

Winnipeg Sewage Treatment Program Integrated Management System



Project and Vendor Site Designs

PG-RC-RF-03

Draft

Rev	Prepared by	Reviewed by	Approved by	Date

Project Site Libraries --->

Content Type	Template	Record Category (system)	Tech Numbering Doc Code	Tech Numbering Source Code	*For Paper Filing	Classification (V1)							
						1. Project Dev. & Mgmt.	2. Financial	3. Technical	4. Procurement	5. Contract Admin.	6. Public Information	7. Safety & Security	8. Target Cost
		190				24	13	47	20	71	11	34	17
Addendum	y	P				4.1	0	0	0	1	0	0	0
Agenda	y	P				1.0, 2.0, 3.0, 4.0, 5.0, 6.0, 7.0	1	1	1	1	1	1	1
Approved Contract Change	y	P			y	4.7.5	0	0	0	0	1	0	0
Area Manual		E+T	AM	E		3.0	0	0	1	0	0	0	0
Asset Register	y	E	LA	A		3.0	0	0	1	0	0	0	0
Audit Report		P				1.0, 2.0, 5.0	1	1	0	0	1	0	0
Award Letter**	y	L				4.2	0	0	0	1	0	0	0
Award recommendation		P			y	4.1	0	0	0	1	0	0	0
Award report	y	P			y	4.2	0	0	0	1	0	0	0
Bid		P			y	4.1	0	0	0	1	0	0	0
Bid Evaluation	y	P				4.2	0	0	0	1	0	0	0
Bid Opportunity Document	y	T				4.1	0	0	0	1	0	0	0
Briefing Note	y	P				1.0, 2.0, 3.0, 4.0, 5.0, 6.0, 7.0	1	1	1	1	1	1	1
Budget - Capital		P				2.1, 7.0	0	1	0	0	0	0	1
Budget - Operating		P				2.2, 7.0	0	1	0	0	0	0	1
Business Case	y	P				1.1	1	0	0	0	0	0	0
Calculations		E	CU	A		3.0	0	0	1	0	0	0	0
Calibration Checklist	y	P				4.11.1	0	0	0	0	1	0	0
Capital Project TC Estimation report		P				7.0	0	0	0	0	0	0	1
Cash Flow Report		P				2.3, 4.6	0	1	0	0	1	0	0
Certificate of Acceptance	y	P			y	4.11.6	0	0	0	0	1	0	0
Certificate of Calibration		P				4.9	0	0	0	0	1	0	0
Certificate of Commissioning Completion	y	P			y	4.11.3, 7.0	0	0	0	0	1	0	1
Certificate of Equipment Delivery (Form 100)	y	P			y	4.9	0	0	0	0	1	0	0
Certificate of Equipment Satisfactory Performance (Form 103)	y	P			y	4.9	0	0	0	0	1	0	0
Certificate of Readiness to Install (Form 101)	y	P			y	4.9	0	0	0	0	1	0	0
Certificate of Satisfactory Installation (Form 102)	y	P			y	4.9	0	0	0	0	1	0	0
Certificate of Satisfactory Process Performance (Form 104)	y	P			y	4.11.2	0	0	0	0	1	0	0
Certificate of Substantial Performance	y	P			y	4.11.1	0	0	0	0	1	0	0
Certificate of Total Performance	y	P			y	4.11.1	0	0	0	0	1	0	0
Code Analysis		E	CA	A		3.0	0	0	1	0	0	0	0
Commissioning Completion Assurance		P			y	4.11.3	0	0	0	0	1	0	0
Complaints		P				5.4	0	0	0	0	0	1	0
Component TC report		P				7.0	0	0	0	0	0	0	1
Conceptual Design report		E+T	CR	A		3.3	0	0	1	0	0	0	0
Concrete mix design		P				3.0	0	0	1	0	0	0	0
Construction Emergency Response Plan		P				6.1	0	0	0	0	0	1	0
Construction Job Hazard Assessment		P				6.1	0	0	0	0	0	1	0
Construction Lockout/Tagout Procedure		P				6.1	0	0	0	0	0	1	0
Construction Program		P				3.0	0	0	0	0	1	0	0
Construction Review Record		P				4.9	0	0	0	0	1	0	0
Construction Safe Work Method Statement		P				6.1	0	0	0	0	0	1	0
Construction TC Report		p				7.0	0	0	0	0	0	0	1
Contemplated Change Notice	y	P				4.7.4	0	0	0	0	1	0	0
Contract**		L				4.2	0	0	0	1	0	0	0
Contract Change Management Record Report		P				4.7	0	0	0	0	1	0	0
Contractor Operating and Maintenance Manual		E	OM	E		3.0	0	0	1	0	0	0	0
Contractor Quality Manual/Plan Review		P				4.0	0	0	0	0	1	0	0
Contractor Safety Management Plan		P				6.1	0	0	0	0	0	1	0
Contractor Safety Manual		P				6.1	0	0	0	0	0	1	0
Contractor Safety Meeting Record**	y	P				6.1	0	0	0	0	0	1	0
Control Table		E	CT	A		3.0	0	0	1	0	0	0	0
Correspondence		P				1.0, 5.0	1	0	0	0	1	0	0
Cost Commitment Report		P				2.3	0	1	0	0	0	0	0
Daily Safety Report		P				6.1	0	0	0	0	0	1	0
Data Sheet		E	DS	A		3.0	0	0	1	0	0	0	0
Deficiency List	y	P				4.11.4	0	0	0	0	1	0	0
Design Notes		E	DN	A		3.0	0	0	1	0	0	0	0
Design Plan		E	DP	A		3.0	0	0	1	0	0	0	0
Detailed Design Report		P	DD	A		3.6	0	0	1	0	0	0	0
Disciplinary Action		P				6.1	0	0	0	0	0	1	0
Documents list		E	LD	A		3.0	0	0	0	0	0	0	0
Drawing		D				3.0	0	0	1	0	0	0	0
Drawings list		E	LW	A		3.0	0	0	0	0	0	0	0
Emergency Operating Procedure	y	E+T	EO	E		3.0	0	0	1	0	0	0	0
Environmental report		P				3.2	0	0	1	0	0	0	0
Estimate		P				2.1, 4.7	0	1	0	0	1	0	0
Evaluation Visit Report		P				4.9	0	0	0	0	1	0	0
Expediting and Inspection		P				4.9	0	0	0	0	1	0	0
Field Instruction		P				4.7.2	0	0	0	0	1	0	0
Field Level Risk Assessment		P				6.1	0	0	0	0	0	1	0
Field Work Authorization	y	P			y	4.7.2	0	0	0	0	1	0	0
Fluids list		E	LF	A		3.0	0	0	1	0	0	0	0
Forecast Cost Report		P				2.3, 4.7	0	1	0	0	1	0	0
Functional Design Specification		E	FS	A		3.0	0	0	1	0	0	0	0
Funding Report		P				2.1	0	1	0	0	0	0	0

