

1 Purpose of this Standard

The purpose of this standard is to establish the basis of abbreviations, acronyms, and terminology used in the realm of Document Management and all its divisions. See DMC-DM-STD-021 for engineering sector specific acronyms and terminology (to be used in conjunction with this standard).

2 Risks of non-compliance

Some of the risks of not having, or not complying with these standards are:

- Miscommunication between document management groups
- Lack of understanding of typical terms used in the Document Management profession

3 Overview

There are many terms and acronyms used across all industries that may seem confusing. It is important to understand the definition of these to ensure a common understanding in discussions, resulting in expectations regarding Document and Data Management and Control.

Each industry will have terms and acronyms specific to their environment. It is important to ask for a definition when there is a lack of clear understanding.

Below are terms and acronyms commonly used in Document Management in general, but you may find additions to this list as you gain more experience.

4 Terminology and Acronyms

All efforts should be made to acquire books on this topic for the relevant industry of the organization.

Document Control Group	This is the group of individuals who are responsible to ensure the highest quality data is processed and distributed to internal and external recipients according to established procedures and protocols. The group is responsible and accountable for the accuracy of the repository (network or software), and may or may not be split into sub-groups that manage data for corporate data, supplier data, modifiable files, publishing documentation, and expediting of such documentation and data.
Document Control Expediting Group	This is an individual or group of individuals whose main objective is to ensure data is received, reviewed, and processed by all involved in the workflow according to pre-established timelines.
Document Control Quality Assurances and Control	The systems and processes that are put in place by the Document Control Group to ensure quality is reached during the creation of documentation (QA), and the checks that are established to ensure those standards have been carried out (QC).

Drawing, Document, or Data File Number	A structured number given to every document, drawing, 3D model, or data file created. Each number shall be unique and is not subject to change unless the prescribed change procedure is followed. Each number may undergo multiple revisions. The unique number shall be used as the main component of the filename.
Deliverable	A task or work assignment that is one of the required action items in a given scope of work, often resulting in the delivery of documentation or data files to be published or distributed.
Version	A version refers to the most current saved file, which may be because of auto save within a software application, such as a word processing software, or because of an upload into a document management repository. A version does not necessarily indicate an official revision. There may be many versions saved before a file is ready to be released under a new revision.
Revision	A revision is an official change to a document, drawing, or data file. Each revision may require many versions before it is complete for its intended purpose.
Soft Revision	Identified by alpha or alpha-numeric characters. Soft revisions are used for stages of documentation that occur as a part of the lead up to the ultimate purpose as defined by the “Hard Revision”. For Drawings: all revisions that are not Issued for Construction, Issued for Record or Issued for As Built. For Documents: all revisions that are not issued for Use.
Hard Revision	Identified by numeric characters. For Drawings: all revisions that are Issued for Construction, Issued for Record, or Issued for As Built. For Documents: all revisions issued for Use and/or Implementation. Surveys and other map type drawings may be Issued for Use. 3D Model files are not revised with every change, but can be revised and Issued for As Built, requiring a hard revision included in the file, or filename.
Revision Description	This is the name given to the revision. The description of the drawing or document identifies the issue stage. For example, the revision description could be “Issued for Approval”.
Revision History	The history of the revisions of a document, drawing, or data file. All document or drawing numbers have their own revision history, starting sequentially at the lowest alpha, alpha-numeric, or numeric revision (depending on what the issue stage is). The revision number is not meant to identify the issue stage - the revision description identifies the stage.

