

EXPRO National Manual for Projects Management

Volume 14, Chapter 6

Project Subcontract Deliverables Schedule (SDS) Procedure

Document No. EPM-KR0-PR-000006 Rev 003



Project Subcontract Deliverables Schedule (SDS) Procedure

Document Revisions History:

Revision:	Date:	Reason For Issue
000	02/11/2017	For Use
001	27/12/2017	For Use
002	15/01/2019	For Use
003	01/07/2021	For Use



Project Subcontract Deliverables Schedule (SDS) Procedure

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Project Subcontract Deliverables Schedule (SDS) Procedure

1.0 PURPOSE

This procedure outlines the Subcontractor document submission process and clearly defines how to complete the Subcontractor Deliverables Schedule (SDS) which is to be managed by the Contractor's Document Management Department (CDMD).

2.0 SCOPE

The procedure is applicable to all Subcontract submittals received by the Contractor for review and use for works performed under all Government construction projects executed throughout the Kingdom of Saudi Arabia.

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
Contractor	One that agrees to furnish materials or perform services at a specified price, especially for construction work.
Document Placeholder	Used by the Document Management Department to allocate a Document Number in the Enterprise Content Management System (ECMS)
Enterprise Content Management System (ECMS)	An information management and collaboration platform for managing and controlling documents and records
Entity	A Saudi Government organization which is responsible for the delivery of government funded infrastructure construction projects.
RE	Responsible Engineer for the Contractor
SCA	Subcontract Administrator for the Contractor also referred to as the "Expeditor"
SDC	Subcontractor Document Controller
SDR	Subcontract Deliverable Register
SDS	Subcontract Deliverable Schedule
Subcontract	Refers to Subcontracts and Purchase Orders
Subcontractor	Refers to Subcontractors, Suppliers and Vendors

4.0 REFERENCES

1. EPM-KR0-PR-000001 - Project Document Management Procedure
2. EPM-KR0-PR-000002 - Project Standard Document Numbering Procedure
3. EPM-KR0-PR-000005 - Project Subcontractor Submittal Management Procedure

5.0 RESPONSIBILITIES

5.1 Contractor Document Management Department (CDMD)

- Ensure that the requirements of this procedure are properly implemented and provide overall advice and assistance to Subcontractor in regards to submittal preparation and management



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- Provide assistance and advice to the Subcontractor and Contractor personnel with regards to document numbering
- Attend the kick off meeting and provide training on the Subcontractor submission processes which includes how to populate SDS
- Ensure the Subcontractor has been given a "Subcontractor Welcome Package"
- Issue the SDS to the Responsible Engineer (RE) and Subcontract Administrator (SCA) for approval
- Use the approved SDS to complete the Subcontract Deliverables Register (SDR) with the required submittal details and create Document Placeholders in the Enterprise Content Management System (ECMS)
- Update the SDR on a regular basis and issue the report to the RE and SCA periodically or as per the project requirements

5.2 Responsible Engineer (RE)

- Review and approve the SDS, which is effectively a Deliverables List, by ensuring it contains all the technical documentation required under the contract with accurate submission dates
- Facilitate and coordinate resolution of any open issues between reviewers
- Coordinate and consolidate comments from all reviewers into the Master mark-up of the submittal deliverable
- Assign the relevant review codes for each deliverable via the ECMS review process
- Conduct final review and coding of the SDR as part of the contract close out process

5.3 Subcontract Administrator (SCA)

- Coordinate with the Subcontractor to ensure the SDS for their particular package is available and lists all the required deliverables
- Provide the agreed submission dates for the Subcontractor Deliverables as per the contract
- Expedite overdue submissions by the Subcontractor
- Expedite overdue Deliverables with the RE

5.4 Subcontractor

- Submit Deliverables in accordance with the Project Subcontractor Submittal Management Procedure and Project Standard Document Numbering Procedure
- Subcontractor Document Controller (SDC) shall attend the ECMS and Subcontractor Submission training session which shall be conducted by the CDMD at the same time of the Subcontract kick off meeting
- Submit the SDS to the CDMD within 30 days from the kick off meeting
- Transmit deliverables directly to the CDMD using the nominated ECMS. Submissions not covered by a transmittal will be deemed unofficial and will not be accepted or processed by the CDMD

6.0 PROCESS

The SDS (Attachment 2) is an Excel spreadsheet, which contains a complete list of Subcontractor deliverables as detailed in the Subcontract. Once the Subcontractor has been registered, the CDMD will register the SDS template in the ECMS with the nominated Subcontractor code as outlined in the Project Subcontractor Submittal Management Procedure. The SDS is the first document that is to be submitted by the Subcontractor, which is to be reviewed by the RE. The Subcontractor shall complete the SDS by listing all of the required deliverables for the respective Subcontract.

The SDS is used by the SDC to:

1. Provide important deliverable information
2. Request Project document numbers
3. Submit planned submission dates

Once the RE approves the SDS, it is not necessary to revise the SDS unless there is a requirement for additional Subcontractor deliverables added to the contract.