Geotechnical Investigation		P				3.1.2	0	0	1	0	0	0	0	0
Haz-OP report		P				3.0	0	0	1	0	0	0	0	0
Hired Equipment Register		P				4.0	0	0	0	0	1	0	0	0
HSE Committee Inspection		P				6.1	0	0	0	0	0	0	1	0
Incident Report & Investigation		P				6.1	0	0	0	0	0	0	1	0
Infraction Record		P				6.1	0	0	0	0	0	0	1	0
Input /Output list Process Logic Controller		E	IO	A		3.0	0	0	1	0	0	0	0	0
Inspection & testing plan		P				4.9	0	0	1	0	0	0	0	0
Inspection Check Sheet		P				4.9	0	0	0	0	1	0	0	0
Inspection Report	y	P				5.07	0	0	0	0	1	0	0	0
Inspection Test Plan/Checklist Review		P				4.9	0	0	1	0	0	0	0	0
Instruments list		E	LI	A		3.0	0	0	1	0	0	0	0	0
Insurance**		P				4.3	0	0	0	0	1	0	0	0
Inter-Departmental Report		P				1.0, 4.0, 5.0	1	0	0	1	1	1	0	0
Invoice		P				2.3, 4.8	0	1	0	0	0	1	0	0
Job Hazard Analysis		P				6.1	0	0	0	0	0	0	1	0
Letter	y	P				4.0	0	0	0	0	1	0	0	0
Letter of Intent**	y	L				4.2	0	0	0	1	0	0	0	0
Letter register		P				4.0	0	0	0	0	1	0	0	0
License		L				1.5	1	0	0	0	0	0	0	0
Lines list		E	LL	A		3.0	0	0	1	0	0	0	0	0
List of Commissioning Documents		P	LC	E		4.0	0	0	0	0	1	0	0	0
List of Operations Documents		E	LO	E		4.0	0	0	0	0	1	0	0	0
Lot compliance records		P				4.0	0	0	0	0	1	0	0	0
Management Plan		P				1.2	1	0	0	0	0	0	0	0
Management Procedure		P				1.2	1	0	0	0	0	0	0	0
Minutes of Meeting	y	P				1.0, 2.0, 3.0, 4.0, 5.0, 6.0, 7.0	1	1	1	1	1	1	1	1
Motors list		E	LM	A		3.0	0	0	1	0	0	0	0	0
Near Miss Record		P				6.1	0	0	0	0	0	0	1	0
Newsletter		P				1.0, 5.4	1	0	0	0	0	1	0	0
Non-Conformance Report	y	P				4.11.4	0	0	0	0	1	0	0	0
Operating Safe Work Procedure	y	E+T	OS	E		3.0	0	0	1	0	0	0	0	0
Operational TC report		P				7.0	0	0	0	0	0	0	0	1
Operations Emergency Response Plan		P				3.0	0	0	1	0	0	0	0	0
Operations Job Hazard Assessment		E	JH	E		3.0	0	0	1	0	0	0	0	0
Operations Lockout/Tagout Procedure		E	TO	E		3.0	0	0	1	0	0	0	0	0
Over Expenditure report**	y	P			y	2.3	0	1	0	0	0	0	0	0
Permit		P			y	1.5	1	0	0	0	0	0	0	0
Permit - Confined Space		P			y	6.1	0	0	0	0	0	0	1	0
Permit - Construction, Other		P			y	6.1	0	0	0	0	0	0	1	0
Permit - Critical Lift		P			y	6.1	0	0	0	0	0	0	1	0
Permit - Hot Work		P			y	6.1	0	0	0	0	0	0	1	0
Permit - Permit Request		P			y	6.1	0	0	0	0	0	0	1	0
Permit - Plant Entry		P			y	6.1	0	0	0	0	0	0	1	0
Permit - Process Interruption		P			y	6.1	0	0	0	0	0	0	1	0
Permit - Shutdown Request		P			y	6.1	0	0	0	0	0	0	1	0
Photo		P				1.0, 4.10	1	0	0	0	1	0	0	0
Photo Report		E	PH	A		4.10	0	0	0	0	1	0	0	0
Policy		P				1.4	1	0	0	0	0	0	0	0
Pre job Safety Instruction		P				6.1	0	0	0	0	0	0	1	0
Preliminary Design Report		E+T	PR	A		3.0	0	0	1	0	0	0	0	0
Press Release		P				5.2	0	0	0	0	0	1	0	0
Process Selection Report		E	PS	A		3.0	0	0	1	0	0	0	0	0
Progress Estimate**	y	P				4.6	0	0	0	0	0	1	0	0
Progress Report (Status report)		P				4.8	0	0	0	0	1	0	0	0
Project Change Management Record Report		P				1.0	1	0	0	0	0	0	0	0
Project Charter	y	P				1.2.1	1	0	0	0	0	0	0	0
Project Definition Report		E	PD	A		3	0	0	1	0	0	0	0	0
Project Plan	y	P				1.2	1	0	0	0	0	0	0	0
Project Safety Report and Statistics		P				6.1	0	0	0	0	0	0	1	0
Proposal		P			y	4.1	0	0	0	1	0	0	0	0
Public Notification		P				5.4	0	0	0	0	0	1	0	0
Public Presentation		P				5.4	0	0	0	0	0	1	0	0
Public Survey		P				5.1	0	0	0	0	0	1	0	0
Purchase Order**	y	P				4.2	0	0	0	1	0	0	0	0
Quality Report	y	P				1.0, 4.0	1	0	0	0	0	0	0	0
Regulatory Inspection		P				6.1	0	0	0	0	0	0	1	0
Request for Information	y	P				4.1, 4.7.3	0	0	0	1	1	0	0	0
Request for Proposal	y	T				4.1	0	0	0	1	0	0	0	0
Request for Quote	y	T				4.1	0	0	0	1	0	0	0	0
Requirement Definition Report		E	RD	A		3.0, 7.0	0	0	1	0	0	0	0	1
Requisition	y	P				4.2	0	0	0	1	0	0	0	0
Risk Action Plan	y	T				1.7, 4.0, 7.0	1	0	0	0	1	0	0	1
Risk Register	y	T				1.7, 4.0, 7.0	1	0	0	0	1	0	0	1
Risk Statement		P				1.7, 4.0	1	0	0	0	1	0	0	0
Safe Work Plan		P				6.1	0	0	0	0	0	0	1	0
Safety Bulletin		P				6.1	0	0	0	0	0	0	1	0
Schedule of Material		E	SM	A		3.0	0	0	1	0	0	0	0	0
Schedule of Work		P				1.3, 4.5, 7.0	1	0	0	0	1	0	0	1
Shop Drawing		D				3.0	0	0	1	0	0	0	0	0
Sketch		E	SK	A		3.0	0	0	1	0	0	0	0	0
Specification		E+T	SP	A		3.0	0	0	1	0	0	0	0	0
Standard Operating Procedure (SOP)	y	E+T	OP	E		3.0	0	0	1	0	0	0	0	0
Stop Work Order		P			y	6.1	0	0	0	0	0	0	1	0
Structure Works Lot Register		P				4.0	0	0	0	0	1	0	0	0
Survey data		P				3.1.1	0	0	1	0	0	0	0	0
Survey Equipment Calibration Checklist		P				4.0	0	0	0	0	1	0	0	0
TC Development document		P				7.0	0	0	0	0	0	0	0	1
TC Establishment Percentage Report		P				7.0	0	0	0	0	0	0	0	1
Technical Assessment		E	TA	A		3.2	0	0	1	0	0	0	0	0
Technical Memorandum		E	TM	A		3.0	0	0	1	0	0	0	0	0
Test Result - Autom. / Instrm. & Ctrl.		P				4.9	0	0	0	0	1	0	0	0
Test Result - Building / Architectural		P				4.9	0	0	0	0	1	0	0	0

