder can subscribe up to ten people to receive notifications about documents in a given folder (when a new document or version is added or a document is approved). The subscribers are added when creating a new folder or by editing a folder, and setting the *Request Subscribers* property.

Once the subscribers have been added, they will be sent an e-mail informing them that they have been registered as subscribers to the documents inside the folder.

Note:

- Users will not receive any notification e-mails until they activate the folder, see 9.12.1.
- Users will receive notifications about changes to documents in that folder and sub-folders. Below is the list of events that are currently available to initiate notification:
 - Folder Document Creation;
 - Folder Document Version Creation;
 - Folder Document Version Approved.

9.12.1 Activating Folder Notifications

If you have been added as a subscriber for folder notifications, you must activate the subscription to start receiving notifications. To do this, on the IDM home page (*My Area*), underneath the list of your subscribed items, is a link for “Manage IDM Folder Subscription” (bottom right of the page).

Subscribed Items		Hide
Title	Last Change Date	
 UM 0007	29 Apr 2009 11:41	
 HR 0804	18 Feb 2010 14:06	
 ICP	12 Oct 2010 09:01	
 downini	18 Oct 2010 13:24	
Manage IDM Folder Subscription		

Follow this link, then you can activate or de-activate any of your folder subscriptions by checking the boxes and then pressing *Save Settings*:

Active	Title
☐	downini

Notifications are sent according to your subscription preferences (see Section 9.10).

9.13 Show Path

By positioning the mouse on *View*, and then clicking on *Show Path* from the menu, the full path of the current document or folder is given, along with the full paths of any shortcuts to the same document or folder.

9.14 View History

By positioning the mouse on *View*, and then clicking on *View History* from the menu, the history is given of all of the actions that have been performed on the document (within IDM). By default, the history is sorted in reverse chronological order. To sort it on one of the other fields, click on the header of that field (and click again to toggle between sorting in ascending or descending order).

9.15 Export to Word

By positioning the mouse on *Action*, and then clicking on *Export to word* from the menu, the contents of the document are exported to a word file.

9.16 Add to Favorite

Putting the mouse over *Action* and then clicking on *Add to Favorite* causes the item to be added to the user's list of Favorites. If the item is already in the user's list of Favorites, the option will be offered to *Remove from Favorite*, instead. Items in the list of Favorites are shown on the *Home page* for ease of reference.

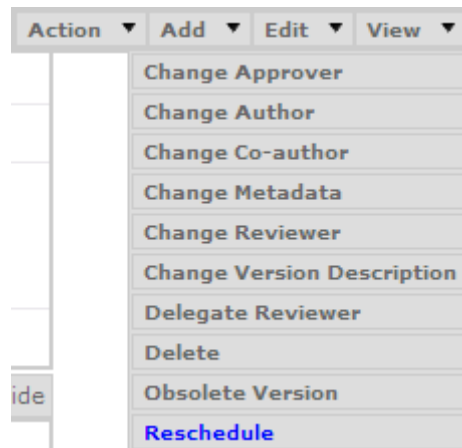
9.17 Scheduling of Workflow

The approval process has been automated, and a policy for the approval of documents has been implemented, so that notifications are sent about the status of document versions, including information on requested and performed actions by the staff involved in the workflow process.

When any document is uploaded, the author and co-authors are encouraged to sign it within 7 days. If they fail to do so, they are sent email reminders, once every week thereafter. The *Sign before* date is shown in the metadata, as depicted in the following image.

Schedule Workflow	
Sign Before	02 Dec 2009
If author/co-author has not signed before this date then he/she will be sent a notification email	

Authors and co-authors can choose to extend this *Sign before* date by choosing the *Reschedule* option, as shown below.



By clicking on *Reschedule*, an author or co-author can delay the *Sign before* date so that reminders will not be sent before this new date. A mandatory explanation must be given by the author or co-author when rescheduling.

Reschedule		Save	Cancel
Sign Before * <i>If author/co-author has not signed before this date then he/she will be sent a notification email</i>	02 Dec 2009 		
Source                              Font Size B I U abc x₂ x²              			
Comment * <i>e.g. "I am rescheduling because..."; "Rescheduling is necessary because..."</i>			
		Save	Cancel

After the author and all co-authors have signed, an email can be send to the reviewers to review and recommend the document version. The review process should be completed within 14 days following the last of the author/co-authors' signature(s). This date of *Review before* is shown in the metadata, as depicted in the following image.

Review Before <i>If reviewer has not reviewed before this date then he/she will be sent a notification email</i>	16 Dec 2009
--	-------------

Any reviewers who fail to review the document within 14 days are sent an email reminder, repeated weekly thereafter.

By positioning the mouse on *Edit*, and then clicking on *Reschedule* from the menu, a reviewer can delay the review date, and reminder emails will not be sent before the new date. A mandatory explanation must be given by the reviewer(s) when rescheduling.

Reschedule		Save	Cancel
Review Before * If reviewer has not reviewed before this date then he/she will be sent a notification email	09 Dec 2009 		
	Source                             Font Size                 		
Comment * e.g. "I am rescheduling because..."; *Rescheduling is necessary because...".	Source                             Font Size                 		
	Source                             Font Size                 		

After the author and all co-authors have signed, and all of the reviewers (if any) have recommended the document version, an email can be sent to the approver, directing him/her to approve the document within 14 days. The *Approve before* date is shown on the metadata page, as depicted below.

Approve Before <i>If approver has not approved before this date then he/she will be sent a notification email</i>	23 Dec 2009
---	-------------

If the approver does not approve the document within 14 days, an email reminder is sent, and then weekly after that.

By positioning the mouse on *Edit*, and then clicking on *Reschedule* from the menu, the approver can delay the approval date, and reminders will not be sent before the new date. A mandatory explanation must be given by the approver when rescheduling.

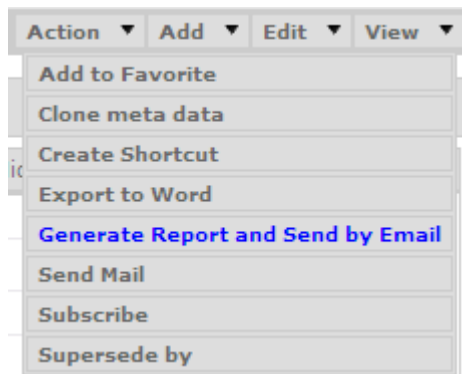
Reschedule	Save Cancel
Approve Before * <i>If approver has not approved before this date then he/she will be sent a notification email</i>	09 Dec 2009 
Comment * <i>e.g. "I am rescheduling because..."; *Rescheduling is necessary because..."</i>	Source                      Font Size B I U abc x₂ x² bulleted list numbered list link icon unlink icon font family font size bold italic underline text color background color font size Comment * e.g. "I am rescheduling because..."; *Rescheduling is necessary because..." Save Cancel

Only the project administrator can reset the sign before, review before and approve before dates, of any document, to a date earlier than the automatically set date.

9.18 Report on the Approval Process

A report can be generated to summarize the status of the approval process for a document version. Any stakeholder (the Author, Co-Authors, Reviewers or Approver) can generate this

report by positioning the mouse on *Action*, and then clicking on *Generate Report and Send by Email*, as depicted below:



The report provides the following information:

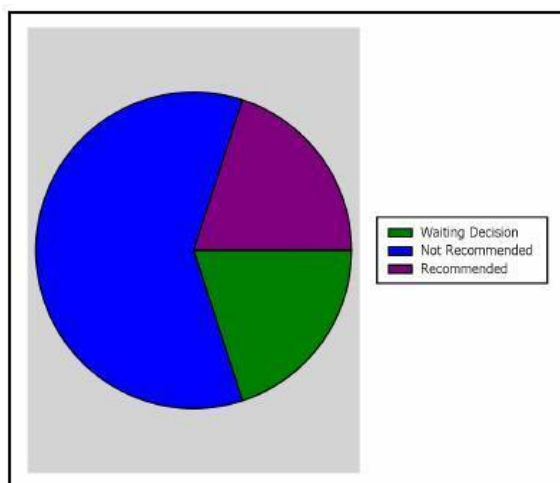
- UID (a unique identifier, also called the IDM number), current status, current version, and so on.
- Chart that displays review/recommend statistics.
- All comments that are associated with the version
- All users who have specific roles on the document version.

This generates the report, and takes the user to a mail page containing the link to the generated report. The user can then set various mail options, such as recipients, and subject. A few images of sample review reports are shown in the following illustrations.

ITER_D_XXXXXX v1.0 Approval Status

Document Title: Presentation Document

CURRENT VERSION: v1.0



This version of the document was **submitted** by the author on: 09 Mar 2009

The **final** status of the previous version of this document was: Signed

The document review is expected to be completed by: 23 Mar 2009

The review status is:

Recommended	1
Not Recommended	3
Waiting Decision	1

Here are the comments of the reviewers who did not recommend the document:

Here are the comments of the reviewers who did not recommend the document:

Name	Entered on Date	Comment
Alice Weber	10 Mar 2009	The document is not written properly.
John Smith	19 Mar 2009	Please format the document.
Bob Miller	18 Mar 2009	Please review the section 1.1 again.

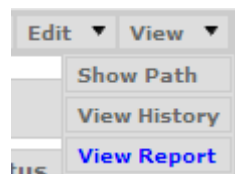
Here are other comments related to this version:

Name	Entered on Date	Comment
Alice Weber	09 Mar 2009	The document is nicely composed.

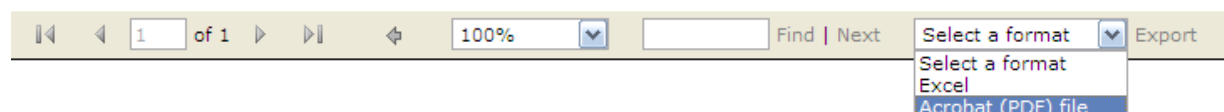
Here is the current list of persons involved with the current version of this document

Name	Role	Date
John Smith	author	has signed: 09 Mar 2009 15:12
Alice Weber	reviewer	
Bob Miller	reviewer	has reviewed: 19 Mar 2009 09:29

Instead of having the report sent by email, it is possible to view it on the screen by selecting *View Report* on the *View* menu, as indicated in the following image.



