

The Siemens logo is positioned in the top left corner. The background features a stylized globe with a grid of latitude and longitude lines, overlaid with a network of white lines that suggest a complex engineering or data structure. The overall color palette is light and professional, with shades of blue, green, and white.

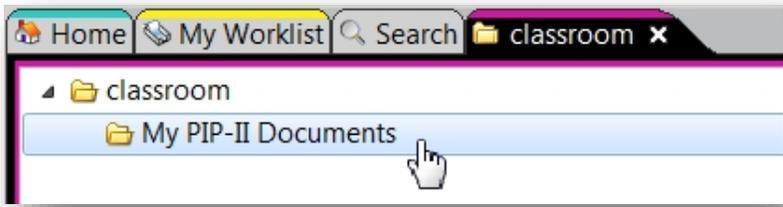
SIEMENS

# Creating an EPDM

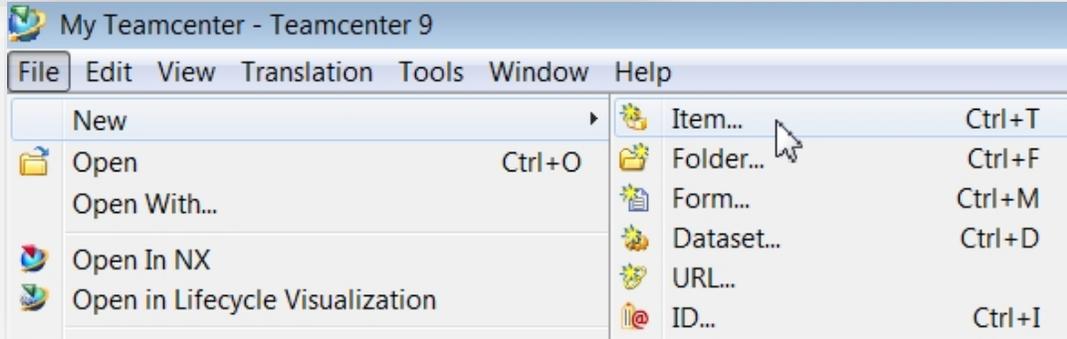
Teamcenter Fundamental Training

How to create an Engineering Process Document Management Form

(a.k.a. Work package Roadmap / Checklist)



To create an EPDM document, start by selecting an existing folder.



Then, File → New → Item

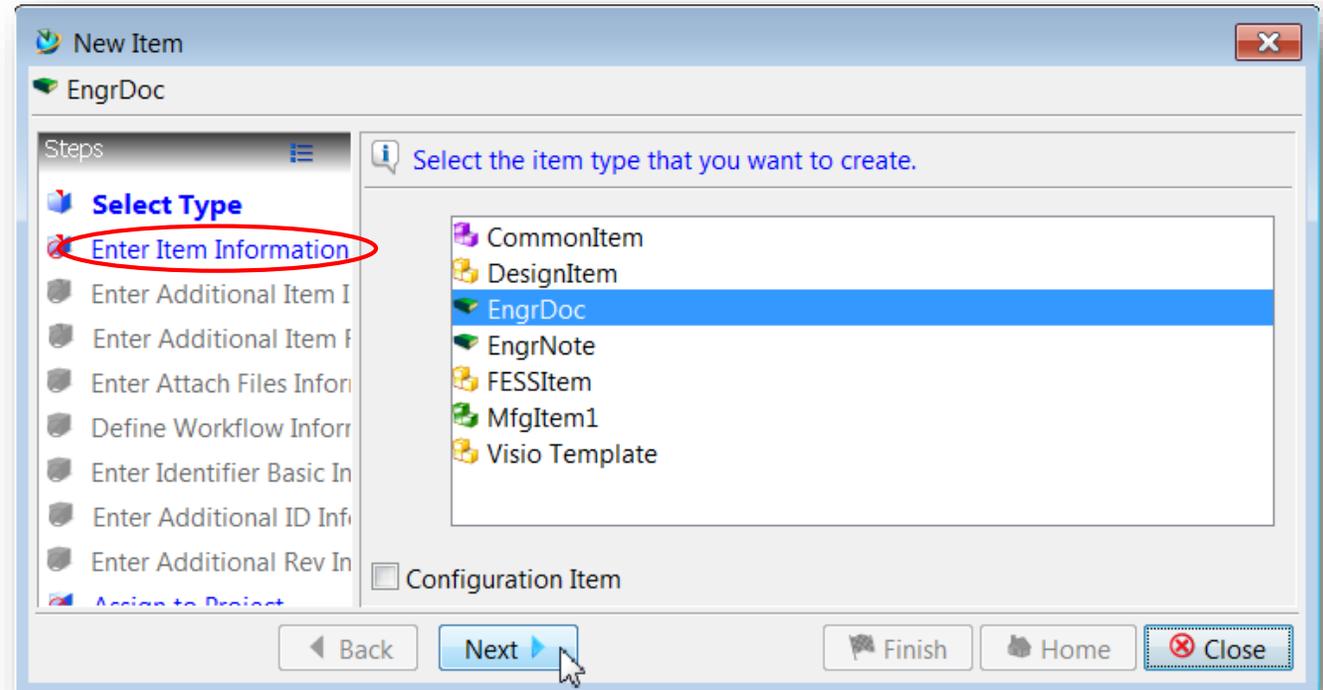
Select *EngrDoc* as the Item Type.  
Click *Next*