Test Result - Civil		P				4.9	0	0	0	0	1	0	0	0
Test Result - Electrical		P				4.9	0	0	0	0	1	0	0	0
Test Result - General		P				4.9	0	0	0	0	1	0	0	0
Test Result - Mechanical		P				4.9	0	0	0	0	1	0	0	0
Test Result - Piping / Plumbing / HVAC		P				4.9	0	0	0	0	1	0	0	0
Test Result - Process		P				4.9	0	0	0	0	1	0	0	0
Test Result - Security / Emergency Exits		P				4.9	0	0	0	0	1	0	0	0
Test Result - Site		P				4.9	0	0	0	0	1	0	0	0
Test Result - Structural / Piling		P				4.9	0	0	0	0	1	0	0	0
Training Certificate		P			y	4.11.5	0	0	0	0	1	0	0	0
Training Material		E	TR	D		3.0	0	0	1	0	0	0	0	0
Transmittal	y	P				1.0, 4.0, 5.0, 7.0	1	0	0	1	1	1	0	1
Value Engineering Report		P				3.0	0	0	1	0	0	0	0	0
Valves list		E	LV	A		3.0	0	0	1	0	0	0	0	0
Warranty		P				4.11.6	0	0	0	0	1	0	0	0
Weld Procedure Qualification Records		P				4.0	0	0	0	0	1	0	0	0
Weld Procedure Specification		P				3.0	0	0	0	0	1	0	0	0
Welding Summary Sheet		P				3.0	0	0	0	0	1	0	0	0
WHMIS Submission		P				6.1	0	0	0	0	0	0	1	0
Work Package**	Y	P				1.2	1	0	0	0	0	0	0	0
Worker Orientation Record		P				6.1	0	0	0	0	0	0	1	0

