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Title:

## VENDOR DELIVERABLE STANDARD

# VENDOR DELIVERABLE STANDARD

### APPROVALS

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### PURPOSE

The purpose of this document is to provide details on Pembina's Vendor deliverable format requirements.

This is a temporary Standard intended to be revised in the near-term.

### INTENDED AUDIENCE

This document is a standard for all stakeholders engaged on projects at Pembina.

It is a key reference standard for Vendors and Contractors providing services and materials to Pembina.

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Title:

## VENDOR DELIVERABLE STANDARD

### DOCUMENT INFORMATION

#### DOCUMENT OWNER

This document is owned by the Technical & Project Services department.

#### REVISIONS

Revision #	Revision Date	Revision Notes	Revised By
0	2018.08.10	Issued for Use	Tracey Spence

Title:

**VENDOR DELIVERABLE STANDARD**

## Table of Contents

1.0	Purpose.....	4
2.0	Scope .....	4
2.1	Exclusions.....	4
2.2	Deviations or Variance.....	4
3.0	Key Terms, Acronyms and Abbreviations .....	4
4.0	Reference Documents .....	5
5.0	Responsibilities .....	5
6.0	Document Control Process Overview .....	5
7.0	Vendor Deliverable Requirements .....	6
8.0	Vendor Document Number .....	6
8.1	Number Format .....	6
8.2	Number Component Definitions.....	6
9.0	Format Requirements.....	8
9.1	Filename .....	8
9.2	Project Lifecycle Versions .....	8
9.3	Final Vendor Information.....	8

## List of Tables

Table 1. Definitions.....	4
Table 2. Reference Documents.....	5
Table 3. Vendor Number Structure .....	6
Table 4. Discipline Codes .....	7

## List of Figures

Figure 1. Vendor ID Stamp.....	8
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Title:

**VENDOR DELIVERABLE STANDARD**

## 1.0 PURPOSE

The purpose of this document is to standardize the management and delivery of Vendor deliverables.

## 2.0 SCOPE

This Standard applies to all deliverables generated or modified for a Pembina project or asset. Vendor deliverables are managed according to TSU-TPS-DC-PRO-STD-001 Document Control Process Standard and Submitted in compliance with TSU-TPS-DC-STND-STD-003 Deliverable Exchange Standard.

### 2.1 Exclusions

- Working copies of non-issued/in-progress native documents
- Emails
- “bootleg” pdf deliverables
- CER & PR classified deliverables

### 2.2 Deviations or Variance

Requests for exceptions and deviations (with comments and justifications) shall be submitted at the time of quotation and shall be resolved prior to proceeding with further consideration of the proposal or award of order.

## 3.0 KEY TERMS, ACRONYMS AND ABBREVIATIONS

**Must** is a mandatory requirement, which is required to meet legislation requirements.

**Shall** is an absolute requirement, which is to be followed strictly in order to conform to the standard.

**Should** is a recommendation. Alternative solutions having the same functionality and quality are acceptable.

**May** indicates a course of action that is permissible within the limits of the standard permission.

**Can** is conditional and indicates a possibility open to the user of the standard.

Table 1. Definitions

Term/Acronym/Abbreviation	Definition
Contractor	Any person or firm contracted by Pembina to provide services
CER	Controlled Engineering Record
Deliverable	Project drawings and documents
PO	Purchase Order
PR	Project Record
Vendor	Any person or firm contracted by Pembina to provide equipment and/or material

Title:

**VENDOR DELIVERABLE STANDARD**

## 4.0 REFERENCE DOCUMENTS

Table 2. Reference Documents

Document Number	Document Name
TSU-TPS-DC-PRO-STD-001	Document Control Process Standard
TSU-TPS-DC-STND-STD-003	Deliverable Exchange Standard
TSU-TPS-DC-STND-STD-004	Deliverable Quality Standard
TSU-TPS-DDC-REF-FRM-001	Drafting and Document Control Support Request Form
TSU-TPS-DC-REF-FRM-002	Deliverable Number Request Form
TSU-TPS-DC-REF-FRM-003	VDR Template
TSU-TPS-DC-REF-FRM-005	MRB Section Cover Page Template
TSU-TPS-DC-REF-IST-001	Document Control Process Instruction Manual
TSU-TPS-DC-REF-IST-006	Document Control Service Level Agreement
ESS 2.25	Project and Acquisition Information Turnover Standard

## 5.0 RESPONSIBILITIES

Key roles and responsibilities include:

- Process Owner: Drafting and Document Control
- Primary end-users (deliverable originators):
  - Project managers
  - Project team
  - Document control
  - Contractors
  - Vendors

## 6.0 DOCUMENT CONTROL PROCESS OVERVIEW

- Deliverables are defined in accordance with Pembina's standards;
- Document Control issues unique numbers for each deliverable;
- All deliverables are controlled and monitored during their lifecycle of submittal, distribution, review and acceptance for the multiple versions of issuance;
- Upon completion of the project, deliverables are turned over for operational use, transferred to FileNet, and/or are archived for historical reference;
- The expectations for Contractors are included in the engagement contracts and/or purchase orders;
- Deliverables are managed in an electronic document management system (EDMS).