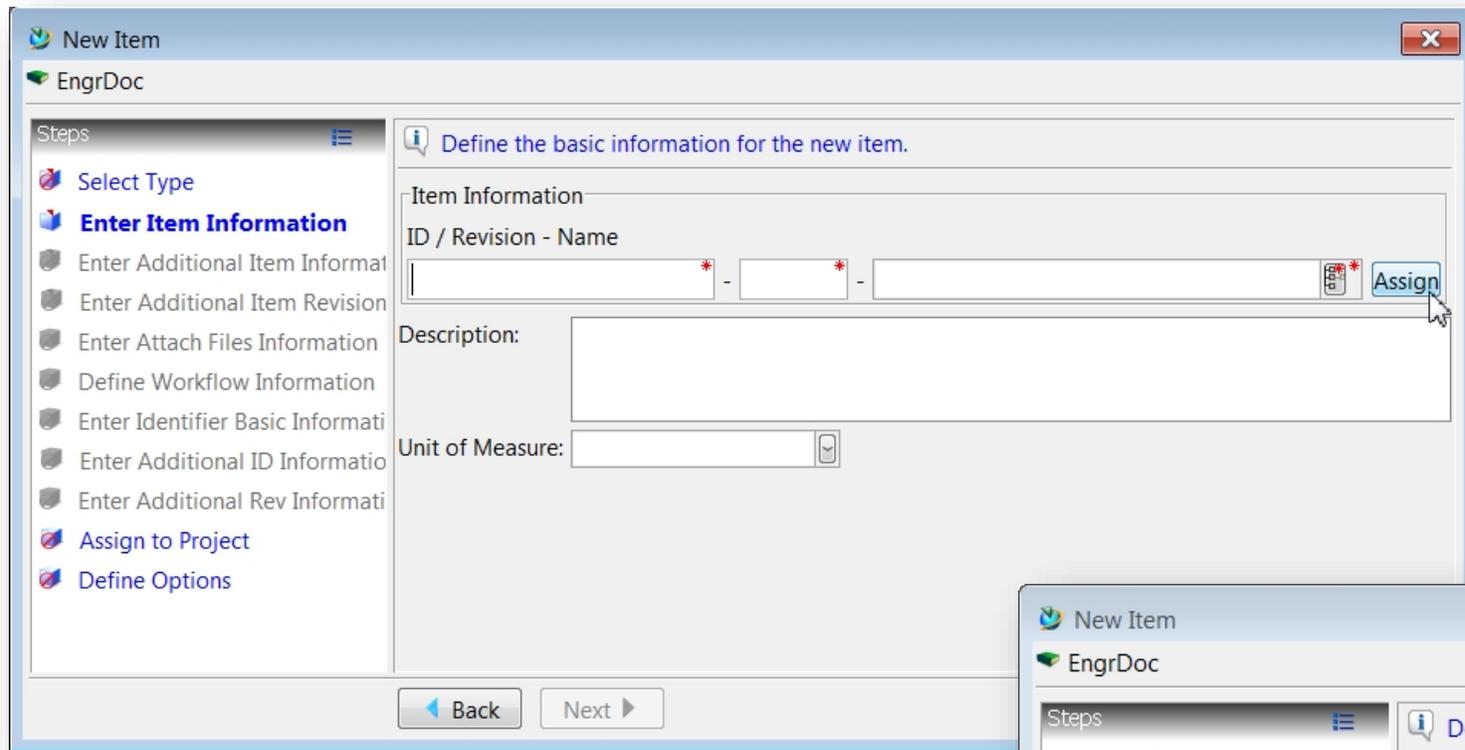
6 Teamcenter attributes are required:

1. Name
2. Number
3. Revision
4. Description
5. Category
6. Project

*Additionally, it is recommended that you include the author name and Fermilab Division/Section.*