Classification			Libraries	Classification
Primary Class	Sub-Class	Sub-sub-Class		
1			Project Development And Management	
	1.1			Business Case
	1.2			Project Plan
		1.2.1		Project Charter
	1.3			Project Schedule
	1.4			Background Information
		1.4.1		Preliminary Data
	1.5			Regulatory Information
	1.6			Advisory/Steering Committee
	1.7			Risk Management
		1.7.1		Partnering
2			Financial	
	2.1			Capital Budget Estimates
	2.2			Operating Budget Estimates
	2.3			Project Cost
3			Technical	
	3.01			Advisory Services
		3.01.1		Surveying and Mapping
		3.01.2		Geotechnical Investigation
		3.01.3		Feasibility Studies
		3.01.4		Planning Studies
	3.02			Studies and Assessments
	3.03			Conceptual Design
	3.04			Preliminary Design
	3.05			Value Engineering
	3.06			Detailed Design
	3.07			Shop Drawings
	3.08			As-Constructed Drawings
	3.09			Training
	3.10			Operation and Maintenance Manuals
4			Procurement	
	4.1			Bid Opportunity Documents
	4.2			Addenda
	4.3			Bid Evaluation and Contract Award
5			Contract Administration	
	5.01			Insurance
	5.02			Work Schedule
	5.03			Risk Management
	5.04			Progress Estimates / Invoicing
	5.05			Change Control
	5.06			Progress Meetings and Reports
	5.07			Inspection and Test Agency Reports
	5.08			Photographs
	5.09			Legal Services
	5.10			Performance Evaluation
	5.11			Performance Verification Tests
	5.12			Commissioning
	5.13			Deficiencies
	5.14			Warranty
6			Public Information	
	6.1			Public Consultation
	6.2			Press Releases
	6.3			Briefing Notes
	6.4			Public Communication
7			Safety Management	
	7.1			Project Safety
	7.2			Permits
	7.3			Project Security
8			Target Cost	

