

Project Document Numbering & Naming Requirements

TMS1654 - Standard

Revision Table

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# Purpose

The purpose of this document is to define the requirements for the format and required data inclusions for the numbering and naming of project and technical documents and associated data for *Urban Utilities*. The requirements outlined in this Procedure extend from the planning and development through to the implementation, improvement and retirement of all deliverable documentation produced for *Urban Utilities*.

# Scope

This Procedure defines numbering and naming conventions for all controlled documentation produced, sent or received during the lifecycle of Urban Utilities’ projects and is to be read in conjunction with the *STD156* *Project Document Control Standard*. The scope of this Procedure applies to all persons within Urban Utilities and Delivery Partner (DP) teams undertaking works to create, review, approve or publish controlled documentation to support Urban Utilities in the delivery of Works Under Contract (WUC). Documentation and subsequent revisions are subject to a formal review and approval process before publication to the Urban Utilities Document Management System (DMS).

Note: drawings are not covered in this document. The naming, numbering, technical requirements and management of drawings are detailed in *PRO307 Drafting and Drawing Management Guidelines for Capital Project Delivery*.

# Responsibilities

The below table outlines the roles and responsibilities required to implement this Procedure:

|  |  |
| --- | --- |
| **Role** | **Responsibility** |
| Program Controls Lead | Takes ownership of this Procedure and ensures all controlled documents are compliant. |
| Document Control | Ensures documents are registered in the Document Management System (DMS) with unique document numbers and processed in accordance with this Procedure. |
| Document Author | Responsible for creating documents and content of appropriate quality in accordance with this Procedure. |
| Document Owner | Ensures documents will be delivered with relevant numbering and naming conventions in accordance with the Procedure. |
| Project Team | Responsible for managing controlled documentation in accordance with this Procedure.  Comprised of people contributing to project outcomes (including the Document Author, Document Owner and others) |
| Delivery Partner | Responsible for ensuring all controlled documentation including Vendor documentation is numbered in accordance with this Procedure. |

# Terms and Definitions

The below table outlines common terms and definitions used throughout this Procedure:

| **Term** | **Definition** |
| --- | --- |
| Asset Classifications | *Single Site Assets*: are facilities and other assets identifiable using a single Asset Identification number associated with a defined site perimeter, facility or location (as defined by UU Asset Management).  *Other Assets:* Refers to infrastructure located outside of Site perimeters. Assets in this category are generally linear assets and will be majority civil infrastructure.  This classification is also used when referring to projects which may work on multiple assets/sites across distinct geographical areas with the same design requirements (e.g. a series of switchboard replacements). |
| Contract or Framework Agreement | The agreement between Urban Utilities and Delivery Partners to which this Procedure pertains. |
| Contractor/Delivery Partner/Service Provider / Service Provider | Under the Integrated Engineering Services Contract the Consultant Partner is referred to as the Services Provider.  Under the Delivery Partner Framework contracts the Contractor/Delivery Partner/Service Provider is the party engaged by Urban Utilities as the Principal to provide services under contract. |
| Controlled Document | Any document requiring approval/acceptance for implementation and revision or identified as a deliverable in accordance with the terms and conditions of an awarded Contract. All controlled documents are required to be recorded and managed within a formal Document Management System (DMS). |
| Document Management System (DMS) | An electronic system used to store, manage and track controlled documents and the document review and approval processes. |
| Document Placeholder | A number reserved for an intended submission of a controlled document that will be stored electronically in future. |
| Revision | An incremental indicator of each published controlled document to distinguish major changes of a document at various states and stages. |
| Version | The incremental output from a review and update process where the output produced is different from the earlier product. Versions do not result in a new issue / publication. |
| WUC | Work Under Contract |
| Vendor | An entity engaged by a Contractor/Delivery Partner/Service Provider to supply goods, services and / or works to the Contractor/Delivery Partner/Service Provider. |

# Document Numbering

All deliverable documents produced during the course of a project are identifiable by a unique number supplied by Urban Utilities Document Control to facilitate identification of disciplines and document types.

