	<p align="center">Standard</p>	<p align="center">Technology</p>
---	---------------------------------------	---

Title: **Smartplant For Owner Operators (SPO) Documentation Metadata Standard**

Unique Identifier: **240-58552870**

Alternative Reference Number: **N/A**

Area of Applicability: **Engineering**

Documentation Type: **Standard**

Revision: **1**

Total Pages: **28**

Next Review Date: **February 2015**

Disclosure Classification: **CONTROLLED DISCLOSURE**

APPROVED FOR AUTHORISATION
 TECHNOLOGY ENGINEERING
DOCUMENT CENTRE ☎ x4962


Compiled by



S.J. Barnard
Chief Engineer – System Design

Date: 6 February 2014

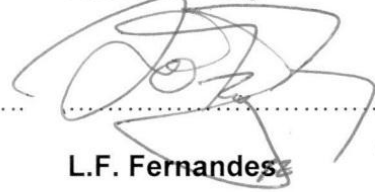
Approved by



P. Serekwa
Acting Configuration Manager – Group Technology Plant Engineering

Date: 12/02/2014

Authorised by



L.F. Fernandes
Senior Manager – System Integration - Group Technology Plant Engineering

Date: 2014/02/20

Supported by SCOT/SC/TC



G. Brown
SCOT/SC/TC Chairperson

Date: 12-02-2014

PCM Reference : **32-1216**

SCOT Study Committee Number/Name : **Configuration and Data Management**

CONTENTS

	Page
1. INTRODUCTION	3
2. SUPPORTING CLAUSES.....	4
2.1 SCOPE	4
2.1.1 Purpose	4
2.1.2 Applicability.....	4
2.2 NORMATIVE/INFORMATIVE REFERENCES.....	4
2.2.1 Informative.....	5
2.3 DEFINITIONS.....	5
2.3.1 Disclosure Classification	5
2.4 ABBREVIATIONS.....	6
3. ROLES AND RESPONSIBILITIES	6
3.1.1 Document Manager	6
3.2 PROCESS FOR MONITORING.....	6
3.3 RELATED/SUPPORTING DOCUMENTS.....	6
4. METADATA REQUIREMENTS	7
4.1 RULES FOR METADATA DEFINITION.....	7
4.2 METADATA	7
5. METADATA STANDARD	9
5.1 ENGINEERING DOCUMENT METADATA.....	10
5.2 ALTERNATIVE IDENTIFIER METADATA	19
5.3 USER METADATA	20
5.4 PHYSICAL LOCATION METADATA.....	24
5.5 ORGANISATION METADATA	25
5.6 DOCUMENT AND REVISION STATES.....	25
5.7 ITEM OWNING GROUP PICKLIST	25
5.8 APPROVAL STATUS PICKLIST	26
5.9 AUTHORISATION STATUS PICKLIST.....	26
5.10 MEDIA TYPE PICKLIST	26
5.11 USER TITLE PICKLIST.....	27
6. AUTHORISATION.....	27
7. REVISIONS	27
8. DEVELOPMENT TEAM	27
9. ACKNOWLEDGEMENTS	28

FIGURES

Figure 1: Metadata in Context of the Business	8
---	---

CONTROLLED DISCLOSURE

When downloaded from the EDMS, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorised version on the system.

1. INTRODUCTION

Metadata is structured or semi-structured information that enables the creation, registration, classification, access, preservation and disposition of documents and records through time and across domains. They are used to identify, authenticate and contextualise documents/records, people, processes and systems that create, manage, maintain and use them.

During the implementation of Smart Plant 3.8 during 2007, the lack of a Metadata Specification was highlighted as one of the root causes for poor data quality and the perception that you cannot find the required documentation in the system.

It was later found that during the development of the Metadata Standard for Smart Plant 3.8, that numerous business rules did not exist, various fields are duplicated in their meaning and not unique, while it highlighted numerous opportunities for simplification and rationalisation in future.

This learning and experience from using Smart Plant 3.8 in particular was used as the basis for the configuration of SPO and is incorporated within this standard.

Some of the benefits of having a Metadata Standard available as identified in the Workgroup includes:

- Assist with reporting and management information in that you can track and find the correct property in line with the definition and or business rule.
- Auditing and Quality Control. Audits can be carried out on data quality to confirm that the data is meeting the criteria set in this document.
- Data Integrity. Users can all follow the standard, rather than follow their diverse experience when creating and finding documentation.
- Defines what each field means, thereby improving the usability of the system.
- Defines how to use each field (business rules), thereby ensuring that each field has a particular purpose and process of completion.
- Provides context of the fields, by showing how each field is related and used.
- Used to identify Benchmarks/KPI's for critical data.
- A Metadata Standard assists users to find the right documentation.
- Defines how users should interact with the system and the physical documentation.
- Ensures uniqueness of fields , by identifying duplicates & ambiguities during the compilation of a Metadata Standard
- Provides an inventory of metadata fields (and their descriptions) for the system
- Provides baseline of the system metadata
- Defines how the Metadata appears on documentation and how it is used to produce and find documentation.
- Clearly indicate where Metadata is compulsory, providing a better understanding of the system process.

CONTROLLED DISCLOSURE

2. SUPPORTING CLAUSES

2.1 SCOPE

This standard describes the metadata that shall be used in support in the management of documentation in Smart Plant for Owner Operator (SPO). The standard defines the metadata that can be captured in support of the business process.

2.1.1 Purpose

The purpose of this document is to describe the metadata standard for documentation to be managed in SPO 4.4.

Within the business various metadata schemas are used. To support data maintenance, system integration compatibility and each of data migration between companies and external international contractors, the following metadata standard is developed to align Eskom with the International best practices and standards (ISO) to ensure compliance.

This Standard includes:

- SPO system configurations as of Build 27.X
- User interaction required (business rules) on how to interact with the system.
- Administration interaction required on how to interact with the system, to support users.
- Documentation requirements to enable them to be managed within the system.

2.1.2 Applicability

This Standard is applicable to all Documentation (documents, drawings and records) which are registered, created, updated, used, revised, reviewed, approved authorised, stored, disseminated and controlled during the execution of functions and activities using SPO 4.4 Build 27.X or later¹.

2.2 NORMATIVE/INFORMATIVE REFERENCES

- [1] 32-1: Eskom Document and Records Management Policy
- [2] 32-6: Document and Records Management Procedure
- [3] 32-644: Eskom Documentation Management Standard
- [4] 240-54179170: Technical Documentation Classification and Designation Standard
- [5] 32-1216: Process Control Manual for Manage Documents and Records.
- [6] 240-53113685: Design Review Procedure
- [7] 240-53114186: Project/Plant Specific Technical Document And Records Management Procedure
- [8] 240-53665024: Quality Management System Manual
- [9] 240-53114190: Internal Audit Procedure
- [10] 240-53114026: Project Engineering Change Management Procedure

¹ It should be noted that this document will be continuously updated to reflect the latest configuration and capabilities of the Smart Plant for Owner Operator (SPO) system. The SPO system as it is rolled out to Eskom, will become the standardised way in which Engineering Technical Documentation in particular is managed throughout the organisation.

2.2.1 Informative

- [11] ISO 9000: Quality management systems — Fundamentals and vocabulary
- [12] ISO 9001: Quality management systems – Requirements
- [13] ASME NQA-1-2008: Quality Assurance Requirements for Nuclear Facility Applications
- [14] IEC 61355: Classification and designation of documents for plants, systems and equipment
- [15] ISO 11179-4:-Information Technology – Specification and Standardization of Data Elements. Part 4 Rules and Guidelines for the Formulation of Data Elements
- [16] ISO 23081-1:2006, IDT, Ed. 1: Information and documentation - Records management processes - Metadata for records Part 1: Principles
- [17] ISO 23081-2:2009, IDT, Ed. 1: Information and documentation - Managing metadata for records Part 2: Conceptual and implementation issues

2.3 DEFINITIONS

Document Metadata – is all additional related document information that describes the attributes of a specific document (or record). Metadata includes but are not limited to the following; document title, document identifiers, document revision number, document compiler, document revision dates, document types, and areas of applicability.

Document Kind – is a kind of document defined with respect to its specified content of information and form of presentation. See 240-54179170: Technical Documentation Classification and Designation Standard [4].

2.3.1 Disclosure Classification

Controlled Disclosure: Controlled Disclosure to external parties (either enforced by law, or discretionary).

CONTROLLED DISCLOSURE

When downloaded from the EDMS, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorised version on the system.

2.4 ABBREVIATIONS

Abbreviation	Description
ARIS	Architecture of Integrated Information Systems
ASME	American Society of Mechanical Engineers
CARAT	Completeness, Accuracy, Relevant, Accessibility and Timely
COE	Centre of Excellence
CEO	Chief Executive Officer
DIN	German Institute for Standardisation
Div Exec	Divisional Executive
EDMS	Eskom Document Management System
EHPUM	Eskom High Performance Utility Model
EPGB	Engineering Process Governance Body
HAZOP	Hazards and Operability Study
ISO	International Standards Organisation
MDI	Master Document Index
PBS	Plant Breakdown Structure also known as "ConfigPBS"
PDF	Adobe Document Publishing Format
OHS	Occupational Health and Safety
QMS	Quality Management System
SANS	South African National Standard
SCOT	Steering Committee of Technology
SME	Subject Matter Expert
SPE	SmartPlant Enterprise
SPO	SmartPlant for Owner Operators

3. ROLES AND RESPONSIBILITIES

3.1.1 Document Manager

The Document Manager shall be appointed by the Business Management System Representative, in terms of 32-644: Eskom documentation management Standard [4].

The Document Manager shall ensure compliance to this Standard and 32-1: Eskom Document and Records Management Policy [1], 240-53114186: Project/Plant Specific Technical Document And Records Management Procedure [7] and, where applicable the requirements of 32-6: Document and Records Management Procedure [2] and 32-644: Eskom documentation management Standard [4].

3.2 PROCESS FOR MONITORING

This procedure will be monitored via 240-53114190: Internal Audit Procedure [9] and self-assessments.

3.3 RELATED/SUPPORTING DOCUMENTS

N/A

CONTROLLED DISCLOSURE

When downloaded from the EDMS, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorised version on the system.

4. METADATA REQUIREMENTS

4.1 RULES FOR METADATA DEFINITION

The following rules, as applicable for this standard are derived from the Rules and Guidelines for Formulation of data elements (ISO 11179 Part 4). A listing of the rules and explanations has been provided in the table below.

Rule 1	Be unique (within any data dictionary in which it appears):- Each definition shall be distinguishable from every other definition (within the dictionary) to ensure the specificity is retained. One or several characteristics expressed in the definition must differentiate the concept to be defined from other concepts.
RULE 2	Be stated in the singular :- The concept expressed by the data definition shall be expressed in the singular. (An exception is made if the concept itself is plural.)
RULE 3	State what the concept is , not only what it is not:- When constructing definitions, the concept cannot be defined exclusively by stating what the concept is not.
RULE 4	Be stated as a descriptive phrase or sentence(s) (in most languages):- A phrase is necessary (in most languages) to form a precise definition that includes the essential characteristics of the concept. Simply stating one or more synonym(s) is insufficient. Simply restating the words of the name in a different order is insufficient. If more than a descriptive phrase is needed, use complete, grammatically correct sentences.
RULE 5	Contain only commonly understood abbreviations :- Understanding the meaning of an abbreviation, including acronyms and initialisms, is usually confined to a certain environment. In other environments the same abbreviation can cause misinterpretation or confusion. Therefore, to avoid ambiguity, full words, not abbreviations, shall be used in the definition.
RULE 6	Be expressed without embedding definitions of other data elements or underlying concepts:- The definition of a second data element or related concept should not appear in the definition proper of the primary data element. Definitions of terms should be provided in an associated glossary. If the second definition is necessary, it may be attached by a note at the end of the primary definition's main text or as a separate entry in the dictionary. Related definitions can be accessed through relational attributes (e.g., cross-reference).

4.2 METADATA

Metadata management support the complex part of the management of documents and records, serving a variety of functions and purposes. In a document and records management context, metadata are defined as data describing the context, content and structure of documentation and their management through time (ISO 15489-1:2001, 3.12). As such, metadata are structured or semi-structured information that enables the creation, registration, classification, access, preservation and disposition of

CONTROLLED DISCLOSURE

documentation through time and within and across domains. Each of these domains represents an area of intellectual discourse and of social and/or organizational activity with a distinctive or limited group of people who share certain values and knowledge. Figure 1 illustrates the relationship of metadata and the other possible components. The metadata classes (as defined in ISO 23081) are divided into components of metadata about the record itself; metadata about the business rules or policies and mandates; metadata about agents; metadata about business activities or processes and metadata about records management processes.

