EXPRO National Manual for Projects Management

Volume 14 ,Chapter 2

Project Document Management Procedure

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1.0 PURPOSE

This procedure applies to works performed under all Government construction projects executed throughout the Kingdom of Saudi Arabia. This procedure documents the key processes required to deliver consistent and effective document management services. An Enterprise Content Management System (ECMS) shall be used for storing and controlling all documents.

2.0 SCOPE

This procedure applies to all document management services that are delivered by the Project.

3.0 DEFINITIONS

Definitions	Description
EXPRO	Government Expenditure & Projects Efficiency Authority
Attribute	Information attributed to a document to aid its retrieval from a repository – sometimes also referred to as metadata
CDMD	Contractor Document Management Department, which is part of the Contractor's Management Team
Confidentiality Deed	Provides strict obligations regarding the disclosure of the confidential information, including any subsequent information produced by the Project from use of the confidential information
Contractor	One that agrees to furnish materials or perform services at a specified price, especially for construction work.
Correspondence	Communication between parties, these include, letters, faxes, emails, memorandums, administrative resolutions, board administrative resolutions and manual transmittals
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 Project documents and records
Entity	A Saudi Government organization which is responsible for the delivery of government funded infrastructure construction projects.
EPMO	An Entity Project Management Organization, this is an integrated team that comprises the Entity and its PMC responsible for managing all the Entity's projects.
IDR	Inter Department Review
PDF	Portable Document Format (Adobe)
PDMD	Project Document Management Department; is the Document Management Department for the Project Management Team (PMT)
PMT	Project Management Team; is the team deployed by the Entity to manage the Project
Record	Document, book, paper, map, figure, photograph, material sample, or audio, video, computer file regardless of physical form, created or received by Entity personnel through transacting the company's business and preserved or deemed appropriate for preservation. Holds the evidence of the organization, policies, procedures, operations, decisions, and other activities or because of the data's information and value, as per Entity's Record Retention Schedule (RRS).
Subcontractor	Refers to the Subcontractors, Suppliers and Vendors
Vector PDF	PDF created from the source file instead of creating PDFs by scanning.
Wet Signed	Created when a person physically signs a document. The word "wet" implies that the signature requires time to dry, as it was made with ink

4.0 REFERENCES

1. EPM-KR0-PR-000002 - Project Standard Document Numbering Procedure
2. EPM-KR0-PR-000003 - Project Inter Department Review (IDR) Procedure
3. EPM-KR0-PR-000004 - Project Hard Copy Filing Procedure
4. EPM-KR0-PR-000005 - Project Subcontract Documentation Management Procedure
5. EPM-KRR-PR-000001 - Project Records Retention and Turnover Procedure
6. EPM-KE0-PR-000008 - CAD Standards Procedure

5.0 RESPONSIBILITIES

5.1 Project Document Management Department (PDMD)

A Project Document Management Department (PDMD) shall be established as part of the Project Management Team (PMT). The PDMD will be adequately staffed with both professional and administrative levels of personnel that provide document, record, reprographics services and information management support to a specific Project.

- Implement the document control procedures
- Update procedures regularly to align with current work processes
- Ensure document restrictions are set based on the appropriate level of security assigned to them
- Assign the correct attributes to documents in the ECMS e.g. document status, type etc.
- Develop and implement distribution matrices for the Project so that information is sent to the required stakeholders in a timely manner
- Establishment of an information management system for all Project documents and records
- Provision of in-house reprographics services. Supported by external vendors as required to meet high volume reproduction and reprographic requirements
- Retain hard copies, where required, in secure and dedicated areas provided for filing
- Coordinate training sessions for system users
- Provide reports detailing Key Performance Indicators for the PDMD

5.2 Project Management Team (PMT)

- Follow the processes outlined in the Project document management procedures
- Ensure that the documents they are using are always the current version of the document found in the ECMS
- Ensure all documentation has a document number in line with the Project Standard Document Numbering Procedure

5.3 PDMD Key Positions

The Project's size, scale and complexity will determine which PDMD positions are required to ensure effective document management execution.

