



Engineering Analysis, Intelligent Solutions

SPI

Governance

documents

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“In its most abstract sense, governance is a theoretical concept referring to the actions and processes by which stable practices and organizations arise and persist.” (Wikipedia)

SPI governance documents – “A set of documents that describe processes and procedures by which engineering information is enabled, created and maintained in projects and operations using SPI.” (Alex Koifman)

Why do we need governance documents?

- Economic reality translates into a lot of optimization and less projects.
- Reduce waste
- Improve project quality
- Accommodate project execution in the Cloud environment
- Improve communications (“RTFF”)

Don't we have them already?

- We have an “SPI seed file”!
- We have an SPI project specification!
- We have best practices, international standards and project methodologies!
- We have vendor (Hexagon) documentation!
- We have consultants who can tell us what to do!

What governance documents do we need?

- IT architecture and procedures (IT) Ω Θ
- Engineering Guide (engineering) Ω
- Project Specification (engineering, project management) Ω
- Facilities Guide (engineering, manufacturing/operations) Θ
- N.B.: Seed file should be a supplement to the Engineering Guide and Project Specification.

- Infrastructure architecture
- Installation, setup and administration
- Business continuity (back-up restore, disaster recovery, etc.)
- Support infrastructure and procedures.

- Standards and practices (by reference)
- SPI configuration – modules used, NC, supporting tables, spec customization, etc.
- Procedures – data entry, quality control, integration, workflows, 3-d party data, coordination, close out, claim/merge, etc.
- Deliverables (formats and content) and mandatory data entry requirements.
- Sufficient rationale for all of the above

- Project parties – Client, Contractors, Plants,
- Project definitions – overall purpose, units involved,
- Exceptions to the Engineering Guide rules – additions and exclusions

- Access to and use of SPI information
- Ownership and upkeep responsibilities
- Using SPI information in integration with other IT systems – ERP/CMMS (SAP, Maximo, etc), Reliability, Safety Lifecycle Management, etc.

What not to include

- No replication of the engineering practices already documented elsewhere (GP, best practices, etc.) – should be included by reference
- No replication of the SPI training documents, Help or User Guides
- N.B. Use Appendices for detailed technical configuration.

How to get it done

- Collect existing information
- Interview stakeholders
- Structure and propose
- Review and approve
- Implement on a project
- Continuously review, update and improve based on realities

Q&A / Discussion