The report can be exported in MS Excel or PDF format. The export options are available at the top of the report, as shown below:



9.19 Delayed Action Report

This report is generated for all users who have pending actions (*Sign*, *Review*, *Recommend*, *Approve*). The report is generated weekly, and is sent to the corresponding person automatically by email. The report lists all pending tasks and also provides hyperlinks to the documents. A sample report is shown here:

Report of outstanding activities in IDM

This is a report of the outstanding actions you are expected to accomplish using the ITER Document Management System (IDM).

#	Item	Action	Due Date	Days overdue
1	ITER_D_XXXXXX v1.0 - Document Title	Sign	13 Mar 2009 	20
2	ITER_D_XXXXXX v1.0 - Document Title	Sign	13 Mar 2009 	20
3	ITER_D_XXXXXX v1.0 - Document Title	Sign	16 Mar 2009 	17
4	ITER_D_XXXXXX v1.0 - Document Title	Review	20 Mar 2009 	13
5	ITER_D_XXXXXX v1.0 - Document Title	Review	20 Mar 2009 	13
6	ITER_D_XXXXXX v1.0 - Document Title	Review	23 Mar 2009 	10

Click on the item hyperlink to get to the description (metadata) and complete the action, or click on the calendar  icon in order to reschedule this activity.

To know more on how to reschedule an activity, please consult the [IDM Manual](#)

Please note: this is an automated report generated directly by IDM (ITER Document Management System). Do not respond directly to this message. If you think that some of the items should not be in this list, please inform us by e-mail: doc@iter.org

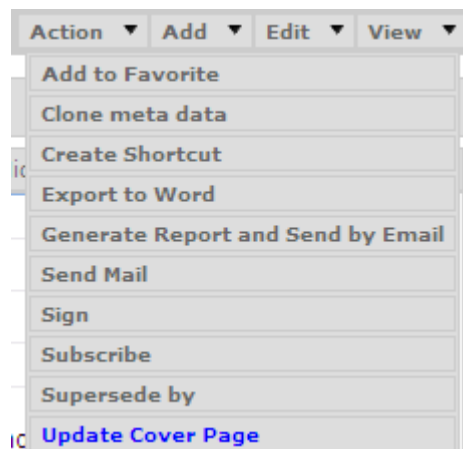
9.20 Cover Page Generation on Document Version

A cover page can be generated for *.rtf, *.doc, *.docx and *.pdf files, and is **mandatory for all baseline document types**.

The following illustration shows a section of the change metadata page that is displayed when editing the metadata of an existing document (by placing the mouse over *Edit*, and then clicking on *Change Metadata*), or else at the time that the document is first uploaded (by placing the mouse over *Add*, and then clicking on *Add Document*).

Configuration		Hide
Auto Generate Cover Page?	☐	
Wbs	 ?	
PBS	 ?	
All registered IDM users can add comments	☐	
Sign Document	☐	
Send Mail	☐	
Folder Keywords		
Is this document restricted? To view restricted document, user must be member of IO Restricted group	☐	

Authors or Signatories of the document can tick the *Auto Generate Cover Page?* check-box, and subsequently click on the *Save Document* button. This causes a new option, *Update cover page*, to be added to the *Action* menu, as shown in the following illustration.

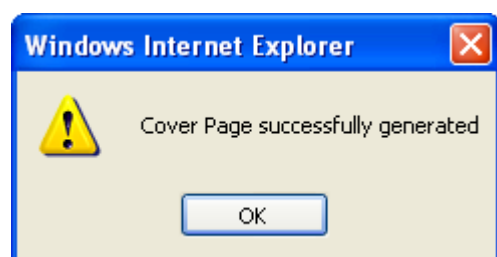


There are two ways to generate a cover page for the document:

1. On Demand (using the Update Cover Page menu item)
2. System generated

9.20.1 On Demand

By placing the mouse over Action, and then clicking on *Update Cover Page*, the process starts to attach the default cover page to the document. When the process is complete, the user receives the following message:



When the user next clicks on the document title, to view the pdf version of the document, a cover page will have been attached, as shown in the following example.

IDM DATE / VERSION / STATUS
25-Jun-2009 / 1.3 / CURRENT

EXTERNAL REFERENCE

COIL POWER SUPPLY CONTROL

[illegible]

<i>Approval Process</i>			
	<i>Name</i>	<i>Action</i>	<i>Affiliation</i>
<i>Author</i>	Fertal A.	29-Jun-2009:signed	
<i>Reviewers</i>	Alonso Casalo J. Ancher F. Amirov E. Basy N. Beloglazov S. Bernizolo R. Boccaccini L. Brana B. Braun T. Brunstone P. Cardoso-Gonzalez S. Mebis N. Fertal Y.	29-Jun-2009:reviewed 29-Jun-2009:recommended	CEP CEP IO/FDDG/CND/CITAT
<i>Approver</i>			
<i>Document Security: level 1(FO unclassified)</i>			
	<i>RO: Alice Weber</i>		
<i>Add Access</i>	EO, project administrator		
<i>Read Access</i>	everyone		

Generated on 30-Jun-2009

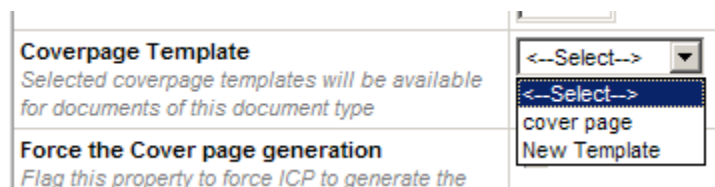
Page 42 of 72

Change Log			
Version	Latest Status	Date	Description of change
v1.2	In Work	25 Jun 2009	Please explain the reason for a the new version, what comments had been addressed from the previous version Please explain the reason for a the new version, what comments had been addressed from the previous version Please explain the reason for a the new version, what comments had been addressed from the previous version Please explain the reason for a the new version, what comments had been addressed from the previous version Please explain the reason for a the new version, what comments had been addressed from the previous version
v1.1	In Work	25 Jun 2009	Description of the document or its application Description of the document or its application Description of the document or its application Description of the document or its application Description of the document or its application Description of the document or its application Description of the document or its application Description of the document or its application Description of the document or its application Description of the document or its application Description of the document or its application Description of the document or its application Description of the document or its application Description of the document or its application Description of the document or its application
v1.0	Signed	25 Jun 2009	

After the cover page has been generated, the RO, Author and Project Administrator will also see the *Remove cover page* option on the *Action* menu, as shown in the following illustration.

The option of a cover page can be removed by unchecking the *Auto Generate Cover Page?* check-box in *Edit, Change Metadata*.

End user cannot change the document template for the cover page. This is done by [Document Type Category](#) Responsible Officer. It is done by selecting one from the list, as shown in the following illustration. If none is selected, the default cover page will be used.



Once a document has been created with an automatic cover page, the document is viewed/downloaded as a pdf. The original document type (ie *.rtf, *.doc, *.docx and *.pdf files) is available only to the stakeholders of the document, to be used for a new version, or for making comments during review or disapproval process.

Obsolete Water Mark

Once such a document has been made obsolete, a water mark “Obsolete” will be displayed on all the pages of the document, as shown below.

EXTERNAL REFERENCE

COIL POWER SUPPLY CONTROL

[illegible]

Approval Process			
	Name	Action	Affiliation
Author	Fertal A.	25-Jun-2009:signed	
Reviewers			
Approver			

Document Security: level 1(FO unclassified)
RO: Alice Weber

Add Access	RO, project administrator
Read Access	SYSTEMS

Generated on 30-Jun-2009

This feature allows a document to be made private to the stakeholders: only stakeholders will be able to see the metadata page, or to access the *View History* information.

The following image shows a section of the page that is displayed when editing the metadata of an existing document (by placing the mouse over *Edit*, and then clicking on *Change Metadata*), or else at the time that the document is first uploaded (by placing the mouse over *Add*, and then clicking on *Add Document*).

Private For Stakeholder?	☒
--------------------------	-------------------------------------

9.22 View HTML format of document

ITER_D_22223J v3.20 - IDM Manual	
Properties Hide	
Document Title	IDM Manual (22223J v3.20) (current)   <*****
Current Version	 v3.20 Click to see in html format

This feature allows the user to view certain types of document (those **uploaded** with “.doc” or “.docx” extension) as HTML files. A document that is converted to a “.pdf” as a result of selecting *Autogenerated cover page* will also be available in HTML format. Clicking on the icon, as shown in the illustration above, quickly opens the HTML format of the file if required.

9.23 Metadata links: Superseded By

A document stakeholder can position the mouse on *Action*, and then click on *Superseding Link* from the menu, as shown in the illustration below, to indicate that the document is to be considered obsolete and superseded by another.

Action ▼	Add ▼	Edit ▼	View ▼
Add to Favorite Clone meta data Create Shortcut Export to Word Generate Report and Send by Email Send Mail Subscribe Supersede by			

Select the documents that are to be shown as superseding this document, and click on the *Save* button. (One or several documents can be selected).

Note: only the approver of the approved version of a document is allowed to supersede that version with another document. For document with status, *In Work* or *Signed*, only the RO of the folder containing the document to be superseded can supersede one document by another.

Select one or multiple Document

Enter Document ID: ITER_D_ * Enter minimum four characters to start search

ITER_D_80273E - Document2

>>

<<

1 records available for selection

Save Cancel

The “Obsolete Document” page will then indicate that this document has been superseded, and by which documents.

Warning: you are accessing an obsolete version
 Download here: [Document1 \(A37B09 v1.0\)](#)
 Current version: v1.0

Signature Information Hide

CoAuthor [Alice Weber](#) ✓ has Signed: 25 Nov 2009 16:50

This document has been superseded by:

Title	Last change date	Issue Date	Type	Size	Status	Signatory
Document2 (ITER_D_80273E v1.0)	25 Nov 2009 16:51	25 Nov 2009	txt	5 B	In Work	Weber A.