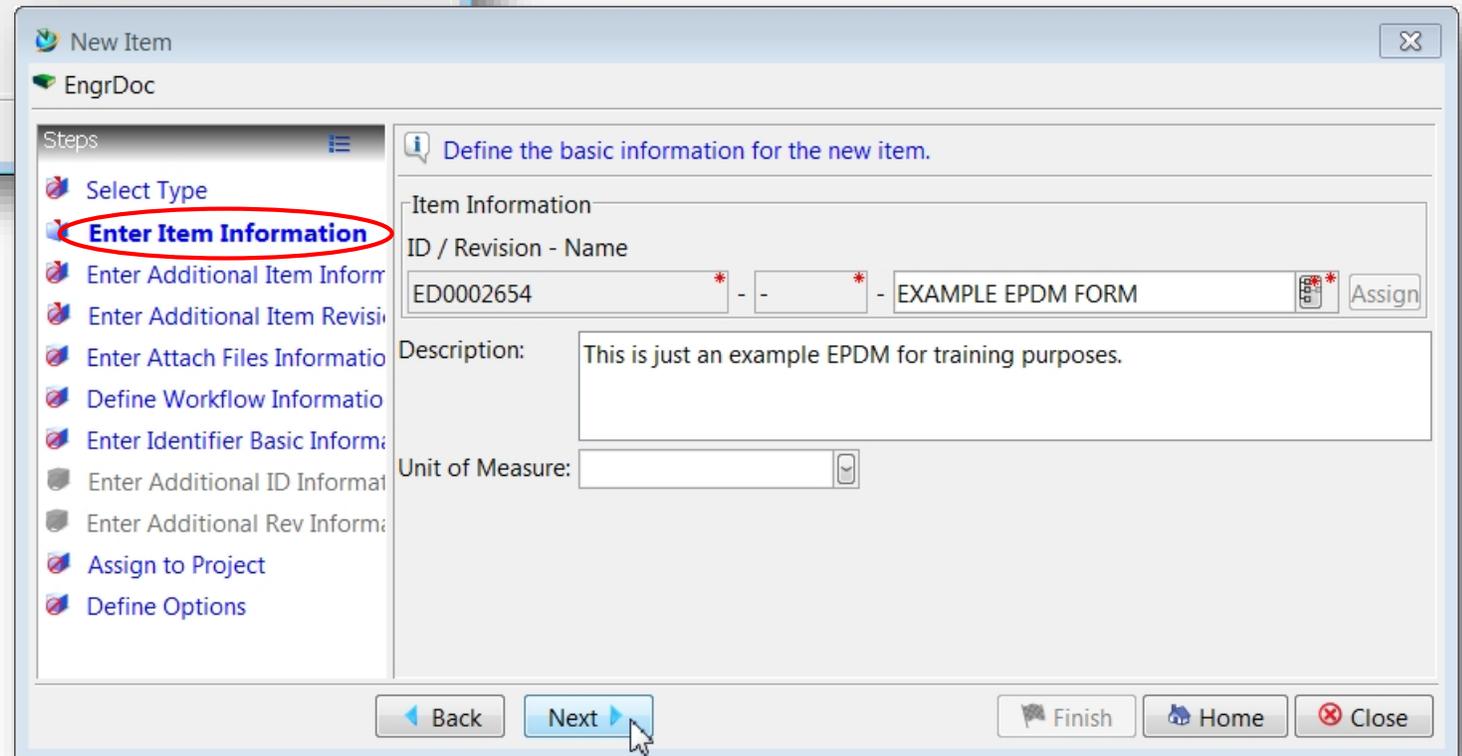
**NOTE: Do NOT put Items inside of Items!**





