

Introduction/Executive Summary
Scope – from DM perspective
Definitions and Abbreviations
Roles & Responsibilities (including locations) • By discipline • DM • Information management • Engineering management
Table outlining • Document Numbering conventions (Design/Supplier) • Document Coding • Document types • Document revisioning • Issue purpose codes • Approval codes • Use of hierarchical reference data (WBS Codes, Cost codes, Asset Tags etc.)
Filing/Storage requirements • DM Systems used (and who uses them) • Access/Security & confidentiality requirements • Existing document library • New document library? • Physical storage & floor space requirements

Document formats Acceptable formats (e.g., locked PDF + native file format)
List of exclusions (zip files/TIFFS etc.) • File Size restrictions • File Naming conventions • Language(s)
Reporting requirements • MDR/SDR • Progress reporting • Expediting reports
Front page • Header Block format • e.g., Number, Title, Date, Revision, Status, Logo(s), Sheet Numbering
Document Templates Included in Procedure Document as attachments or URL to network location
Document review and Approval cycles • Engineering • Customer Suppliers • Correspondence
Distribution Matrix • Input from Discipline lead • Hard copy/soft copy • Include template for matrices

Document procedures
• Issuing • Transmittals • Approvals/Authorisation • Commenting (including turnaround times) Revisions • Audit/KPI Checks • Handover process and requirements • Retention, Archiving & Destruction
Schedule & Milestone dates
Training and communication of relevant procedures
Transmittal format
• Transmittal numbering • Include template for transmittals
Communications and Interface management
Metadata requirements

Reference Documents

Client Contract

- SOW
- Client's IM Plan
- Numbering & Tagging Procedures

Handover requirements

Internal/Project

- PMP/PEP
- IM Plan
- DM Procedures
- Corporate Standards & Procedures