No. of Records : 1

View Access: everyone
 Add Access: everyone

link [ITER_D_A37B09 - Document1](#) <http://localhost:1583/?uid=A37B09>
 Last Modification: 25 Nov 2009 16:52 by [Alice Weber](#)

The superseding documents will also show in their metadata the new information about the superseded document, as shown in the following illustration.

This document supersedes: Hide

Title	Last change date	Issue Date	Type	Size	Status	Signatory
Document1 (ITER_D_A37B09 v1.0)	25 Nov 2009 16:52	25 Nov 2009	txt	5 B	Obsolete	Weber A.

No. of Records : 1

Note: The “Superseded by” link is not available in version 0.0, as there is no file.

9.24 Metadata Links: Generated From

In some cases a document has been generated from another document, but does not supersede it.

In such situations, the generated document can have the link of the original document in the field *Generated From* located in the ‘Additional Information’ section of the metadata.

To set this property while uploading a new document, edit the field in *Add, Add document*.

To set this property for an existing document, edit the field at *Edit, Change Metadata*.

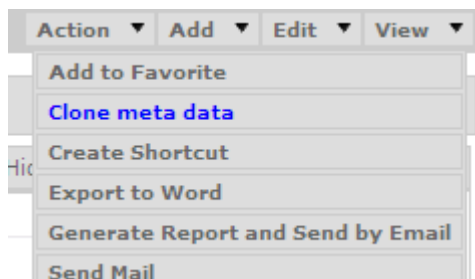
Note: The UID of the linked document must be known before making the search.

Additional Information		Hide
Issue Date *	19 Jul 2010 	
Comment Description <i>Author's Comment</i>	Source               Font Size                   	
Keywords		
External Number		
Private For Stakeholder?	☐	
Contractual Information		
Generated From		

This property has a reciprocal nature. In the metadata of documents selected in the field *Generated From*, there will be an extra field created automatically entitled *Derived Documents*. Here will be listed the documents that have been generated from the original document.

9.25 Clone Metadata

This feature allows users to make a copy of the metadata. Click on *Clone metadata* in the *Actions* menu of document's metadata view page as shown here:



This menu will be available to users who can “add” documents in the folder of the current document.

By this method the complete metadata of the displayed document will be copied except the uid and file itself.

A new page will be opened as shown here with all the copied data filled in.

Add a Document in Training		Save Document	Save + Load Next	Cancel
Properties Hide				
Uid	3PEQTL ITER_D_3PEQTL			
Title	Sample Document			
Abstract or description of the document *	Source Font Size B <i>I</i> <u>U</u> abc x₂ x' This is a sample description of a sample document.			
Upload File	Browse... Delete			
Document Type *	[D]-Memorandum / Note			
Roles Hide				
Author/Signatory *	author			
Author *	Alice Weber			
Co-author	Alice Weber <i>Start typing a person's name to select them.</i>			
Reviewer	Alice Weber John Smith <i>Start typing a person's name to select them.</i>			
Approver	Alice Weber			

The user can change the metadata where necessary, and can upload a new file and save the document.

The new document will be created in the same folder.

9.26 Modifying Change Description of New Version

When a new version of a document is uploaded, an explanation of the changes from the previous version is mandatory in the field, *Change description on new version*. This field can only be corrected by the author/signatory for the period that document remains *In Work*, see section 9.3.

The screenshot shows a table with columns 'Action', 'Add', 'Edit', and 'View'. The 'Edit' dropdown menu is open, displaying a list of actions. The 'Change Version Description' option is highlighted in blue. The table content includes a 'Work' column with entries like 'In Work', 'Signed', 'Approved', 'Current', and 'In Work'.

9.27 Restricted Documents

Restricted documents are documents which are placed in a Restricted folder. The restricted folders can only be accessed by members of the Global Group: IO_Restricted.

A document can be made restricted by setting the “Is this document restricted” property of document to true. A restricted folder will be identified by “r” suffix. If a document is made restricted then its restricted folder will automatically be created and the document will be moved into that restricted folder.

Is this document restricted? To view restricted document, user must be member of IO Restricted group	☐
--	--------------------------

☐ Title	Last change date	Issue Date
☐  Design_r	04 Jan 2010 13:20	

The icon to identify the restricted folder is . The document is allowed to be a restricted document only if all stakeholders of document are part of GG: IO Restricted group. The restricted folder will have only View access.

The security of a restricted folder will be the intersection of the parent folder security and GG: IO Restricted group members, so that only common members will be able to see the restricted folder and its contents. The membership of GG: IO Restricted will be controlled and managed the Section Head of SAS/SCD/SEC.

9.28 Next Expected Version Date

This property indicates the date on which a new version of a document should be produced. The purpose is to assist the submitter to manage the document. In general this is not a mandatory field, although it could be selected as mandatory for specific document types. The property can be selected as part of the metadata when uploading a new document, or after the upload has been saved in *Edit/Change Metadata*.

Next expected version date This date indicates when a new version of this document shall be produced * indicates required field	 < << January 2011 >> > <table> <tr> <td>S</td><td>M</td><td>T</td><td>W</td><td>T</td><td>F</td><td>S</td></tr> <tr> <td></td><td></td><td></td><td></td><td></td><td></td><td>1</td></tr> <tr> <td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td></tr> <tr> <td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td></tr> <tr> <td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td><td>22</td></tr> <tr> <td>23</td><td>24</td><td>25</td><td>26</td><td>27</td><td>28</td><td>29</td></tr> <tr> <td>30</td><td>31</td><td></td><td></td><td></td><td></td><td></td></tr> </table> Clear Close	S	M	T	W	T	F	S							1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31					
S	M	T	W	T	F	S																																												
						1																																												
2	3	4	5	6	7	8																																												
9	10	11	12	13	14	15																																												
16	17	18	19	20	21	22																																												
23	24	25	26	27	28	29																																												
30	31																																																	

Setting a date for this property will enable you to be notified via the *To Do* list.

Title	Type	Status	Created By	Creation Date	Modified Date	Requested Action	Due Date
AA Test for Next Version (C7E71C)	Document		Portal A.	07 Jan 2011 16:29	07 Jan 2011 16:55	Upload New Version	10 Jan 2011

If you wish to remove the date, click *Clear* from the end of the calendar. This will also remove *Upload New Version* as a *Requested Action* for that document in your *ToDo* list.

When you upload a new version this property is reset by the system to no date. If required, you would need to set a new date yourself in *Edit/ Change Metadata*.

9.29 Documents under Configuration Control

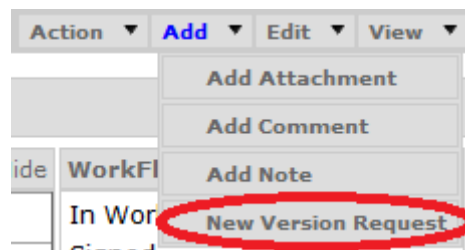
A document comes under configuration control when its document type is a configuration controlled type. Document types under configuration control are clearly labelled: “(Under Configuration Control)”.

Documents under configuration control are listed with a padlock icon:

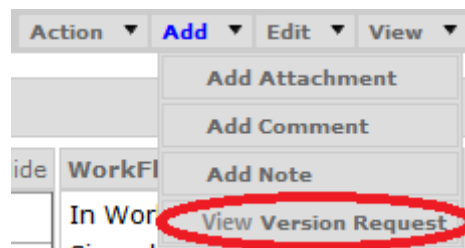
	Under Configuration Control (ITER_D_7D8A18 v1.0)	08 Apr 2010 15:45	08 Apr 2010	xlsx
--	--	-------------------	-------------	------

When under configuration control, the actions “Change Document Type” and “Add New Version” must be validated by the configuration control manager before being carried out. In order for an action to be validated, a request must first be submitted. These requests are only valid for the user who submits them.

This additional workflow step is reflected by a change in the action name, for example *Add New Version* becomes *New Version Request*, and is only available from the *Add* menu.



If a request has already been submitted, this option will be replaced with the ability to view the request:



1A7275 - Document Approval Request			
Properties		Hide	WorkFlow Status
Document	ITER_D_1A7275 - Also Under Config Control		Submitted
Action	Document Approval Request		Approved
Submitter	Downing James EXT		Disapproved
Status	Approved		Current Status
			Approved

When creating a request, justification must be given for the action.

If the configuration manager approves the request then the action will be available as usual on the document, for the user who created the request.

If the configuration manager refuses the request, the *View Document Approval Request* remains visible, and the action is not available. The configuration manager may approve a disapproved request at a later date.

9.29.1 New Version Requests

After a new version request has been approved, the *Add New Version* action is available until one of the new versions has been *Approved*.

10 Search

10.1 Simple Search



The search engine performs a simple search for any text string that is typed into the Search box (as in the example above, searching for the UID “22223j”). The search engine searches for this text in the metadata of each document to which the user has read access (on the IDM system). That is, it searches for the text within the following fields of each document: the UID, the title, the description, the author, the contributors, the co-authors, the reviewers, the approvers, the status, the workflow, the external number, and the document type.

Click on the magnifying-glass icon, as shown below, to start the search. IDM performs the search, and returns a list of applicable documents and folders.



10.1.1 Phrase Search

In Search, “IDM Manual” and “Manual IDM” will produce same results, as shown here.