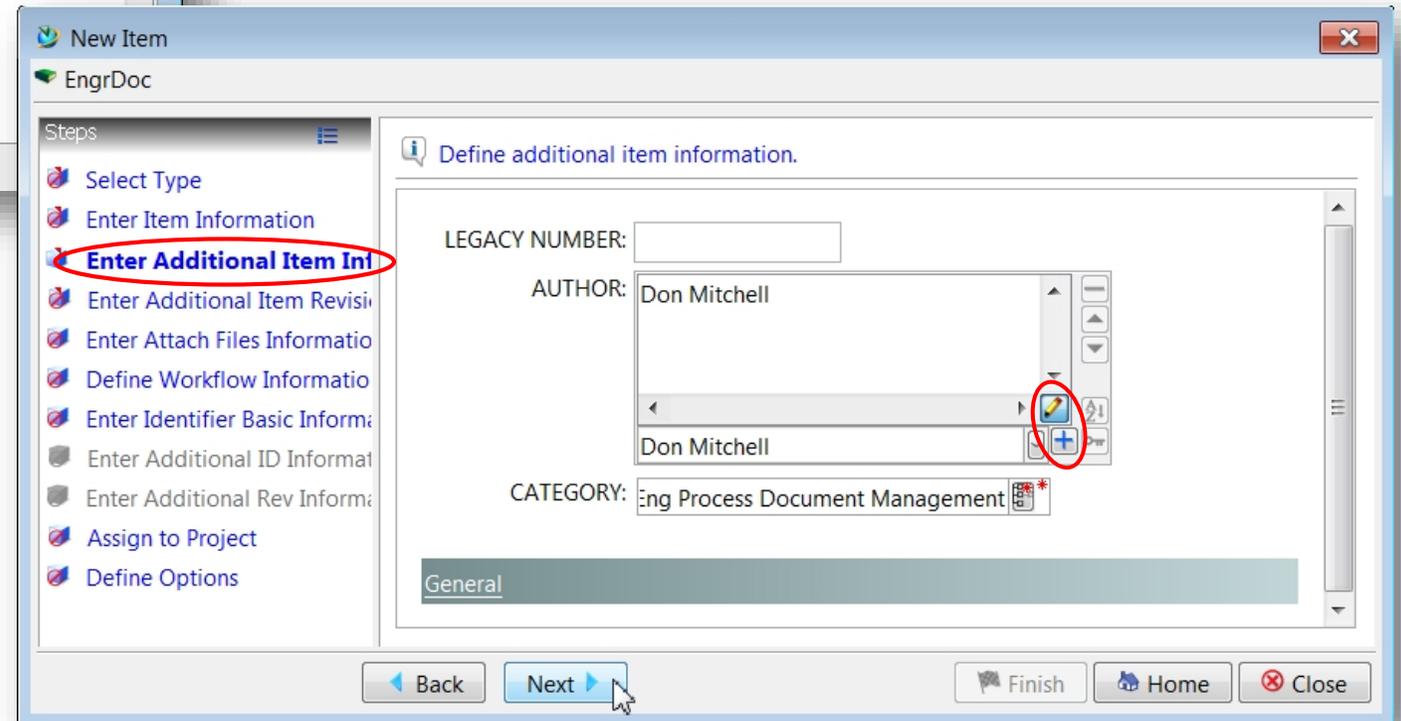
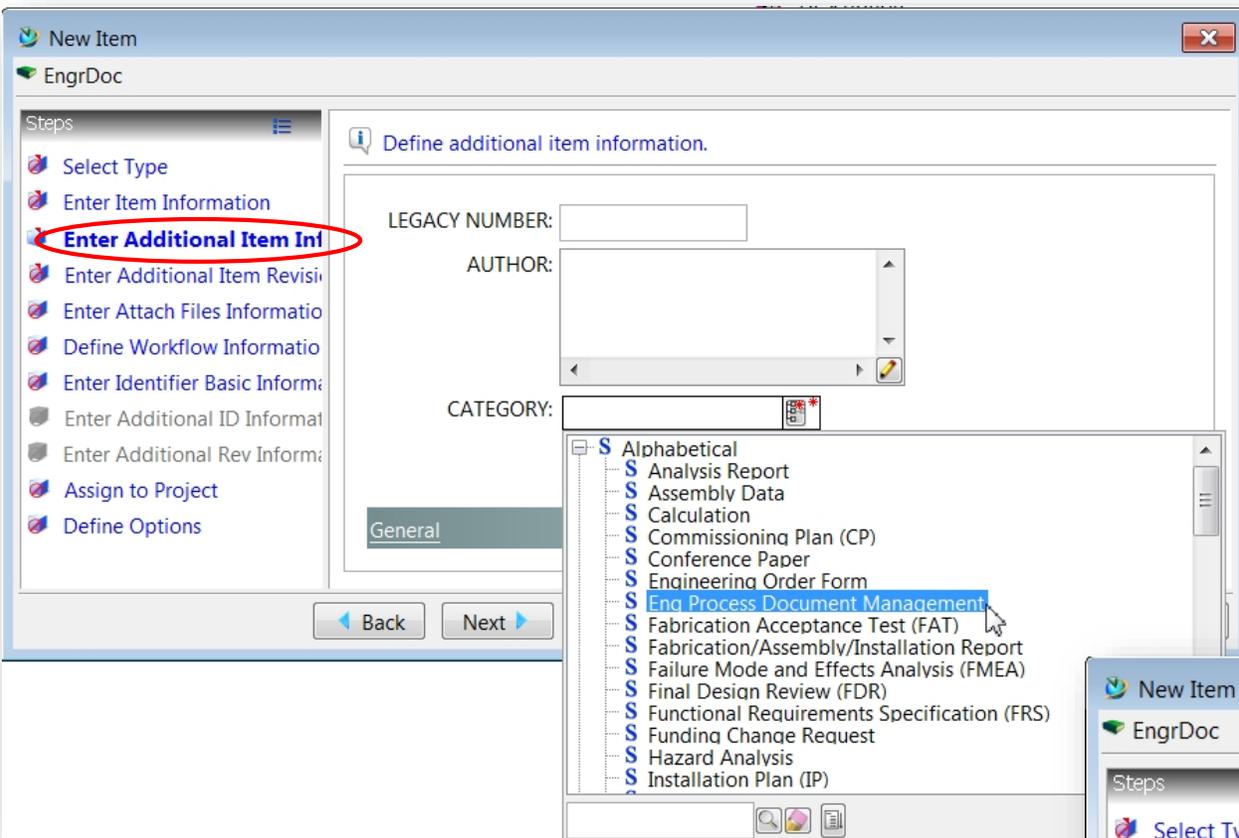
Click on the *Assign* button to assign a new Item Number.