The PDMD may consist of the following positions:

5.3.1 Project Document Department Manager

Responsibilities include developing Project Document Management procedures, managing the team budget, reporting on hours, staffing and training for the PDMD personnel, as well as coordination with the Entity and Contractors regarding their submittals. The Document Department Manager shall champion lessons learned and support continuous improvement of work processes.

The Project Document Department Manager will configure, manage and audit the Enterprise Content Management System (ECMS) to ensure attributes and workflows are being used correctly.

5.3.2 Project Deputy Document Department Manager

The Project Deputy Document Department Manager will support the Project Document Department Manager to provide an effective document control function for Project delivery.

The Project Deputy Document Department Manager is required to cascade the Project policies and procedures into the work environment. The Project Deputy Document Department Manager is “Entity and Contractor facing” and will proactively develop relationships with their counterparts who work with their respective Document Management teams.

The Project Deputy Document Department Manager is challenged to be creative so that innovative solutions can be utilized in order to better achieve the Project objectives.

5.3.3 Project Senior Document Controller

The Project Senior Document Controller is responsible for ensuring the continuity of work process and maintaining the integrity and quality of the documents and data in the ECMS.

The Project Senior Document Controller tasks and activities include:

- Reports to the PDMD Managers
- Supervise specific tasks and daily routines of the PDMD
- Ensure procedures are adhered to
- Ensure consistency of working practices within the team
- Ensure the delivery protocol is followed by the Contractors
- Ensure the distribution of hard copy and electronic documents is carried out
- Oversee the control and recording of correspondence within the Project
- Ensure the timely generation of statistical reports
- Liaise with PMT and Contractor Document Management Department (CDMD) staff on a regular basis
- Operate the ECMS as an Administrator

5.3.4 Project Document Controller

The Project Document Controller will assist the PMT with the processing of all documents.

Project Document Controller tasks and activities include:

- Reports to the Project Senior Document Controller
- Register documents into the ECMS
- Scan, copy and print documents where necessary
- Distribute documents internally and externally
- Enforce work instructions to support the approved Project procedures
- Process Project documentation in an efficient and timely manner

5.3.5 Project Technical Clerk

Project Technical Clerk will provide administrative support in the form of collating data, records and other information as and when required and provide general assistance in the preparation of outputs, including printing work as required.

The Project Technical Clerk will be responsible to produce the required number of hard copies (prints, DVDs etc.) of Project transmittals to the Entity and Contractors. The Project Technical Clerk will report to a Project Senior Document Controller.

6.0 PROCESS

6.1 Enterprise Content Management System (ECMS)

The Enterprise Content Management System (ECMS) (e.g. Aconex, assai or Bluecielo etc.) will be used by the PDMD to capture, manage, store, preserve, and deliver content and documents to facilitate successful Project delivery. The ECMS covers the management of information within the entire scope of a Project, whether that information is in the form of a paper document, an electronic file, or even an email.

6.1.1 ECMS Functionality

The ECMS that is to be selected for the Project shall have the following functionality at a minimum:

- Auto Numbering
- Version Control
- Ability to capture Metadata
- Advance Search Features
- Workflow Capabilities
- Transmittal Generation
- User Access Control Settings
- Security Level Control Options
- Electronic Review Markup
- Reporting Features

6.1.2 ECMS Mandatory Fields

The ECMS that is to be selected for the Project shall have the following fields configured at a minimum:

Field Name	ECMS Configuration	Description of Use
Contract Code	Single select drop down list	For tagging the document to a Main Contract for the Project
Document Number	Auto number text field	For tagging a document with the unique number required by the applicable document numbering convention
Revision	Text field	For tagging a document with a revision reference (applicable project convention) when it is updated
Title	Text field	For tagging a document with the applicable title description associated with the document
Reason for Issue	Single select drop down list	For tagging a document with the appropriate Document Development status
Document Status	Single select drop down list	For tagging a document with the appropriate status reference that is relevant to the document lifecycle
Organization Code	Single select drop down list	For tagging document with an appropriate originating company
Location	Single select drop down list	For tagging a document to classify it with a physical location within the Project
Discipline	Single select drop down list	For tagging a document with an appropriate department or discipline classification
Document Type	Single select drop down list	For tagging a document to classify it with an appropriate document type
Revision Date	Date field	For tagging document with an appropriate creation date used on document
Date Received by Document Management	Date field	The date when the document is received by Document Management

