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|  Eskom | Standard | Technology |
|---|----------|------------|

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**

APPROVED FOR AUTHORISATION
☒ TECHNOLOGY ENGINEERING
DOCUMENT CENTRE ☎ x4962

Next Review Date: **February 2015**

Disclosure Classification: **CONTROLLED DISCLOSURE**

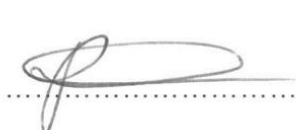
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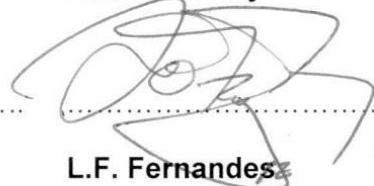
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PCM Reference : **32-1216**

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

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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.

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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.

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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).

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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

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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

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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.

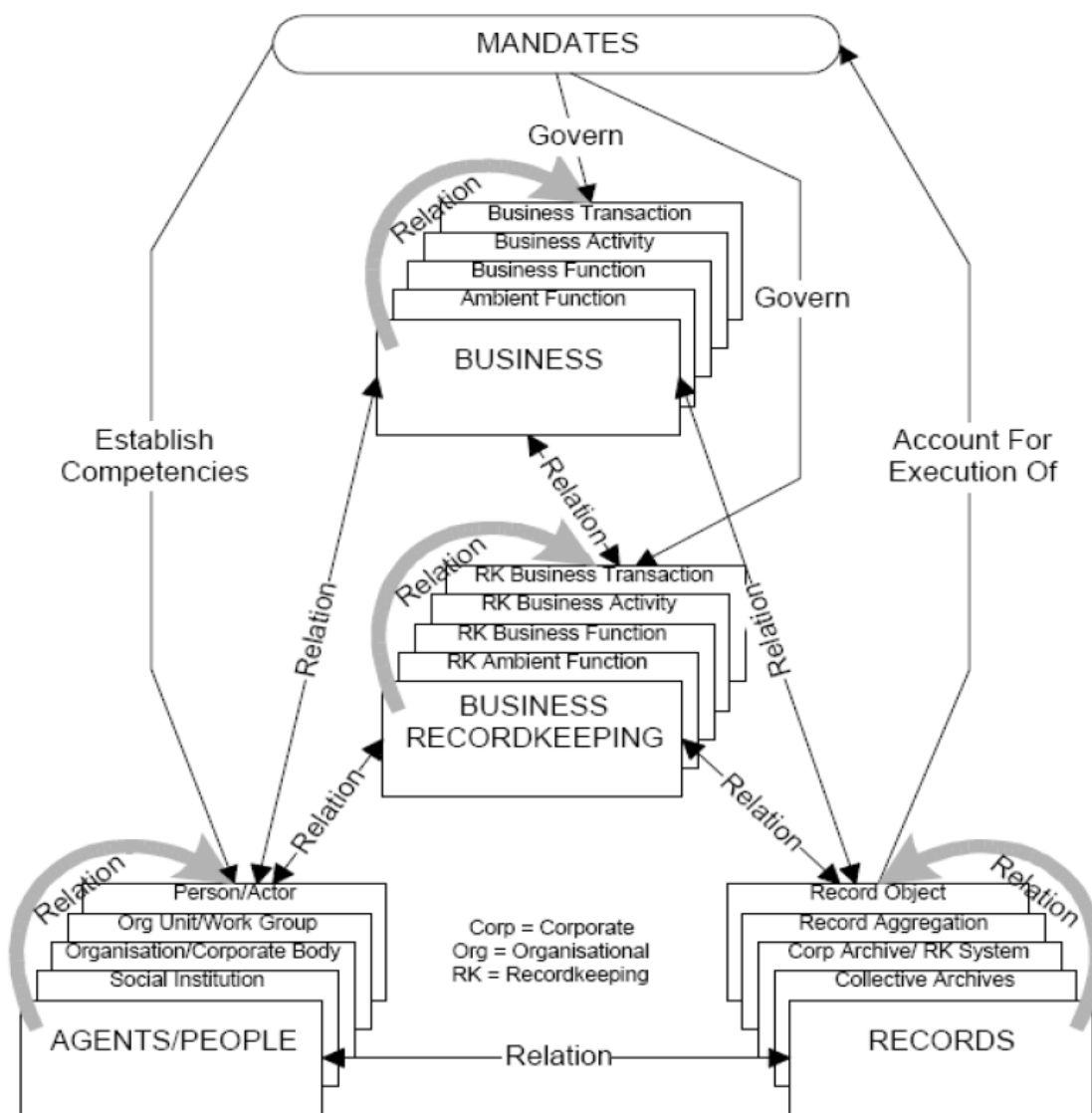


Figure 1: Metadata in Context of the Business

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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

