

1. Purpose of this Standard

The purpose of this standard is to ensure that appropriate elements are considered when creating nomenclature (taxonomy) for the various files created by, distributed by, or used by an organization. It also serves to provide a structure for revising documentation and data files.

2. Risks of non-compliance

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

- Files are not easily identifiable
- Subsequent revisions to documentation or data files may not be identified, and as such, traceability is lost
- Revision structures will lose their purpose if additional non-vital elements are included
- Variances in documentation and data files will occur
- Revisions may not make sense and cause avoidable confusion

3. Overview

Every document, drawing, and data file needs to have a unique identifying number assigned to it that will stay with it until it is deemed VOID and is removed from circulation.

Active drawing numbers do not change unless extreme circumstances call for it. Once a number is assigned, that number in conjunction with its revision number must never be duplicated or reused.

All controlled files are required to have a unique identifier, uncontrolled documentation and data files may or may not have individual numbers.

Revision numbers exist to show a logical progression of information contained within the file. The only other information contained in a revision structure is the finality of the information.

4. Numbering Structure Guidelines

Each category of documentation and data may have its own unique structure requirement, and within each category, there may be different groups of files that require variation to the numbering.

For example in the Engineering Sector the sub-category, Facility Drawings, may have different groupings of files that have different requirements, such as Isometric drawings.

Each individual file will have its own number. Thus, each drawing will have a unique number, separating it from other files of the same type by using a sequential or sheet number. The sequential and/or sheet number must appear as a part of the drawing number.

Documents and manuals can each have one number regardless of how many pages are contained within.

The following are content identifying elements that must be considered when creating nomenclature for each category of file:

Facility Documents and Facility Drawings

- Facility identification

- Physical area within the facility
- Geographic information (legal description/region)
- Technical discipline
- Document/drawing/data type identification
- Equipment/Instrument Tag (ID) numbers
- Line Numbers (for piping isometrics)
- Loop numbers (for instruments)

Project/Activity Documents

- Project or task identification
- Geographic information (legal description/region)
- Technical or non-technical discipline/department
- Document/data type identification

Legal Documents

- Client code
- Case type
- Case number
- Document/data type identification

Corporate Documents and Drawings

- Corporate identification
- Technical or non-technical discipline/department
- Document/drawing/data type identification

5. File Names

The revision or date of the file should not be included as a component of the numbering convention because each time there are changes, the number of the drawing, document or data file changes. The revision and date can appear (when appropriate) in the filename when saving the file to a network drive.

Any piece of information that changes with each revision of the file should not be included in the filename when software that tracks versions is being utilized.

6. VOID Numbers

Numbers of VOID files will not be reused.

All efforts should be made to keep the identification number from the beginning to the end of a drawing or document's life, but occasionally the number does have to change.

The following are the main considerations when changing a number:

- Is the file in the initial preliminary stages of creation
- Has the file been authenticated by a professional technical discipline/individual
- Has the file been issued through the construction phase
- How widely distributed is the file (how easy will it be to inform people of the change)

- Does the number need to change
- Is the number referenced within other drawings or documents, and how many
- Do you have the authority to change the number
- What groups rely on finding or referencing the file using the number

When changing a number, you must always remember that although the revision number is not a component of a number, the number of the drawing or document and the revision number together identify the exact version of information.

7. Revision Structures

There are only two reasons for a revision number. The first is to identify the logical sequence of changes to the information contained within the drawing or document, and the other is to clearly identify the finality of the content.

To define the finality of content we must consider the end purpose for the file, which will either be for construction, to show an exact representation of a physical structure after construction, or the file will be for use by consumers of the information.

All other stages of development are working towards those ultimate purposes, such as review, approval, design, etc.

The finality of content is indicated by use of numeric characters, and is described as a *hard revision*. All other stages are indicated by alpha, or alpha-numeric characters, and is described as a *soft revision*.

Revision dates must not be used as a part of the revision number structure. The date can be used in the filename when files are updated continually throughout the day or week, such as with 3D model files and financial documents.

Versions of files that are under creation and review in order to create either a soft or hard revision are not typically controlled, and are described as *intermediate revisions*. For example; an engineer asks a drafter to create a drawing. The drafter gives the first intermediate revision of the drawing to the engineer to confirm his expectations are met, the engineer may ask for modifications, the drafter then gives a second intermediate revision to the engineer. Once the engineer is satisfied with the content, the drawing is then issued as a soft revision. Later when the drawing is to be revised again, those changes may have to go through a similar process before being issued at the next soft revision.

Files may continually go back and forth between soft revisions and hard revisions and may or may not have intermediate revisions each time.

A REVISION NUMBER CAN NEVER BE REUSED FOR THE SAME DRAWING, DOCUMENT, OR DATA FILE NUMBER.

Therefore, it is imperative that there is strong revision and version control in the Document Management system.

Example of the progression of a file through soft and hard revisions

Revision Number	Issue Stage	Reason for issue
A	Issued for Review	The initial review phase to ensure that content is meeting initial expectations before too much time and effort is put into the creation of the content
B	Issued for Approval	The content has been expanded to include as much information as is available, and assumptions are noted for the approvers to comment on
C	Issued for Design	The content is at a stage where it can be issued to other technical disciplines to enable their decisions on their design input
0	Issued for Construction	The design has been created to a point where the construction crews can now take the design and build from it
1	As Built	As construction progressed, some changes in the design were required. These changes must now be reflected in updated content so that the information is available in the future

There must be provision in the revision structure to allow for future soft revisions, and the soft revision numbers already used cannot be used again.