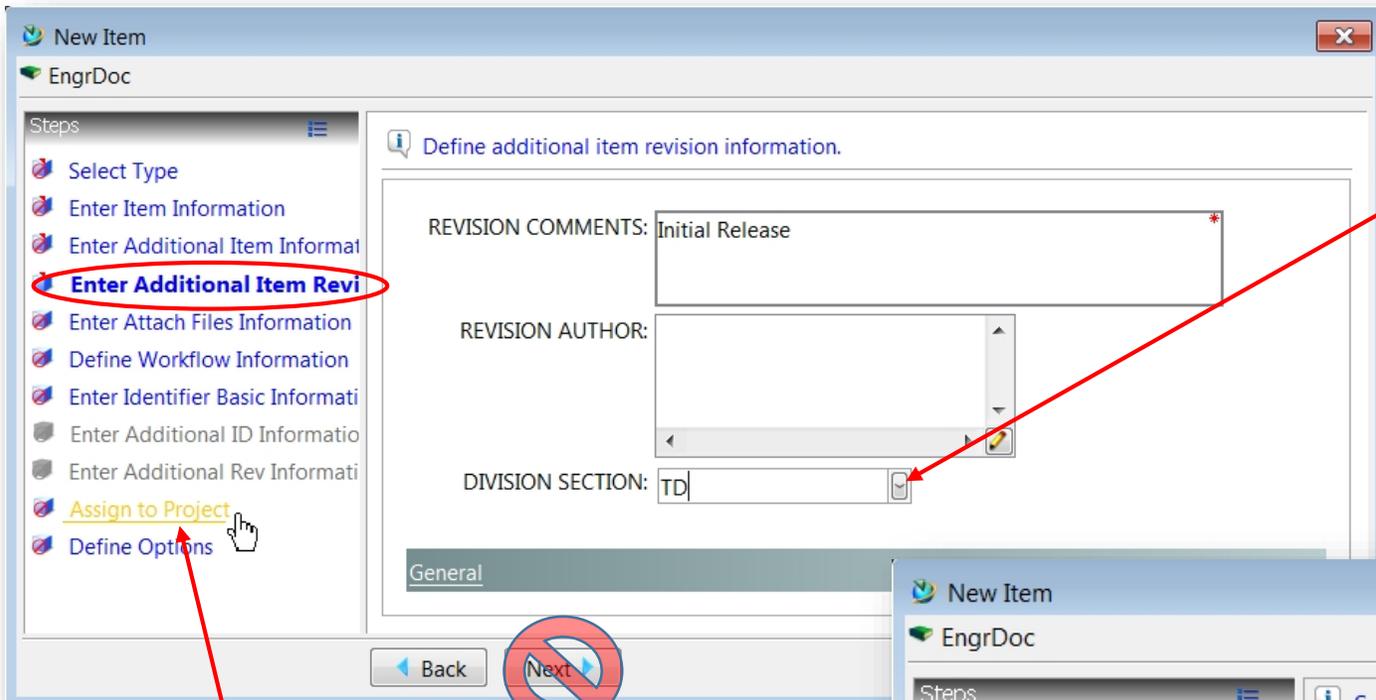
Type in a meaningful name and description.  
Click *Next*



Pull down the *Category* list and double-click on *Eng Process Document Management*.

Click on the *pencil* icon and enter in your name. Click on the “+” icon to add your name to the author list. Then click *Next*.



