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Managing APS Engineering Documents

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- Updated Section 1.4 Applicability to reflect new deadline

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Managing APS Engineering Documents

1 Introduction

1.1 Purpose

Adherence to this procedure will ensure that there is a common scheme for managing engineering documentation at the APS. When consistently implemented, all documentation will be accessible from a single web-based search tool that will cross group, division, project and engineering discipline boundaries.

1.2 Definitions

Refer to **Managing APS Documents Policy** ([APS_1273342](#)) for definitions of terms used within this procedure.

1.3 Scope

This procedure guides the engineering staff through the process of management and control of engineering documents per Policy [APS_1273342](#). It implements a document management framework that addresses:

- The level of rigor required to control an engineering document
- Where engineering documents are stored (i.e. document repositories)
- The process of creating/revising/approving an engineering document
- The need for documents to be catalogued into a single index (i.e. the Engineering Document Portal) to provide simple yet thorough search mechanisms across projects, groups, divisions, and engineering disciplines

Within this framework, technical groups are given a substantial amount of flexibility on the specifics of how they manage their documents. These specifics are documented in a group-specific plan approved by their line management.

1.4 Applicability

All engineering documents that describe the design, fabrication, installation and operation of the APS technical systems are managed by this policy.

All groups are expected to be following this procedure by June 2013.

1.5 Related Documents

- Workflow Diagram ([APS 1428895](#))
- Managing APS Documents Policy ([APS 1273342](#))
- Group-Specific Engineering Document Management Plan – Template ([APS 1423690](#))
- APS Design and Drafting Drawing Standard ([APS 1429632](#))
- Releasing APS Purchased Parts ([APS 1286337](#))
- [ANL Quality Assurance Program Plan](#)

2 Step-by-step Workflow to Create/Revise Documents

The diagram, APS Engineering Document Workflow ([APS 1428895](#)) describes the process to create or revise an engineering document. The yellow elements indicate where information is required from the group's Engineering Document Management Plan for proper direction. Key aspects of this procedure are summarized here:

- Each group that produces engineering documentation for the APS facility must have an approved Group Specific Engineering Document Management Plan to guide the staff in the necessary processes for creating or revising a particular document.
- The process varies slightly depending on which “APS-approved repository” is used. Electronic approval workflows will utilize the capabilities provided by the commercial content management systems intended for specific types of documents, e.g., ICMS, Vault, and PDMLink.
- Each relevant engineering document must have an entry in the Engineering Document Portal (EDP), which identifies the location of the document source, the location of a web-viewable image of the file, and other simple attributes.
- The primary mechanism for finding documents will be to search/browse through the “collections” of the EDP. This should be kept in mind when organizing documents into an EDP collection.

3 Feedback and Improvement

If you are using this procedure and have comments or suggested improvements for it, please go to the [APS Policies and Procedures Comment Form](#)^{*} to submit your input to a Procedure Administrator. If you are reviewing this procedure in workflow, your input must be entered in the comment box when you approve or reject the procedure.

Instructions for execution-time modifications to a policy/procedure can be found in the following document: Field Modification of APS Policy/Procedure ([APS 1408152](#)).

* http://centraldocs.aps.anl.gov/comment_form.php