Field Name	ECMS Configuration	Description of Use
Scheduled Completion Date	Date field	For tagging document with an appropriate scheduled completion date
Date Action Complete	Date field	For tagging document with an appropriate action complete date
Alternate Reference No	Text field	For tagging a document with details of alternate reference document number
Reference Documents	Text field	For entering Reference documents relevant to the document to assist in searching and retrieval
Comments	Text field	For entering comments relevant to the document to assist in searching and retrieval (e.g. changes between revisions)
Record Retention Code	Single select drop down list	For tagging the document to the Record Retention Schedule
Handover Index ID	Single select drop down list	For tagging the document to a section within the Handover book

6.2 Correspondence Management

Below are some examples of Project correspondence types:

- Letter
- Facsimile (fax)
- E-mail
- Memorandum (memo)
- Administrative Resolution
- Manual Transmittal

Project correspondence shall:

1. Prepared in the mandated Project templates
2. Address the appropriate contact or group for the relevant organization
3. Use a unique reference number and issued date
4. Use a clear and concise subject line
5. Be authorized by the principal contact or designated authority

Note: All correspondence by the PMT Prime Contractor, Entities or EPMOs shall be given priority and processed by the Document Management Departments as soon as possible.

6.2.1 E-mail Correspondence Management

E-mail correspondence is considered an informal communication medium. However, if the e-mail discussions develop into a matter of significant business intent, then one of the approved types of formal correspondence shall be used to formally convey the intent. If any party believes that the e-mail correspondence is material to the Project, the e-mail shall be passed onto the PDMD to be entered into the ECMS as a Project record as outlined in the Project Standard Document Numbering Procedure to formalize the correspondence.

If attachments are to be sent with an email, the file size should be smaller than 5 MB. The transfer of larger file size sets shall be accomplished by using either the nominated ECMS process or the Project file share site. Information that is to be formally submitted shall be covered by a transmittal (described in Section 6.9.2).

6.2.2 Facsimile (Fax)

Facsimile correspondence is subject to the protocols of correspondence; however, it is regarded as an informal correspondence medium. If any party believes that the facsimile correspondence is material to the Project, the facsimile shall be entered into the ECMS as outlined in the Project Standard Document Numbering Procedure to formalize the correspondence.

6.3 Document Management

Project documents will be managed and controlled through the ECMS. The preferred electronic format for the exchange of documents shall be Portable Document format (PDF).

Where possible the PDMD 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. If the document is wet signed the signature page shall then be scanned and inserted in the vector PDF to capture the authorizing signatures when applicable.

PDMD will upload both the native file and the PDF into the ECMS with the native file being entered as the first version of the specified revision and the PDF then being uploaded over the native file as a higher version in the ECMS. This makes the PDF the current version in the ECMS but also captures the native file as part of the document history which allows it to be accessible when the document is to be revised.

Native files may be utilized if a “live” document is required to be used by the end user e.g. Project Templates would be uploaded as a native file as the current version in the ECMS.

The integrity of a native file may not be retained after transmission, or after use on a different computer to that in which the file was developed. The user of a file shall verify the file integrity and in the event of a discrepancy the user shall revert back to the native file that is currently in the ECMS or was originally transmitted.

6.3.1 CD/DVD

If a CD/DVD is used, the CD/DVD shall be covered by a transmittal and must be presented in their transparent cases or CD filing wallets with a copy of the transmittal specifying the contents of the CD/DVD. The CD/DVD contents will dictate how the data/information is entered into the ECMS.

The CD/DVD will have the title, Project number, transmittal number, document number (if applicable) and received date written on the disk. This information is not to be written on the CD/DVD card insert, but rather on the CD/DVD itself as the CD/DVD card insert will be removed and discarded from the CD/DVD case.