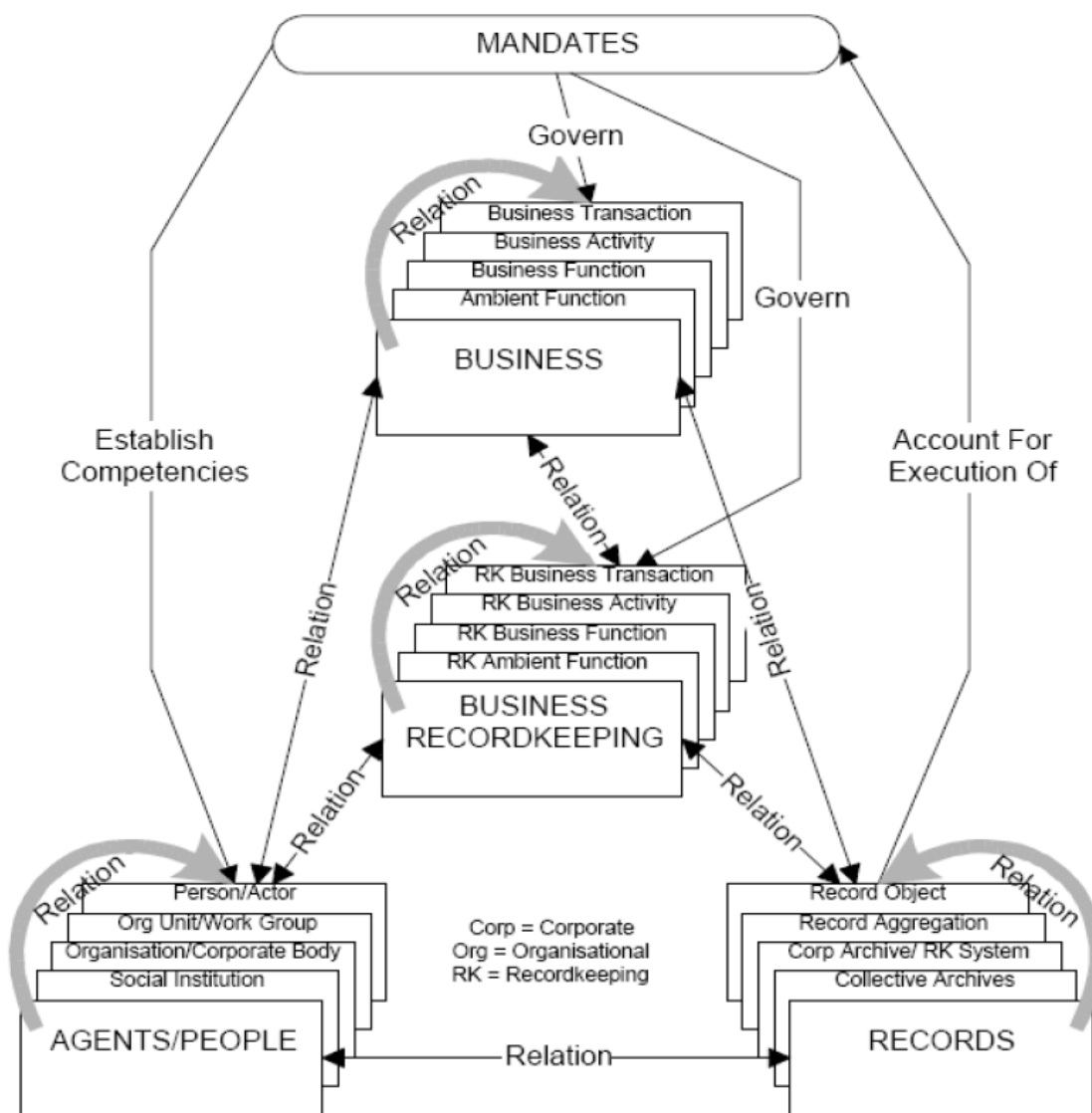


Figure 1: Metadata in Context of the Business

CONTROLLED DISCLOSURE

When downloaded from the EDMS, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorised version on the system.

5. METADATA STANDARD

The Metadata Standard is detailed in the sections below by describing the main objects' forms and picklists that the users are interacting with in SPO in order to manage documentation:

- Section 5.1 Engineering Document Metadata
- Section 5.2 Alternative Identifier Metadata
- Section 5.3 User Metadata
- Section 5.4 Physical Location Metadata
- Section 5.5 Organisation Metadata
- Section 5.6 Document and Revision States
- Section 5.7 Item Owning Group Picklist
- Section 5.8 Approval Status Picklist
- Section 5.9 Authorisation Status Picklist
- Section 5.10 Media Type Picklist
- Section 5.11 User Title Picklist

CONTROLLED DISCLOSURE

When downloaded from the EDMS, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorised version on the system.

5.1 ENGINEERING DOCUMENT METADATA

Main

Metadata Field/Attribute:	Unique Identifier						
Properties							
User Interface Tab	Main						
Metadata Form Section	Main Details						
Definition	This is a unique eskom document number assigned by an electronic numbering system (ENS). The number (together with the revision and version) uniquely identifies a document and distinguishes a document from others throughout the Eskom business.						
Rules for use	Sequential unique number as generated by the respective numbering system (Typically SPO). Each instance of SPO to have it's own numbering system or name space register. For a Planned document, this number will then be put on the title page of the document.						
User Interface	Form: Create New...Engineering Document	Form: Update...Engineering Document	Form: Copy...Engineering Document	Form: Revise...Engineering Document	Drag&DropEngineering Document	Form: Query...Engineering Document	Details...Engineering Document
Role Requirements to Access Interface	Registrar	Document Controller	Registrar	Registrar	Not Applicable	Eskom Default User	Eskom Default User
Population Method	Greyed Out - System to Allocate using ENS	Not Editable-Greyed Out	Greyed Out - System to Allocate using ENS	Not Editable-Greyed Out		Free Text	Not Editable-Greyed Out
Mandatory	Yes - System Generated		Yes - System Generated			No	
Mask or Pick lists	Fixed Configuration in Build Files		Fixed Configuration in Build Files	Carried over to next revision		Also accepts Wild Cards like "*" and "?"	
Field Length	35						
Class	SPXEngineeringDoc						
Interface	IObject						
PropertyDef	Name						
DisplayItem	ESK_UID_DI						
Metadata Field/Attribute:	Title						
Properties							
User Interface Tab	Main						
Metadata Form Section	Main Details						
Definition	This is the title as defined on the actual document without any change or correction. A meaningful textual description of the document. This is exactly as the title appears on the document without change or correction. Where the document is still planned, the title will be captured in line with the following rules: From 32-644: Eskom Documentation Standard. The title of a document must be descriptive of the content and intent and must include the document kind. The language structure of the title shall follow the rules of sentence writing, where only the first letter is in capital unless the word is the name of person, division, business unit, department, place, country, or abbreviation (i.e. a proper noun). A title should comply to the following rules 1) It will describe the topic that is covered in the document 2) It shall be concise 3) It can contain unique key words pertaining to the document						
Rules for use	Document titles will normally follow the following structure for guidance: Plant, Unit, System, Subsystem, Manufacturer, Component, Sub-Component, Model Number, Document Kind. (As applicable) Examples of document titles a) Koeberg Nuclear Power Station Reactor Coolant Pump Upper Internals Weekly Maintenance Instruction b) Kusile 400kV Substation Station Transformer Number 2 15 kV Bay Schedule c) Matimba Power Station Unit 1 Condensate Polishing Plant Booster Pumps Piping and Instrumentation Diagram d) Brown Boveri 400/275/132/22kV Transformer Model AB8400x Maintenance Instruction						
User Interface	Form: Create New...Engineering Document	Form: Update...Engineering Document	Form: Copy...Engineering Document	Form: Revise...Engineering Document	Drag&DropEngineering Document	Form: Query...Engineering Document	Details...Engineering Document
Role Requirements to Access Interface	Registrar	Document Controller	Registrar	Registrar	Not Applicable	Eskom Default User	Eskom Default User
Population Method	Free Text	Free Text	Free Text	Free Text		Free Text	Not Editable-Greyed Out
Mandatory	Yes	Yes	Yes	Yes		No	
Mask or Pick lists	System Automatically Change Text to CAPS only	System Automatically Change Text to CAPS only	System Automatically Change Text to CAPS only	System Automatically Change Text to CAPS only		Also accepts Wild Cards like "*" and "?"	
Field Length	256						
Class	SPXEngineeringDoc						
Interface	IObject						
PropertyDef	Description						
DisplayItem	ESK_Description						
Metadata Field/Attribute:	Document Kind Class (DCC) L1						
Properties							
User Interface Tab	Main						
Metadata Form Section	Document Classification						
Definition	Refer to 240-54179170 Technical Documentation Classification and Designation Standard. The Document Kind Class Classification comprises of 4 levels. The Document Kind Class (DCC) L1 or "Technical Areas" are represented by a single letter code, the first letter in the code. A document kind from the application area "management" may, for example, be assigned to the technical area "overall management" if used in cross-technical area situations. In other cases it may be assigned to "electrical engineering" if only management within this technical area is addressed.						
Rules for use	Refer to 240-54179170 Technical Documentation Classification and Designation Standard. Even though the system is defaulting to a predetermined value, it should be checked /change to as noted on the document to be loaded. If the classification does not appear on the document or if it is a planned document, the document should be classified by a person competent in applying the rules as indicated in 240-54179170 Technical Documentation Classification and Designation Standard, in conjunction with the Compiler.						
User Interface	Form: Create New...Engineering Document	Form: Update...Engineering Document	Form: Copy...Engineering Document	Form: Revise...Engineering Document	Drag&DropEngineering Document	Form: Query...Engineering Document	Details...Engineering Document
Role Requirements to Access Interface	Registrar	Document Controller	Registrar	Registrar	Not Applicable	Eskom Default User	Eskom Default User
Population Method	Picklist-Defaulted	Not Editable-Greyed Out	Not Editable-Greyed Out	Not Editable-Greyed Out		Picklist	Not Editable-Greyed Out
Mandatory	Yes					No	
Mask or Pick lists	Pick List as defined in 240-54179170 - Technical Documentation Classification and Designation Standard			Carried over to next revision		Pick List as defined in 240-54179170 - Technical Documentation Classification and Designation Standard	
Field Length	35						
Class	SPXEngineeringDoc						
RelDef	ESK_CommonMasterDCCLevel1						
DisplayItem	ESK_DKCL1						

CONTROLLED DISCLOSURE

When downloaded from the EDMS, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorised version on the system.

Metadata Field/Attribute:		Document Kind Class (DCC) L2						
Properties								
User Interface Tab	Main							
Metadata Form Section	Document Classification							
Definition	Refer to 240-54179170 Technical Documentation Classification and Designation Standard. This Document Kind Class (DCC) L2 represents a main class of document kinds. Document kinds belong to the same main class if they contain the same type of leading information.							
Rules for use	Refer to 240-54179170 Technical Documentation Classification and Designation Standard. The user navigates down the hierarchy of Document Kind Class (DCC) L2 & L3 to select the correct Document Kind Class (DCC) L4 as it appears on the document. If the classification does not appear on the document or if it is a planned document, the document should be classified by a person competent in applying the rules as indicated in 240-54179170 Technical Documentation Classification and Designation Standard, in conjunction with the Compiler.							
User Interface	Form: Create New...Engineering Document	Form: Update...Engineering Document	Form: Copy...Engineering Document	Form: Revise...Engineering Document	Drag&DropEngineering Document	Form: Query...Engineering Document	Details...Engineering Document	
Role Requirements to Access Interface	Registrar	Document Controller	Registrar	Registrar	Not Applicable	Eskom Default User	Eskom Default User	
Population Method	Greyed Out - System Generated from using the Registrar's navigation via tree, or Registrar's clicking directly via Document Kind Class (DCC) L4 selection	Not Editable-Greyed Out	Not Editable-Greyed Out	Not Editable-Greyed Out		Greyed Out - System Generated from using the User's navigation via tree.	Not Editable-Greyed Out	
Mandatory	Yes					No		
Mask or Pick lists	Pick List as defined in 240-54179170 - Technical Documentation Classification and Designation Standard			Carried over to next revision		Pick List as defined in 240-54179170 - Technical Documentation Classification and Designation Standard		
Field Length	35							
Class	SPXEngineeringDoc							
Rel/Def	SPFClassifiedLevel2							
DisplayItem	ESK_DKCL2							