Results found for **idm AND manual**. (1,15 seconds)

☐ Include Obsolete ☐ Include Full Text Search Again For ->

idm manual UID:22223J document type: [d]-guideline/ handbook (non-baseline document) Author: campbell j. Last modification: 05 Jul 2010 09:49	☒ All ☐ Action ☐ CWS Action ☐ Design Work Orde ☐ Document ☐ Record ☐ Task
archives application manual (idm) - user UID:2UWKY document type: [d]-guideline/ handbook (non-baseline document) Author: villarreal s. Last modification: 18 Jun 2010 10:18	
archives application manual (idm) – system administrator UID:2UWCPG document type: [d]-guideline/ handbook (non-baseline document) Author: villarreal s. Last modification: 04 Jan 2010 14:56	
why diagrams? UID:33B82R document type: [d]-presentations Author: papineschi f. Last modification: 02 Jun 2010 15:31	
5.1 p2.us 01.0 annex a UID:2WBJLK document type: [k]-annex a Author: miele p. Last modification: 16 Aug 2010 13:54	
procedure for the management of cad work & cad data (models and drawings) UID:2DWU2M document type: [d]-guideline/ handbook (non-baseline document) Author: mann j. Last modification: 31 May 2010 01:18	
instructions for uploading documents into idm UID:2UTZGC document type: [d]-guideline/ handbook (non-baseline document) Author: mena m. Last modification: 10 Jun 2010 08:36	
guidelines for catia drawings and data structuring in collaboration UID:35ZHJD document type: [q]-working instruction Author: thomas e. Last modification: 02 Jun 2010 13:07	
codac core system installation manual UID:33JNKW document type: [d]-guideline/ handbook (non-baseline document) Author: kobal m. Last modification: 20 Jul 2010 11:35	

Results found for **manual AND idm**. (1,171 seconds)

☐ Include Obsolete ☐ Include Full Text **Search Again For ->** manual idm 

Icon	Title	UID	document type	Author	Last modification
	idm manual	UID:22223J	[d]-guideline/ handbook (non-baseline document)	Author: campbell j.	Last modification: 05 Jul 2010 09:49
	archives application manual (idm) - user	UID:2UZKKY	[d]-guideline/ handbook (non-baseline document)	Author: villarreal s.	Last modification: 18 Jun 2010 10:18
	archives application manual (idm) – system administrator	UID:2UWCPG	[d]-guideline/ handbook (non-baseline document)	Author: villarreal s.	Last modification: 04 Jan 2010 14:56
	why diagrams?	UID:33B82R	[d]-presentations	Author: papineschi f.	Last modification: 02 Jun 2010 15:31
	5.1 p2 us 01.0 annex a	UID:2WBJLK	[k]-annex a	Author: miele p.	Last modification: 16 Aug 2010 13:54
	procedure for the management of cad work & cad data (models and drawings)	UID:2DWU2M	[d]-guideline/ handbook (non-baseline document)	Author: mann j.	Last modification: 31 May 2010 01:18
	instructions for uploading documents into idm	UID:2UTZGC	[d]-guideline/ handbook (non-baseline document)	Author: mena m.	Last modification: 10 Jun 2010 08:36
	guidelines for catia drawings and data structuring in collaboration	UID:35ZHJD	[q]-working instruction	Author: thomas e.	Last modification: 02 Jun 2010 13:07
	codac core system installation manual	UID:33JNKW	[d]-guideline/ handbook (non-baseline document)	Author: kobal m.	Last modification: 20 Jul 2010 11:35

☒ All
☐ Action
☐ CWS Action
☐ Design Work Order
☐ Document
☐ Record
☐ Task

The closest match to the word(s) searched is displayed first.

In addition the results can be further refined according to the type of ICP entry, eg *Design Work Orders* indicated on the right hand side of the screen will then reduce the original list to display only Design Work Orders.

Results found for **manual AND idm**. (0,31 seconds)

☐ Include Obsolete ☐ Include Full Text **Search Again For ->** manual AND idm 

Icon	Title	UID	document type	Last modification
	dwo-26-301-gdc-us	UID:2M6F7G	Design Work Order	Last modification: 28 Jul 2009 15:15
	dwo-30-301-fae	UID:35KY4R	Design Work Order	Last modification: 26 Apr 2010 14:11
	dwo-30-301-fae-ext-2	UID:3N9FP7	Design Work Order	Last modification: 04 Aug 2010 21:01
	dwo-30-301-fae-ext-1	UID:34HA7A	Design Work Order	Last modification: 25 May 2010 10:52
	dwo-76-337-mln	UID:33QC4C	Design Work Order	Last modification: 24 Jun 2010 08:08

☐ All
☐ Action
☐ CWS Action
☒ Design Work Order
☐ Document
☐ Record
☐ Task

10.2 Advanced Search

A finer control of the search engine is possible with the *Advanced Search* feature of IDM. This performs the search only on selected metadata fields.

Click on *Advanced Search* in the Top Frame, right hand side.

Advanced Search

A template with several search options will appear. Place the cursor on the metadata item to which you wish to add a filter, and select (Search condition) and fill in (Search value) the relevant information. Then press *Add Filter* to add the filter to the search, and repeat with any other metadata item.

The check boxes (left of the list of metadata items) can be ticked to select the metadata information that will be provided for each document found as a result of the search.

The screenshot shows the 'Advance Search' window. On the left, under 'Properties', the 'Title' property is checked. On the right, the 'Add Condition' section is active, showing 'Title' as the property name, 'Contains' as the search condition, and 'Timesheets' as the search value. The 'Add Filter' button is circled in red.

The advanced search can also be used to create, and save *Reports*. The user can search by selecting the *Metatype* from the drop-down menu, such as *Document*, *Folder*, and *Tickets*. If the user wants to save the search reports, they should do so from the results page (as indicated below):

The screenshot shows the search results page. The 'Condition List' section shows the search criteria: Content Type: Document, Property: Title, Operator: Contains, Value: Timesheets. The 'Advance Search Result(s)' table shows 5 results. The 'Save Condition(s) as Report' button is circled in red.

Title	Creation date	Created By	Last change date	Last Change By	Last Version Workflow Status	Issue Date	Type	Size	Signatory
Proposal on Timesheets	21 Jul 2009 16:13	Su M.	21 Jul 2009 16:13	Su M.	Signed	21 Jul 2009	ppt	203 KB	Su M.
Why Timesheets? - Presentation	12 Nov 2009 14:48	Lenormand S.	28 May 2010 02:50	Portal A.	Signed	19 Nov 2009	pdf	305.07 KB	Lenormand S.
Timesheets - Obsolete versions - Plant	26 Apr 2010 13:46	Duglue I.	31 May 2010 01:23	Portal A.	Signed	29 Apr 2010	xls	24 KB	Duglue I.
Timesheets - obsolete versions - Mechanical	26 Apr 2010 13:41	Duglue I.	31 May 2010 01:23	Portal A.	Approved	26 Apr 2010	xls	26.5 KB	Duglue I.
Timesheets - obsolete versions - Configuration	26 Apr 2010 13:47	Duglue I.	31 May 2010 01:23	Portal A.	Signed	30 Apr 2010	xls	27 KB	Duglue I.

10.3 Full Text Search

It is possible to conduct a search for a given text string within the body of documents. To do this, the user first needs to perform a simple search, as described above (which, of course, only searches for the text string within the metadata fields). Then, when the search results are displayed, he/she can tick the checkbox labelled *Include Full Text*, and then click on the button labelled *Search again for* →.

☐ Include Obsolete ☐ Include Full Text 

11 Security Settings

11.1 Giving Permissions to Groups

Security can be set on folders in IDM. To change the security of a folder (where you are the RO) select *Edit > Set Security* from the menu when viewing the folder. You will be presented with a view showing which groups are currently assigned permissions:

Permission set on groups				
Group	RO	Add	View	None
AD: External Collaborators		☐	☒	☐
AD: ITER		☐	☒	☐

You can change the permissions granted to these groups by selecting the appropriate column (Add, View or None) and then pressing the save button.

To grant permission to another group, use the *Group Name* search box to find the group, select the appropriate permission level and then press the save button:

Add new Group for Permission

Group Name

section - it 

Section - IT ame to select them.

Section - IT - EXT

Add new Group for Permission

Group Name

☒ Section - IT ☐ Add ☐ View



Start typing a content's name to select them.

You may use the tree selection by clicking on the dedicated icon as shown below:

Add new Group for Permission

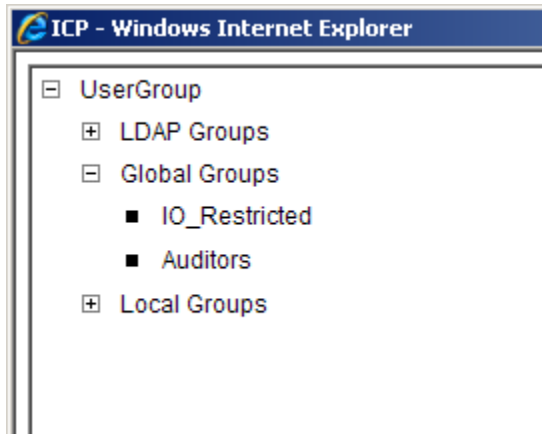
Group Name



Start typing a content's name to select them.

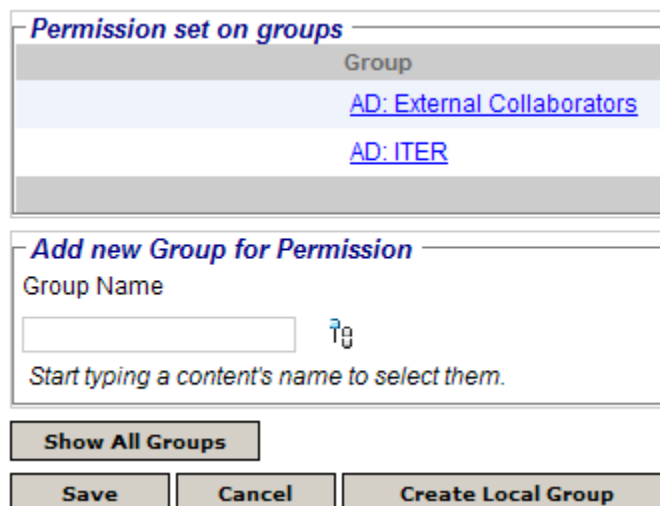
Show All Groups

A new window is opened which allows you to select the correct group by browsing the tree structure.



Once the group is selected, you must apply your security settings.