6.3.2 CAD Files

CAD files shall be exchanged in PDF format, however, at designated milestones, CAD files will be exchanged in native format for technical coordination and review. The type of CAD format will be nominated by the Project Engineering Manager and will be submitted in accordance with the Project CAD Standards Procedure.

CAD Drawings typically consist of a number of reference or X Ref files. When exchanging native format CAD files, the files shall be ‘bound’ with all reference files.

For example, when packaging AutoCAD files, the eTransmit function shall be used to ensure all applicable XRef’s, Fonts and Pen tables are captured. The resultant ZIP files should be numbered identically to the drawing file (described in Section 6.6) which is to be upload as a native file into the ECMS (described in Section 6.36.3).

6.4 Confidential Records

Some records may be sensitive and protected by a legal document such as a Confidentiality Deed, which governs the manner in which the staff members are allowed to use the confidential information. The PDMD will restrict access to the documentation to these documents based the appropriate confidentiality classifications and will store the document in accordance with the Project Hard Copy Filing Procedure.

Consultant personnel are required to sign a confidentiality agreement prior to being able to access the information. Access to specific information records shall be restricted to all, except those parties who have signed a Non-Disclosure Agreement or confidentiality undertaking.

6.5 Numbering System and Formatting

All Project documents produced shall be generated by using the correct Project Templates and numbered in accordance with the Project Standard Document Numbering Procedure, which ensures all documents are assigned a unique reference number.

Document numbers are assigned by the PDMD based on the Project, organization, location, discipline and document type given by the originator of the document.

6.6 Document "Electronic File Names"

Electronic files will be renamed to capture the complete document number and revision, document titles and descriptions shall not be included as part of the document file name.

Example: **17MOHG00001-1-EPM-250MAT-EQ-PR-000001_00A**

Note: An underscore "_" will be used to separate the document number from the revision.

6.7 Document Review and Approval

The Document Submission Flow Chart (Attachment 1) outlines the process for Contractor Document Submission.

The Project Inter Department Review (IDR) Procedure outlines the document development, review and approval processes for documents being created by the PMT.

6.7.1 Initial Document Registration

Upon establishing the appropriate document number, the PDMD will register the document number as a placeholder in the ECMS, as this enables the number to be reserved appropriately.

The PDMD will enter the document details as part of the registration process.

Below are some examples of document details that will be entered into the ECMS:

- Project
- Document number
- Title
- Status ("Not Started" for placeholders)
- Organization
- Discipline
- Document type
- Revision date (date of registration for placeholders)
- Planned submission date (used to report open placeholders)
- Author (requestor of the placeholder)

PDMD will notify the originator of the work request once the activity has been completed.

6.7.2 Electronic Deliverable Review

Documents are to be reviewed electronically, all records (email messages, track changes, etc.) indicating comments or changes to a document need to be captured by the PDMD (electronically). These records will be used as evidence of the review process.

The document originator requests the PDMD to issue the document for review by either emailing PDMD with clear work instruction or by using the using the Project Document Control Work Request (Attachment 1). It is important to ensure that the registration of the document by the PDMD is complete as outlined in the Project Inter Department Review (IDR) Procedure prior to the review being requested.

The originator will specify whether the document is classified as confidential, which would require specific handling requirements (described in Section 6.4).

When sending a document for electronic review, the document will be issued as the native file to the reviewers utilizing the “track changes” option to record the comments undertaken by the reviewers. Reviews can also use the “New Comment” feature or the ECMS mark-up feature to capture their comments.

The reviewers then send the document back with the highlighted changes or comments back to the originator via the IDR workflow. The Document Originator will be cc’d when initiating the IDR workflow, to advise them that the document has been issued for review.

The IDR workflow will capture the names of the reviewers and the date the review is due to be completed.

On completion of the IDR review, the reviewers advise the PDMD and document originator that the review has been completed. Once this advice has been received, the document originator accesses the reviewed document mark-ups to assess the respective comments and decide if the document requires further development or it is approved and can be issued for use.