Metadata Field/Attribute:		Document Kind Class (DCC) L3						
Properties								
User Interface Tab	Main							
Metadata Form Section	Document Classification							
Definition	Refer to 240-54179170 Technical Documentation Classification and Designation Standard. This class represents a sub class of document kinds. Document kinds belong to the same subclass if they have a common description of the content of information within the description of the main class.							
Rules for use	Refer to 240-54179170 Technical Documentation Classification and Designation Standard. The user navigates down the hierarchy of Document Kind Class (DCC) L2 & L3 to select the correct Document Kind Class (DCC) L4 as it appears on the document. If the classification does not appear on the document or if it is a planned document, the document should be classified by a person competent in applying the rules as indicated in 240-54179170 Technical Documentation Classification and Designation Standard, in conjunction with the Compiler.							
User Interface	Form: Create New...Engineering Document	Form: Update...Engineering Document	Form: Copy...Engineering Document	Form: Revise...Engineering Document	Drag&DropEngineering Document	Form: Query...Engineering Document	Details...Engineering Document	
Role Requirements to Access Interface	Registrar	Document Controller	Registrar	Registrar	Not Applicable	Eskom Default User	Eskom Default User	
Population Method	Greyed Out - System Generated from using the Registrar's navigation via tree, or Registrar's clicking directly via Document Kind Class (DCC) L4 selection	Not Editable-Greyed Out	Not Editable-Greyed Out	Not Editable-Greyed Out		Greyed Out - System Generated from using the User's navigation via tree.	Not Editable-Greyed Out	
Mandatory	Yes					No		
Mask or Pick lists	Pick List as defined in 240-54179170 - Technical Documentation Classification and Designation Standard			Carried over to next revision		Pick List as defined in 240-54179170 - Technical Documentation Classification and Designation Standard		
Field Length	35							
Class	SPXEngineeringDoc							
Rel/Def	SPFClassifiedLevel3							
DisplayItem	ESK_DKCL3							

Metadata Field/Attribute:		Document Kind Class (DCC) L4						
Properties								
User Interface Tab	Main							
Metadata Form Section	Document Classification							
Definition	Refer to 240-54179170 Technical Documentation Classification and Designation Standard. Type of document defined with respect to its specified content of information and form of presentation..							
Rules for use	Refer to 240-54179170 Technical Documentation Classification and Designation Standard. The user navigates down the hierarchy of Document Kind Class (DCC) L2 & L3 to select the correct Document Kind Class (DCC) L4 as it appears on the document. If the classification does not appear on the document or if it is a planned document, the document should be classified by a person competent in applying the rules as indicated in 240-54179170 Technical Documentation Classification and Designation Standard, in conjunction with the Compiler.							
User Interface	Form: Create New...Engineering Document	Form: Update...Engineering Document	Form: Copy...Engineering Document	Form: Revise...Engineering Document	Drag&DropEngineering Document	Form: Query...Engineering Document	Details...Engineering Document	
Role Requirements to Access Interface	Registrar	Document Controller	Registrar	Registrar	Not Applicable	Eskom Default User	Eskom Default User	
Population Method	Greyed Out - System Generated from using the Registrar's navigation via tree, or Registrar's clicking directly via Document Kind Class (DCC) L4 selection	Not Editable-Greyed Out	Not Editable-Greyed Out	Not Editable-Greyed Out		Greyed Out - System Generated from using the User's navigation via tree.	Not Editable-Greyed Out	
Mandatory	Yes					No		
Mask or Pick lists	Pick List as defined in 240-54179170 - Technical Documentation Classification and Designation Standard			Carried over to next revision		Pick List as defined in 240-54179170 - Technical Documentation Classification and Designation Standard		
Field Length	35							
Class	SPXEngineeringDoc							
Rel/Def	SPFClassifiedLevel4							
DisplayItem	ESK_DKCL4							

CONTROLLED DISCLOSURE

When downloaded from the EDMS, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorised version on the system.

Metadata Field/Attribute:	Revision Scheme						
Properties							
User Interface Tab	Main						
Metadata Form Section	Revision Details						
Definition	32-644 defines as Major-Version to be used for the revision scheme						
Rules for use	<p>The system is configured to make use of "Eskom Revision Scheme 1,1" for the Revision Scheme for the engineering documentation. This means that the system only makes use of "Major Revision - Version" (Minor Revision is not used). Both the Major Revision and the Version are numerical values, with the Major Revision that normally starts at 0 and the Version starting at 1.</p> <p>Each engineering document requires a mandatory Major Revision Number and a Version Number. The Major Revision Number is defaulted by the system, but changeable by the user. The Version Number is automatically created by the system, starting at the number 1, and then incrementing by one for each time the document is checked out. Refer to the Major Revision definition.</p> <p>The system uniquely identifies engineering document objects using a combination of Unique Identifiers and Major Revision - Version. The Alternative Identifiers can make use of any revision scheme, where required.</p>						
User Interface	Form: Create New...Engineering Document	Form: Update...Engineering Document	Form: Copy...Engineering Document	Form: Revise...Engineering Document	Drag&DropEngineering Document	Form: Query...Engineering Document	Details...Engineering Document
Role Requirements to Access Interface	Registrar	Document Controller	Registrar	Registrar	Not Applicable	Eskom Default User	Eskom Default User
Population Method	Greyed Out - Fixed System Configuration	Fixed System Configuration	Fixed System Configuration	Fixed System Configuration		Picklist	Not Editable-Greyed Out
Mandatory						No	
Mask or Pick lists							
Field Length	35						
Class	SPXEngineeringDoc						
RelDef	SPFDocRevisionRevisionScheme						
DisplayItem	Doc_RevScheme						

Metadata Field/Attribute:	Major Revision						
Properties							
User Interface Tab	Main						
Metadata Form Section	Revision Details						
Definition	A major revision uniquely identifies separate, approved versions or releases of a document.						
Rules for use	<p>This is a numerical indicator of either the number of submittals made by an external party or contractor, or the number of times it was revised within Eskom.</p> <p>For an internally generated document: The Major Revision is a numerical indicator starting at 0, and increase by one, each time when changes are made to a previous approved document. The user captures the Major Revision as it appears on the document.</p> <p>For an externally produced document with an Eskom Major Revision that is formally received via a transmittal: The Major Revision is a numerical indicator starting at 0, and increases by 1 with each subsequent submission of a revised/changed document. The Major Revision number is captured in the system as it appears on the document. When a document is received with the same or lower Major Revision than the current revision in the system, the document revision will be rejected on the transmittal and not loaded to the system (as the Major Revision must indicate the submittal number of the document)- the supplier of a document will be expected to correctly indicate the submission sequence by means of a document's Eskom Major Revision number (as the submittal sequence) in the document's title block. Where consecutive submissions are for documents that do not contain any changes or revisions, the document's eskom Major Revision is not changed. In these cases where a subsequent submittal contains the same document as in a previous submittal, the transmittal is linked to the document revision already loaded in the system.</p> <p>For an externally produced document without an Eskom Major Revision that is formally received via a transmittal: The Major Revision is a numerical indicator starting at 0, and increases by 1 with each subsequent submission of a revised/changed document. In this case the user captures the Major Revision as a sequence number of the submission, starting at 0. Where consecutive submissions are for documents that do not contain any changes or revisions (changes to the Alternative Revisions), the document is not reloaded, but linked to the revision already captured in the system.</p>						
User Interface	Form: Create New...Engineering Document	Form: Update...Engineering Document	Form: Copy...Engineering Document	Form: Revise...Engineering Document	Drag&DropEngineering Document	Form: Query...Engineering Document	Details...Engineering Document
Role Requirements to Access Interface	Registrar	Document Controller	Registrar	Registrar	Not Applicable	Eskom Default User	Eskom Default User
Population Method	Free Text	Greyed Out - Not Editable	Free Text	Greyed Out - Not Editable		Free Text	Greyed Out - Not Editable
Mandatory	Yes - Defaulted to 0 at Creation		Yes - Defaulted to 0 at Creation	Yes - Next Increment at Revision		No	
Mask or Pick lists	Masked Numeric ### only		Masked Numeric ### only	Masked Numeric #### only		Masked Numeric ###, but also accepts wild cards like "*" and "?"	
Field Length	35						
Class	SPXEngineeringDoc						
Interface	ISPFDocumentRevision						
Propertydef	SPFMajorRevision						
DisplayItem	Doc_MajorRev						

Metadata Field/Attribute:	Revision State						
Properties							
User Interface Tab	Main						
Metadata Form Section	Revision Details						
Definition	Displays the revision state of the document						
Rules for use	This is a system generated field used to track the document and to differentiate the states amongs revisions - See Revision Status Picklist of how the system is working in the background						
User Interface	Form: Create New...Engineering Document	Form: Update...Engineering Document	Form: Copy...Engineering Document	Form: Revise...Engineering Document	Drag&DropEngineering Document	Form: Query...Engineering Document	Details...Engineering Document
Role Requirements to Access Interface	Registrar	Document Controller	Registrar	Registrar	Not Applicable	Eskom Default User	Eskom Default User
Population Method	Greyed Out - System Generated	Greyed Out - System Generated	Greyed Out - System Generated	Greyed Out - System Generated		Picklist	Not Editable-Greyed Out
Mandatory	Yes	Yes	Yes	Yes		No	
Mask or Pick lists	See Revision & Document States	See Revision & Document States	See Revision & Document States	See Revision & Document States		See Revision & Document States	
Field Length	35						
Class	SPXEngineeringDoc						
Interface	ISPFDocumentRevision						
Propertydef	SPFRevState						
DisplayItem	Doc_SPFRevState						

CONTROLLED DISCLOSURE

When downloaded from the EDMS, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorised version on the system.

Metadata Field/Attribute:		Alternative Identifiers						
Properties								
User Interface Tab		Main						
Metadata Form Section		Alternative Identifiers						
Definition		This Alternative Identifier (Concatenation of the Alternative Number and the Alternative Revision associated with the Alternative Number) is an identifier as allocated to the document that is different to that as allocated by the system's Engineering Numbering System as the Unique Identifier for the document. There may be numerous Alternative Identifiers for a particular document.						
Rules for use		The rules for the allocation and selection of alternative Numbers and Alternative Revisions and Common References should be established for each site, prior to implementation. Examples would be to capture contractors document numbers, legacy numbers, and other system generated numbers and revisions as alternatives, and then select a single identifier as the common reference. Using the tools bar for the Alternative identifier, create the Alternative Number and Revision. See "Create Alternative Identifier", and then look up the Alternative Identifiers using the Find or Dragging and Dropping the Alternative Identifiers on the Document Revision Object.						
User Interface		Form: Create New...Engineering Document	Form: Update...Engineering Document	Form: Copy...Engineering Document	Form: Revise...Engineering Document	Drag&DropEngineering Document	Form: Query...Engineering Document	Details...Engineering Document
Role Requirements to Access Interface		Registrar	Document Controller	Registrar	Registrar	Registrar While "Working"	Eskom Default User	Eskom Default User
Population Method		Find, Multi Selection	Find, Multi Selection	Find, Multi Selection	Not Editable-Greyed Out	Drag and Drop	Find, Multi Selection	Not Editable-Greyed Out
Mandatory		No	No	No	No	No	No	No
Mask or Pick lists		Multi Selection of previous created Alternative Identifiers - See Creation of the Alternative Identifier	Multi Selection of previous created Alternative Identifiers - See Creation of the Alternative Identifier	Multi Selection of previous created Alternative Identifiers - See Creation of the Alternative Identifier	All Alternative Identifier relationships to be cleared when clicking "Finish"		Multi Selection of previous created Alternative Identifiers - See Creation of the Alternative Identifier	
Field Length		35						
Class		SPXEngineeringDoc						
RelDef		ESKAlternateNumberedObjectToAlternateNumberRecipient						
DisplayItem		DI_ESK_AltIdentifiers						