Project Area Core Metadata

Metadata Field	Mandatory/Optional M/O	Type	Master Data	How	Example	Description
DMS Project #	M	Numeric	Yes	System	S-881	File number, comes by system in Project Library based on selected Contract
Document ID	M	Numeric		System		SharePoint assigned Document number
Creator	M	Text		System		Document uploader
Version	M	Numeric		System		SharePoint assigned version number
Record Category	M	Text		System	Project Records; Drawings; Turn-over; Legal	System assigned based on content type
Filename	M	Alphanumeric		System	Business_Requirements.pdf	System assigned, from file name
Title	M	Text		System/user	SharePoint Online Solution Scope	SharePoint fills in document title, user can overwrite with desired Title. Priority field for searches, name of document
Original Author	M	Text		System/user	John Doe	SharePoint fills in document Author, user can overwrite with desired Author.
Classification	M	Text		System		One to one by Content Type (and library)
Content Type	M	Text		User, drop down List box	Detailed Design Report	Limited choice, filtered per library
DMS Contract #	M (For CA and Procurement)	Numeric	Yes	System/User, drop down List box		Sequential number, created by System at DMS Admin level.
Activity Status	M	Text		User, drop down List box	Active (default), Obsolete, Finalized	Identifies document's state in the DMS
Workflow Status	M	Text		System	Available for Workflow, Under Review, Reviewed, In Approval, Approved, Unavailable	Identifies document's involvement in a workflow
Referenced to	O	Numeric		User/drop list?		Records a reference (one or many) to an original document within the DMS.
Referenced by	O	Numeric		System		Records a reference (one or many) by an original document within the DMS.
Record Change Index	O	Numeric	Yes	System/User, multi-select box	Change #, Description	(One or many) sequential number, created by System
Document Comment	O	Text		User		Additional descriptive field for the document
External document number	O	Text or number		User	<i>No particular number standard</i>	Allows external parties to link City project documents to their own filing numbers/system
External project number	O	Text or number		User	<i>No particular number standard</i>	Allows external parties to link City project documents to their own filing numbers/system

Other Metadata / Master Data may be required to satisfy the business Requirement document and need to be added during the development phase

Drawings

Metadata Field	Mandatory/Optional M/O	Type	How	Example	Description
Source Code	M	Number	Choice	1 (Design Drawing), 2 (Manufacturer's Drawing)	Selected from defined list, see IMS doc PG-RC-PC-02 Drawing Numbering System
Facility Code	M	Number	Choice	0101 (North Plant), 0102 (South Plant), ...	The Plant that the drawing is associated with, from defined list (see IMS doc PG-RC-PC-02 Drawing Numbering System)
Process Area	M	Text	Choice	D (Digesters), R (Oxygen Reactors), ...	Type of drawing, from defined list (see PG-RC-PC-02 Drawing Numbering System)
Discipline Code	M	Text	Choice	M (Mechanical), C (Civil), ...	Selected from defined list, see IMS doc PG-RC-PC-02 Drawing Numbering System
Number Code	M	Number	User	0001	As per IMS doc: PG-RC-PC-02 Drawing Numbering System
Sheet #	M	Number	User	001	Format described in IMS doc PG-RC-PC-02 Drawing Numbering System
Revision #	M	Alphanumeric	User	C9/01	As per IMS doc: PG-RC-PC-02 Drawing Numbering System
Drawing #	M	Alphanumeric	User	1-0101R-M0001-001-01	Format described in IMS doc PG-RC-PC-02 Drawing Numbering System
Shop drawing index	O	Number	User	0019	Unique number for shop drawings, assigned by user and manually tracked within a project and its related contracts

Technical Documents

Metadata Field	Mandatory/Optional M/O	Type	How	Example	Description
Source Code	M	Character	Choice	A	Selected from defined list, see IMS doc PG-RC-PC-03 Technical Document Numbering System
Facility Code	M	Number	Choice	101	For list and format see IMS doc PG-RC-PC-03 Technical Document Numbering System
Process Area	M	Text	Choice	S	From defined list (see PG-RC-PC-03 Technical Document Numbering System)
Discipline Code	M	Text	Choice	M	From defined list (see PG-RC-PC-03 Technical Document Numbering System)
Number Code	M	Alphanumeric	User	DS16	As per IMS doc: PG-RC-PC-02 Technical Document Numbering System
Sheet #	M	Number	User	FAL	Format described in IMS doc PG-RC-PC-03 Technical Document Numbering System
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