Title:

**VENDOR DELIVERABLE STANDARD**

## 7.0 VENDOR DELIVERABLE REQUIREMENTS

A Vendor Document Requirements (VDR) is a listing of all required deliverables associated with a purchase of equipment or material. A VDR shall be approved by a Pembina Project Manager ensuring applicable documentation required in ESS 2.25 (*Project and Acquisition Information Turnover Standard*) is included. The VDR shall be included with each project RFP and resultant contract and/or purchase order. A template is available for project specific modification and use; see *TSU-TPS-DC-REF-FRM-003 – VDR Template*.

Vendor deliverables may be controlled, monitored and expedited by a Contractor. The contract and/or purchase order terms and conditions identifies the responsible party for controlling, monitoring and expediting the deliverables. This dictates the responsibility for applying the Vendor ID Stamp detailed in Section 9.0 Format Requirements.

The VDR shall indicate when native files (e.g., CAD, Excel) are required.

## 8.0 VENDOR DOCUMENT NUMBER

### 8.1 Number Format

Vendor Deliverables are numbered as follows:

**Table 3. Vendor Number Structure**

AAAAAA	-	BB	-	VND	-	CCCCCCCC	-	DDDD
Project Code	-	Discipline Code	-	Document Type	-	PO	-	Assigned Number

Example: C123654-ME-VND-4512345678-00001

## 8.2 Number Component Definitions

### 8.2.1 Project Code

The project code identifies the project and is the AFE number. If a document is shared amongst multiple AFEs, the predominant AFE shall be used. The project manager provides the number to document control. This shall be done at the earliest phase of the project and will be used throughout the lifecycle of the project.

Title:

**VENDOR DELIVERABLE STANDARD**

## 8.2.2 Discipline Codes

The Discipline Code is applied according to the discipline of the PO and retains this code for all deliverables.

**Table 4. Discipline Codes**

Code	Description
AB	Aboriginal
CM	Communication (Telecom)
CS	Construction
CX	Commissioning
CV	Civil
DC	Document Control
DR	Drafting
EL	Electrical
EG	General Engineering
EV	Environment
GV	Governance (used for PDGL Gate approval deliverables)
GT	Geotechnical
HT	Hydrotechnical
IC	Instrumentation & Controls
LN	Land
ME	Mechanical
OM	Operations & Maintenance
MA	Marine
PC	Project Controls
PL	Pipeline
PM	Project Management
PR	Process
QA	Quality Assurance/Quality Control
RA	Rail
RG	Regulatory
SA	Safety
SC	Supply Chain
ST	Structural
SV	Survey

## 8.2.3 Assigned Number

Assigned numbers are created by Pembina Document Control through Pembina's EDMS upon request. Assigned numbers create uniqueness and do not represent sequence.

Title:

**VENDOR DELIVERABLE STANDARD**

## 9.0 FORMAT REQUIREMENTS

### 9.1 Filename

All files shall be named “Pembina Assigned Document Number”, underscore “\_”, “R”, “submittal number”; for example: C123654-ME-VND-4512345678-00001\_R2.pdf.

### 9.2 Project Lifecycle Versions

Project lifecycle versions are vendor deliverables submitted any purpose other than final (e.g.; Issued for Review (IFR), Issued for Acceptance (IFA)). Project lifecycle versions of deliverables shall be submitted to Pembina Document Control as individual pdf files, unprotected and text searchable. Each vendor deliverable shall include on the first page of multi-page documents or on each individual deliverable, at minimum, the Pembina document number, the submittal number, received date and a list of applicable equipment tag numbers. This information should be included in a Vendor ID Stamp (see Figure 1. Vendor ID Stamp) and may be included in another format such as a cover page.

**Figure 1. Vendor ID Stamp**

PEMBINA VENDOR ID	
<b>VDR Code:</b>	
<b>TAG(S):</b>	<i>(e.g.) P-101A/B</i>
<b>Pembina #:</b>	<i>Pembina Tech Doc #</i>
<b>Submittal:</b>	<i>1, first submittal, 2 etc.</i>
<b>Received:</b>	<i>Received date</i>

All Submittals shall be provided to Pembina Document Control following *TSU-TPS-DC-STND-STD-003 Deliverable Exchange Standard*.

### 9.3 Final Vendor Information

Final Vendor information is submitted as an electronic Manufacturer Record Book (MRB). The MRB contains all VDR listed deliverables and is submitted as:

- A single text-searchable pdf file of all final Drawings
- A single text-searchable pdf file of all installation and operation instructions
- A single text-searchable pdf file of all calculations
- A single text-searchable pdf file of all regulatory certificates
- A single pdf file of all manufacturing QA/QC data
- Individual native files (e.g.; Excel) of all datasheets

Each pdf file includes a cover page, a template is available for project specific modification and use; please see *TSU-TPS-DC-REF-FRM-003 – MRB Section Cover Page Template*.