Urban Utilities Document Control is responsible for validating document numbering codes to ensure no duplications occur and will issue a start-up sequential number to the Contractor/Delivery Partner/Service Provider for each document type required for the WUC. Urban Utilities Document Control is also responsible for providing supporting documentation to facilitate compliance with this Procedure. This will include but is not limited to:

* STD156 Project Document Control Standard
* Deliverables Requirements List (SDRL) CHE486
* Facility, Site, Process and / or Location Codes (refer PRO395)
* FOR1063 Document Number Request Form

The Contractor/Delivery Partner/Service Provider is responsible for following the requirements within this Procedure. Should the Contractor/Delivery Partner/Service Provider choose to issue documentation not aligned with these requirements, this is done at the Contractor/Delivery Partner/Service Provider’s risk, and any costs incurred from redrafting or reissuing documentation to meet requirements will be borne fully by the Contractor/Delivery Partner/Service Provider.

## Project Management Documentation

Project Management Documentation provides information relevant to the development and implementation of a project and is used to manage the project and the associated processes. Where the document is a program-wide management document, global [Multiple Asset Identifiers Asset Classification](#_Multiple_Asset_Identifiers) identifier codes are used (refer Appendices).

## Technical Deliverables

Technical Deliverables are comprised of documentation (excluding drawings) that describes the design, construction, functionality, handling, operation and maintenance of a technical product under development or use. The numbering compositions are defined by elements within two possible categories: *Identifiable Single Asset* or *Multiple Assets*.

Document Numbering Convention

All deliverable documents shall be uniquely numbered with a document control number and revision controlled in accordance with this Procedure. Project Teams should make use of the document number as the primary key on documents. The numbering convention that the project must use is established before numbering placeholders are created in the Urban Utilities DMS using the coding compositions outlined in this Procedure and is to be displayed in document file naming and titling. All Document Control Numbers in the Urban Utilities DMS will comprise of the following numbering convention:

|  |  |
| --- | --- |
| Element | Definition |
| Location Attribute | The location attribute will differ for site-based assets and network assets.  *Network assets:* the location attribute will be a local government region, suburb or project management identifier.  *Site-based assets:* Asset Identification codes associated with the Site of the asset(s) relevant to the WUC specified by Urban Utilities at commencement of Contract and will be a five (5) character identifier. |
| Process / Element | Identifies a Process/Element within a broader facility, or asset class. Process/Element codes are specified by Urban Utilities at commencement of Contract and will be a four (4) numeric character identifier (refer PRO395).  *Notes: where a single document relates to multiple elements of a process the parent process the parent process will be used.*  *Where a single document relates to multiple processes four zeros 0000 will be used.*  *When a document relates to pre-delivery and a process/element is not yet defined, project management identifiers will be used.* |
| Discipline | A two (2) alpha character identifier that refers to the originating discipline group of the document produced ([refer Appendix 11.3](#_Discipline_Identifiers)). |
| Document Type | A three (3) alpha character identifier that refers to the type of document produced ([refer Appendix 11.4](#_Document_Type_Identifiers)). |
| Sequence Number | Sequential numbers are a unique identifier for each deliverable and contain five (5) numeric characters starting from 00001. |
| Revision | Revision codes refer to the current [document status](#_revisions_and_codes) (see Section 9) and will be alpha or numeric characters as applicable. |

The following document numbering convention will be used across Urban Utilities’ projects for Project Management and Technical Deliverable documentation to ensure traceability and consistency:

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Location |  | Process/  Element |  | Discipline |  | Document  Type |  | Sequence Number |  | Revision |
| XXXXX | - | 0000 | - | AA | - | AAA | - | 00001 | \_ | A |

XXXXX-0000-AA-AAA-00001\_A

Asset Identification

Process/Element

Discipline

Document Type

Sequence Number

Revision

## Document Numbering Types

The document content and applicability determine the code parameters. There are three categories of numbering:

1. Single Asset
2. Multiple Asset, Single Location
3. Multiple Asset / Multiple Location / Project / Program Management

### Numbering Type 1 Single Asset Example

**Document Number**

ST018-0900-ME-REP-00015\_B

### Numbering Type 2 Multiple Assets, Single Location Example

**Document Number**

ST018-0600-PM-PLN-00002\_A

### Numbering Type 3 Examples

Multiple Assets

**Document Number**

UUNES-0000-CV-MDR-00100\_B

Multiple Locations

**Document Number**

UUNEW-0048-CV-SUR-01001\_C

Project Management

**Document Number**

UUTMS-0000-PM-MDR-00012\_1

Number Allocations

Number allocations will be issued by Urban Utilities Document Control using the numbering and coding convention outlined in this Procedure. It is important that document number requests are complete and accurate using the *FOR1063 Document Number Request Form* supplied to Urban Utilities Document Control for correct document numbers to be issued in a timely manner.

## Format Requirements

It is expected that the Contractor/Delivery Partner/Service Provider will allocate the appropriate Urban Utilities document control number to each of their respective deliverable documents in accordance with the requirements of their Contract and this Procedure. Electronic files must be named consistently using Urban Utilities numbering and naming convention and the appropriate file extension. This applies to all controlled documents provided to Urban Utilities Document Control from Contractor/Delivery Partner/Service Providers.

# Document Naming Convention

Documents will have a document control number and must also have meaningful document naming. Document naming is key to ensuring that the critical information to identify the document is available for immediate use and for future use once the Project has completed. Descriptive titles and file names are essential to assist in the filtering, searching, retrieval, identification and use of documents.

## Document File Naming

Document file names must be formed using the following principles:

* Document file names should be short, descriptive, unambiguous, understandable, and always include the document type in the description;
* Abbreviations and acronyms are to be avoided unless they are commonly used within the project;
* Must include the document revision.

## Document Titling Types

Standard naming is to be included in the document content (when utilising Urban Utilities templates, this should be in the standard header) so printed versions are identifiable as uncontrolled versions and are traceable to their antecedent documents. The relevant document control number used for the document must be included in the header of each page and in the title block at the front of the document.

Document titles are comprised of the following attributes:

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| SDRL Code | Project ID Code | Doc Type Description | Location | Sub-Location (if applicable) | Free Text |
| A00 | AAAAAA00(A00) | Various character lengths | Best known address or geographic indicator | Location within a site | As required to better identify document content |

Worked examples are included below displayed against the three categories of Document Numbering from Section 6.

### Titling Type 1 Single Asset Example

**Document Title**

M20 BWWTAA01C37 Type Test Reports Luggage Point STP Flare Blower

### Titling Type 2 Multiple Assets, Single Location Example

**Document Title**

G20 BWWTAA92 Construction Methodology Luggage Point STP - Final Settling Tanks 9-12

### Titling Type 3 Examples

Multiple Assets

**Document Title**

E46 BWWTAA01C06 Engineer’s Data Sheet Luggage Point STP Switchboard Renewal

Multiple Locations

**Document Title**

C07 BDWDAA01A55 Site Survey 4170 Windermere, Britannia and Blackwood Avenues

Project Management

**Document Title**

G22 BWWTAA01C37 Monthly Progress Report Luggage Point STP Flare Blower

# Revisions and Codes

The revision status must be identified in the cover title block on documents as well as the revision history and change summary table, showing the latest revision and brief description of changes. Electronic files must be named using Urban Utilities numbering and naming convention and include the document revision status. Document revisions are subject to the formalised revision convention in accordance with this Procedure. Document revisions shall progress as follows:

|  |  |  |
| --- | --- | --- |
| Alpha Revisions  (A)\* | Document Status | Preliminary Issue |
| Concept |
| Market Ready Design |
| Issued for Review |
| Issued for Approval |
| Issued for Information |
| Issued for Tender |
| Numeric Revisions  (0) | **Document Status** | **Final Issue** |
| Issued for Construction | Use |
| Re-Issued for Approval |
| As-Built |