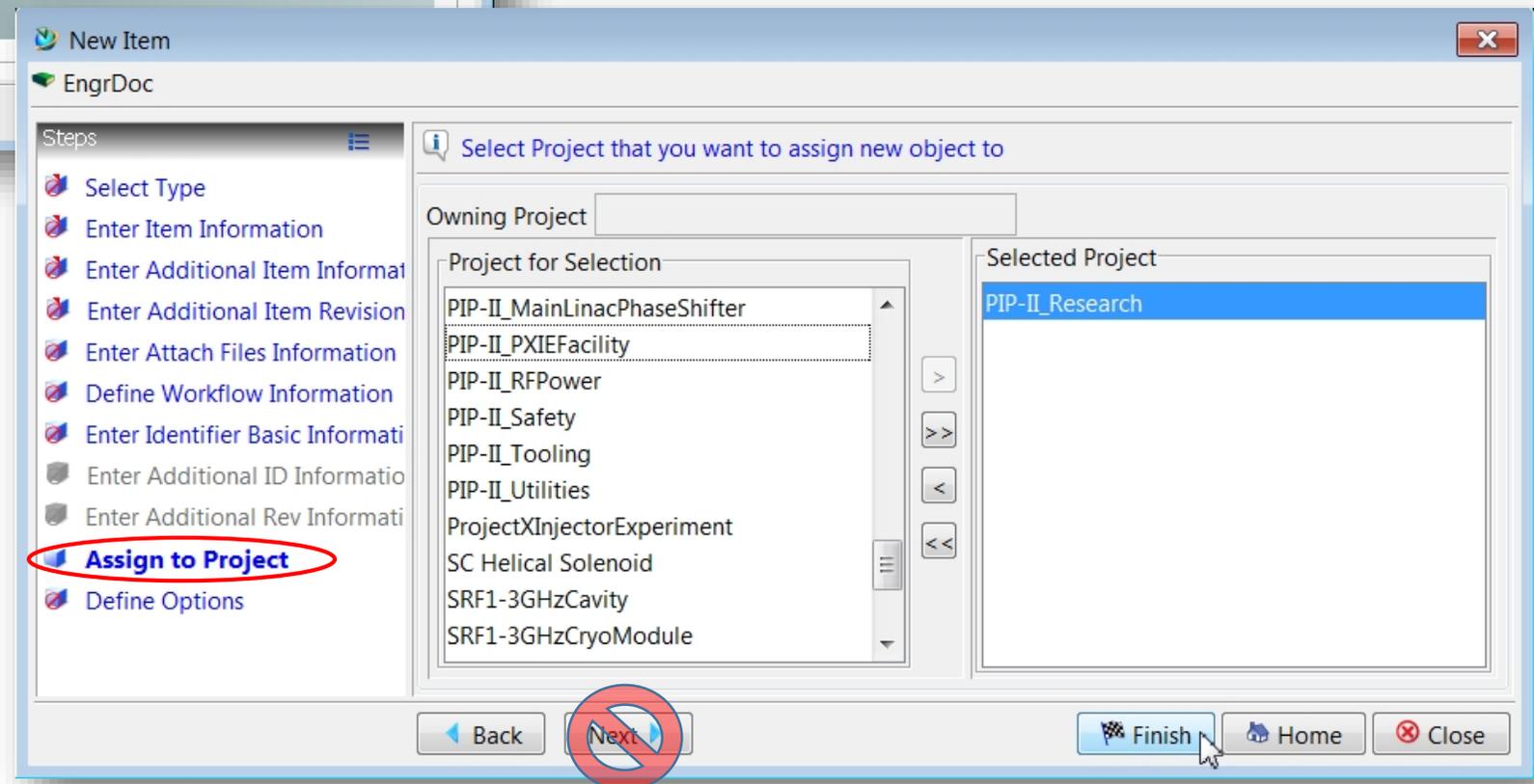


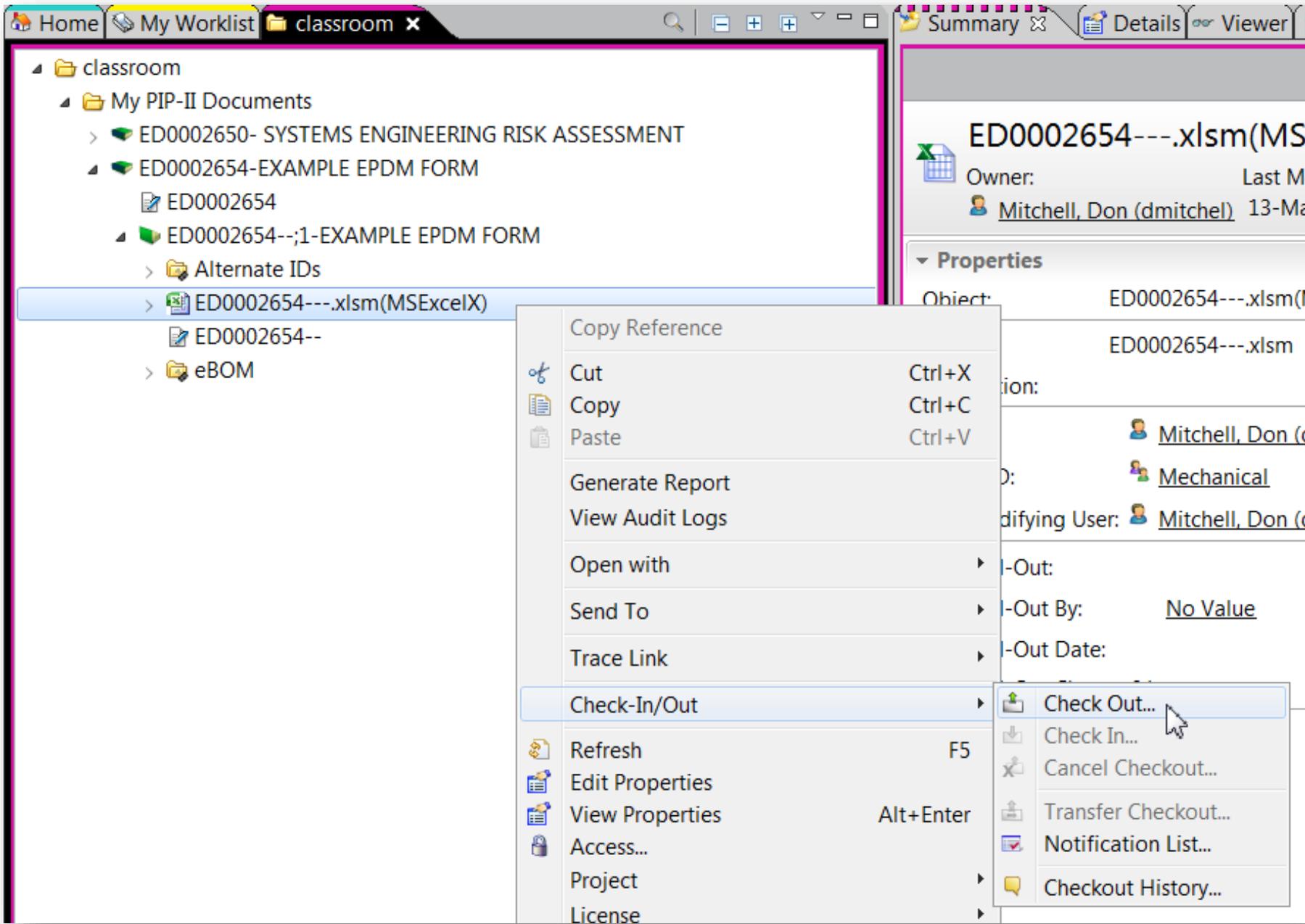
Select your Division/Section from the pull-down list.

You should skip the next several forms and instead go directly to the *Assign to Project* form. Do this by clicking on *Assign to Project*.