If the name of the group is not known, or if you wish to view all the possible groups, then clicking on *Show All Groups* will display all AD, GG, and relevant LGs (for that folder), see below.



11.2 Local groups

IDM defines certain major groups of IDM user, and allows the user to set their read and write access rights on any folders for which that user is the RO, or the RO's trusted person (an authorised delegate).

In addition, the local group feature allows read and write access rights to be set for custom-defined groups of IDM users. This involves doing the following:

Within the appropriate folder, click on *Edit*, and then position the mouse over *Action*, and click on *Set Security*

Click the *Create Local Group* button, give a name to the local group, select the access rights, and double-click on those users who are required as members of the Local Group.

Fill in the appropriate fields, and click on the *Save User Group* button.

Properties Hide

Title * Local Group 1

Individuals * Alice Weber ✖
 Start typing Last Name here
 Start typing a person's name to select them.

Group Editors
 Start typing a person's name to select them.

Group(s) ITER 🔗

* Indicates required field Save Local User Group Cancel

To change members of a local group:

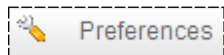
Click on the Pencil icon, as shown below.

Local Group					Hide
Group		RO	Add	View	None
		LG: Local Group 1	Weber A.	☐	☐
				☐	☒

Note: Local groups can also be used as a mechanism for taking away read and write access privileges from certain users.

11.3 Trusted Person

Through the trust-giver/trust-receiver system, the trusted person feature allows IDM users to delegate all user rights and authority to another trusted IDM user. The trusted person must first be set up by the user who is giving the trust, and may be for any (long or short) length of time.



To control and make use of this feature, click on the *Preferences* button on the top frame.

11.3.1 Trust-giver

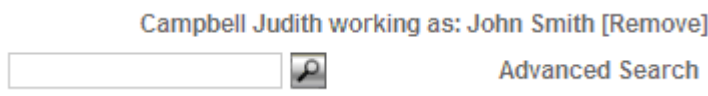
To allow another IDM user to work on your behalf, in the *trusted person* field click, on the blue icon, and select the appropriate user(s), as indicated in the illustration, below.

User Preference		Hide
Max no of files listed per page *	30	
Max no of search hits listed *	200	
Trusted person this is the list of persons who can work for you.	Alice Weber — Start typing Last Name here for selecting a trusted person Start typing a person's name to select them.	
Work for you can select the person for whom you wish to work.	<--Select-->	
Favorite listings sorting order	Title	
Content changes notification select to receive email daily or to receive email weekly, or, by default, no email.	Get weekly change mail	
To Do Notification select to receive To Do email daily or to receive email weekly, or, by default, no email.	<--Select-->	
Copy e-mails to me Should the system copy mails sent on your behalf to you? You will have the option of overriding this default setting when sending messages.	☐	
* Indicates required field		Save Preference Cancel

11.3.2 Trust-receiver

To work in behalf of another person, click on the name of the user from the drop-down list in the field *Work for*, and then click on *Save*.

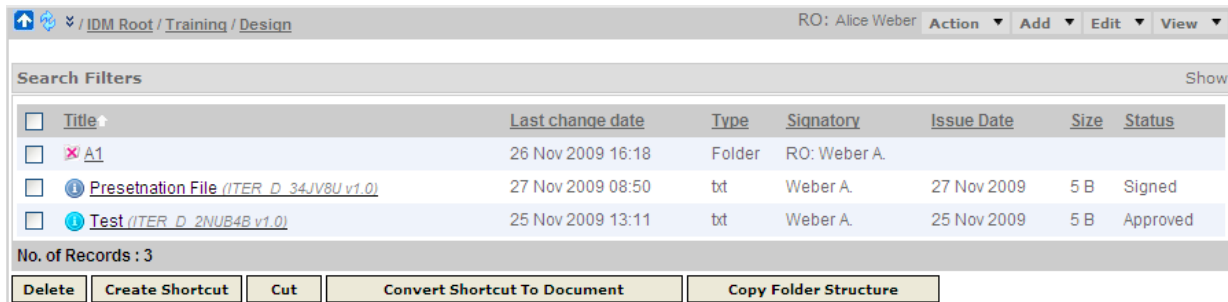
In the Top Frame, next to user's name, the name of the selected trust-giver will appear, indicating for whom it is that the user is working.



To return to working on your own account, click on **[Remove]**, or else repeat the above process, selecting ---me--- from the drop-down list and click on *Save*. The removal of the 'working for' is not automatic on closing the browser, or shutting down the computer. It must be removed.

When removing delegation, you will be returned to either the page that you were last viewing (if you still have permission to view it) or to the page that you were viewing immediately before working as trust-giver.

12 Move, Link, Convert and Delete



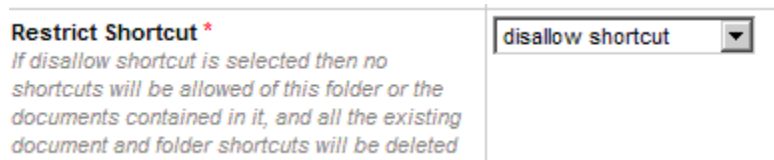
12.1 Cut-and-paste for documents and folders

This enables a document or folder to be moved from one area to another:

1. Go to the folder that currently contains the documents and sub-folders to be moved (as depicted in the illustration above).
2. Each document and sub-folder has a check-box associated with it, in the left-most column of the display frame (as shown in the illustration). Tick those (by clicking on the check-box) that are to be moved. (One, many, or all may be selected).
3. With sufficient access rights, there will be a *Cut* button among the buttons along the bottom of the frame. Click on the *Cut* button.
4. Now go to the folder in which the chosen documents and/ or sub-folders are to be pasted.
5. With sufficient access rights, there will be a *Paste* button among the buttons along the bottom of the frame. Click on this *Paste* button.

12.2 Create Shortcut for documents

1. Go to the folder that currently contains the documents and sub-folders that are to be linked (as depicted in the illustration at the start of this chapter).
2. Each document and sub-folder has a check-box associated with it, in the left-most column of the display frame (as shown in the illustration). Tick those (by clicking on the check-box) that are to be shortcuts in another folder. (One, many, or all may be selected).
3. With sufficient access rights, there will be a *Create Shortcut* button among the buttons along the bottom of the frame. Click on this *Create Shortcut* button.
4. Now go to the folder in to which the chosen documents and/ or sub-folders are to be pasted.
5. With sufficient access rights, there will be a *Paste* button among the buttons along the bottom of the frame. Click on this *Paste* button. The shortcuts are depicted with a dark arrow on their  icon for a folder and  for a document shortcut.
6. *Create Shortcut* will not be available if the folder is restricted for shortcuts as shown below.



12.3 Creating a shortcut to a folder

1. Go to the folder that currently contains the sub-folders to which shortcuts are required (as depicted in the illustration at the start of this chapter).
2. Each sub-folder has a check-box associated with it, in the left-most column of the display frame (as shown in the illustration). Tick those (by clicking on the check-box) that are to be shortcuts in another folder (One, many, or all may be selected).
3. With sufficient access rights, there will be a *Create Folder Shortcut* button among the buttons along the bottom of the frame. Click on this *Create Folder Shortcut* button.
4. Now go to the folder in which the shortcuts to the chosen sub-folders are to be pasted.
5. With sufficient access rights, there will be a *Paste* button among the buttons along the bottom of the frame. Click on this *Paste* button. The shortcuts are depicted with a dark arrow on their  icon.
6. Folder shortcuts will not be available if the folder is restricted for shortcuts, as shown in the illustration in the previous section.

12.4 To convert a shortcut/document

Any number of shortcuts can be made of a document (or folder), each one of which will appear with the appropriate pointer  icon. The original document (or folder), though, will still appear with the normal icon. The *Convert To Document* button enables a document shortcut to be made into being the original document with the “original” original one being turned into the shortcut:

1. Go to the folder that contains the shortcut to be converted (as indicated by the pointer  icon).
2. It has a check-box associated with it, in the left-most column of the display frame. Tick this (by clicking on the check-box).
3. With sufficient access rights, there will be a *Convert To Document* button among the buttons along the bottom of the frame. Click on this *Convert To Document* button.
4. This folder will now contain the main (or original) document, as indicated by the usual icon, and the original document will now be converted into shortcut, with the  icon.

12.5 Delete

1. Go to the folder that contains the documents that are to be deleted.
2. Each document and sub-folder has a check-box associated with it, in the left-most column of the display frame (as shown in the illustration at the start of this chapter). Tick those documents (by clicking in the check-box) that are to be deleted. (More than one document can be selected at a time and deleted).

3. For the Responsible Officer of the folder (or any parent folder) containing the document / document shortcut to be deleted, there will be a *Delete* button among the buttons along the bottom of the frame. Click on this *Delete* button.

This can also be used to delete sub-folders (in which case, the corresponding shortcuts will also be deleted).

There is also a facility to delete a document version from document metadata view page. To use this, place the mouse over the *Edit menu*, and click on *Delete*.

However, this menu will appear only if:

1. No action has previously been performed on the document version, such as being signed
2. The document version is not more than one week old
3. The person attempting the operation is the author, co-author, signatory or co-signatory
4. The version number is not 0.0.
5. There is more than one version, and the version to be deleted is the most recent one
6. No email has been sent from the metadata page of the document version
7. No-one except the author, co-author, signatory or co-signatory has downloaded the version's file

12.6 Copy Folder Structure

Note: This option may only be carried out by a Project Administrator.

This enables a folder structure to be copied from one area to another:

1. Go to the folder that contains folders and sub-folders that are to be copied.
2. Each folder has a check-box associated with it, in the left-most column of the display frame (as shown in the illustration at the start of this chapter). Tick those (by clicking on the check-box) that are required to be copied (One, many, or all may be selected).
3. With sufficient access rights, there will be a *Copy Folder Structure* button among the buttons along the bottom of the frame. Click on this *Copy Folder Structure* button.
4. Now go to the folder in which the chosen folders and sub-folders are to be pasted.
5. With sufficient access rights, there will be a *Paste* button among the buttons along the bottom of the frame. Click on this *Paste* button.

