Working Items Naming and Versioning Procedure for TRM003-001

This procedure is specifically for the Puget Sound Optimization Project TRM003-001

What is a "Working Item"?

All deliverables on the Master Deliverables List.

Any document not on the Master Deliverables List that will be sent to the Client.

Any document that you are preparing for others, within or outside of your team, to provide information for their deliverables. Examples include reports, calculations, datasheets, and certain memos.

Where are working items located?

All working items must be saved in the project Sharepoint.

Deliverables must be saved according to the Project File Structure List LS-407-LST-0005. Project File Structure List.pdf

This structure is also described in Lauren Master Services List LS-407-LST-0003. Lauren Services Master List.pdf

How are working item document numbers determined?

All deliverables on the Master Deliverables List must have a Trans Mountain document number per "Project Document Numbering and Revisions Standard PSO-DC-STD-0001" ***add Sharepoint Link to Doc Control folder***

All working items from the Master Deliverables List must be submitted to Document Control using the Drawing & Number Request Form.xlsx LS-407-FRM-0001 Drawing & Number Request Form.xlsx

Any document not on the Master Deliverables List that will be sent to the client directly (not through Document Control) should be numbered according to the Project Document Numbering Procedure LS-407-PRO-0001. Project Document Numbering Procedure.pdf

Other working items may be given a unique number according to the Project Document Numbering Procedure LS-407-PRO-0001 [Project Document Numbering Procedure.pdf](#) without processing through Document Control.

How are working item files names determined?

It's preferred to only have the file name as the document number for your current working version. However, it may be beneficial to name the files in a way to identify the contents.

Working versions may include a file description, including "Working" though the file structure does also clearly identify the current working version.

You must not put the current revision letter or number, what the file is to be issued for, or the Date in the file name of the current working version because this will break the version history in Sharepoint. Whichever convention is used it should not change throughout the life of the working item so that Sharepoint can have a complete version history automatically backed up. If you change the file name then Sharepoint doesn't associate the new file with the old file and the version history is broken

 The place to put dates, "issued for", or other descriptions in the file name is in artifact folders.

How are versions managed?

All working items must be version controlled on Sharepoint and only the current working version may be located in the root folder (i.e. 0410 Quality Control Plan folder should have only the current working version.

The document owner (who is the Discipline Lead by default but can be any designate) should "Check Out" the file while it is being worked on and "Check In" the file with a description of the changes made. Each lead can determine who checks in / out files and the extent and duration of checking out files. While checked out, others will not see the changes being made nor can they alter the file.

Superseded versions should be maintained by Sharepoint's version history functionality. If for some reason a particular working version becomes obsolete it can be moved into the _Archive folder.

For a history of the working version you can revert to a previous version using Sharepoint basic functions.

Additionally, artifact folders should be used to take "snapshots in time".

Artifact folders are how specific instances of working items are saved

The use of "artifact folders" are for creating specific instances of a working item. These are snapshots in time of the working item that can be used for purposes such as:

- Issuing for use / review / design / etc.
  - Document Control will only have a record of issued items from the Master Deliverables List
- Issuing for others to add comments or make changes
  - You can also invite others to work directly in the working version – the choice is left up to the Leads
- Saving a critical moment in the development of the file
  - You can also rely on Sharepoint for this, but the use of artifact folders can make it easier to share with others or quickly find the version you are looking for
- Sharing with others for information (but not giving them the working version, which could corrupt the file / change it without your knowledge)

Save references with your working items

Each working folder should have a _References folder. Regularly filing references with your working items will save your team time looking for information and makes checking easier.

Internal review and squad check of working items

Each working item that requires a formal review or squad check must be managed through a Bluebeam session. For all items on the Master Deliverables List we will follow the Internal Review and Issuance Procedure (Drawings & Documents) LS-407-PRO-0009 Internal Review and Issuance Procedure.pdf

For other working items that should have a formal review, or at the discretion of the Lead, a self-hosted Bluebeam session can be set up. There is no need to upload to Document Control through the 17-Check and Stamp folder.