*\*Do not use the letters “I” or “O”*

# References

|  |  |
| --- | --- |
| Document Number | Document Title |
| CHE486 | Supplier Data Requirements List (SDRL) |
| PRO307 | Drafting and Drawing Management Guidelines for Capital Project Delivery |
| PRO395 | QUU Addendum to SEQ Water Supply and Sewerage Design and Construction Code (SEQ WS&S D&C Code – Employers Information Requirements |
| SEQ Code | SEQ Water Supply Code |
| TMS1647 | Equipment Tag Naming Standard Technical Specification |

Appendices

## Location Code

| Single Site Assets |
| --- |
| Site asset codes are used for documentation relating to works within a single site location only. These codes are five (5) alpha-numeric characters and have a 1:1 relationship to an Urban Utilities site incl. pumping stations, treatment plants, water boosters, reservoirs, etc.  *Site identifiers are specified in Appendix B of PRO395.* |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Region Identifiable or General/Non-Specific Locations | | | | | |
| Region identifiers are specified below and relate to projects across multiple assets or single alignments which cross suburb boundaries within a single local government area.  The last two rows of the table include two exceptions:   * UU is used where a document describes works across multiple locations but with the same infrastructure and product types. This code * URBAN is used as a five (5) character string for documents describing works across multiple infrastructure or product types. * Both UU and URBAN are most likely to be used for Project/Program Management and early stage project documentation. | | | | | |
| Identifiers are comprised of 3 attributes combined to give a five (5) character string. The attributes are: | | | | | |
| Region/Council Area | **Code** | **Infrastructure Type** | **Code** | **Product Type** | **Code** |
| Brisbane City | BC | Network | NE | Sewage | S |
| Ipswich City | IC | Treatment | TM | Water | W |
| Lockyer Valley Region | LV | Recycled | RE | Information Technology | I |
| Scenic Rim Region | SR |  |  |  |  |
| Somerset Region | SC |  |  |  |  |
| Urban Utilities | UU |  |  |  |  |
| Multiple regions / types / products: URBAN | | | | | |
| Examples:   * Single region project in Brisbane for Network Water assets would use identifier BCNEW * Single region project in Somerset for Treatment Sewage assets would use identifier SCTMS * Management plan for IES Treatment Service Provider would use code UUTMS * Management plan for IES Networks Service Provider (due to covering two product types) would use code URBAN * Scope of works covering multiple regions for Network Water assets would use code UUNEW | | | | | |

## Asset Element / Process Identifier

|  |  |
| --- | --- |
| Code | Description |
| Establishment Codes  These alphabetic codes only apply to Program Establishment documentation for long-term Strategic Partners. | |
| IEST | Integrated Engineering Services Treatment |
| IESN | Integrated Engineering Services Network |
| NETP | Network Partner |
| TMTP | Treatment Partner |
| Element Identifiers  These codes are utilised for documentation relating to network assets | |
| 0000 | Generic – for use in early project stages where design is not mature enough to identify a sub-classification or process. |
| 0011 | General – QUU Standards |
| 0012 | General – Miscellaneous |
| 0013 | General – Recycled Drinking Water |
| 0014 | General – Survey |
| 0041 | Water – QUU Standards |
| 0042 | Water – Miscellaneous |
| 0046 | Water – Trunk Mains |
| 0049 | Water – Reticulations |
| 0051 | Sewer – QUU Standards |
| 0052 | Sewer – Miscellaneous |
| 0056 | Sewer – Branch & Trunk Mains |
| 0058 | Sewer – Rising Mains |
| 0059 | Sewer – Reticulation |
| 0515 | Sewer – Overflow Structures |
| Process Codes  These codes are described in *Appendix C of PRO395*. | |

