

7.5 Documented Information

The Standard gives clear direction as to what documentation it requires:

Clause	Documentation Requirement
4.3 (Scope)	The scope shall be maintained as documented information and be available to interested parties.
5.2 (Energy Policy)	The energy policy shall be maintained as documented information.
6.2.1 & 6.2.3 (Objectives, energy targets and planning to achieve them)	The organization shall retain documented information on the objectives, energy targets and action plans.
6.3 (Energy Review)	The organization shall maintain as documented information of the methods and criteria used to develop the energy review, and shall retain documented information of its results.
6.4 (Energy Performance Indicator(s) (EnPIs))	The method for determining and updating the EnPI(s) shall be maintained as documented information. The organization shall retain documented information of EnPI value(s).
6.5 (Energy baseline EnB(s))	The organization shall retain information of EnB(s), relevant variable data and modifications to EnB(s) as documented information
6.6 (Planning for collection of energy data)	<p>Data to be collected (or acquired by measurement as applicable) and retained documented information shall include:</p> <ul style="list-style-type: none"> a) the relevant variables for SEUs; b) energy consumption related to SEUs and to the organization; c) operational criteria related to SEUs; d) static factors, if applicable; e) data specified in action plans. <p>The organization shall retain documented information on measurement, monitoring and other means of establishing accuracy and repeatability.</p>
7.2 (Competence)	The organization shall retain appropriate documented information as evidence of competence.
7.4.1 (Communication - General)	The organization shall consider retaining documented information of the suggested improvements from any person(s) doing work under the organizations control.
7.5.1 (Documented information – General)	<p>The organization's EnMS shall include:</p> <ul style="list-style-type: none"> a) documented information required by this document; b) documented information determined by the organization as being necessary for the effectiveness of the EnMS and to demonstrate energy performance improvement. <p>NOTE: The extent of documented information for an EnMS can differ from one organization to another due to:</p> <ul style="list-style-type: none"> • The size of organization and its type of activities, processes, products and services. • The complexity of processes and their interactions. • The competence of persons.
7.5.3 (Control of documented information)	Documented information of external origin determined by the organization to be necessary for the planning and operation of the EnMS shall be identified, as appropriate, and controlled.
8.1 (Operational planning and control)	The organization shall....keep documented information to the extent necessary to have confidence that the processes have been carried out as planned.
8.2 (Design)	The organization shall retain documented information of the design activities related to energy performance.
9.1.1 (Monitoring, measurement, analysis and evaluation of energy performance and the EnMS)	The organization shall retain documented information on the results of the investigation and response. The organization shall retain appropriate documented information on the results from monitoring and measurement.
9.1.2 (Evaluation of compliance)	The organization shall retain documented information on the results of the evaluation of compliance and any actions taken.
9.2.2 (Internal audit programme)	The organization shall retain documented information as evidence of the implementation of the audit programme(s) and the audit results.
9.3 (Management review)	The organization shall retain documented information as evidence of the results of management reviews.
10.1 (Non-conformity and corrective action)	<p>The organization shall retain documented information as evidence of:</p> <ul style="list-style-type: none"> • the nature of the nonconformities and any subsequent actions taken; • the results of any corrective action.

After these mandatory requirements, it is up to the organization to decide whether it requires further documentation. ISO 50001 says that the organization should determine appropriate documentation "as being necessary for the effectiveness of the EnMS and to demonstrate performance improvement". Therefore, it is up to the organization to decide when and where they need documentation and of course what form that should take, whether it is a procedure, flow chart, data table, graph or some other way of describing and managing the EnMS requirements.

Where documented information is produced it needs to be created, updated and controlled consistently. An organization should look to do this in as simple a way as they can as the greater the degree of complexity - the more it can go wrong! As a minimum, a version number, date and page numbers should be on each document.

Often organizations subscribe to software to manage their energy data. In this case the actual software provides the document control that is required under this clause.