Find your Project in the list and add it to the *Selected Project* column.

Click *Finish*.



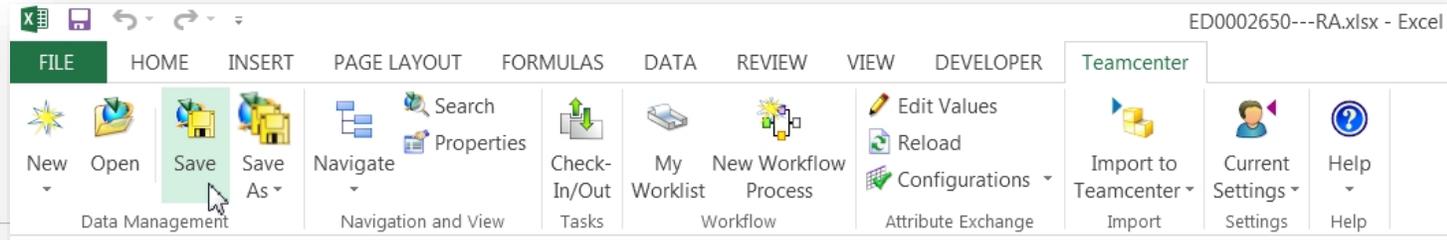
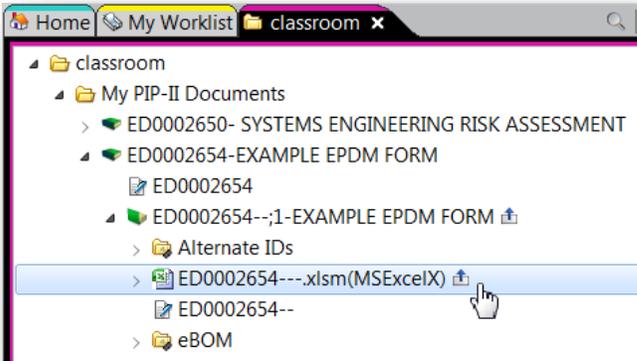


The new *EPDM* has been created. An Excel *Dataset* has been automatically created.

RMB click on the *dataset* and check it out.

When asked, click *OK*.