Issue Stage	Describes what is included in the issue stage. It clearly outlines the information that is to be shown in the content of the drawing or document, how far along in the design/creation process the document is, and what the document is now ready to be used for. For example, the Issue Stage will identify what needs to be involved / included in the Issued for Approval drawing. (See DMC-DM-STD-011 for various Issue Stages).
Metadata	Metadata is pieces of information that are tagged to a file within a Document Management Software application, or in a manual system where it is provided in the columns of information that is entered in the Index. Metadata provides the means for the searchable or filterable fields. It is data about data.
Title Block or Title Page	The area on a drawing that provides the title, number and revision, the scale, the revision history including signoff of each, reference documents, notes, names and even logos of the firm responsible for preparing and the client and engineering and certification stamps as appropriate. For text type documents, this same information is contained on the Title Page of the document.
Original	This is the signed or initialed hard copy, or digitally signed electronic copy (modifiable or PDF).
Published file	The scanned .PDF of the signed original (hard copy or modifiable original) drawing or document. This is typically the document that is issued as per the Distribution Matrix.
Modifiable	This is a file that is opened in its software application, such as word processing, spread sheeting, presentation, or Computer Aided Design and Drafting (CADD) application, etc.
Electronic Signatures	Electronic signatures are images of a signature captured by means of electronic reproduction or scanning. There is no digital encryption or specialized software application required.
Digital Signatures	Digital signatures require specialized software applications that embed an encrypted mark within a file, and require a user to log in using a username and password. Digital signatures may or may not look like an electronic signature.
Void	Void is the term used when a drawing or document is no longer in circulation. This may be because the documentation or file number is incorrect and needs to be changed, or because the content is no longer valid or part of the scope of the project, facility, or activity. It does not pertain to files that have merely become a record.

Obsolete	Obsolete is the term used when a specific revision of a file is replaced with a file of the same revision, before it becomes published information.
Supersede	Supersede is the term used when a document, drawing, or data file has a newer version or revision. It is an out of date copy.
Rendition	A rendition is a non-modifiable electronic file created directly from the modifiable file, and does not contain any digital signatures.
Clean Copy	A clean copy is a document or drawing that, other than any ink signatures or initials, does not have any pen or electronic mark ups on the file.
Markup	A markup is a pen or digital mark that is added to a hard copy, rendition, or electronic copy of a drawing or document for the purpose of updating or changing the content. Mark ups are then used to determine the changes to the modifiable file for the next revision.
Documentation and Data Requirements (DDR)	A form to be completed by the individual responsible for the technical elements of a purchase order or contract. It is provided to the Purchasing group for issuance to the supplier of goods or services. The purpose of this document is to give clear instruction to the supplier of goods and/or services as to what drawings, documents, and/or data files are required, and at what stage in the schedule the files are expected. The Documentation Expeditor utilizes this form to expedite and monitor supplier submissions.
Documentation/Data Distribution Matrix (DDM)	The Documentation Distribution Matrix lists all possible deliverables identifying which individuals are to receive those files, at the various stages in the development of the files, and the form in which they are to be distributed.
RAC(S)I (<i>ray-see</i>)	This is the Responsibility, Accountability, Consulted, (Supported by) and Informed matrix for all deliverables to be created on a project. It is constructed very similarly to the DDM. There must always be an individual who is Responsible, and an individual who is Accountable for any task. It is possible they are the same person. At different stages of development in a document those individuals Consulted and those individuals Informed may differ.
New Documentation Request (NDR)	New Documentation Request forms are used when a group or organization is creating new documentation or data files, and must request a number for that file from the group responsible for managing and issuing new numbers.

Existing Documentation Request (EDR)	Existing Documentation Request forms are used when an organization needs to request an existing file to be signed out (See DMC-DM-STD-012 for sign out process) to be used for a particular purpose, often to be modified.
Document Control Non-Conformance Report (NCR)	Non Conformance Reports that are specific to Document and Data Management and Control are used to list errors in submissions. You cannot create a deficiency on a submission if the submission expectations were never established. Other groups may have their own NCR forms for the purpose of communicating errors in their own fields.
Signed In	The status of a controlled modifiable file that is in the possession of the file owner's system. It is not to be modified by any group or individual, regardless of if the group or individual is intern to the company or not.
Signed Out	The status of a controlled modifiable file that is in the possession of the individual or group (internal or external to the file owner's organization) who is to modify the file.
Squad check	A process whereby a document or set of documents are placed up for review, and the reviewers of that documentation are required to undertake their review and provide their comments by the identified due date.
Supplier Documentation	All drawings, documents, calculations, manuals, catalogues, and other deliverables that are submitted by the supplier as defined in the Documentation and Data Requirements form issued with the Purchase Order. These are subject to Squad Check.