Glossary

Change procedures

There are two procedures available for changing documents, each of which is linked to the document type: *** Use versioning**

When stamping, a new version of the document is created, which must be released separately. This procedure is used when several users work on a document one after the other or when editing statuses should also be visible to other users. This mode should also be used if the editor is not authorised to release the document.

* Do not use versioning

When stamping, a new revision is released directly. In this case, the editor is always authorised to release documents.

Document

In the context of document management systems, a document refers to a digital information carrier with any content, e.g. written documents, plans or images. Documents are available as files and can consist of several linked files. They can be created by scanning or by application programmes. Documents can undergo a change process in which different versions and revisions are created.

Document type

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PDM uses document types to classify documents. A separate document type should always be created if the documents have the following differences: * Different file formats (e.g. .dwg, .doc, .xls, etc.)

- Different attribute sets for the same file type (e.g. delivery notes and technical documentation – both in „Word" (.doc) format)
- Different application programmes for editing the same file type (e.g. AutoCAD, Mechanical Desktop)

In addition, a document type can also be used for content classification, e.g. for individual part drawings, assembly drawings or circuit diagrams. Inspeedy

PDM, a specific change procedure is assigned to each document type.

Document management system (DMS)

A document management system is used to manage all types of documents. Additional information (properties, attributes or metadata) is stored in a separate database. This information enables documents to be filtered and searched for based on any characteristics.

Properties / Attributes / Metadata

Properties, attributes or metadata are supplementary information about a document (e.g. creator, creation date, version) or its content (e.g. drawing number, subject). They are stored in thespeedy

PDM database and are used to uniquely identify and manage documents.

History

The document history tracks the development of a document across different versions and revisions. This history is automatically managed and stored in a traceable manner inspeedy

PDM.

Container

Within a vault,speedy

PDM offers the option of structuring documents using containers. The documents themselves are stored in the top level of the vault, while the containers only contain references to these original documents.

Containers are assigned to a container type. Currently, the container type *„General"*

is available, which is based on the functionality of a conventional directory container (e.g. in Windows Explorer).

Revision

A revision refers to the approved and unchangeable status of a document. Both the properties and the content of the document remain fixed in this state. A document can have several revisions, e.g. for different sample statuses of a component. Each revision is based on a previously approved plan.

Vault

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PDM, documents are organised in so-called vaults. Separate vaults are particularly useful when documents form a self-contained unit, e.g. all plans for a master article or the documentation for a project.

Each vault has its own database and a separate file directory. This makes it easy to archive vaults, e.g. on an external data carrier. If there are a large number of documents, the search speed can be improved by distributing documents across several smaller vaults.

Version

A version is an intermediate state of a document during editing before it is released and becomes a revision. Versions are only created if the option *„Use versioning"*

is activated for the respective document type.

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