13 Miscellaneous

13.1 Viewing your profile, and other users' profiles

To view the details of your personal profile, click on your name in the Top Frame. From here, details can be checked (such as your email address, telephone number, office number, IDM group memberships).

If a change of password or any of personal details is required, click on the *Self Admin* button. The system will first demand your present password, and will (assuming that the security check is passed) then display a page listing *First Name*, *Last Name*, *Email* address, *Office* number (building/room), *Phone* number, and *Fax* number. The first three cannot be changed directly, but a hyperlink is still offered to *Send a Change Request to the Windows Admin* staff to consider performing the change. The last three, though, can be changed directly by the user, by clicking on the *Change* button. The login password can also be changed in this way.

These changes, including that of password, will take effect for **all of the ITER computing systems** that are connected on the main network. Indeed, clicking on the *Self Admin* button takes you to the network address that can be, alternatively, accessed at any time by typing <https://www.iter.org/selfadmin> as the address for your web browser.

Alice Weber's Profile		Hide
UserName	webera	
Abbreviation		
First Name	Alice	
Last Name	Weber	
Contact Information		
Office	n/a	
Phone	n/a	
Fax	n/a	
Email	Alice.Weber@iter.org	
Other Details		
View Other Users Profile View all items in which you are RO Self Admin		

Photo

Add/Change Picture

Groups

- External Collaborators
- ITER

If you wish to add a photo of yourself in this area using the webcam, go to <https://user.iter.org/?uid=2EHCB5> . This photo will appear above the *Groups* box on the right hand side. The photo will also be accessible from the ITER Phone Book, where a blue icon denotes that a photo is available, and a yellow icon indicates that no photo is yet available.

To view another user's profile, click on the *View Other Users Profile* button. A pop-up page will appear, like the one shown below. Search for the required name, and select it (either by double-clicking on it, or by using the >> button) and then click on the *Apply* button.

ICP - Windows Internet Explorer

https://user.iter.org/Portal/Pages/GenericSelection.aspx?multi=False&textfield=ctl00_MasterPlaceholder_GIDocument_

Select person

Search * List will populate if less than 500 records are available for selection

Alice Weber
Weber Charles

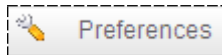
>>
<<

2 records available for selection

Apply Cancel

Click on the *View all items in which you are RO* button to obtain a list of the folders for which the user is the RO.

13.2 Preferences



To change your preferences, click on the *Preferences* button, on the top frame.

Preference : Weber A. Save Preference Cancel

User Preference Hide

Max no of files listed per page *	25
Max no of search hits listed *	100
Trusted person this is the list of persons who can work for you.	
Work for you can select the person for whom you wish to work.	<--Select-->
Favorite listings sorting order	Use content default
Content changes notification select to receive email daily or to receive email weekly, or, by default, no email.	No mail

* indicates required field Save Preference Cancel

Other Information Hide

IDM user folder	webera
Allocated UUIDs	34JV8U Request for new UUIDs
Subscribed items	Manage subscribed items

Local Groups Hide

Group Name	Path
------------	------

Here, the maximum number of files that are to be listed in the display frame can be specified, and also the number of files to be returned whenever a search with the search engine is performed.

To create your own Users folder, click on the *Request* button. This button will not be offered if the folder already exists for you.

You can select sort order, for the Favorites list, from the drop-down list for sorting by Title, Creation date, or Last modification date.

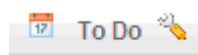
Clicking on the *Manage Subscribed Items* button takes you to a page that lists the documents that are presently being tracked for you.

You can select to *Receive email daily* or *Receive email weekly*, or, by default, *No email*.

You are allocated, in advance, a list of UUIDs (that are used, for example, when creating a new document or folder). These can be viewed in the *Allocated UUIDs* drop-down list. Clicking *Request for New UUIDs* forces IDM to discard these, and to allocate a fresh set.

13.3 To Do

In order to see the current *To Do* list (that is, those documents for which your action is required); click on the *To Do* button on the Top Frame.



☐ Title	Type	Status	Created By	Creation Date	Modified Date	Requested Action	Due Date
☐ Sample Document (27Y7K2 v1.0)	Document Version	Signed	Portal A.	27 Nov 2009 15:38	27 Nov 2009 15:50	Recommend	11 Dec 2009

If you want to clear the documents from your *To Do* list, tick the required check-boxes, then click the *Remove from To Do List* button. The selected documents will not appear again in the *To Do* list. However, note that documents will still appear on the Delayed Task Lists of stakeholders if the actions required are not completed within the due date.

13.4 Permission Panel

View Access: [External Collaborators](#), [ITER](#)
Add Access: [project administrator](#), [RQ](#)

link [Design](#) <https://user.iter.org/?uid=2NRAF5>
Last Modification: 25 Nov 2009 11:50 by [Alice Weber](#)

The permission panel is normally already displayed in the display frame. It shows the link and the path of the folder/document. For folders, it shows the groups that have *View access* and *Add access* to that folder (users with *Add access* also have *View access*). For documents, it shows the users that have view access to the document. Each group is represented as a hyperlink. Clicking on this will show the members of that group. If both the groups: ITER and External Collaborator are selected, no other sub group will be allowed as all IDM account holders must be a member of one of these two groups.

13.5 Mass Download Utility

The screenshot shows the IDM web interface. At the top, there's a green 'idm' logo. Below it, a navigation bar includes 'Support', 'Tools', 'Contact', 'Subscribe', 'Help Manual', 'To Do', 'Preferences', and 'Log out'. The main content area shows a folder tree with 'RO: Alice Weber' selected. A context menu is open over the 'Action' column, with 'Mass Download' highlighted. Below the menu, a table lists files and folders with columns for 'Last change date', 'Type', 'Signatory', 'Size', and 'Status'.

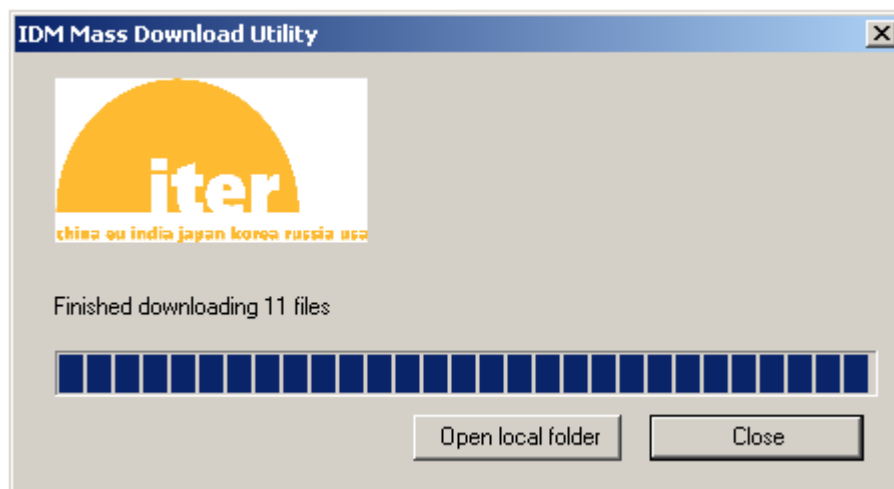
	Last change date	Type	Signatory	Size	Status
Folder	26 Nov 2009 16:18	Folder	RO: Weber A.		
File (ITER_D_34JV8U v1.0)	27 Nov 2009 08:50	txt	Weber A.	27 Nov 2009	5 B Signed
File (2NUB4B v1.0)	25 Nov 2009 13:11	txt	Weber A.	25 Nov 2009	5 B Approved

The Mass Download utility is available by positioning the mouse on *Action*, and then clicking on *Mass Download*. It can be applied to any folder that is at least in the third level of the IDM folder tree.

Note: this utility works with Internet Explorer and is not available for other browsers.

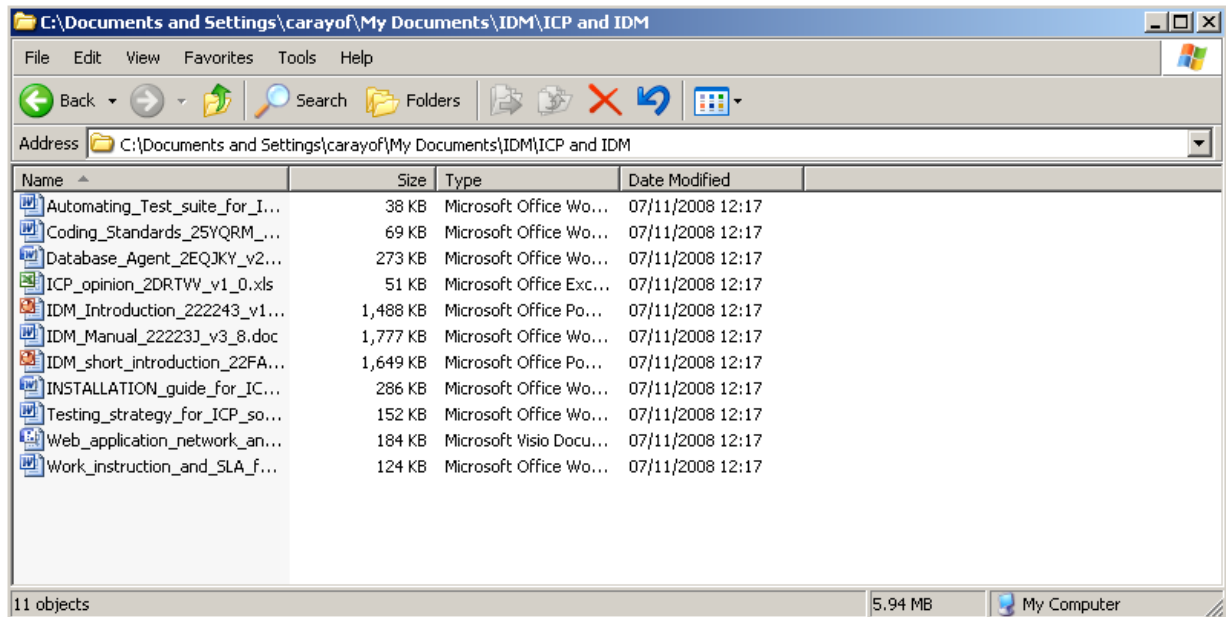
The screenshot shows the 'IDM Mass Download Utility' window. It has a blue title bar and a grey background. On the left, there's a logo with the word 'iter' and a list of countries: 'china', 'eu', 'india', 'japan', 'korea', 'russia', 'usa'. Below the logo, it says 'Finished downloading 11 files'. At the bottom, there are two buttons: 'Open local folder' and 'Close'. On the right side, there's a checkbox labeled 'Download all subfolders.' and a blue button labeled 'Click to Download'.