6.7.3 Digital Signature

Digital signatures should be used as part of the document review and approval process. To ensure legitimacy of the digital signature process, a licensed authentication service provider will produce the required digital authentication certificates for the signatory (the signature’s author and owner).

The use of digital signatures will ensure that documents are signed efficiently and effectively which will reduce processing time, administrative effort and reduce the hard copy filing requirements. Certain types of documents may still be wet signed to meet legislative, contractual and organizational requirements. These wet signed documents will be filed as outlined in the Project Document Control Filing Procedure.

6.7.4 Revised Document Registration

When a document is changed to incorporate comments, the document shall be revised to the next applicable revision; this process is outlined in the Project Inter Department Review (IDR) Procedure.

All subsequent revisions of a document must be registered by the PDMD to permit control and traceability. It is the responsibility of the originator of the revised document to ensure both the signed document and native file is forwarded to the PDMD.

The original copy (wet signed) and the native file of the document is then filed in the respective electronic formats (described in Section 6.3) and the Hard Copy Filing Library as outlined in the Project Hard Copy Filing Procedure. The superseded revision will be archived in accordance with the Project Records Retention and Turnover Procedure.

The PDMD will ensure that the revised document attributes are registered in the ECMS and on completion of recording this information, the document may be issued in accordance with Section 6.11 of this procedure.

6.7.5 Approved Document Registration

When the document is ready to be issued for use and approval signatures have been obtained, the signed copy of the document plus the native file shall be forwarded to the PDMD, as outlined in the Project Inter Department Review (IDR) Procedure.

The PDMD uploads both the PDF and the native file into the ECMS (described in Section 6.3) and updates the required attributes to reflect the document status and revision. If the document is wet signed (original) the signature page will be filed as outlined in the Project Hard Copy Filing Procedure.

The PDMD will ensure that the approved document attributes are registered in the ECMS and on completion of recording this information, the document may be issued in accordance with Section 6.11 of this procedure.

6.8 Revision Codes and Document Lifecycle Status

The Project Standard Document Numbering Procedure outlines the project revision hierarchy and relevant revisions status that shall be used for Project documents.

All documents must start at either 00A or 000 depending on their lifecycle status; this is detailed in the Project Standard Document Numbering Procedure. Documents at their very first issue, cannot be at revisions higher than 00A or 000 i.e. 00B, 00C or 001, 002 etc. with the exception of Subcontract document revisions as they will start at Revision 001 which is explained in the Project Subcontract Documentation Management Procedure.

Where a document is generated for information only, it may be allocated a revision status of "For Information" with an alpha revision e.g. 00A, 00B etc. Documents developed "For Information" do not require comments to be advised, as the intent of the document is to be used for information only. Documents developed "For Information" are not to be used for Tendering, Purchasing or Construction.

*Note: Revision codes **00I** and **00O**, letters **I** and **O** are not to be used to avoid confusion with one **(1)** and zero **(0**). Therefore **00H** is followed by **00J** and **00N** by **00P**.*

6.9 Issuing and Receiving of Documents

6.9.1 Issuing Documents

The PDMD will use transmittals to issue controlled documents to internal personnel as well as to external parties so that it is done in a traceable manner.

There are two methods of issuing transmittals:

1. Issue of Project documents together with associated electronic transmittal generated and issued through the ECMS
2. Issue of Project documents together with associated manual transmittal which is to be registered in the ECMS

Project personnel can submit PDMD work requests by either emailing PDMD with clear work instruction or by using the Project Document Control Work Request (Attachment 2).

PDMD will notify the originator of the work request, once the activity has been completed.

6.9.1.1 ECMS Transmittals

The ECMS generated and issued transmittal are the preferred method for issuing controlled documents externally and internally to the Project.

The ECMS will generate the transmittal number and track the transmitted documents automatically within the ECMS Document Register.

The Electronic transmittal shall display the following attributes:

- Transmittal number
- The transmittal issue date
- The recipients the transmittal was addressed to
- Reason for issue
- Response required date
- Transmittal subject line
- Document attributes (document number, revision, title and status)
- Comments/instructions

6.9.1.2 Manual Transmittals

Manual transmittals are created using the Project Transmittal Template (Attachment 3). Manual transmittals should only be used when the transmittal cannot be generated and issued from the ECMS, e.g. when the network is unavailable.