Metadata Field/Attribute:		Common Reference						
Properties								
User Interface Tab		Main						
Metadata Form Section		Common Reference						
Definition		The Common Reference is used to refer to an object using a specific reference across multiple organisations. This is typically achieved by using the same reference as originally given to the document by the author (along with the associated revision number). There can only be a single Common Reference for each document. Unfortunately SPO will not allow the user to select the Unique Identifier as the Common Reference, thus, the rule is that when this field is empty, the Unique Identifier is the Common Reference.						
Rules for use		The rules for the allocation and selection of alternative Numbers and Alternative Revisions and Common References should be established for each site, prior to implementation. Examples would be to capture contractors document numbers, legacy numbers, and other system generated numbers and revisions as alternatives, and then select a single identifier as the common reference. There can only be a single Common Reference for each document. This field is only completed if the Common Reference is not the Unique Identifier. If the Unique Identifier is used for the purpose of a Common Reference, it should be left empty in the system.						
User Interface		Form: Create New...Engineering Document	Form: Update...Engineering Document	Form: Copy...Engineering Document	Form: Revise...Engineering Document	Drag&DropEngineering Document	Form: Query...Engineering Document	Details...Engineering Document
Role Requirements to Access Interface		Registrar	Document Controller	Registrar	Registrar	Registrar While "Working"	Eskom Default User	Eskom Default User
Population Method		Find, Picklist	Find, Picklist	Find, Picklist	Not Editable-Greyed Out	Drag and Drop	Find, Picklist	Not Editable-Greyed Out
Mandatory		No	No	No	No	No	No	No
Mask or Pick lists		Multi Selection of previous created Alternative Identifiers - See Creation of the Alternative Identifier	Multi Selection of previous created Alternative Identifiers - See Creation of the Alternative Identifier	Multi Selection of previous created Alternative Identifiers - See Creation of the Alternative Identifier	Common Reference relationship to be cleared when clicking "Finish" - Starting the "Clear Revision Values" workflow		Multi Selection of previous created Alternative Identifiers - See Creation of the Alternative Identifier	
Field Length		35						
Class		SPXEngineeringDoc						
PropertyDef		ESK_AlternativeDocToAlternateNumberRecipient						
DisplayItem		DI_ESK_CommonRef						

Metadata Field/Attribute:		Item Owning Group						
Properties								
User Interface Tab		Main						
Metadata Form Section		Owning Group						
Definition		This field is used to control the security access of the document in line with its Disclosure Classification ie, this field defines who (what level of clearance) is allowed to access the document content and shown as the document's Disclosure Classification on the document.						
Rules for use		All the documents kinds were mapped to a defaulted Disclosure Classification to be used as the Item Owning Group. This may be changed at registration or update of the document. The Item Owning Group should be selected to correspond to the Disclosure Classification as shown on the document.						
User Interface		Form: Create New...Engineering Document	Form: Update...Engineering Document	Form: Copy...Engineering Document	Form: Revise...Engineering Document	Drag&DropEngineering Document	Form: Query...Engineering Document	Details...Engineering Document
Role Requirements to Access Interface		Registrar	Not Available - Not Displayed on Form	Registrar	Not Available - Not Displayed on Form	Not Applicable	Eskom Default User	Eskom Default User
Population Method		Picklist-Defaulted		Picklist-Defaulted			Picklist	Not Editable-Greyed Out
Mandatory		Yes - Defaulted		Yes - Defaulted			No	
Mask or Pick lists		Item Owning Group Picklist	Same as originally assigned when creating/revising the document	Item Owning Group Picklist	Same as for Previous Revision		Item Owning Group Picklist	
Field Length		35						
Class		SPXEngineeringDoc						
Edge		SPFOwningGroupsForInvokingMethod						
DisplayItem		ItemOwningGroup_Create						

CONTROLLED DISCLOSURE

When downloaded from the EDMS, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorised version on the system.

Config

Metadata Field/Attribute:	Plant						
Properties							
User Interface Tab	Config						
Metadata Form Section	Plant						
Definition	A unique meaningful identifier for a particular plant/project as issued by Eskom Information Management						
Rules for use	This will be allocated uniquely per site/project by IM and does not require any user interaction. Will be created at the beginning and forms part of the unique configuration of the site.						
User Interface	Form: Create New...Engineering Document	Form: Update...Engineering Document	Form: Copy...Engineering Document	Form: Revise...Engineering Document	Drag&DropEngineering Document	Form: Query...Engineering Document	Details...Engineering Document
Role Requirements to Access Interface	Registrar	Document Controller	Registrar	Registrar	Not Applicable	Not Available - Greyed Out	Eskom Default User
Population Method	Greyed Out - Fixed System Configuration	Greyed Out - Not Editable	Greyed Out - Not Editable	Greyed Out - Not Editable		Greyed Out - Fixed System Configuration	Not Editable-Greyed Out
Mandatory	Yes - System Generated			Yes - System Generated			
Mask or Pick lists							
Field Length	35						
Class	SPXEngineeringDoc						
RelDef	ESK_PlantDocument						
DisplayItem	ESK_PlantDocument						

Metadata Field/Attribute:	Configuration PBS						
Properties							
User Interface Tab	Config						
Metadata Form Section	Configuration PBS						
Definition	<p>These Configuration PBS items are indicating the relevant plant, systems, equipment etc that is described by this specific document. The Configuration PBS is the "Visible PBS" against which users will link documents. The initial structure will be loaded by batch process and thereafter be maintained by the Configuration Manager (the PBS will grow as the design matures). It will typically follow the KKS codification standard. The KKS rules will be applied logically – the system does not validate the KKS rules. The number of levels typically 6, but unlimited.</p> <p>The ConfigPBS will be created as a separate hierarchical structure in SPO and will be used by non-design tool specialists to navigate the plant structure and locate associated Tags and Documents. The number of levels will vary according to the coding system applied e.g. KKS, AKZ etc. and the plant design. Documents may be linked to any level of the configPBS and Tags to the bottom level of the configPBS.</p> <p>It is the Plant Configuration Manager's responsibility to establish and maintain and provide the rules for the configPBS - it evolves during the lifecycle of the plant.</p> <p>The document and PBS hierarchy establishes a reference which can be used to easily identify documentation describing a specific piece of plant. For example, if a P&ID document is related to the PBS node "6 0MAW10" which represents the main steam turbine for unit 6 of a plant, an engineer will be able to find the turbine P&ID without necessarily knowing anything else about the document's metadata.</p>						
Rules for use	<p>The document will be captured against the highest common and complete system reference, according to the discretion of the Configuration Technician. The document may not be related to a PBS node if any of the children of the node are not within the scope of the content of the document.</p> <p>Registrar will select only 1 PBS relationship (normally only on the first unit) as it appears on the document on registration.</p> <p>The complete set of PBS to document relationship will either be captured or verified by a Configuration Technician later in workflow.</p> <pre> graph TD A((Not Linked)) --> B((Link)) A --> C((Not Linked)) B --> D((Not Link (Implied by Parent))) B --> E((Not Link (Implied by Parent))) C --> F((Not Link)) </pre>						
User Interface	Form: Create New...Engineering Document	Form: Update...Engineering Document	Form: Copy...Engineering Document	Form: Revise...Engineering Document	Drag&DropEngineering Document	Form: Query...Engineering Document	Details...Engineering Document
Role Requirements to Access Interface	Registrar	Document Controller	Registrar	Registrar	Registrar While "Working", Configuration Management Practitioner anytime	Eskom Default User	Eskom Default User
Population Method	Find, Multi Selection	Find, Multi Selection	Find, Multi Selection	Find, Multi Selection	Drag and Drop	Find, Multi Selection	Not Editable-Greyed Out
Mandatory	No	No	No	No	No	No	
Mask or Pick lists	Respective Key part	Respective Key part	Respective Key part	Carried over to next revision	Respective Key part	Respective Key part	Respective Key part
Field Length	35						
Class	SPXEngineeringDoc						
RelDef	ESK_SystemDocument						
DisplayItem	ESK_SystemDocument						

Metadata Field/Attribute:	CDW Authored Tag						
Properties							
User Interface Tab	Config						
Metadata Form Section	CDW Tag						
Definition	CDW tag represents the lower levels of the plant breakdown structure (PBS). As such, the application of CDW tags is the same as that of the PBS (refer to the specification for the Configuration PBS). A CDW Authored Tag is a Tag that is being created by this particular document.						
Rules for use	The CDW tag to document relationship will be captured using Drag and Drop a Configuration Technician, once the CDW Tag has been published. The document will be captured against the CDW reference that is being created and controlled by this particular document.						
User Interface	Form: Create New...Engineering Document	Form: Update...Engineering Document	Form: Copy...Engineering Document	Form: Revise...Engineering Document	Drag&DropEngineering Document	Form: Query...Engineering Document	Details...Engineering Document
Role Requirements to Access Interface	Registrar	Document Controller	Registrar	Registrar	Configuration Controller	Eskom Default User	Eskom Default User
Population Method	Greyed Out - Not Editable	Not Editable-Greyed Out	Not Editable-Greyed Out	Not Editable-Greyed Out		Find, Multi Selection	Not Editable-Greyed Out
Mandatory					No	No	
Mask or Pick lists	Respective Key part	Respective Key part	Respective Key part	Carried over to next revision	Respective Key part	Respective Key part	Respective Key part
Field Length	35						
Class	SPXEngineeringDoc						
RelDef	ESK_SPXCDWTagDocument						
DisplayItem	ESK_SPXCDWTagDocument						

CONTROLLED DISCLOSURE

When downloaded from the EDMS, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorised version on the system.

Process

Metadata Field/Attribute:	Creation User							
Properties	Creation User							
User Interface Tab	Process							
Metadata Form Section	Meta Data Creation Information							
Definition	This is the user's login details as captured by the system as the user that initially created the object for this document in SPO. The system captures the user's details who has opened the form to create/copy/revise a document.							
Rules for use	The system automatically captures this information when a new document object is created.							
User Interface	Form: Create New...Engineering Document	Form: Update...Engineering Document	Form: Copy...Engineering Document	Form: Revise...Engineering Document	Drag&DropEngineering Document	Form: Query...Engineering Document	Details...Engineering Document	
Role Requirements to Access Interface	Registrar	Document Controller	Registrar	Registrar	Not Applicable	Eskom Default User	Eskom Default User	
Population Method	Greyed Out - System Generated from the details of the user that is logged in.	Greyed Out - Not Editable	Greyed Out - System Generated from the details of the user that is logged in.	Greyed Out - System Generated from the details of the user that is logged in.		Free Text	Not Editable-Greyed Out	
Mandatory	Yes - System Generated		Yes - System Generated	Yes - System Generated		No		
Mask or Pick lists						Also accepts Wild Cards like "*" and "?"		
Field Length	35							
Class	SPXEngineeringDoc							
Interface	Iobjct							
PropertyDef	CreationUser							
DisplayItem	CreationUser_DisplayItem							

Metadata Field/Attribute:	Creation Date							
Properties	Creation Date							
User Interface Tab	Process							
Metadata Form Section	Meta Data Creation Information							
Definition	This is the exact date and time when the document object was originally created in SPO							
Rules for use	The system automatically captures this date and time information when a new document object is created, by opening the form.							
User Interface	Form: Create New...Engineering Document	Form: Update...Engineering Document	Form: Copy...Engineering Document	Form: Revise...Engineering Document	Drag&DropEngineering Document	Form: Query...Engineering Document	Details...Engineering Document	
Role Requirements to Access Interface	Registrar	Document Controller	Registrar	Registrar	Not Applicable	Eskom Default User	Eskom Default User	
Population Method	Greyed Out - System Generated	Greyed Out - Not Editable	Greyed Out - System Generated	Greyed Out - System Generated		Date Calendar Selection	Not Editable-Greyed Out	
Mandatory	Yes - System Generated		Yes - System Generated	Yes - System Generated		No		
Mask or Pick lists	yyyy/MM/dd HH:mm:ss		yyyy/MM/dd HH:mm:ss	yyyy/MM/dd HH:mm:ss		yyyy/MM/dd HH:mm:ss	yyyy/MM/dd HH:mm:ss	
Field Length	35							
Class	SPXEngineeringDoc							
Interface	Iobjct							
PropertyDef	CreationDate							
DisplayItem	CreationDate_DisplayItem							

Metadata Field/Attribute:	Compiler							
Properties	Compiler							
User Interface Tab	Process							
Metadata Form Section	Compilation Information							
Definition	This field identifies the person that actually drafted the content (ie the files attached to the Document Object), under direction of Approver. This field will identify the person that compiled the document. The details of the person is captured in this "Compiler" field as indicated on the Document Registration Request Form or the Document title page.							
Rules for use	The Compiler signed for adherence to the business processes and standards governing the creation of a document. This is normally identified on the document by "Drafted by", "Compiled by", "Authorized by" etc. All the users must be registered in SPO as either a SPO User, Paper Users or E-mail Users to be selectable from this list.							
User Interface	Form: Create New...Engineering Document	Form: Update...Engineering Document	Form: Copy...Engineering Document	Form: Revise...Engineering Document	Drag&DropEngineering Document	Form: Query...Engineering Document	Details...Engineering Document	
Role Requirements to Access Interface	Registrar	Document Controller	Registrar	Registrar	Not Applicable	Eskom Default User	Eskom Default User	
Population Method	Find, Picklist	Find, Picklist	Find, Picklist	Not Editable-Greyed Out		Find, Picklist	Not Editable-Greyed Out	
Mandatory	No	No	No			No		
Mask or Pick lists	Picklist from Registered users (Paper, E-mail and SPO User)	Picklist from Registered users (Paper, E-mail and SPO User)	Picklist from Registered users (Paper, E-mail and SPO User)	Compiler relationships to be cleared when clicking "Finish" - Starting the "Clear Revision Values" workflow		Picklist from Registered users (Paper, E-mail and SPO User)		
Field Length	35							
Class	SPXEngineeringDoc							
RelDef	ESK_EngDocRevtoSPLoginUser_Compiler							
DisplayItem	ESK_CompiledBy							