In the Mass download page, the “Download three levels of sub folders” checkbox, if checked, allows the user to download, to your local hard disk, the content of the folder and that of sub-folders down to three levels. Otherwise only the documents of the current folder are downloaded.



Clicking the “click to download button” will pop up this window and process the download of documents. Once finished, the *Open local folder* button opens an explorer window showing the

downloaded files. The current folder will be downloaded in “My documents” of your computer, as shown in following figure.



Only current versions or drafts are downloaded.

If a new version of a document has been added, a subsequent use of the mass download utility on the same folder will replace the old version by the new one, and delete any documents that have become obsolete.

It is also possible to flag IDM folders (when creating a folder or by clicking on *Rename folder* in the *Edit* menu) to allow users to download files with their original file names. To do so tick the check-box labelled “Allow original file name download”.

Responsible Officer	Alice Weber
Wbs	
Folder Keywords	<--Select-->
Allow original file name download If checked allows the users to download the files of this folder with their original names	☐

For the given folder, the mass download page will now display an additional check-box “original file names” as shown in following figure.

[Back](#)

Welcome to the IDM mass download utility for internet explorer. The file synchronization only operates one way for download and not for Upload.
 All downloaded files and folders are located in "My Documents\IDM" folder on your computer.
 In order to enable the control on non IO computers you need to download and run [this installer](#) with administrative rights.
 (works with internet explorer 6 and later versions, requires .NET framework 2.0 to be installed on your computer)

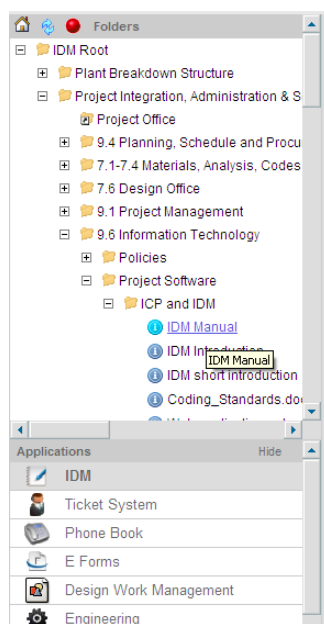
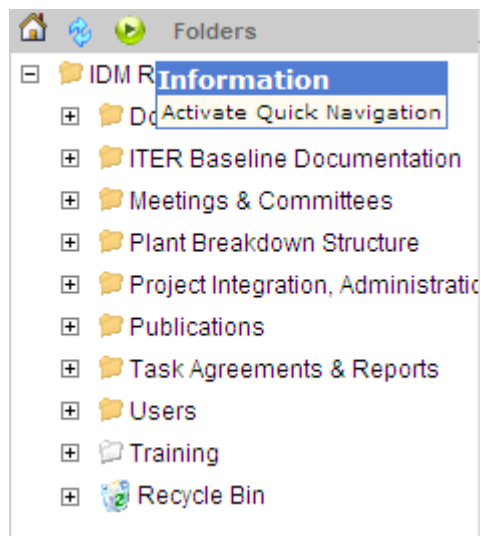
☐ Download all subfolders.

☐ Original file names

[Click to Download](#)

13.6 IDM Quick Navigation

IDM Quick navigation is available in the navigation tree if the green button  on the left side is visible. If so, click the button and the navigation tree is expanded.



ITER Document Management (IDM) User Manual

Abstract

This document gives an initial introduction on how to use the ITER Document Management (IDM) system.

Modifications found in Version 3.20:

- 5.2.4 IDM document type (*new feature*)
- 7.1 New document – added PBS property in screenshot
- 8.7 RO has project administrator rights locally for own folders (*new feature*)
- 9.1 Icon showing an obsolete document that has been superseded by another (*new feature*)
- 9.14 Project administrators can change review before, approve before dates (*new feature*)
- 9.20 Superseded by link screenshot changed, note added

In the navigation tree itself, you can view the metadata page of the document by clicking on the  icon. To see the Microsoft Office documents, text, PDF files in the right frame, click on the title of the document in the navigation tree.

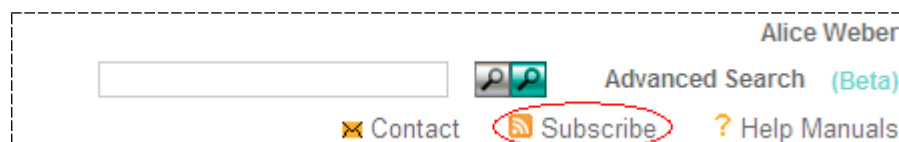
If you are not able to view the Microsoft Office documents in centre frame then visit this link: <http://www.tutorialized.com/view/tutorial/Configure-Internet-Explorer-to-open-Ms-Office-Word-Excel-Power-Point-Etc-documents/32780> for configure the Microsoft office 2007 documents to be viewed in the centre frame.

There is also a facility for you to view Word documents in HTML format when the IDM Quick Navigation is on, by clicking on the download links of the document in the navigation tree, and also in the metadata page of the document.

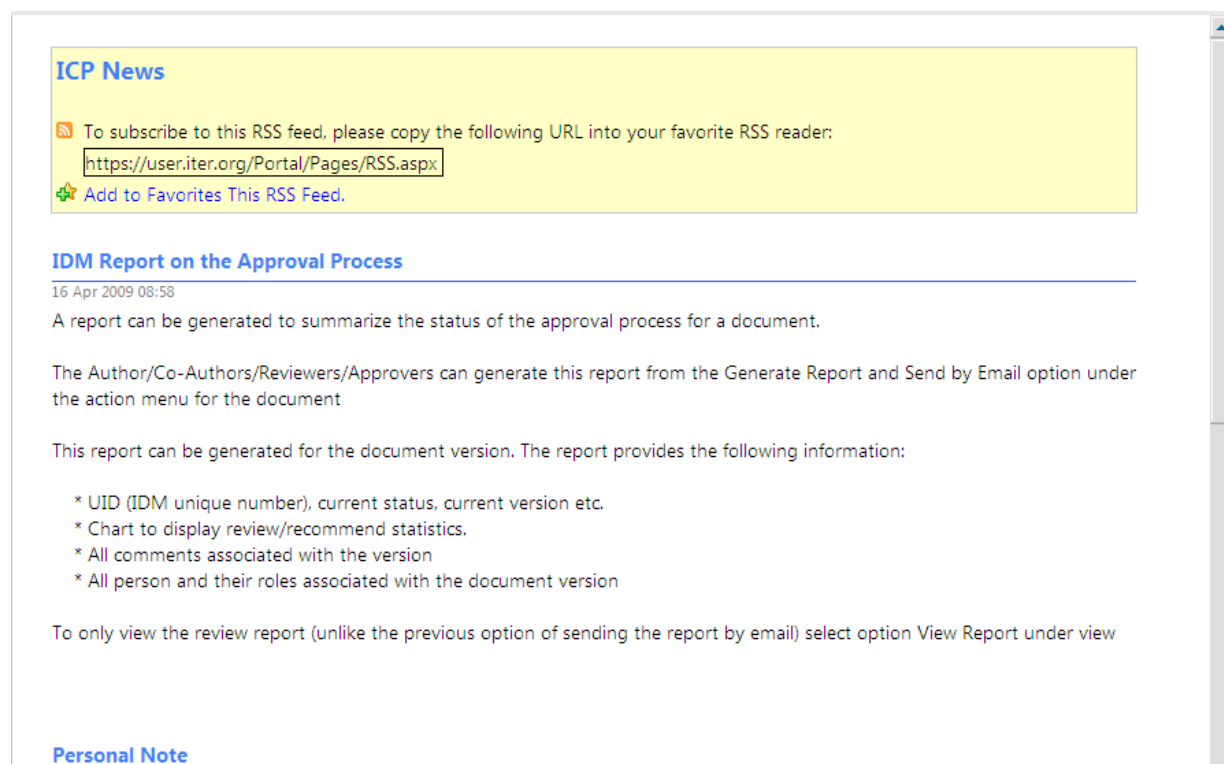
To deactivate this navigation feature, click on the red button .

13.7 What's New

A “Subscribe” link is available in the right hand end of the Top frame. This is used to obtain the latest ICP News. Whenever anything new comes in ICP, a description of it is displayed on this News page. The following image shows where to find this “Subscribe” link.



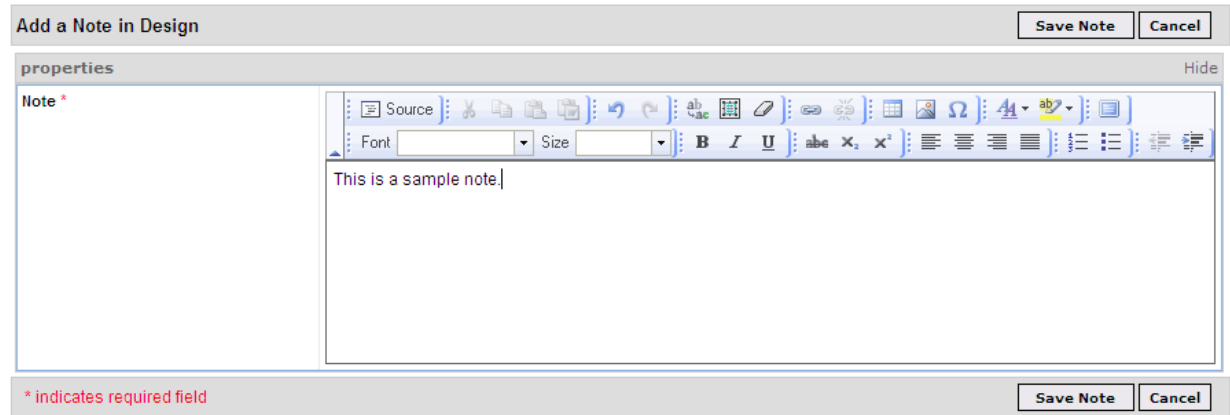
The following image shows the appearance of the news page.



