EXPRO National Manual of Assets and Facilities Management
Volume 13, Chapter 1

Document Management Introduction Guideline

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1.0 INTRODUCTION

The purpose of this chapter in the National Manual of Assets and Facilities Management is to provide the user with a preliminary introduction to the Document Management discipline. Document Management discipline exists primarily in Assets and Facilities Management sector to organize, store, and retrieve documents accurately and efficiently. These documents may include, but not limited to, contracts, asset registration documents, condition assessment reports, guidelines, operating procedures and maintenance plans.

When such documents and Entities' data reside in a structured system, sophisticated file-handling procedures become possible. Therefore, key concepts and ideas that are the fundamental elements of Document Management are introduced, and the benefits of Document Management are highlighted.

The Volume consists of five Chapters:

1. Introduction
2. Assets and Facilities Management Document Management
3. Assets and Facilities Management Inter Department Review (IDR)
4. Assets and Facilities Management Hard Copy Filing
5. Assets and Facilities Management Contractor Management

2.0 DEFINITIONS

Definitions	Description
Enterprise Content Management System (ECMS)	An information management and collaboration platform for managing and controlling documents and records
Entity	A Saudi Government organization
IDR	Assets and Facilities Management Inter Department Review
RRTM	Assets and Facilities Management Records Retention and Turnover Matrix

3.0 REFERENCES

1. ENT-ID0-PR-000001 - Entity Standard Document Numbering Procedure
2. ENT-IRR-PR-000001 - Entity Records Retention Procedure

4.0 ASSETS AND FACILITIES MANAGEMENT DOCUMENT MANAGEMENT

The purpose of this chapter is to outline the key processes required to deliver consistent and effective document management services.
This chapter will introduce the key topics below:

1. Assets and Facilities Management Document Management Department Roles and Responsibilities
2. Enterprise Content Management Systems (ECMS) Requirements
3. Correspondence Management
4. Document Management
5. Confidential Records
6. Document Numbering Systems
7. Document Review and Approval
8. Issuing and Receiving Assets and Facilities Management Documents
9. Storage of Documents
10. Document Distribution

The key reference documents for this chapter:

A&FM Index	Document Title	Document Number
13.2.1	Assets and Facilities Management Document Management Procedure	EOM-ID0-PR-000001
13.2.1.1	Assets and Facilities Management Document Control Work Request Template	EOM-ID0-TP-000001
13.2.1.2	Assets and Facilities Management Transmittal Template	EOM-ID0-TP-000002
13.2.1.3	Assets and Facilities Management Distribution Matrix Template	EOM-ID0-TP-000003

5.0 ASSETS AND FACILITIES MANAGEMENT STANDARD DOCUMENT NUMBERING

Standard document numbering enables documents to be characterized by their key elements and therefore ensures their control, management and easy retrieval. Document numbering will be managed through the Assets and Facilities Managements Enterprise Content Management System (ECMS) which will use predefined structures to ensure documents are numbered and retrieved in a consistent manner.

Refer to ENT-ID0-PR-000001 - Entity Standard Document Numbering Procedure. This procedure describes and defines the numbering system to be applied to all documents prepared, issued and received by the Entity.

6.0 ASSETS AND FACILITIES MANAGEMENT INTER DEPARTMENT REVIEW (IDR)

The purpose of this chapter is to describe the requirements for initiating, preparing, approving, and revising documents for the Assets and Facilities Management Delivery Team.

This chapter will introduce these key topics:

1. Assets and Facilities Management Inter Department Review (IDR) Process
2. Resolving IDR Comments
3. Document Sign Off

The key reference document for this chapter:

A&FM Index	Document Title	Document Number
13.4.1	Assets and Facilities Management Inter Department Review (IDR) Procedure	EOM-ID0-PR-000003

7.0 ASSETS AND FACILITIES MANAGEMENT HARD COPY FILIN

The purpose of this chapter is to define the process of managing hard copy filing for documents used by the Assets and Facilities Management delivery team. Documentation needs to be filed in a uniformed and consistent manner to ensure the control, management and easy retrieval of Assets and Facilities Management documents.
This chapter will introduce these key topics:

1. Hard Copy Requirements
2. Hard Copy Filing Structure
3. Filing Confidential Records
4. Revision and Document Status
5. Folder Label
6. Document Size

The key reference documents for this chapter:

A&FM Index	Document Title	Document Number
13.5.1	Assets and Facilities Management Hard Copy Filing Procedure	EOM-ID0-PR-000004
13.5.1.1	Assets and Facilities Management Folder Label Template	EOM-ID0-TP-000005

8.0 ASSETS AND FACILITIES MANAGEMENT CONTRACTOR MANAGEMENT

The purpose of this chapter is to define the standard process for the submission and processing of subcontractor, suppliers and vendors deliverables submitted to the Main Contractor for Assets and Facilities Management delivery.

This chapter will introduce these key topics:

1. Requisitioning of Assets and Facilities Management Subcontract Deliverables
2. Assets and Facilities Management Subcontractor On-Boarding
3. Assets and Facilities Management Material Samples
4. Assets and Facilities Management Expediting and Status Reporting

The key reference documents for this chapter:

A&FM Index	Document Title	Document Number
13.6.1	Assets and Facilities Management Subcontractor Submittal Management Procedure	EOM-ID0-PR-000005
13.6.1.1	Assets and Facilities Management Subcontractor Decal Template	EOM-ID0-TP-000006

9.0 ASSETS AND FACILITIES MANAGEMENT RECORDS RETENTION &TURNOVER

Assets and Facilities Management Record Retention & Turnover is to define the process for achieving two main goals; a process for identification and documentation of the appropriate/required Assets and Facilities Management records or information that evidences significant Assets and Facilities Management activity or otherwise has long term value to the Assets and Facilities Management .Secondly, the efficient and effective transfer of those records to the Entity for retention per their requirements.

Refer to ENT-IRR-PR-000001 - Entity Records Retention Procedure. This procedure serves to ensure that all necessary records are identified and adequately maintained to comply with record retention requirements of the Entity and other relevant authorizing agencies.