Metadata Field/Attribute:	Compiled Date							
Properties	Compiled Date							
User Interface Tab	Process							
Metadata Form Section	Compilation Information							
Definition	This is the date when the document compilation was completed, or the date by when the document is planned to be completed.							
Rules for use	This is the date when the Compiler signed to indicate that the document compilation was completed as indicated on the document. For Planned documents, it is the date when the document is planned to be completed.							
User Interface	Form: Create New...Engineering Document	Form: Update...Engineering Document	Form: Copy...Engineering Document	Form: Revise...Engineering Document	Drag&DropEngineering Document	Form: Query...Engineering Document	Details...Engineering Document	
Role Requirements to Access Interface	Registrar	Document Controller	Registrar	Registrar	Not Applicable	Eskom Default User	Eskom Default User	
Population Method	Date Calendar Selection	Date Calendar Selection	Date Calendar Selection	Not Editable-Greyed Out		Date Calendar Selection	Not Editable-Greyed Out	
Mandatory	No	No	No			No		
Mask or Pick lists	yyyy/MM/dd	yyyy/MM/dd	yyyy/MM/dd	Compiled Date to be cleared when clicking "Finish" - Starting the "Clear Revision Values" workflow		yyyy/MM/dd		
Field Length	35							
Class	SPXEngineeringDoc							
Interface	IESK_EngineeringDocRecordDoc							
PropertyDef	ESK_CompiledDate							
DisplayItem	ESK_CompiledDate							

CONTROLLED DISCLOSURE

When downloaded from the EDMS, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorised version on the system.

Metadata Field/Attribute:		Approver						
Properties								
User Interface Tab		Process						
Metadata Form Section		Approval Information						
Definition		This field identifies the competent person who takes professional accountability for content (as per Manage Engineering Accountability for Eskom personnel & relevant Professional Organisation)						
Rules for use		<p>This identifies the person that Approved the document, ie the competent person who takes professional accountability for content (as per Manage Engineering Accountability for Eskom personnel & relevant Professional Organisation). The field is completed with the details of the person identified as the Approver as indicated on the document.</p> <p>The Approver certifies compliance with the Engineering Processes and integrity of the content. Confirms that the technical content falls within the envelope for which standard was established. Declares what the content is approved for i.e. what it may be used for.</p> <p>Note: In some cases documents may reflect "Approved and Authorised" with a single signature. In these cases, the same person will be identified under the Approver and Authoriser fields in SPO.</p> <p>All the users must be registered in SPO as either a SPO User, Paper Users or E-mail Users to be selectable from this list.</p>						
User Interface		Form: Create New...Engineering Document	Form: Update...Engineering Document	Form: Copy...Engineering Document	Form: Revise...Engineering Document	Drag&DropEngineering Document	Form: Query...Engineering Document	Details...Engineering Document
Role Requirements to Access Interface		Registrar	Document Controller	Registrar	Registrar	Not Applicable	Eskom Default User	Eskom Default User
Population Method		Find, Picklist	Find, Picklist	Find, Picklist	Not Editable-Greyed Out		Find, Picklist	Not Editable-Greyed Out
Mandatory		No	No	No			No	
Mask or Pick lists		Picklist from Registered users (Paper, E-mail and SPO User)	Picklist from Registered users (Paper, E-mail and SPO User)	Picklist from Registered users (Paper, E-mail and SPO User)	Approver relationships to be cleared when clicking "Finish". Starting the "Clear Revision Values" workflow		Picklist from Registered users (Paper, E-mail and SPO User)	
Field Length		35						
Class		SPXEngineeringDoc						
Interface		IESK_EngineeringDocRecordDoc						
PropertyDef		ESK_EngDocRevtoSPLoginUser_Approver						
DisplayItem		ESK_ApprovedBy						

Metadata Field/Attribute:		Approval Date						
Properties								
User Interface Tab		Process						
Metadata Form Section		Approval Information						
Definition		This is the date when the document was Approved.						
Rules for use		This is the date when the document was Approved as indicated on the document.						
User Interface		Form: Create New...Engineering Document	Form: Update...Engineering Document	Form: Copy...Engineering Document	Form: Revise...Engineering Document	Drag&DropEngineering Document	Form: Query...Engineering Document	Details...Engineering Document
Role Requirements to Access Interface		Registrar	Document Controller	Registrar	Registrar	Not Applicable	Eskom Default User	Eskom Default User
Population Method		Date Calendar Selection	Date Calendar Selection	Date Calendar Selection	Not Editable-Greyed Out		Date Calendar Selection	Not Editable-Greyed Out
Mandatory		No	No	No			No	
Mask or Pick lists		yyyy/MM/dd	yyyy/MM/dd	yyyy/MM/dd	Approval Date to be cleared when clicking "Finish" - Starting the "Clear Revision Values" workflow		yyyy/MM/dd	
Field Length		35						
Class		SPXEngineeringDoc						
Interface		IESK_EngineeringDocRecordDoc						
PropertyDef		ESK_ApprovedDate						
DisplayItem		ESK_ApprovedDate						

Metadata Field/Attribute:		Approval Status						
Properties								
User Interface Tab		Process						
Metadata Form Section		Approval Information						
Definition		This Approval Status indicates what this document is approved for, ie the purpose of the document as declared by the Approver (the person who take professional accountability of the content within context of its purpose).						
Rules for use		<p>Initially, when the document object is created (ie document is being planned), this is defaulted to "Planned" status to indicate that no document content exist yet. Once a document file is created and attached, but not yet Approved, the Approval Status should be changed to "Draft" on the sytem.</p> <p>The purpose as declared by the Approved is indicated on the document itself or for external document in the purpose of the transmittal, with the documentation controller selecting the corresponding status as indicated on the drawing or document where the approval was done outside SPO. When the approval is within SPO (and the tools) the Approver selects this status when approving the document.</p> <p>Where the document is envisaged only, it will have a "Planned" status until it has started with the actual compilation of the document, during which its status becomes "Draft". Refer to the Approval Status picklist for more details. For external documents, where the trasmittal purpose and the purpose as indicated on the document contradicts each other, it is referred to the Engineering Design Work Lead for resolution prior to selecting the status on the system.</p>						
User Interface		Form: Create New...Engineering Document	Form: Update...Engineering Document	Form: Copy...Engineering Document	Form: Revise...Engineering Document	Drag&DropEngineering Document	Form: Query...Engineering Document	Details...Engineering Document
Role Requirements to Access Interface		Registrar	Document Controller	Registrar	Registrar	Not Applicable	Eskom Default User	Eskom Default User
Population Method		Picklist-Defaulted	Picklist	Picklist-Defaulted	Not Editable-Greyed Out		Picklist	Not Editable-Greyed Out
Mandatory		Yes - Defaulted	Yes	Yes			No	
Mask or Pick lists		Approval Status Picklist	Approval Status Picklist	Approval Status Picklist	Approval Status to be set to "Planned" when clicking "Finish" - Starting the "Clear Revision Values" workflow		Approval Status Picklist	
Field Length		35						
Class		SPXEngineeringDoc						
Interface		IESK_EngineeringDocRecordDoc						
PropertyDef		ESK_ApprovalState						
DisplayItem		ESK_ApprovalState						

CONTROLLED DISCLOSURE

When downloaded from the EDMS, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorised version on the system.

Metadata Field/Attribute:	Authoriser						
Properties	Process						
User Interface Tab	Authorisation Information						
Metadata Form Section	Authorisation Information						
Definition	This field identifies the person duly delegated to release the content for use within the applicable domain. The field is completed with the details of the person identified as the Authoriser as indicated on the document. This identifies the person that Authorised the document, ie the person that declared himself competent in terms of Manage Engineering Accountability, with the responsibility to review the document for: a) Competency of approver and reviewers. b) Adequacy of scope of review and soundness of review process. c) Release of content for use within the applicable domain. With authorisation he is releasing the document for the application, use and purpose as declared by the Approver. Note: In some cases documents may reflect "Approved and Authorised" with a single signature. In these cases, the same person will be identified under the Approver and Authoriser fields in SPO. All the users must be registered in SPO as either a SPO User, Paper Users or E-mail Users to be selectable from this list.						
User Interface	Form: Create New...Engineering Document	Form: Update...Engineering Document	Form: Copy...Engineering Document	Form: Revise...Engineering Document	Drag&DropEngineering Document	Form: Query...Engineering Document	Details...Engineering Document
Role Requirements to Access Interface	Registrar	Document Controller	Registrar	Registrar	Not Applicable	Eskom Default User	Eskom Default User
Population Method	Greyed Out but System Populated from the Workflow	Greyed Out but System Populated from the Workflow	Greyed Out but System Populated from the Workflow	Greyed Out - Not Editable		Find, Picklist	Not Editable-Greyed Out
Mandatory	No	No	No	No		No	
Mask or Pick lists	Picklist from Registered users (Paper, E-mail and SPO User)	Picklist from Registered users (Paper, E-mail and SPO User)	Picklist from Registered users (Paper, E-mail and SPO User)	Authoriser relationships to be cleared when clicking "Finish". Starting the "Clear Revision Values" workflow		Picklist from Registered users (Paper, E-mail and SPO User)	
Field Length	35						
Class	SPXEngineeringDoc						
Interface	ESK_EngDocRevtoSPLoginUser_Authoriser						
Propertydef	ESK_AuthorisedBy						
DisplayItem	ESK_AuthorisedBy						

Metadata Field/Attribute:	Authorisation Date						
Properties	Process						
User Interface Tab	Authorisation Information						
Metadata Form Section	Authorisation Information						
Definition	This is the date when the document was Authorised by the Authoriser						
Rules for use	This is the date when the document was Authorised as indicated on the document.						
User Interface	Form: Create New...Engineering Document	Form: Update...Engineering Document	Form: Copy...Engineering Document	Form: Revise...Engineering Document	Drag&DropEngineering Document	Form: Query...Engineering Document	Details...Engineering Document
Role Requirements to Access Interface	Registrar	Document Controller	Registrar	Registrar	Not Applicable	Eskom Default User	Eskom Default User
Population Method	Greyed Out but System Populated from the Workflow	Greyed Out but System Populated from the Workflow	Greyed Out but System Populated from the Workflow	Greyed Out - Not Editable		Date Calendar Selection	Not Editable-Greyed Out
Mandatory	No	No	No	No		No	
Mask or Pick lists	yyyy/MM/dd	yyyy/MM/dd	yyyy/MM/dd	AuthorisationDate to be cleared when clicking "Finish". Starting the "Clear Revision Values" workflow		yyyy/MM/dd	
Field Length	35						
Class	SPXEngineeringDoc						
Interface	IESK_EngineeringDocRecordDoc						
Propertydef	ESK_AuthorisedDate						
DisplayItem	ESK_AuthorisedDate						

Metadata Field/Attribute:	Authorisation Status						
Properties	Process						
User Interface Tab	Authorisation Information						
Metadata Form Section	Authorisation Information						
Definition	This Authorisation Status indicates if this document may be used within the relevant domain, ie if the content for may be used within the applicable domain as per the purpose indicated by the Approver. Where the document is not yet authorised, it will reflect the default status of "Not Reviewed", and later changed to "In Review" when entering the workflow.						
Rules for use	Refer to the picklist. The Authorisation Status of SmartPlant is only updated/changed using workflow.						
User Interface	Form: Create New...Engineering Document	Form: Update...Engineering Document	Form: Copy...Engineering Document	Form: Revise...Engineering Document	Drag&DropEngineering Document	Form: Query...Engineering Document	Details...Engineering Document
Role Requirements to Access Interface	Registrar	Document Controller	Registrar	Registrar	Not Applicable	Eskom Default User	Eskom Default User
Population Method	Greyed Out but System Populated from the Workflow	Greyed Out but System Populated from the Workflow	Greyed Out but System Populated from the Workflow	Not Editable-Greyed Out		Picklist	Not Editable-Greyed Out
Mandatory	Yes - Defaulted	Yes	Yes			No	
Mask or Pick lists	Authorisation Status Picklist	Authorisation Status Picklist	Authorisation Status Picklist	Authorisation Status to be set to "Planned" when clicking "Finish" - Starting the "Clear Revision Values" workflow		Authorisation Status Picklist	
Field Length	35						
Class	SPXEngineeringDoc						
Interface	IESK_EngineeringDocRecordDoc						
Propertydef	ESK_AuthorisationState						
DisplayItem	ESK_AuthorisationState						

CONTROLLED DISCLOSURE

When downloaded from the EDMS, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorised version on the system.

