

EXPRO National Manual of Assets and Facilities Management

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Assets and Facilities Management Inter Department Review (IDR) Procedure

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Assets and Facilities Management Inter Department Review (IDR) Procedure

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Assets and Facilities Management Inter Department Review (IDR) Procedure

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Assets and Facilities Management Inter Department Review (IDR) Procedure

1.0 PURPOSE

This procedure applies to works performed under all Government Entities Assets and Facilities Management activities executed throughout the Kingdom of Saudi Arabia. This procedure describes the requirements for initiating, preparing, approving, and revising documents for the Asset and Facilities Management Team (AFMT).

2.0 SCOPE

This procedure is applicable for the development/revision of all documents that are related to Assets and Facilities Management.

3.0 DEFINITIONS

Definitions	Description
Approver	The Approver will be the person that has designated authority to have final sign-off on the document. The document cannot reach the status of "Issued for Use" until the Approver reviews and approves the documents.
Checker	The Checker should have a good understanding of the document being created. The Checker should be from the same department as the Originator with equal experience and understanding of the content matter
Digital Signature	Digital code that, like a handwritten signature, authenticates and executes a document and identifies the signatory
Enterprise Content Management System (ECMS)	An information management and collaboration platform for managing and controlling documents and records
Electronic Markup	Used to annotate text and embed comments in electronic documents
IDR	Inter Department Review
PDF	Portable Document Format (Adobe)
AFMDMD	Assets and Facilities Management Document Management Department
AFMT	Assets and Facilities Management Team; is the team deployed by the Entity to manage the Assets and Facilities
Procedure	Documents that provide information about how to preform interdepartmental activities and processes consistently. Procedures are used to manage and control activities such as tasks preformed across different groups or functions such as Engineering, Procurement, Document Control etc.
Process	A sequential series of steps or actions that lead to a desired result or output. A set of related tasks that create a product or service that will satisfy a customer or group of customer's needs.
Reviewer	The Reviewer will be more experienced than the Originator usually being a manager of the related department or discipline
Vector PDF	Is a PDF created from the source file instead of creating PDFs by scanning

4.0 REFERENCES

1. EOM-ID0-PR-000001 – Asset and Facilities Document Management Procedure
2. ENT-ID0-PR-000001 – Entity Standard Document Numbering Procedure



5.0 RESPONSIBILITIES

5.1 Originator

- Prepare the documents based of the relevant procedures and templates
- Request document number from Assets and Facilities Management Document Management Department (AFMDMD)
- Select Reviewers and Approver based on the process related to the documents being created
- Enable the “Restricts Editing” on the document to capture “comments” made by the Reviewers and Approver electronically
- Send the native file of the document to the AFMDMD so that the Inter Department Review (IDR) workflow can be initiated in the Enterprise Content Management System (ECMS)
- Expedite overdue IDR workflows
- Facilitate comment resolution
- Consolidate the Checker, Reviewer and Approver signatures on the approved document

5.2 Reviewer

- Perform the review of the electronic document in a timely manner based on the due date requested
- Ensure that their comments are captured electronically (Track Changes, Comments Review or electronic markup feature)
- Complete the ECMS IDR workflow step with the relevant Review status code
- Verify that the review has been conducted by signing the document

5.3 Approver

- Perform the review and approval of the electronic document in a timely manner based on the due date requested
- Ensure that their comments are captured by either the Review “Comments” or electronic markup feature
- Close the ECMS IDR workflow with the relevant Review status code
- Verify that the approval process has been conducted by signing the document

5.4 Asset and Facilities Management Document Management Department (AFMDMD)

- Create Document Number Placeholders in line with the Entity Standard Numbering Procedure
- Check that the native file has the “Restrict Editing” option enabled
- Upload the Native file into the ECMS
- Initiate the ECMS IDR workflow
- Issue overdue IDR report to the required workflow participants
- Convert the native file of the document to create a vector PDF

6.0 PROCESS

6.1 General

Personnel preparing Documents shall follow the requirements of this procedure for review, approval and issuance.

6.2 Asset and Facilities Management Inter Department Review (IDR)

Once the document is ready to be reviewed, the Originator will enable the “Restricts Editing” option on the native file to capture the Checker/Reviewer and Approver comments within the document.



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The Originator will issue the native file to the AFMDMD with the following instructions:

- Names of the Checker, Reviewer and Approver
- Duration of Review in working days (10 working days is the standard review period)

AFMDMD will register the document in the ECMS in accordance with A&FM Document Management Procedure.

AFMDMD will initiate the ECMS IDR workflow which will send out a notification to the nominated Checker, Reviewer and Approver.

The Originator is responsible for expediting any overdue IDR's to ensure that the workflows are closed out in a timely manner.

The IDR process outlined in the Attachment 1 of this procedure.

6.3 Resolving IDR Comments

The Originator is required to resolve any comments made by the Checker, Reviewer and Approver. If the Originator deems their comments to be valid and incorporates them, the document shall be revised to the next consecutive revision e.g. Rev **00A** would become Rev **00B**.

The IDR shall be repeated until the document is reviewed with no further comments at which point the document will be revised to Rev **000**, "Issued for Use".

6.4 Document Sign off

The use of digital signatures should be used as part of the document review and approval process. To ensure legitimacy of the digital signatures process, a licensed authentication service provider will produce the required digital authentication certificates for the signatory (the signature's author and owner), this outlined the A&FM Document Management Procedure.

Documents that require formal sign-off the Originator will be the responsible person for routing the document to the relevant people (Originator, Checker, Reviewer and Approver). The Originator is responsible for tracking the movement of their documents during the sign-off process.

Once the document is signed off, the Originator will send the native file and the signed off document to AFMDMD to be uploaded into the ECMS.

AFMDMD will create a vector PDF file of the document by directly converting it from the native file. This allows the PDF to be text searchable as well as improves the legibility and size of file. The signature page shall then be inserted into the vector PDF to capture the authorizing signatures.

AFMDMD will upload both the native file and the vector PDF into the ECMS in accordance with Asset and Facilities Management Document Management Procedure.

7.0 ATTACHMENTS

1. Asset and Facilities Management Inter Department Review (IDR) Flow Chart



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Attachment 1 – Asset and Facilities Management Inter Department Review (IDR) Flow Chart

