Metadata Design Guide

For Technical Documentation in Energy Infrastructure

By SoDera - www.soedera.eu

Core Metadata Checklist

[ ] Document number - unique identifier

[ ] Document title - clear and descriptive

[ ] Revision - version tracking

[ ] Status - draft, approved, superseded

[ ] Author and approver names

[ ] Effective or issue date

[ ] Related asset or system reference

Extended Metadata Options

[ ] Equipment tag or asset ID

[ ] Discipline - mechanical, electrical, process

[ ] Document type - drawing, procedure, report

[ ] Keywords or functional tags

[ ] Related or referenced documents

[ ] Review or expiry date

Best Practices

1. Use controlled lists instead of free text
2. Align asset identifiers with engineering systems
3. Document metadata definitions in simple language
4. Review metadata standards periodically
5. Update metadata during reviews and approvals
6. Archive or flag superseded documents clearly

Contact: info@soedera.eu