Offline

Metadata Field/Attribute:	Media Type						
Properties	Offline						
User Interface Tab	Offline Information						
Metadata Form Section	Offline Information						
Definition	This describes the actual original physical media on which the content or supporting evidence was submitted. This physical media is stored off-line at a safe location, and not within the system. This location must conform to the minimum specific requirements as specified for the storage of hard copies in the Documentation and Records Management Procedure, to ensure that the media is adequate stored.						
Rules for use	Select the relevant media type contained with the picklist. If the media can not be identified refer to the Engineering Design Work Lead for clarification and the Site Admin to create it if necessary. Note: Even though the Doc Controller should be managing the hard copies, the Registrar may incorrectly populate this field/relationship at registration.						
User Interface	Form: Create New...Engineering Document	Form: Update...Engineering Document	Form: Copy...Engineering Document	Form: Revise...Engineering Document	Drag&DropEngineering Document	Form: Query...Engineering Document	Details...Engineering Document
Role Requirements to Access Interface	Registrar	Document Controller	Registrar	Registrar	Not Applicable	Eskom Default User	Eskom Default User
Population Method	Picklist	Picklist	Picklist	Not Editable-Greyed Out		Picklist	Not Editable-Greyed Out
Mandatory	No	No	No			No	
Mask or Pick lists				Media Type to be Cleared when clicking "Finish" - Starting the "Clear Revision Values" workflow			Media Type Picklist
Field Length	35						
Class	SPXEngineeringDocRevision						
Interface	IESK_EngineeringDocRevision						
PropertyDef	ESK_MediaType						
DisplayItem	ESK_MediaType						

Metadata Field/Attribute:	Storage Location						
Properties	Offline						
User Interface Tab	Offline Information						
Metadata Form Section	Offline Information						
Definition	This is the location (building, room, shelf, drawers) where the Physical Media is stored. This location must conform to the minimum specific requirements as specified for the storage of hard copies in the Documentation and Records Management Procedure, to ensure that the media is adequate stored.						
Rules for use	This is a relationship with the Physical Location objects and hierarchy, to indicate where the media is being stored.						
User Interface	Form: Create New...Engineering Document	Form: Update...Engineering Document	Form: Copy...Engineering Document	Form: Revise...Engineering Document	Drag&DropEngineering Document	Form: Query...Engineering Document	Details...Engineering Document
Role Requirements to Access Interface	Registrar	Document Controller	Registrar	Registrar	Document Controller	Eskom Default User	Eskom Default User
Population Method	Not available on the form. Created using Drag&Drop	Not available on the form. Created using Drag&Drop	Not available on the form. Created using Drag&Drop	Not available on the form. Created using Drag&Drop	Drag and Drop	Find, Multi Selection	Not Editable-Greyed Out
Mandatory	No	No	No			No	
Mask or Pick lists				"Storage Location" relationship to be Cleared when clicking "Finish" - Starting the "Clear Revision Values" workflow		Also accepts Wild Cards like "*" and "?"	
Field Length	35						
Class	SPXEngineeringDocRevision						
Interface	IESK_EngineeringDocRevision						
PropertyDef	ESK_EngDocRevtoStorageLocation						
DisplayItem	ESK_StorageLocation						

Metadata Field/Attribute:	Offline Comments						
Properties	Offline						
User Interface Tab	Offline Information						
Metadata Form Section	Offline Information						
Definition	This is to allow free text comments by the Document Controller						
Rules for use	This is a free text field that is used to capture any other details for the Offline Information that be be useful in future. Note: Even though the Doc Controller should be managing the hard copies, the Registrar may incorrectly populate this field/relationship at registration.						
User Interface	Form: Create New...Engineering Document	Form: Update...Engineering Document	Form: Copy...Engineering Document	Form: Revise...Engineering Document	Drag&DropEngineering Document	Form: Query...Engineering Document	Details...Engineering Document
Role Requirements to Access Interface	Registrar	Document Controller	Registrar	Registrar	Not Applicable	Eskom Default User	Eskom Default User
Population Method	Free Text	Free Text	Free Text	Free Text		Free Text	Not Editable-Greyed Out
Mandatory	No	No	No			No	
Mask or Pick lists				"Offline Comments" to be Cleared when clicking "Finish" - Starting the "Clear Revision Values" workflow		Also accepts Wild Cards like "*" and "?"	
Field Length	256						
Class	SPXEngineeringDocRevision						
Interface	IESK_EngineeringDocRevision						
PropertyDef	ESK_OfflineComments						
DisplayItem	ESK_OfflineComments						

CONTROLLED DISCLOSURE

When downloaded from the EDMS, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorised version on the system.

5.2 ALTERNATIVE IDENTIFIER METADATA

Metadata Field/Attribute:	Alternative Number						
Properties							
Metadata Form Section	Alternative Identifier						
Definition	This is an alternative number, normally allocated by another numbering system, and may be used to identify the document. The Alternative Number is different to the number as allocated by the system's Engineering Numbering System as the Unique Identifier for the document.						
Rules for use	The rules for the allocation and selection of alternative Numbers and Alternative Revisions and Common References should be established for each site, prior to implementation. Examples would be to capture contractors document numbers, legacy numbers, and other system generated numbers and revisions as alternatives, and then select a single identifier as the common reference. The system has no constraint on the number of Alternative Numbers it can store per document. However, it should be considered that large numbers being stored and associated will require additional resources to maintain such a complex system. The effort required to maintain these multiple numbering schemes should be weighed against the benefit of maintaining them in future.						
User Interface	Form: Create New...Alternative Identifier	Form: Update...Alternative Identifier	Form: Copy...Alternative Identifier	Form: Revise...Alternative Identifier	Drag&DropAlternative Identifier	Form: Query...Alternative Identifier	Details...Alternative Identifier
Role Requirements to Access Interface	Registrar	Not Applicable	Registrar	Not Applicable	Not Applicable	Not Applicable	Eskom Default User
Population Method	Free Text		Free Text				Not Editable-Greyed Out
Mandatory	Yes		Yes				
Mask or Pick lists							
Field Length	35						
Class	ESK_AlternateBusinessObjectIdentifier						
Interface	IESK_AlternateNumberedObject						
Propertydef	ESK_AlternateObjectNumber						
DisplayItem	ESK_AlternateObjectNumber						

Metadata Field/Attribute:	Alternative Revision						
Properties							
Metadata Form Section	Alternative Identifier						
Definition	This is an alternative revision associated with the Alternative Number allocated to the document that is different to that as allocated by the system's Engineering Numbering System as the Unique Identifier for the document						
Rules for use	The rules for the allocation and selection of alternative Numbers and Alternative Revisions and Common References should be established for each site, prior to implementation. Examples would be to capture contractors document numbers, legacy numbers, and other system generated numbers and revisions as alternatives, and then select a single identifier as the common reference.						
User Interface	Form: Create New...Alternative Identifier	Form: Update...Alternative Identifier	Form: Copy...Alternative Identifier	Form: Revise...Alternative Identifier	Drag&DropAlternative Identifier	Form: Query...Alternative Identifier	Details...Alternative Identifier
Role Requirements to Access Interface	Registrar	Not Applicable	Registrar	Not Applicable	Not Applicable	Not Applicable	Eskom Default User
Population Method	Free Text		Free Text				Not Editable-Greyed Out
Mandatory	Yes		Yes				
Mask or Pick lists							
Field Length	35						
Class	ESK_AlternateBusinessObjectIdentifier						
Interface	IESK_AlternateNumberedObject						
Propertydef	ESK_AlternateObjectRevision						
DisplayItem	ESK_AlternateObjectRevision						

CONTROLLED DISCLOSURE

When downloaded from the EDMS, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorised version on the system.

5.3 USER METADATA

Metadata Field/Attribute:	User Known Name (E-mail Address)						
Properties							
Metadata Form Section	Main Details						
Definition	This is a unique identifier of the person, created at registration of the user by the name and surname by which the user is commonly known as, combined with the E-mail address of the user and should never be changed. This will also be used as Labels on the document to identify the Authoriser.						
Rules for use	Select the e-mail address to uniquely identify the user. For Eskom users it should be in the format of: Sssssll@eskom.co.za where Sssssll normally is the users login made up from the first six letters of the surname and two initials as capitalised in Outlook. Find it on outlook and use it i.e. for both the e-mail and the known names. Where email addresses are changed by users, a new user account should be created and the old account disabled only. eg. Dudley Rheeder (RheedeDJ@eskom.co.za) or Pine Pienaar (PienaarJ@eskom.co.za)						
User Interface	Form: Create New...User	Form: Update...User	Form: Copy...User	Form: Revise...User	Drag&DropUser	Form: Query...User	Details...User
Role Requirements to Access Inter	Site Administrator	System Administrator	Site Administrator	Not Applicable	Not Applicable	Eskom Default User	Eskom Default User
Population Method	Free Text	Greyed Out - Not Editable	Free Text			Free Text	Not Editable-Greyed Out
Mandatory	Yes		Yes			No	
Mask or Pick lists						Also accepts Wild Cards like "*" and "?"	
Field Length	35						
Class	SPFLoginUser						
Interface	IOBject						
Propertydef	Name						
DisplayItem	ESK_EmailName_DisplayItem						
Metadata Field/Attribute:	Nick Name						
Properties							
Metadata Form Section	Main Details						
Definition	This is a concatenation of the Initials and Surname Fields to assist with the quick identification of the users within the system.						
Rules for use	As per the following rule configured in the system: Concatenate(Initials,"-",Surname), eg SJ Barnard, L-Gaga, D-Dre, D-Guetta						
User Interface	Form: Create New...User	Form: Update...User	Form: Copy...User	Form: Revise...User	Drag&DropUser	Form: Query...User	Details...User
Role Requirements to Access Inter	Site Administrator	System Administrator	Site Administrator	Not Applicable	Not Applicable	Eskom Default User	Eskom Default User
Population Method	Greyed Out - System to Allocate using ENS	Greyed Out - Not Editable	Greyed Out - System to Allocate using ENS			Free Text	Not Editable-Greyed Out
Mandatory	Yes		Yes			No	
Mask or Pick lists						Also accepts Wild Cards like "*" and "?"	
Field Length	256						
Class	SPFLoginUser						
Interface	IOBject						
Propertydef	Description						
DisplayItem	ESK_NNDescription_DisplayItem						
Metadata Field/Attribute:	Organisation						
Properties							
Metadata Form Section	Organisation						
Definition	This is the organisation (Municipality, Contractor, Regulator, Government Organisation, Supplier, Consultant etc.) that is employing the services of the person, and is using the company's knowhow, processes, templates and equipment rendering the service. This Organisation is also managing and directing this person to determine the outcome. This organisation is not necessarily the same organisation that was contracted to Eskom for the delivery of the product, but really the actual organisation that provided the service.						
Rules for use	Use the legal entity that this person is working for. Eg. For all Eskom personnel, it will be "Eskom Holdings Limited". The organisation for all bodyshopped personnel working under the direct supervision and direction of Eskom, will also be "Eskom Holdings Limited". This organisation is not necessarily the same organisation that was contracted to Eskom for the delivery of the product, but really the actual organisation that provided the service. Eg. if Eskom Contracts with Alstom for the full Turbine Island, and subcontracts the building to Cosira, who subcontracts the Ventilation to Steafa, who subcontracts the Switcgear to ABB, the person who is compiling and approving documentation on the switchgear, his organisation will be "ABB Pty Ltd".						
User Interface	Form: Create New...User	Form: Update...User	Form: Copy...User	Form: Revise...User	Drag&DropUser	Form: Query...User	Details...User
Role Requirements to Access Inter	Site Administrator	System Administrator	Site Administrator	Not Applicable	Not Applicable	Eskom Default User	Eskom Default User
Population Method	Picklist	Picklist	Picklist			Picklist	Not Editable-Greyed Out
Mandatory	Yes		Yes			No	
Mask or Pick lists	See Organisation		See Organisation			See Organisation	
Field Length	35						
Class	SPFLoginUser						
RelDef	ESK_SPFUserToOrganisation						
DisplayItem	DI_EKS_Organisation						

CONTROLLED DISCLOSURE

When downloaded from the EDMS, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorised version on the system.

