

## 1 Purpose of this Standard

The purpose of this standard is to ensure that the proper integration occurs between the controllers of project documentation and data, and the individuals who are managing the project elements have appropriate interaction and integration.

## 2 Risks of non-compliance

The risks of not complying with this standard include:

- Lack of understanding by Document Management of expected deliverables on a project
- Lack of ability by Document Management to expedite deliverables on a project
- Reduced understanding of project schedule and deliverable milestones
- High risk of errors or late/inaccurate distribution of deliverables
- Deliverables may not be available at project closeout (for handover or for reporting to agencies)
- Lack of understanding of expectations by internal project team members
- Inadvertent impacts to the project progression due to misused information

## 3 Overview

It is imperative that the project team work well, and that document Management and all its relevant divisions are included in the project team. This includes the inclusion of scoping and estimating for a job for the document Management function (See DMC-DM-STD-019).

## 4 Document Management interaction on projects or activities

Document Management must ensure that they understand the standards or requirements of any organization that is involved in the project, be it a vendor or supplier of services, an engineering firm, a law firm, or a customer or client.

This entails sharing of corporate governance documentation between organizations as well as clarification meetings whenever required.

This is often done at a project or activity kickoff meeting, or other team meeting.

Document Management must ensure they understand:

- The requirements of which documents, drawings, or data files are required to be created, received, or distributed
- Distribution requirements
- Quantity and frequency of deliverables
- Timelines for each deliverable/milestone
- Any deviations from standard Document Management processes in the organization (for that particular project)

This communication of project Document Management requirements may be in the form of a project execution plan, detailed in a project schedule, or outlined in a full deliverables listing.

Any changes to the Document Management requirements must be communicated at the earliest possible time by the Project Management group to ensure that document Management can respond appropriately. All other relevant parties should be notified of any changes to the Document Management requirements, and any approved modifications should be processed through typical Management of Change (MOC) processes.