Manual transmittals should be distributed in accordance to the following list when issued:

1. Original transmittal – the PDMD
2. Copy of transmittal – issued to the recipients on the transmittal

When issuing the manual transmittal and documents via email the following information shall be included:

- The reason for Issue should be noted i.e. Issued for Information, Issued for Review, etc.
- The documents and the associated manual transmittal being issued will either have a secure link to the transmittal package via the Project file share site or are electronically attached to the email
- To reduce the cost of tracking the ‘acknowledgement’ copies of transmittals, consideration should be given to utilizing the ‘Read Receipt’ function within the email system used for the Project
- Documents issued externally should be PDF unless otherwise stated and should be under 5MB file size (the Project file share site may be used to transfer larger files. Email notifications with a link to the documents shall be sent to the recipients).

6.9.2 Receiving Documents

The PDMD will be used as the focal point for documentation coming into the Project. All documents shall be submitted formally through the designated ECMS Process.

It is the responsibility of all Project personnel to ensure that all documents received from any external source are forward to the PDMD by either emailing PDMD a clear work instruction or by using the Project Document Control Work Request (Attachment 2) for hard copy submissions when required. If a document is not submitted to the PDMD directly, it is imperative that the PDMD notifies the originator of the document of the correct method to formally submit their document to the Project to ensure that the documents are registered efficiently and effectivity within the ECMS.

The recipient can forward the submitted documents to PDMD via email with the following details:

- The original transmittal accompanying the document, where available
- Date the document was received
- From whom the document was received
- Any comments included with the document
- Required distribution of the documentation

The recipient should also advise the PDMD of any confidentiality requirements which would affect how the documents are filed (electronically and hard copy) and distributed.

PDMD will notify the originator of the work request, once the activity has been completed.

6.9.2.1 Receiving Transmittals

When documents are received by the Project accompanied by a transmittal, the transmittal should be forwarded directly to the PDMD with the transmitted documents. The PDMD inputs the transmittal number as a reference number in the ECMS against the specific revision of the document received.

The transmittal and received documents will then be zipped and entered into the ECMS as the Transmittal number.

All transmittals that specify an acknowledgement are required to be acknowledged and returned to the originator with the date received together with the receiver’s signature.

6.10 Storage of Electronic and Hard Copy Documents

Documents must be filed correctly within the filing systems for easy reference and to allow other personnel to access the information. There are three **(3)** main types of storage:

- Hard Copy Filing Library – managed and controlled by the PDMD
- Enterprise Content Management System (ECMS) – electronic documents managed and controlled by the PDMD
- Electronic Filing System – managed and controlled by the relevant departments

Regardless of the storage method used, access to confidential documents shall be restricted to authorized personnel only.

The following sections outline the use of these filing systems.

6.10.1 Hard Copy Filing Library

The PDMD will maintain the Hard Copy Filing Library which is outlined in the Project Document Control Filing Procedure. All original wet signed pages of the document are required to be filed in the Hard Copy Filing Library.

All other documentation will be filed as an electronic copy within the ECMS unless instructed by the Project Document Department Manager to include the document as part of the Hard Copy Filing Library.

Anytime a document is revised within the Hard Copy Filing Library the previous version will be removed from the Hard Copy Filing Library and stored in accordance with the Project Records Retention Procedure. This minimizes the risk of unintended use of obsolete documents while ensuring the document development history remains available for reference if required.

6.10.2 Enterprise Content Management System (ECMS)

The ECMS is a formalized means of organizing and storing the Projects documents, and other content, that relate to the organization's processes.

The ECMS will be managed by the PDMD to control the Project documents by using “Access Control” to limit Project personnel to read only access and edit rights given to PDMD to upload, update and transmit documents.

The ECMS aims to make the management of Project information easier through simplifying storage, security, version control, process routing, and retention. The benefits to a Project include, improved efficiency, better control, and reduced costs.