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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. | | | | | | |
| Rules for use | <p>This is exactly as the title appears on the document without change or correction.</p> <p>Where the document is still planned, the title will be captured in line with the following rules:</p> <p>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).</p> <p>A title should comply to the following rules</p> <ol style="list-style-type: none"> 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 <p>Document titles will normally follow the following structure for guidance:</p> <p>Plant, Unit, System, Subsystem, Manufacturer, Component, Sub-Component, Model Number, Document Kind. (As applicable)</p> <p>Examples of document titles</p> <p>a) Koeberg Nuclear Power Station Reactor Coolant Pump Upper Internals Weekly Maintenance Instruction</p> <p>b) Kusile 400kV Substation Station Transformer Number 2 15 kV Bay Schedule</p> <p>c) Matimba Power Station Unit 1 Condensate Polishing Plant Booster Pumps Piping and Instrumentation Diagram</p> <p>d) Brown Boveri 400/275/132/22kV Transformer Model AB8400x Maintenance Instruction</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 | 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 | <p>Refer to 240-54179170 Technical Documentation Classification and Designation Standard.</p> <p>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.</p> <p>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.</p> | | | | | | |
| Rules for use | <p>Refer to 240-54179170 Technical Documentation Classification and Designation Standard.</p> <p>Even though the system is defaulting to a predetermined value, it should be checked /change to as noted on the document to be loaded.</p> <p>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.</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 | 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 | | | | | | |

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| 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 | | | | | | |
| RelDef | 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 | | | | | | |
| RelDef | 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 | | | | | | |
| RelDef | SPFClassifiedLevel4 | | | | | | |
| DisplayItem | ESK_DKCL4 | | | | | | |

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| 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 | SPFDocRevisionScheme | | | | | | |
| 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 | | | | | | |

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| 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 | | | | | | |

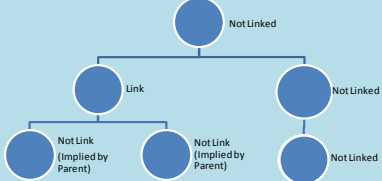
| Metadata Field/Attribute: | Common Reference | | | | | | |
|---------------------------------------|--|--|--|--|-------------------------------|--|--------------------------------|
| Properties | | | | | | | |
| User Interface Tab | Main | | | | | | |
| Metadata Form Section | Common Reference | | | | | | |
| 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 | | | | | | |

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Config

| Metadata Field/Attribute: | Plant | | | | | | |
|---------------------------------------|--|-------------------------------------|-----------------------------------|-------------------------------------|--|---|--------------------------------|
| Properties | | | | | | | |
| User Interface Tab | Config | | | | | | |
| Metadata Form Section | Plant | | | | | | |
| Definition | A unique meaning 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 D0MAW10" 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>  | | | | | | |
| 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 | 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). <p>A CDW Authored Tag is a Tag that is being created by this particular document.</p> | | | | | | |
| 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 | | | | | | |

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Process

| Metadata Field/Attribute: | Creation User | | | | | | |
|---------------------------------------|---|-------------------------------------|---|---|-------------------------------|--|--------------------------------|
| Properties | Process | | | | | | |
| User Interface Tab | Meta Data Creation Information | | | | | | |
| 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 | Process | | | | | | |
| User Interface Tab | Meta Data Creation Information | | | | | | |
| 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 | Process | | | | | | |
| User Interface Tab | Compilation Information | | | | | | |
| 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. | | | | | | |
| Rules for use | 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. 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 | Process | | | | | | |
| User Interface Tab | Compilation Information | | | | | | |
| 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 | | | | | | |