## Discipline Identifiers

| Code | Discipline | Description |
| --- | --- | --- |
| CL | Commercial | Documentation related to the management of contractual or commercial arrangements incl. management of contractual incentives, payments, contractual disputes. |
| CV | Civil | Documentation related to the discipline of Civil engineering incl. design specifications, calculations, reports, Terms Of Reference, clarifications, etc. |
| CS | Commissioning | Documentation related to the function of Commissioning assets, generally mechanical or electrical but also associated with charging of new network infrastructure. |
| DE | Design (general or non-discipline specific) | Documentation related to design documentation which incorporates multiple disciplines of engineering or which is general / non-discipline specific. |
| EE | Electrical | Documentation related to the discipline of Electrical engineering incl. design specifications, calculations, reports, Terms Of Reference, clarifications, etc. |
| ES | Estimating & Cost Control | Documentation related to the processes of cost estimation and cost control incl. Estimates, Cost Sheets, Target Cost Estimates, etc. |
| EV | Environment | Documentation related to the discipline of environmental management incl. environmental approvals, environmental plans, environmental assessments, etc. |
| EX | External Affairs & Communities | Documentation related to the community engagement function of a project incl. Community engagement plans, communications plans, etc. |
| GV | Governance & Approvals | Documentation related to project approvals and governance committees or approval delegates. this will include minutes, agendas and actions arising from meetings of project or technical approval groups. |
| HS | Health & Safety | Documentation related to the health and safety functions of a project incl. Health and Safety Plan, Safety Incident Reports, etc. |
| IT | Information Services & Technology (IS&T) | Documentation related to the delivery of required software and hardware associated with a given asset. May incl. software requirements, Know Your Application, Configuration Guide, Business Rules, etc. |
| ME | Mechanical | Documentation related to the discipline of Mechanical engineering incl. design specifications, calculations, reports, Terms Of Reference, clarifications, etc. |
| OM | Operations & Maintenance | Documentation related to the operation and maintenance functions associated with an asset. May include Operations & Maintenance Manuals, Operating philosophies, Maintenance Schedules, etc. |
| PC | Project Controls | Documentation related to the project controls for the delivery of the asset. Includes Project Schedule, Project earned value reporting, etc. |
| PM | Project Management | Documentation related to the Project Management for the delivery of an asset. Includes the Project Management Plan, Scope control documentation (e.g. project changes), etc. |
| PR | Procurement | Documentation related to the procurement of the asset or associated plant and equipment. Includes Purchase Orders, Quotes, Tender documentation, etc. |
| QA | Quality Assurance | Documentation related to the Quality assurance functions of delivery of an asset. Includes: Quality Management Plan, site audit reports, corrective and preventative actions, etc. |
| QP | Process | Documentation related to the discipline of Process engineering incl. design specifications, calculations, reports, Terms Of Reference, clarifications, etc. |
| RM | Risk Management | Documentation related to the risk management functions of delivering and operating the asset. This includes any Risk Management Plans, Risk Registers, etc. |
| SS | Structural | Documentation related to the discipline of Structural engineering incl. design specifications, calculations, reports, Terms Of Reference, clarifications, etc. |
| TR | Training | Documentation related to training on the operation or maintenance of an asset. |
| VN | Vendor | Documentation delivered from original equipment manufacturers or vendors. Includes data sheets, technical brochures, parts lists, etc. |

