

Module B - Definition Phase

Inputs & Outputs

Inputs	Outputs
Client/Contract requirements including language, their IM plan etc. (read thoroughly and get absolute clarification on any grey areas)	Document numbering
Corporate requirements (check Corporate Standards and guidelines)	Coding
Legal Requirement (check governing law and requirements for all affected countries)	Document revision process
HSE Requirements (check requirements for all affected countries)	Document formatting • Artwork/logos • Cover sheets • Document Header block
Joint Venture Requirements (check and get understanding of the implications)	Handover requirements • Document format • (Locked PDF, native file format, both?) • Hard copy/soft copy • What media? CD-Rom, Hard Drive • Number of copies • Folder type and colour, artwork etc. • Delivery location(s)
Project Management Plan/Project Execution Plan	Schedule/Delivery dates
Lessons Learned from previous projects	Client Authorisation process
Supplier Strategy	Language(s)
Schedule and Milestone dates	Circulation period/commenting period
Deliverables list (by discipline and/or sub- contractor)	Client DM Process
Distribution matrix (from PMP/PEP and/or Engineering)	Engineering DM process

Coding/numbering requirements	Supplier DM process
Budget for DM	Agreed reporting schedule - Content, format, structure etc. - Production of reports
Reporting requirements	DM Audits
Handover requirements - Phased/continuous handover - One-off batch handover - Paper/Electronic/format?	Plans & procedures - Data Management plan - Archiving and retention process and policies - Supplier data management - Supplier Instructions - File naming convention
QA/QMS Audit requirements	DM Manpower/resourcing plan
Licenser Requirements if applicable	Project DM Procedure document
	Security/system access matrix
	Special requirements - Transfer by CD/email/FTP/DMZ/ - Hardcopy - File size - Does client need documents loaded into their system? - Special metadata (e.g. Asset Tag Numbers)