Metadata Field/Attribute: Initials							
Properties	User Details						
Metadata Form Section	User Details						
Definition	This is the initials of the user.						
Rules for use	Initials in CAPS, separated by Periods. No spaces						
User Interface	Form: Create New...User	Form: Update...User	Form: Copy...User	Form: Revise...User	Drag&DropUser	Form: Query...User	Details...User
Role Requirements to Access Inter	Site Administrator	System Administrator	Site Administrator	Not Applicable	Not Applicable	Eskom Default User	Eskom Default User
Population Method	Free Text	Greyed Out - Not Editable	Free Text			Free Text	Not Editable-Greyed Out
Mandatory	Yes		Yes			No	
Mask or Pick lists						Also accepts Wild Cards like "*" and "?"	
Field Length	35						
Class	SPFLoginUser						
Interface	ISPFUser						
Propertydef	ESK_UserFormInitials						
DisplayItem	ESK_UserFormInitials_DisplayItem						

Metadata Field/Attribute: Surname							
Properties	User Details						
Metadata Form Section	User Details						
Definition	The user's surname						
Rules for use	Capture the user's surname in Title Case						
User Interface	Form: Create New...User	Form: Update...User	Form: Copy...User	Form: Revise...User	Drag&DropUser	Form: Query...User	Details...User
Role Requirements to Access Inter	Site Administrator	System Administrator	Site Administrator	Not Applicable	Not Applicable	Eskom Default User	Eskom Default User
Population Method	Free Text	Greyed Out - Not Editable	Free Text			Free Text	Not Editable-Greyed Out
Mandatory	Yes		Yes			No	
Mask or Pick lists						Also accepts Wild Cards like "*" and "?"	
Field Length	35						
Class	SPFLoginUser						
Interface	ISPFUser						
Propertydef	ESK_UserFormSurname						
DisplayItem	ESK_UserFormSurname_DisplayItem						

Metadata Field/Attribute: Title							
Properties	User Details						
Metadata Form Section	User Details						
Definition	The Title of the user						
Rules for use	Select the correct title of the user						
User Interface	Form: Create New...User	Form: Update...User	Form: Copy...User	Form: Revise...User	Drag&DropUser	Form: Query...User	Details...User
Role Requirements to Access Inter	Site Administrator	System Administrator	Site Administrator	Not Applicable	Not Applicable	Eskom Default User	Eskom Default User
Population Method	Picklist	Picklist	Picklist			Picklist	Not Editable-Greyed Out
Mandatory	Yes	Yes	Yes			Yes	
Mask or Pick lists	See Title Picklist	See Title Picklist	See Title Picklist			See Title Picklist	
Field Length	35						
Class	SPFLoginUser						
Interface	ISPFUser						
Propertydef	ESK_UserFormTitle						
DisplayItem	ESK_UserFormTitle_DisplayItem						

Metadata Field/Attribute: Unique Number							
Properties	User Details						
Metadata Form Section	User Details						
Definition	The unique number of the user as issued by HR						
Rules for use	Capture the full Unique Number including the leading zeros Note: For people without an Eskom Unique Number use: 0000000						
User Interface	Form: Create New...User	Form: Update...User	Form: Copy...User	Form: Revise...User	Drag&DropUser	Form: Query...User	Details...User
Role Requirements to Access Inter	Site Administrator	Site Administrator	Site Administrator	Not Applicable	Not Applicable	Eskom Default User	Eskom Default User
Population Method	Free Text	Free Text	Free Text			Free Text	Not Editable-Greyed Out
Mandatory	Yes	Yes	Yes			No	
Mask or Pick lists	Max 7 Characters	Max 7 Characters	Max 7 Characters			Also accepts Wild Cards like "*" and "?"	
Field Length	35						
Class	SPFLoginUser						
Interface	ISPFUser						
Propertydef	ESK_UserFormUniqueNumber						
DisplayItem	ESK_UserFormUniqueNumber_DisplayItem						

CONTROLLED DISCLOSURE

When downloaded from the EDMS, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorised version on the system.

Metadata Field/Attribute: Cell Tel Number							
Properties							
Metadata Form Section: User Details							
Definition: The cellphone number at the office by which the user can be reached							
Rules for use: The cellphone number at the office by which the user can be reached Note: Where numbers are not available use 000-000-0000							
User Interface	Form: Create New...User	Form: Update...User	Form: Copy...User	Form: Revise...User	Drag&DropUser	Form: Query...User	Details...User
Role Requirements to Access Inter	Site Administrator	Site Administrator	Site Administrator	Not Applicable	Not Applicable	Eskom Default User	Eskom Default User
Population Method	Free Text	Free Text	Free Text			Free Text	Not Editable-Greyed Out
Mandatory	Yes	Yes	Yes			No	
Mask or Pick lists	####-####-####	####-####-####	####-####-####			Also accepts Wild Cards like *** and ?"	
Field Length	35						
Class	SPFLoginUser						
Interface	ISPFUser						
Propertydef	ESK_UserFormCellTelNumber						
DisplayItem	ESK_UserFormCellTelNumber_DisplayItem						

Metadata Field/Attribute: Office Telephone Number							
Properties							
Metadata Form Section: User Details							
Definition: The number at the office by which the user can be reached							
Rules for use: The number at the office by which the user can be reached Note: Where numbers are not available use 000-000-0000							
User Interface	Form: Create New...User	Form: Update...User	Form: Copy...User	Form: Revise...User	Drag&DropUser	Form: Query...User	Details...User
Role Requirements to Access Inter	Site Administrator	Site Administrator	Site Administrator	Not Applicable	Not Applicable	Eskom Default User	Eskom Default User
Population Method	Free Text	Free Text	Free Text			Free Text	Not Editable-Greyed Out
Mandatory	Yes	Yes	Yes			No	
Mask or Pick lists	####-####-####	####-####-####	####-####-####			Also accepts Wild Cards like *** and ?"	
Field Length	35						
Class	SPFLoginUser						
Interface	ISPFUser						
Propertydef	ESK_UserFormOfficeTelNumber						
DisplayItem	ESK_UserFormOfficeTelNumber_DisplayItem						

Metadata Field/Attribute: Logon Name							
Properties							
Metadata Form Section: Logon Details							
Definition: This is the same as for the novell logon, normally made up of the first 6 characters of the user's Surname, followed by 2 initials, all in lower case.							
Rules for use: This is the same as for the novell logon, equivalent to the user ID (old Novell Login) in e-mail and be exactly as Novell or Outlook ie typically Title Case . This does not include any reference to the domain or contexts.							
User Interface	Form: Create New...User	Form: Update...User	Form: Copy...User	Form: Revise...User	Drag&DropUser	Form: Query...User	Details...User
Role Requirements to Access Inter	Site Administrator	Site Administrator	Site Administrator	Not Applicable	Not Applicable	Eskom Default User	Eskom Default User
Population Method	Free Text	Free Text	Free Text			Free Text	Not Editable-Greyed Out
Mandatory	Yes	Yes	Yes			No	
Mask or Pick lists						Also accepts Wild Cards like *** and ?"	
Field Length	35						
Class	SPFLoginUser						
Interface	ISPFLoginUser						
Propertydef	SPFLoginName						
DisplayItem	SPFLoginName_DisplayItem						

Metadata Field/Attribute: Password							
Properties							
Metadata Form Section: Logon Details							
Definition: This is the password selected by the user as conforming to Information Security Policy							
Rules for use: This is the password selected by the user as conforming to Information Security Policy							
User Interface	Form: Create New...User	Form: Update...User	Form: Copy...User	Form: Revise...User	Drag&DropUser	Form: Query...User	Details...User
Role Requirements to Access Inter	Site Administrator	Site Administrator	Site Administrator	Not Applicable	Not Applicable	Eskom Default User	Eskom Default User
Population Method	Free Text	Free Text	Free Text			Greyed Out - Not Editable	Not Editable-Greyed Out
Mandatory	Yes	Yes	Yes				
Mask or Pick lists							
Field Length	35						
Class	SPFLoginUser						
Interface	ISPFLoginUser						
Propertydef	SPFPassword						
DisplayItem	SPFPassword_DisplayItem						

Metadata Field/Attribute: E-mail Address							
Properties							
Metadata Form Section: Logon Details							
Definition: This is the e-mail address to which communications as being send to							
Rules for use: The e-mail address where the user would like to receive e-mails and may be changed from time to time.							
User Interface	Form: Create New...User	Form: Update...User	Form: Copy...User	Form: Revise...User	Drag&DropUser	Form: Query...User	Details...User
Role Requirements to Access Inter	Site Administrator	Site Administrator	Site Administrator	Not Applicable	Not Applicable	Eskom Default User	Eskom Default User
Population Method	Free Text	Free Text	Free Text			Free Text	Not Editable-Greyed Out
Mandatory	Yes	Yes	Yes			No	
Mask or Pick lists						Also accepts Wild Cards like *** and ?"	
Field Length	35						
Class	SPFLoginUser						
Interface	ISPFEmailUser						
Propertydef	SPFEmailAddress						
DisplayItem	SPFEmailAddress_DisplayItem						

CONTROLLED DISCLOSURE

When downloaded from the EDMS, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorised version on the system.

Metadata Field/Attribute: Days between password change							
Properties							
Metadata Form Section Logon Details							
Definition This is the number of days between having the user change their password, in line with the Information Security policies							
Rules for use This is the number of days between having the user change their password, in line with the Information Security policies							
User Interface	Form: Create New...User	Form: Update...User	Form: Copy...User	Form: Revise...User	Drag&DropUser	Form: Query...User	Details...User
Role Requirements to Access Inter	Site Administrator	Site Administrator	Site Administrator	Not Applicable	Not Applicable	Eskom Default User	Eskom Default User
Population Method	Free Text	Free Text	Free Text			Free Text	Not Editable-Greyed Out
Mandatory	Yes	Yes	Yes			No	
Mask or Pick lists						Also accepts Wild Cards like "*" and "?"	
Field Length	35						
Class	SPFLoginUser						
Interface	ISPFLoginUser						
Propertydef	SPFDaysBetweenPasswordChange						
DisplayItem	SPFDaysBetweenPasswordChange_DisplayItem						

Metadata Field/Attribute: Timeout Duration for Signoff in Seconds							
Properties							
Metadata Form Section Logon Details							
Definition This is the number of seconds of inactivity before the system automatically sign the user off, in line with Information Security policies							
Rules for use This is the number of seconds of inactivity before the system automatically sign the user off, in line with Information Security policies							
User Interface	Form: Create New...User	Form: Update...User	Form: Copy...User	Form: Revise...User	Drag&DropUser	Form: Query...User	Details...User
Role Requirements to Access Inter	Site Administrator	Site Administrator	Site Administrator	Not Applicable	Not Applicable	Eskom Default User	Eskom Default User
Population Method	Free Text	Free Text	Free Text			Free Text	Not Editable-Greyed Out
Mandatory	Yes	Yes	Yes			No	
Mask or Pick lists						Also accepts Wild Cards like "*" and "?"	
Field Length	35						
Class	SPFLoginUser						
Interface	ISPFLoginUser						
Propertydef	SPFSignOffTimeOut						
DisplayItem	SPFSignOffTimeOut_DisplayItem						

Metadata Field/Attribute: User Maintenance							
Properties							
Metadata Form Section Logon Details							
Definition This setting allows the Site Administrator to update another user's password, without having the original password. - See SPF Administrator's Guide							
Rules for use Make use of this functionality to reset a User's password, without having the original password.							
User Interface	Form: Create New...User	Form: Update...User	Form: Copy...User	Form: Revise...User	Drag&DropUser	Form: Query...User	Details...User
Role Requirements to Access Inter	Site Administrator	Site Administrator	Site Administrator	Not Applicable	Not Applicable	Eskom Default User	Eskom Default User
Population Method	TickBox	TickBox	TickBox			TickBox	Not Editable-Greyed Out
Mandatory	Yes	Yes	Yes			No	
Mask or Pick lists							
Field Length	35						
Class	SPFLoginUser						
Interface	ISPFLoginUser						
Propertydef	SPFUserMaintenance						
DisplayItem	SPFUserMaintenance_DisplayItem						

Metadata Field/Attribute: Disable User							
Properties							
Metadata Form Section Logon Details							
Definition This setting allows the Site Administrator to Disable a user, thereby preventing the using from accessing SPO, ie logging in.							
Rules for use This setting allows the Site Administrator to Disable a user, thereby preventing the using from accessing SPO. The User will still be searchable and useable for documentation and in workflows.							
User Interface	Form: Create New...User	Form: Update...User	Form: Copy...User	Form: Revise...User	Drag&DropUser	Form: Query...User	Details...User
Role Requirements to Access Inter	Site Administrator	Site Administrator	Site Administrator	Not Applicable	Not Applicable	Eskom Default User	Eskom Default User
Population Method	TickBox	TickBox	TickBox			TickBox	Not Editable-Greyed Out
Mandatory	Yes	Yes	Yes			No	
Mask or Pick lists							
Field Length	35						
Class	SPFLoginUser						
Interface	ISPFLoginUser						
Propertydef	SPFDisableUser						
DisplayItem	SPFDisableUser_DisplayItem						

CONTROLLED DISCLOSURE

When downloaded from the EDMS, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorised version on the system.