6.10.3 Electronic Filing System

An electronic filing system (network drive) can be used as a working data directory where Project participants may store documents that are being worked on or are in the process of being revised.

The Project will use network share drives to share information and documents informally between internal personnel as a secure transfer/work in progress collaboration service or where large electronic files are involved (which exceed email size limitations).

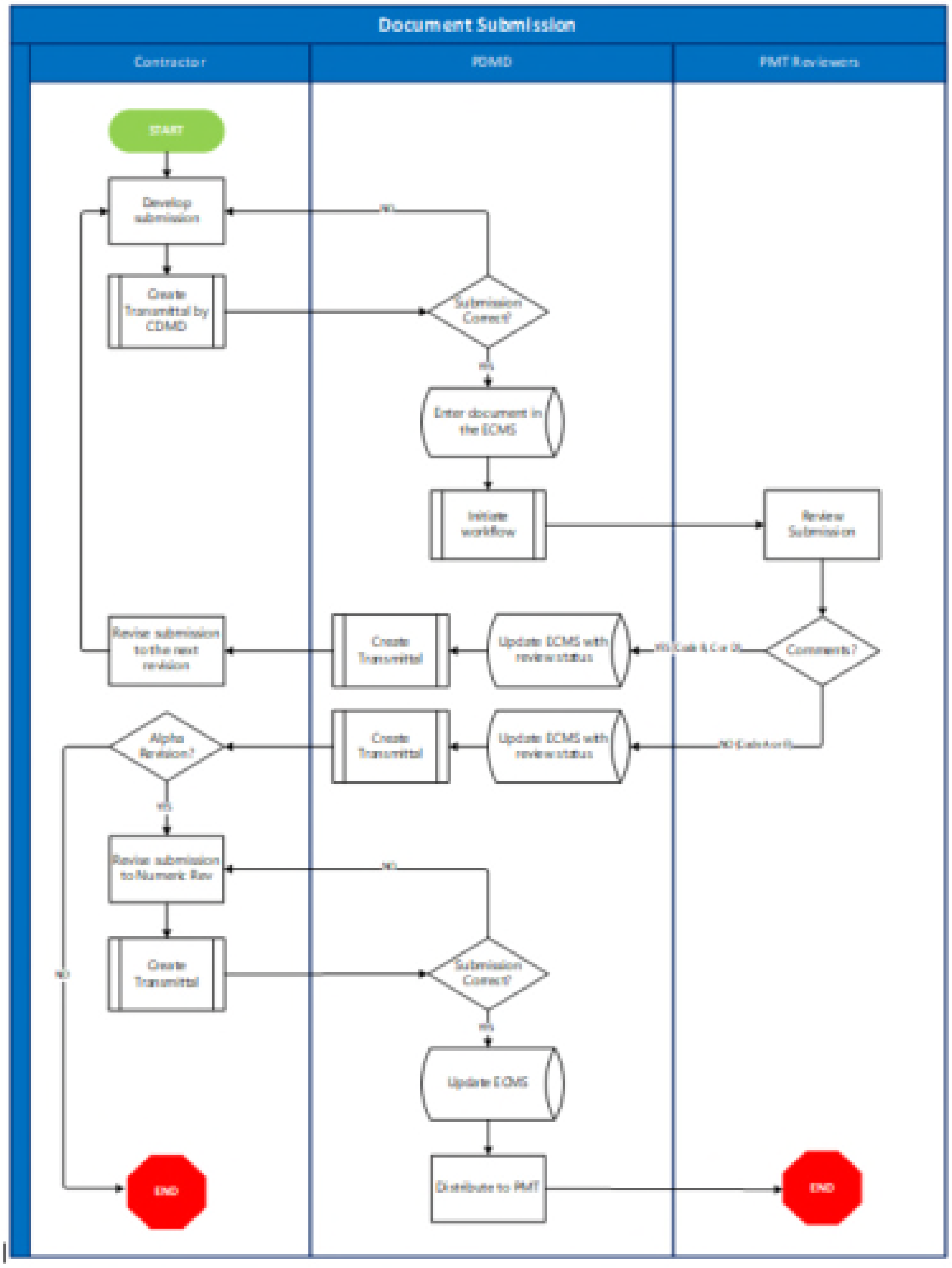
6.11 Project Distribution Matrix

The distribution matrix shall be defined for each department and document type. This will enable the smooth and efficient distribution of data for Information, Review and Approval. If a matrix is not clearly defined (i.e. does not detail the relevant recipients), or does not exist, it can cause delays to the Project and associated stakeholders.

