



Engineering Analysis, Intelligent Solutions

SPI Governance Documents Part II

Alex Koifman
Senior Consultant

Background and subject

- Continuation of the presentation from November 14, 2017 (can be found in [LTUF archive](#))
- “Meet another reality” update

Governance

“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)

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

PROPOSED: SPI Engineering Guide

- **Project Scope definition** – claiming to Engineering Project
- **Module usage** – Instrument Index, Process Data, Calculations, Specifications, Spec Binder/Document Binder, Installation Details, Wiring, Loops, EDE
- **SPI Data entry scope and requirements** – inclusions, exclusions, third-party supplied, interfaces and contractor scope boundaries, data entry methods
- **Data management** – engineering data management, management of templated configuration, management of project (non-template) definitions, specification library management, data validation and QC, use for other project tasks and manufacturing
- **Project management** – Coordination team, support (IT/Corporate Engineering), completion and close out, access and release of project information.

SPI Project Specification

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

PROPOSED: SPI Project Specification

- **Project parties and definitions:** Client, Contractors, plants, project description, SPI Usage, setup, implementation and support,
- **Configuration:** PBS/PAU, Naming conventions, UOM's , optional deliverables, wiring and loop requirements and generation,
- **Procedures:** rules for P&ID expansion, data and document revisions, issue of project data, handover procedures,
- **Exceptions to the Engineering Guide**

Some of the challenges/questions raised

- Describing system setup and support
- Seed database – deliver managed seed vs. detailed instructions (and libraries)?
- Handover from the EPC: EPC flexibility vs. plant controlled environment – how much data manipulation can and should be done?
- As Build/Project management for internally hosted SPI (level of procedural detail)
- Document logic for expanding simplified P&ID symbols into instrument index records?

Challenges/questions raised – cont.

- Information management handover specification vs. SPI database handover.
- “Examples of deliverables” appendix?
- Using Associate Document functionality vs. project document management system (SPF, Documentum, etc)?
- What is the best way to maintain “ever green” Governance Practice?

To be continued...

Q&A / Discussion