Metadata Field/Attribute:	Notification Types						
Properties							
Metadata Form Section	Logon Details						
Definition	This option only applies to notifications sent for subscriptions.						
Rules for use	Fixed system configuration to E-mail and Notifications						
User Interface	Form: Create New...User	Form: Update...User	Form: Copy...User	Form: Revise...User	Drag&DropUser	Form: Query...User	Details...User
Role Requirements to Access Inter	Site Administrator	Site Administrator	Site Administrator	Not Applicable	Not Applicable	Eskom Default User	Eskom Default User
Population Method	Greyed Out - Fixed System Configuration	Greyed Out - Fixed System Configuration	Greyed Out - Fixed System Configuration			Greyed Out - Fixed System Configuration	Not Editable-Greyed Out
Mandatory	Yes	Yes	Yes				
Mask or Pick lists							
Field Length	35						
Class	SPFLoginUser						
Interface	ISPFLoginUser						
Propertydef	SPFNotificationType						
DisplayItem	SPFNotificationType_DisplayItem						

Metadata Field/Attribute:	File Server Organization						
Properties							
Metadata Form Section	Logon Details						
Definition	This field is used by the Launchpad, to point to the File Vault						
Rules for use	This field is used by the Launchpad, to point to the File Vault						
User Interface	Form: Create New...User	Form: Update...User	Form: Copy...User	Form: Revise...User	Drag&DropUser	Form: Query...User	Details...User
Role Requirements to Access Inter	Site Administrator	Site Administrator	Site Administrator	Not Applicable	Not Applicable	Eskom Default User	Eskom Default User
Population Method	Greyed Out - System Generated	Greyed Out - System Generated	Greyed Out - System Generated			Greyed Out - Fixed System Configuration	Not Editable-Greyed Out
Mandatory							
Mask or Pick lists							
Field Length	35						
Class	SPFLoginUser						
RelDef	SPFUserOrganization						
DisplayItem	ISPFUser_Organization_DisplayItem						

5.4 PHYSICAL LOCATION METADATA

Metadata Field/Attribute:	Name						
Properties							
Metadata Form Section	Physical Location Information						
Definition	This is the Physical Location's unique identifying number as given by the system.						
Rules for use	This is the Physical Location's unique identifying number as given by the system. This number is meaningless, and is made up from LOC-#####, starting at LOC-1, and incrementing by 1 for each subsequent Physical Location.						
User Interface	Form: Create New...Physical Location	Form: Update...Physical Location	Form: Copy...Physical Location	Form: Revise...Physical Location	Drag&DropPhysical Location	Form: Query...Physical Location	Details...Physical Location
Role Requirements to Access Inter	Document Controller	Document Controller	Not Applicable	Not Applicable	Not Applicable	Eskom Default User	Eskom Default User
Population Method	Free Text	Greyed Out - Not Editable				Free Text	Not Editable-Greyed Out
Mandatory	Yes					No	
Mask or Pick lists						Also accepts Wild Cards like "*" and "?"	
Field Length	35						
Class	ESK_PhysicalLocation						
Interface	IObject						
Propertydef	Name						
DisplayItem	Name_DisplayItem						

Metadata Field/Attribute:	Description						
Properties							
Metadata Form Section	Physical Location Information						
Definition	This is the Physical Location or the parent (container) location where the actual physical media is being stored. The physical media in this case is either hard copy, or electronic physical media like a DVD, CD, Hard drive, Physical model, etc.						
Rules for use	Enter your Description for the location including the whole hierarchy in your description abbreviate e.g. Building (Bldg), Block(BI), Floor(FI), Room(Rm) or Co-ordinates, Cabinet(Cab), Shelf(Sh), as copied from the Parent Location						
User Interface	Form: Create New...Physical Location	Form: Update...Physical Location	Form: Copy...Physical Location	Form: Revise...Physical Location	Drag&DropPhysical Location	Form: Query...Physical Location	Details...Physical Location
Role Requirements to Access Inter	Document Controller	Document Controller	Not Applicable	Not Applicable	Not Applicable	Eskom Default User	Eskom Default User
Population Method	Free Text	Free Text				Free Text	Not Editable-Greyed Out
Mandatory	Yes	Yes				No	
Mask or Pick lists						Also accepts Wild Cards like "*" and "?"	
Field Length	256						
Class	ESK_PhysicalLocation						
Interface	IObject						
Propertydef	Description						
DisplayItem	ESK_PhLoc_Description						

CONTROLLED DISCLOSURE

When downloaded from the EDMS, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorised version on the system.

5.5 ORGANISATION METADATA

Metadata Field/Attribute:	Organisation Name						
Properties							
Metadata Form Section	Main Details						
Definition	This is the legal entity and the official name for the organisation.						
Rules for use	<p>Use the legal entity that this person is working for. Eg, For all Eskom personnel, it will be "Eskom Holdings Limited". The organisation for all bodyshopped personnel working under the direct supervision and direction of Eskom, will also be "Eskom Holdings Limited".</p> <p>This organisation is not necessarily the same organisation that was contracted to Eskom for the delivery of the product, but really the actual organisation that provided the service. Eg, if Eskom Contracts with Alstom for the full Turbine Island, and subcontracts the building to Cosira, who subcontracts the Ventilation to Steafa, who subcontracts the Switchgear to ABB, the person who is compiling and approving documentation on the switchgear, his organisation will be "ABB Pty Ltd".</p> <p>This should only be Updated if the organisation's name has changed, but maintained the same legal entity, ie when the company's registration number remained the same.</p>						
User Interface	Form: Create New...Organisation	Form: Update...Organisation	Form: Copy...Organisation	Form: Revise...Organisation	Drag&DropOrganisation	Form: Query...Organisation	Details...Organisation
Role Requirements to Access Interface	Site Administrator	System Administrator	Not Applicable	Not Applicable	Not Applicable	Site Administrator	Eskom Default User
Population Method	Free Text	Free Text				Free Text	Greyed Out - Not Editable
Mandatory	Yes	Yes				No	
Mask or Pick lists						Also accepts Wild Cards like "*" and "?"	
Field Length	35						
Class	ESK_Organisation						
Interface	IOObject						
Propertydef	Name						
DisplayItem	ESK_OrganisationName						

5.6 DOCUMENT AND REVISION STATES

Iteration	Action	Document State	Rev 0	Rev 1	Rev 2
			Rev State	Rev State	Rev State
0	New Document is Created	Reserved	Working		
1	Sign Off Document	Issued	Current		
2	Revise Document	ISSUED_WKG	Current	Working	
3	Sign Off Document	Issued	Superceded	Current	
4	Revise Document	ISSUED_WKG	Superceded	Current	Working
5	Sign Off Document	Issued	Superceded	Superceded	Current

5.7 ITEM OWNING GROUP PICKLIST

01. Secret
02. Confidential
03. Controlled Disclosure
04. Public Domain

CONTROLLED DISCLOSURE

When downloaded from the EDMS, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorised version on the system.

5.8 APPROVAL STATUS PICKLIST

Approval Status Picklist		
Approval Status	Equivalent Baseline Once Authorised	Type of Review
00. Planned	N/A	N/A
01. Draft **	N/A	N/A
02. Approved for Information	N/A	Review is not specifically requested by the Designer, however other interfacing designers should note Conformance to Requirements / Integration/Engineering Process/Possible Improvements and Suggestions. Others use information at risk, but is expected to influence the design
03. Approved for Review	N/A	Review is specifically requested by the Designer, typically from interfacing designers. Conformance to Requirements / Integration/Engineering Process/Possible Improvements and Suggestions. Others use information at risk, but is expected to influence the design
04. Approved for Concept Design	Requirements Baseline	Requirements Review
05. Approved for Basic Design	Concept Design Baseline	Concept Design Review
06. Approved For Tender	Acquisition Requirements Baseline	Pre-Enquiry Review
07. Approved For Detail Design	Basic Design Baseline	Basic Design Review
08. Approved For Procurement	Contract Award Baseline	Contract Award Review
09. Approved For Manufacture	Design Freeze Baseline(s) / Integrated Design Baseline	Design Freeze Review (Detail Design)/System Integrated Design Review (Detail Design)
10. Approved For Construction	Design Freeze Baseline(s) / Integrated Design Baseline	Design Freeze Review (Detail Design)/System Integrated Design Review (Detail Design)
11. Approved For Commissioning	As-Built Baseline	Pre-Commissioning Review
12. Approved for Handover	As Commissioned / Handover Baseline	Acceptance Testing Review/Handover Review
13. *Superceeded	N/A	N/A
14. Cancelled	N/A	N/A

*This is where the designer superceeds a drawing by another. Thus he issues a new revision, but marks for the purpose of "Superceeded"
 ** While the document is being drafted, the document will be versioned. This is the default status while the document has not yet been approved by the Designer.
 Analysis reports are approved for the purpose of the design.
Status in Bold indicates when document change to Current Status, ie any change will require a new revision.
Status in RED indicates when document, once Authorised is subjected to Engineering Change Control, ie any change will require a Engineering Change Process (ECP, ECN, FCN)

5.9 AUTHORISATION STATUS PICKLIST

Authorisation Status Picklist	
Authorisation Status	Rule
00. Not Reviewed*	This is the default. The document has not yet been submitted for a review
01. In Review	The Document is in a Review and Authorisation Workflow
02. Not Authorised with Comments	The Document is declared "Not Authorised" and may not be used for futher down stream design development
03. Authorised with Comments	The Document is declared "Authorised with Comments" and may be used for further down stream design and development as is. Only minor corrections are required that will not impact the execution nor the interfacing design development. The document is returned to the Approver to conider and incorporate the comments into the design documentation
04. Authorised	Review is not specifically requested by the Designer, however other interfacing designers should note Conformance to Requirements / Integration/Engineering Process/Possible Improvements and Suggestions. Others use information at risk, but is expected to influence the design
Status in RED indicates when document, once Authorised is subjected to Engineering Change Control, ie any change will require a Engineering Change Process (ECP, ECN, FCN)	

5.10 MEDIA TYPE PICKLIST

Name	Description
Hardcopy	This is a paper copy (or sepia or similar) of the document in question
Electronic media	This is the electronic media that contains the documents (models, programmes, images etc) as an electronic media. This inlcudes CD Roms, memory sticks, Hard drives, Tape Drives, Punch Cards, Floppy and stifty disks.

CONTROLLED DISCLOSURE

When downloaded from the EDMS, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorised version on the system.

5.11 USER TITLE PICKLIST

Dr
Mr
Ms
Prof

6. AUTHORISATION

This document has been seen and accepted by:

Name & Surname	Designation
M Coetsee	Information Management
S Peter	Configuration Management
T Danster	Information Management
A De La Guerre	Chief Engineer
B Lesejane	Configuration Management
B Moodley	Chief Engineer System Design
D Rheeder	Information Management
J Herndler	Cad Office Manager – Engineering Processes Systems and Support
K Elliott	Engineering Systems

7. REVISIONS

Date	Rev.	Compiler	Remarks
Dec 2013	0.1	SJ Barnard	First Issue
Jan 2014	0.2	SJ Barnard	Incorporated Comments from L Ndela, R Swanepoel, M Mammen, T Toefy, M Heugh, G Olukune
February 2014	1.0	SJ Barnard	Authorised
February 2014	1	SJ Barnard	Final Document for Authorisation and Publication

8. DEVELOPMENT TEAM

The following people were involved in the development of this document as part of the Data and Configuration Management's SPO Documentation Metadata Standard Workgroup:

- Andries Scholtz
- Ben Kotze
- Benny Lesejane
- Dudley Rheeder
- Marie Coetsee
- Johannes Rottier
- Mary Mammen
- Michelle Heugh

CONTROLLED DISCLOSURE

When downloaded from the EDMS, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorised version on the system.

- Petunia Serekwa
- Steve Barnard
- Thaabit Toefy
- Thembisa Danster

9. ACKNOWLEDGEMENTS

- The team acknowledges the efforts of the SPO DRM workgroup, in particular for the work they did during April 2013 as this form the basis from which this standard was developed.

CONTROLLED DISCLOSURE

When downloaded from the EDMS, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorised version on the system.