## Document Type Identifiers

*Note: drawings do not have a Document Type Identifier because they are numbered and managed in the RedEye system in accordance with PRO307 Drafting and Drawing Management Guidelines for Capital Project Delivery*

| Code | Type of Document |
| --- | --- |
| AGN | Agenda |
| APR | Approval |
| ASS | Assessment |
| BOD | Basis of Design |
| BKG | Bank Guarantee |
| BGT | Budget |
| CAL | Calculation |
| CER | Certificates |
| CHN | Change Notice |
| CMS | Construction Method Statement |
| CAR | Corrective Action Request |
| CKL | Checklist |
| CMA | Commitment Authorisations |
| CTN | Contract Notice |
| CON | Contract |
| CHT | Charts/Maps |
| DSC | Design Criteria |
| DFN | Defect Notification |
| DSH | Data Sheet |
| EML | Email |
| EST | Estimate |
| FCS | Forecast |
| FRM | Form |
| GDL | Guideline |
| HOD | Handover Dossier |
| ITC | Instruction to Contractor/Delivery Partner/Service Provider |
| INS | Insurance |
| ITP | Inspection and Test Plan |
| IFS | Information Sheets / Fact Sheet |
| IVN | Invoice |
| JHA | Job Hazard Analysis |
| LGL | Legal Document |
| LST | List |
| LTR | Letter |
| MAN | Manual |
| MDR | Manufacturer Data Report |
| MEM | Memo |
| MOM | Meeting Minutes |
| MTO | Material Take-off |
| MTX | Matrix |
| NCR | Non-Conformance Report |
| NTC | Notice / Notification |
| OMM | Operating and Maintenance Manual |
| PER | Permits & Approvals |
| PMC | Payment Claim |
| PRQ | Pre-Qualification |
| PFD | Process Flow Diagram / Chart |
| PCR | Project Change Request |
| PHO | Photo |
| PLN | Plan (Note: these are not drawings, this is used for Management Plans) |
| PCO | Purchase Order |
| POL | Policy |
| PPL | Proposal |
| PRO | Procedure |
| PRS | Presentation |
| QDT | Quality Data |
| QTE | Quote |
| RFC | Recommendation |
| REF | Reference Document |
| REP | Report |
| REG | Register |
| REQ | Request (for Quote, Tender, Proposal, Approval, Variation, etc.) |
| RFI | Request for Information |
| RSK | Risk Assessment |
| SCH | Schedule |
| SCP | Scope Change Proposal |
| SHP | Shop Drawing |
| SKT | Sketch |
| SPN | Supplementary Notes |
| SPC | Specification |
| STD | Standard |
| SUR | Survey |
| SOW | Scope of Work |
| TCS | Terms & Conditions |
| TEN | Tender |
| TEM | Template |
| TCQ | Technical Queries |
| TCR | Tender Clarification Request |
| TOR | Terms of Reference |
| TRN | Transmittal |
| TST | Test Results |
| VAR | Variation |
| VID | Video |
| WIN | Work Instruction |
| WKO | Work Order |

# Managing Documents on Parallel Works

Where works are being undertaken on a site/asset by multiple groups (internal, external, contracted) simultaneously, a single Principal must be appointed and is required to manage the development and dissemination of documentation. Whether this is Urban Utilities, or a contracting partner is the discretion of the project manager.

If no one is appointed, this responsibility defaults to the Urban Utilities Project Manager.

# Modifying Existing

At times, existing documents will require modifications to reflect the current asset’s data. When modifying existing document numbers, the drafter shall maintain the existing document number, and the revision shall reflect the next character in the sequence, i.e. D, E, F, etc, OR 12, 13, 14, etc.

If there’s a new Urban Utilities branding or document control formatting, it shall replace the existing data, and the fields are to be updated to reflect the existing. Any unknown non-matching fields are to be confirmed with the Project Manager.

# Document Code updates and TRansition

Prior to Revision 4 of TMS1654, the components of the document number were different. Previous document numbers were comprised of:

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Location |  | Process/  Element |  | SDRL Code |  | Sequential Number |
| XXXXX | - | 0000 | - | A00 | - | 00001 |

From 16 March 2020 all new Project Documents initiated will utilise the current coding available from Revision 4 onwards.

Documents with existing numbering from the previous system will retain that numbering through development and to finalisation.

*Note: The new Document Number and Title requirements preserve the SDRL Coding in the Title rather than the Document Number. This maintains searchability on this attribute.*