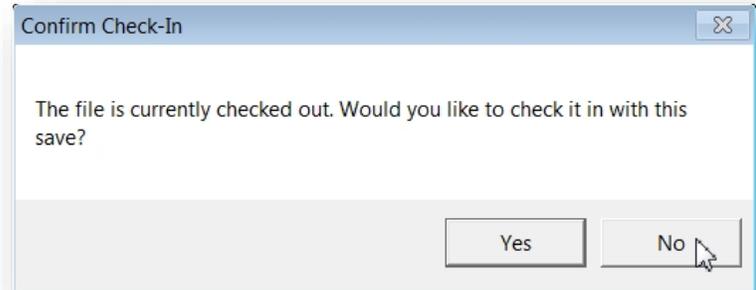


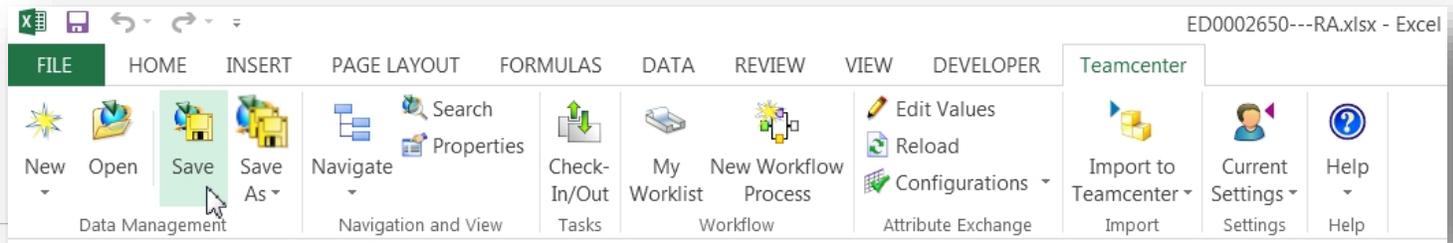
Engineering Process Document Management				
Doc Name	EXAMPLE EPDM FORM			
Doc #	ED0002654			
Does this task require a design?	<input type="checkbox"/> Requires a Design			
Standard Documentation				
Requirement	Document Type	Justification for "Not Required"	Author	TC Item #
	<b>Requirements and Specifications</b>			
REQUIRED	Functional Requirements Specification (FRS)			
<input type="checkbox"/> Required	Statement of Work (SOW)			
	<b>Engineering Risk Assessment</b>			
<input type="checkbox"/> Required	Project Management Plan (PMP)			
REQUIRED	Risk Assessment			
	<b>Requirements and Specifications Review</b>			
<input type="checkbox"/> Required	Technical Requirements Specification (TRS)			
<input type="checkbox"/> Required	Specification Review			
	<b>System Design</b>			
	Technical Design Report (TDR)			
	Preliminary Design Review (PDR)			
<input type="checkbox"/> Required	Systems Integration Review (SIR)			
	Final Design Review (FDR)			
	<b>Procurement and Implementation</b>			
<input type="checkbox"/> Required	Procurement Plan (PP)			

Double-click on the *Dataset* to launch it into Excel. Before you begin to edit the file, make sure that the *Teamcenter Save* icon is not grayed-out.

Edit as necessary and *Save* often.

Mark all of the documents that you feel are required based upon the *Risk Assessment* and *graded approach*.





Engineering Process Document Management				
Doc Name	EXAMPLE EPDM FORM			
Doc #	ED0002654			
Does this task require a design?	<input checked="" type="checkbox"/> Requires a Design			
Standard Documentation				
Requirement	Document Type	Justification for "Not Required"	Author	TC Item
	<b>Requirements and Specifications</b>			
REQUIRED	Functional Requirements Specification (FRS)			
<input checked="" type="checkbox"/> Required	Statement of Work (SOW)			
	<b>Engineering Risk Assessment</b>			
<input type="checkbox"/> Required	Project Management Plan (PMP)			
REQUIRED	Risk Assessment		Don Mitchell	ED0002650
	<b>Requirements and Specifications Review</b>			
<input type="checkbox"/> Required	Technical Requirements Specification (TRS)			
<input type="checkbox"/> Required	Specification Review			
	<b>System Design</b>			
RECOMMENDED	Technical Design Report (TDR)			
REQUIRED	Preliminary Design Review (PDR)			
<input type="checkbox"/> Required	Systems Integration Review (SIR)			
REQUIRED	Final Design Review (FDR)			
	<b>Procurement</b>			

Edit this dataset every time you add documents to your work package.

Use this information as a roadmap to your document management.

This dataset becomes the check-list for all reviews and should be an all-inclusive list capturing all historical work package data.

On your last Save, click *Yes – check-in with this save.*