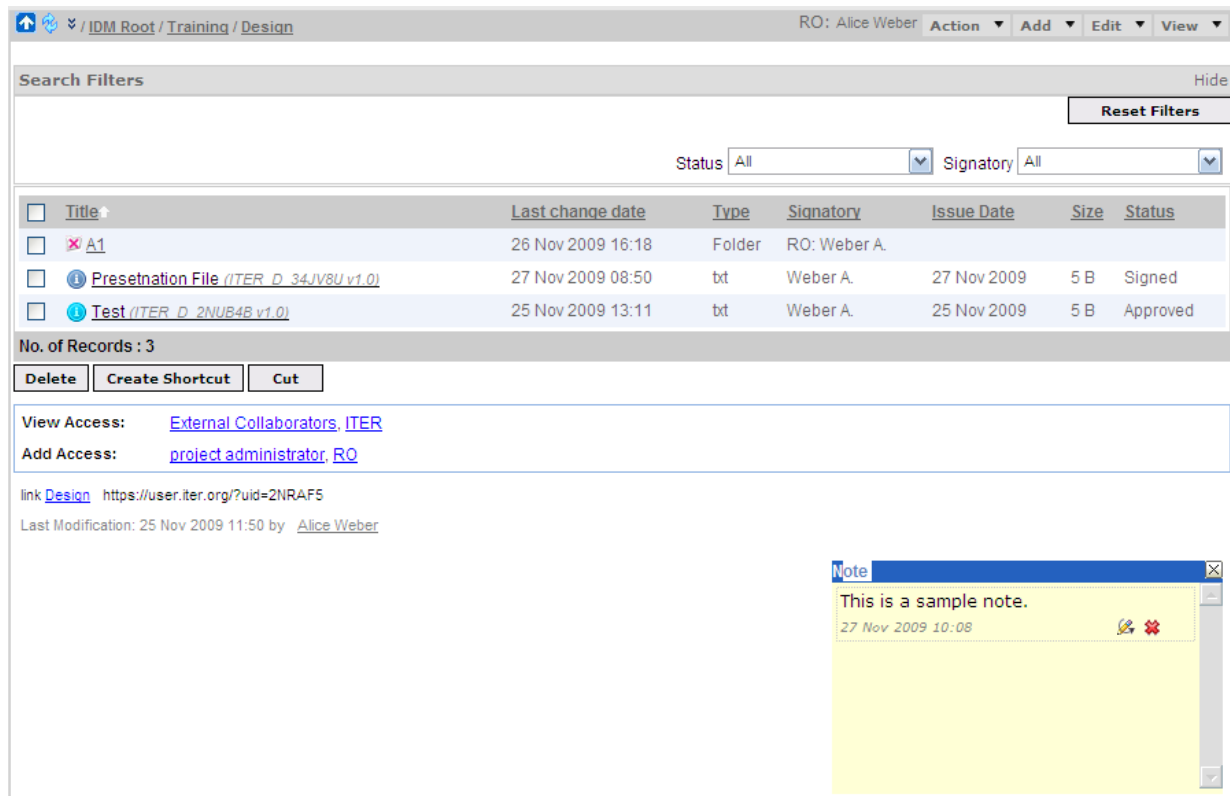
In this page, there is also an RSS link. To subscribe to this RSS feed, to receive up-to-date ICP News, copy the given URL of the page into your RSS reader.

13.8 Personal Notes

To create a personal note within a folder (or document) to which you have **View access** rights, position the mouse on *Add*, and then click on *Add Note*.



After saving the note, it will be displayed in a yellow box in the bottom right corner, as shown below.



To edit the note, click on the  icon, and to delete the note, click on the  icon.

The note can be closed by clicking on the  icon in the yellow box.

The position of the note can be adjusted by putting the cursor over its blue bar and dragging it.

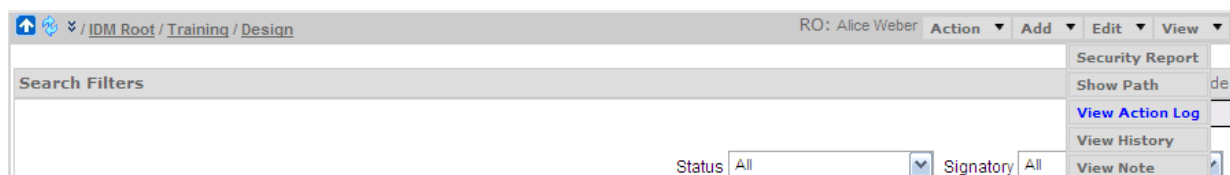
A Personal Note can be viewed again by positioning the mouse on *View*, and then clicking on *View Note*. The note will be displayed again in the bottom right corner.

Note: Personal Notes are only visible to the user who created them. No user can view another user's personal notes.

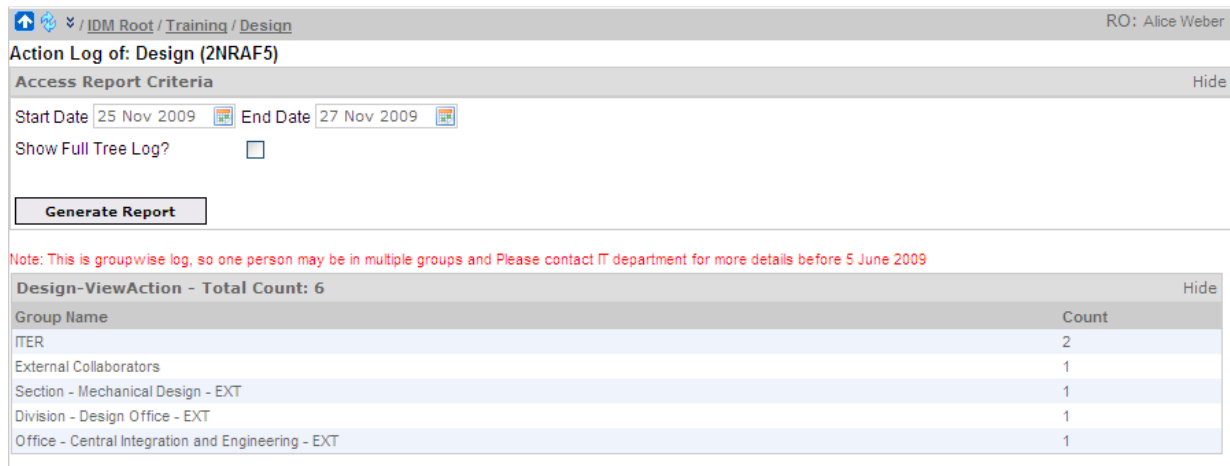
13.9 View Action Log

Under certain conditions, a log can be obtained of the actions that have been performed on a folder or document, by placing the mouse over *View*, and then clicking on *View Action Log*

This function is only available for the Responsible Officer of the current folder, provided that the folder is at the third level (or lower) in the IDM folder tree.



This causes a page to be opened, as shown in the following example.



The user can select a *Start Date* and an *End Date* before clicking on the *Generate Report* button.

↑ / IDM Root / Training / Design RO: Alice Weber

Action Log of: Design (2NRAF5)

Access Report Criteria Hide

Start Date 25 Nov 2009 End Date 27 Nov 2009

Show Full Tree Log? ☒

Generate Report

Note: This is groupwise log, so one person may be in multiple groups and Please contact IT department for more details before 5 June 2009

A1-ViewAction - Total Count: 2		Presetnation File-ViewAction - Total Count: 4	
Group Name	Count	Group Name	Count
ITER	1	ITER	2
External Collaborators	1	External Collaborators	2

Design-ViewAction - Total Count: 6		Test-ViewAction - Total Count: 6	
Group Name	Count	Group Name	Count
ITER	2	ITER	3
External Collaborators	1	External Collaborators	3
Section - Mechanical Design - EXT	1		
Division - Design Office - EXT	1		
Office - Central Integration and Engineering - EXT	1		

The log summarises the view and download actions that have been performed by members of each of the various IDM user groups.

By ticking the *Show Full Tree Log?* check-box, before clicking on *Generate Report*, the log is extended to include actions that have been performed on the sub-folders of the current folder.

13.10 Security Report

A report, showing the security settings of the current folder, is available to the Responsible Officer of the current folder, provided that the folder is at the third level (or lower) in the IDM folder tree.

↑ / IDM Root / Training / Design RO: Alice Weber Action Add Edit View

Search Filters

Status All Signatory All

Security Report

Show Path de

View Action Log

View History

View Note

By placing the mouse over *View*, and then clicking on *Security Report*, the report is generated, in the form of an Excel file, as shown in the following example. The security settings are shown not only of the current folder, but also any sub-folders that it contains.

Folder	Access
testing view action log	DA by defined email extensions, EFDA, External Collaborators, ITER, project administrator, RO
Folder 1	everyone
Folder 1.1	All-IO-Secretaries, DA by defined email extensions, EFDA, External Collaborators, ITER, project administrator, RO
Folder 1.2	everyone
Folder 1.2.1	All-IO-Secretaries, EFDA, External Collaborators, project administrator, RO
Folder 2	RO, project administrator, DA by defined email extensions, EFDA, External Collaborators, ITER
Folder 2.1	EFDA, ITER, project administrator, RO