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| 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 | ESK_EngDocRevtoSPFLoginUser_Approver | | | | | | |
| Propertydef | ESK_ApprovedBy | | | | | | |
| DisplayItem | | | | | | | |
| 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 system.</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 transmittal 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 | | | | | | |

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| 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 | | | | | | |
| RelDef | ESK_EngDocRevtoSPLoginUser_Authoriser | | | | | | |
| 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 | | | | | | |

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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 Picklist | Media Type Picklist | Media Type Picklist | 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 | ESK_EngDocRevtoStorageLocation | | | | | | |
| PropertyDef | ESK_StorageLocation | | | | | | |
| 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 | | | | | | |

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5.2 ALTERNATIVE IDENTIFIER METADATA

| Metadata Field/Attribute: | Alternative Number | | | | | | |
|---------------------------------------|---|---------------------------------------|-------------------------------------|---------------------------------------|---------------------------------|--------------------------------------|----------------------------------|
| Properties | Alternative Identifier | | | | | | |
| 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 | Alternative Identifier | | | | | | |
| 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 | | | | | | |

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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 | IOObject | | | | | | |
| 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 | IOObject | | | | | | |
| 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 Switchgear 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 | | | | | | |

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| Metadata Field/Attribute: | Initials | | | | | | |
|-----------------------------------|--|------------------------------------|------------------------------------|---------------------|----------------|--|-------------------------|
| Properties | | | | | | | |
| 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 | | | | | | | |
| 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 | | | | | | | |
| 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 | | | | | | | |
| 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 | | | | | | |

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| Metadata Field/Attribute: | Cell Tel Number | | | | | | |
|-----------------------------------|--|---------------------|--------------------|---------------------|----------------|--|-------------------------|
| Properties | User Details | | | | | | |
| Metadata Form Section | The cellphone number at the office by which the user can be reached | | | | | | |
| Definition | The cellphone number at the office by which the user can be reached | | | | | | |
| Rules for use | 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 | User Details | | | | | | |
| Metadata Form Section | The number at the office by which the user can be reached | | | | | | |
| Definition | The number at the office by which the user can be reached. | | | | | | |
| Rules for use | 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 | Logon Details | | | | | | |
| Metadata Form Section | 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. | | | | | | |
| Definition | 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. | | | | | | |
| 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 | Logon Details | | | | | | |
| Metadata Form Section | This is the password selected by the user as conforming to Information Security Policy | | | | | | |
| 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 | Logon Details | | | | | | |
| Metadata Form Section | This is the e-mail address to which communications as being send to | | | | | | |
| Definition | This is the e-mail address where the user would like to receive e-mails and may be changed from time to time. | | | | | | |
| 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 | | | | | | |

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| Metadata Field/Attribute: | Days between password change | | | | | | |
|-----------------------------------|--|---------------------|--------------------|---------------------|----------------|--|-------------------------|
| Properties | Ligon Details | | | | | | |
| Metadata Form Section | This is the number of days between having the user change their password, in line with the Information Security policies | | | | | | |
| 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 | Ligon Details | | | | | | |
| Metadata Form Section | This is the number of seconds of inactivity before the system automatically sign the user off, in line with Information Security policies | | | | | | |
| 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 | Ligon Details | | | | | | |
| Metadata Form Section | This setting allows the Site Administrator to update another user's password, without having the original password. - See SPF Administrator's Guide | | | | | | |
| 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 | Ligon Details | | | | | | |
| Metadata Form Section | This setting allows the Site Administrator to Disable a user, thereby preventing the using from accessing SPO, ie logging in. | | | | | | |
| Definition | 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. | | | | | | |
| 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 | | | | | | |

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| Metadata Field/Attribute: | Notification Types | | | | | | |
|-----------------------------------|---|---|---|---------------------|----------------|---|-------------------------|
| Properties | | | | | | | |
| Metadata Form Section | Ligon 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 | Ligon 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 | | | | | | |
| Interface | | | | | | | |
| 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 | | | | | | |

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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 |

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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 further 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 consider 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 sepi 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 includes CD Roms, memory sticks, Hard drives, Tape Drives, Punch Cards, Floppy and stiffy disks. |

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5.11 USER TITLE PICKLIST

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6. AUTHORISATION

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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:

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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.

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