

## EFCOG Best Practice #80

**Best Practice Title:** Naming Conventions for Drawings, Specifications, Manuals and Procedures

**Facility:** Salt Waste Processing Facility, Savannah River Site

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**Brief Description of Best Practice:** With careful and consistent naming of the technical documents and references used at a facility, the data can be successfully linked to Enterprise-based computer systems, such as ASSET Suite, CHAMPS or MAXIMO. This allows the end-user to link to the latest released version of the technical information and reduce the error of out-of-date information being accessed.

**Why the best practice was used:** It is important that operating and maintenance staff get the latest technical information available. It is also important not to have the same data/information in two different spots. Originally maintenance staff were anticipating physically attaching documents (such as drawings, maintenance manuals, procedures) to their selected Computer Management Maintenance System (CMMS). They did not believe they could use the central document system as every time a document was updated, the link was changed. This was because the document control staff had implemented a practice of including the revision and revision date in the file names, as they believed that provided the improved safety of not accidentally losing previous revisions.

**What are the benefits of the best practice:** Changing the practice of how design documents, manuals and procedures are named in the controlled document library allows the key information to be linked, rather than attached. To meet the ISMS principle of 'identification of hazards and controls' it is imperative that the operations and maintenance staff have ready access to the latest technical information. Requiring them to go to multiple locations to get the information often leads to staff developing inappropriate work-arounds, such as maintaining copies of key information at their desk rather than confirming that they have the latest version. Having the links contained within the CMMS substantially improves the chances that the staff will obtain the latest information.

**What problems/issues were associated with the best practice:** Different groups have different experiences in the best way to name and file information. When they do not have a common goal and vision on how the data should be named and stored, it can inhibit electronically linking information. The naming conventions should be set as early as possible in a project with a goal to allow maximum linkage to the new electronic systems at the end. This is particularly important as often the electronic systems are not selected (and often the groups are not even hired) when the document control activities are started early in design. The group performing the document collection and control at that stage is often not exposed to other potential uses of the data, particularly related to electronic linking and can develop practices that are not conducive to later implementation/ upgrades.

**How the success of the Best Practice was measured:** A meeting was held with the key individuals to agree on the most effective naming convention that utilized maintaining 'meta data' (e.g. additional electronic fields tied to the document file) for revision number and dates. This allowed the link to stay consistent and always pull up the latest revision, while providing the electronic history for those staff that needed it. Documents were successfully linked to several different data systems, eliminating the tendency of staff to physically attach files that could become out of date. This process was also implemented at the

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Hanford Site on another project and was successfully maintained by the Document Control professionals in a manner that allows new electronic systems to access documents without actually attaching them. For that site, the team went a step further with key information (safety equipment list information), by breaking the large Safety Equipment list document into subsections for posting. This allowed the document experts to link to specific sections for safety basis information, making this key information very accessible to the staff while assuring they had the latest revision. This resulted in less time spent looking for information during the planning stage, and therefore more time for other ISMS functions, such as providing feedback.

**Description of process experience using the Best Practice:** This is a lessons learned that has been re-learned at several projects across the complex. This is in part due to the complexity and size of most of the facilities where the document control function has historically been tasked with maintenance of lifetime records and is not often involved in the implementation of new software systems or in understanding information needs of operations and maintenance staff. Therefore they do not see the need or benefit of a naming convention that encouraging linkage to the 'latest version' of the document.

Similarly documents are often generated and named by different disciplines/organizations that have different naming conventions. For example, the operating and administrative procedures were generated by different staff in different buildings and used very different naming conventions until a standard format was required.

The system must also allow for the archiving and retrieval of older versions when required. However, this normally is not something that is needed by the majority of operations and maintenance staff who need to have timely access to the latest information. When data is not named in a manner that allows this common linkage, then the implementation of new data access systems is hampered. This often requires files to be renamed later in the project, which might disrupt earlier systems that had used data linkage.