7.0 ATTACHMENTS

1. Document Submission Flow Chart
2. EPM-KR0-TP-000004 - Project Document Control Work Request Template
3. EPM-KR0-TP-000005 - Project Transmittal Template
4. EPM-KR0-TP-000006 - Project Distribution Matrix Template

Attachment 1 - Document Submission Flow Chart



Attachment 2 - EPM-KR0-TP-000004 - Project Document Control Work Request Template

Project Document Control Work Request

Project		Project No	
Originator		Extension No	
Date Submitted		Time Submitted	
Date document's to be issued		Time document's to be issued	
Date Due		Discipline	

NOTE: For large print jobs, please notify PDMT prior to submitting documents — Priority ☐

DOCUMENT INFORMATION (Attach document list or insert additional lines as required)

Document Number	Rev	Description

DOCUMENTS ISSUED FOR

☐ Approval	☐ Contractor Review	☐ Hazid / HazOp	☐ Proposal	☐ Tender
☐ As-built	☐ Design	☐ Information	☐ Purchase	☐ Use
☐ As Requested	☐ Entity Review	☐ IDR \ Review	☐ Quotation/Bid	☐ Cancellation
☐ Construction	☐ Estimate	☐ Photocopying	☐ Supplier Return	☐ Superseded
☐ Hard copy Filing	☐ Other (please specify):			

DOCUMENT DISTRIBUTION ☐ Distribution Matrix Dist. Code ________ ☐ As per manual list (below)

Manual Distribution List (use only if the Document Distribution Matrix is not applicable)

Name	Company	Email

SAMPLE

DOCUMENT HARDCOPY PRESENTATION

☐ Bound (clear front & card back)	☐ Ring Binder	☐ Bulldog Clip	☐ Stapled
☐ Single Sided	☐ Double Sided	☐ Reduced (A3 to A4)	☐ A3 Flat
☐ A1 folded to A4	☐ A3 folded to A4	☐ Other (Describe):	

Is Quality Verification Required before Despatch? ☐ Yes ☐ No

DOCUMENT SOFTCOPY PRESENTATION

☐ Adobe .pdf files (scan "wet signature" original)	☐ Adobe .pdf files (electronic conversion)	☐ Native AutoCAD	☐ Native MicroStation
☐ Native MSWord	☐ Native Excel	☐ Other (Describe)	

ELECTRONIC FILE PATH LOCATION:

Any Specific Instructions (e.g. photocopies, post to SharePoint, shared drive, etc.): ____________

Attachment 3 - EPM-KR0-TP-000005 - Project Transmittal Template

Project Document Transmittal Form

Transmittal No: XXXXXXXXXX-XXX-XXX-XX-XXXXXX	Date	: December 5, 2017

To	From
Reveiers Name	**Project Document Management Team**
Receiving Compay Name Adress line 1 Adress line 2 Adress line 3 County Phone Number	**Project Company Name** Adress line 1 Adress line 2 Adress line 3 County Phone Number

Project / Dept.:

Subject:

The following is being transmitted

- ☐ Drawings ☐ Prints ☐ Plans ☐ Samples
- ☐ Specifications ☐ Copy of Letter ☐ Change Order ☐ Procedures
- ☐ Contractor Documents ☐ Invoices / Expense Claims ☐ Other

SAMPLE

Document No	Rev	Tittle	Status

☐ Attached ☐ File Transfer Protocol (FTP) ....

Transmitted via

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- ☐ As Noted ☐ Other ....

Remarks

Copy to **Signed**

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Attachment 4 - EPM-KR0-TP-000006 - Project Distribution Matrix Template