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The SDS differs from the Subcontractor Deliverables listed in the Subcontract, as the SDS shall provide a higher level of detail of the Subcontractor Deliverables. For example, if one document applies to three separate deliverable items of a Subcontract, that document will appear as one entry in the Subcontractor Deliverables list within the contract. However, the SDS will list three separate entries for that same Subcontractor Documents based on physical location. Additionally, the SDS allows the Subcontractor to provide the Subcontractor's document number so that it can be associated with the Project document number. This allows the Subcontractor to cross-reference their Subcontractor document number with the Project document number.

6.1 Completing the Subcontract Deliverables Schedule (SDS)

6.1.1 Contractor Document Control Department (CDMD)

Once the SDC has attended the compulsory ECMS and Subcontract Submission training session, CDMD will:

1. Register the SDS with the ECMS as a Subcontractor document with the following fields completed:
 - Project Number
 - Contract Number
 - Subcontractor Name
 - Title
 - Document Number
 - Revision
 - Date
2. Transmit the SDS as a native file format (excel) and the "Subcontractor Welcome Package" to the Subcontractor
3. Provide required assistance to the Subcontractor to complete the SDS

6.1.2 Subcontractor

Once the SDS is received from the CDMD, the Subcontractor shall:

1. Consult with the RE and SCA to ensure the SDS is completed according to the contractual requirements
2. Complete the SDS using the Subcontractor Data that was provided in the requisition
3. Fill the following columns with the SDS:
 - Document Title
 - Subcontractor Document Number (if applicable)
 - Forecast Submission Date (dd/mm/yyyy)
 - Location
 - Discipline
 - Document Type

Note :-

- a) All the above fields are mandatory with the exception of the Subcontractor's document number. The Subcontractor's document number is an optional field where the Subcontractor can cross-reference their own Subcontractor document number with the allocated Project document number
- b) The SDC shall not allocate any Project document numbers in any circumstances. All Project document number requests shall be made by updating the SDS and transmitting the SDS to the CDMD
- c) The Project document number shall be used for all Subcontractor deliverables submitted to Contractor
- d) Attributes entered into the SDS related to the respective Subcontractor deliverables shall be accurate, as the Project document number is generated based on the information provided by the Subcontractor in the SDS
- e) Document title/description shall be accurate and reflect what is used in the document



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- f) Document type and discipline are mandatory and shall be selected from the dropdown lists. The Subcontractor will notify CDMD if there any updates required to the dropdown list.
- g) The Subcontractor shall provide a complete list of deliverables they intend to submit for review with all of the relevant details as individual line entries on the SDS (e.g. shop drawing, datasheets and calculations)
- h) Where the Subcontractor is supplying a number of pieces of equipment under separate contract numbers, then all respective documentation shall use the unique identification number (Subcontractor Code) related to each contract, even if the documentation is the same for each piece of equipment. Documentation covering more than one contract or piece of equipment shall not be accepted

6.2 Review of the Subcontract Deliverables Schedule (SDS)

6.2.1 Subcontract Deliverables Schedule (SDS) received by CDMD

Once the SDS is received from the Subcontractor via transmittal, the CDMD shall:

- Quality check the attributes provided by the Subcontractor and the check that the mandatory fields are completed as outlined in section 6.1.2
- Transmit the SDS to the RE and SCA for their review and approval

6.2.2 Subcontract Deliverables Schedule (SDS) is issued for review

Once the SDS is received from the CDMD, the SCA will:

- Provide the agreed submission dates for the Subcontractor Deliverables as per the contract to the "Contract Due Date" column of the SDS
- Complete the following fields of the SDS:
 - o Submission Due Date
- Coordinate with the RE and Subcontractor to resolve any dispute with the data submitted

Once the SDS is received, the RE will:

- Review and verify that the SDS is completed and contains all the required deliverables mentioned in the requisition
- Co-ordinate with the SCA and Subcontractor to resolve any disputes
- Complete the remaining fields of the SDS:
 - o Assets Tag Number
 - o Reviewers Comments (if any)
- Assign the appropriate Review Status ("Code 1", "Code 2" or "Code 3") based on the review outcome and returns to CDMD through the ECMS. "Code 4" should not be assigned for the SDS

6.2.3 Subcontract Deliverables Schedule (SDS) is reviewed

Once the RE has completed the review, the CDMD shall:

SDS that receives a Code 1

- Complete the following fields of the SDS:
 - o Project Document Number
- Create Project document number placeholders based on the SDS and transmit to the Subcontractor

SDS that receives a Code 2 or Code3

- Return the SDS to the Subcontractor to incorporate the RE's comments

6.2.4 Subcontract Deliverables Schedule (SDS) returned to the Subcontractor

Once the SDS is returned on a transmittal, the Subcontractor shall:



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- Code 1: Submit the Subcontract deliverables as listed on the SDS
- Code 2 or Code 3: Incorporate the RE comments and resubmits the SDS as next revision

6.3 Subcontractor Deliverables Register (SDR)

The SDR (Attachment 3) is used to track the submission progress for the subcontract deliverables. Once the SDS is approved by the RE, the CDMD will use the current data from the ECMS to create the SDR. The SDR will be registered in the ECMS as a standalone document and will be numbered appropriately. The SDR shall be updated by the CDMD periodically or as requested.

As part of the Contract close-out process, the RE will review and approve the SDR to ensure that all contractual requirements have been satisfied.

Once the SDR is signed and approved by the RE, the CDMD will transmit the SDR to the Subcontractor for their records.

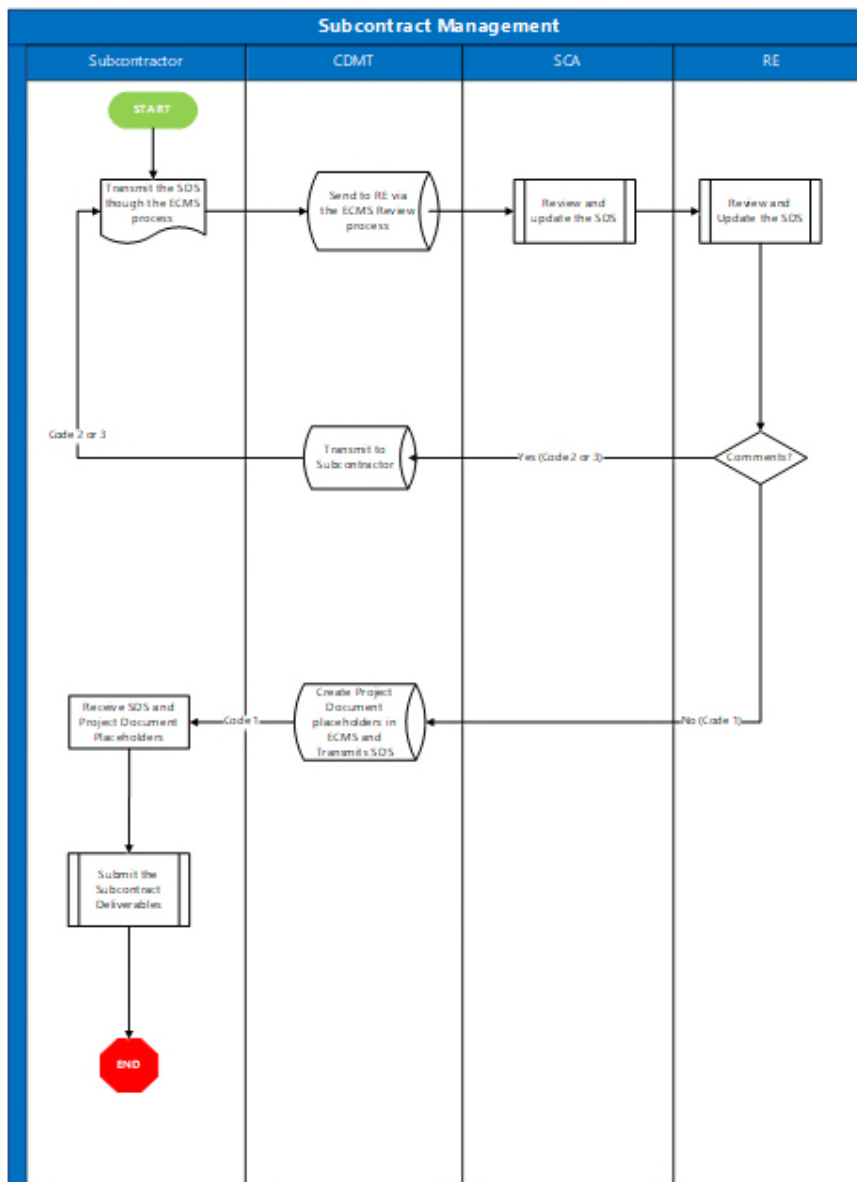
7.0 ATTACHMENTS

1. Subcontract Deliverable Schedule (SDS) Flow Chart
2. EPM-KR0-TP-000002 - Project Subcontract Deliverables Schedule (SDS)
3. EPM-KR0-TP-000003 - Project Subcontract Deliverables Register (SDR)



Project Subcontract Deliverables Schedule (SDS) Procedure

Attachment 1 - Subcontract Deliverable Schedule (SDS) Flow Chart





Attachment 2 - EPM-KR0-TP-000002 - Project Subcontractor Deliverables Schedule (SDS) Template

A sample notebook page with a yellow left half and a white right half, both featuring grid lines. A large red 'SAMPLE' watermark is diagonally across the page.



Attachment 3 - EPM-KR0-TP-000003 - Project Subcontract Deliverables Register (SDR) Template

SAMPLE