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COURSE BROCHURE

Advanced Electronic Document Management for Oil and Gas Projects Course

8 – 19 March 2027
Rome

jupiterprime.uk

info@jupiterprime.uk

Registered in the United Kingdom and Saudi Arabia

Advanced Electronic Document Management for Oil and Gas Projects Course

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Electronic Document Management for Oil and Gas Projects is a 2-week advanced training course for engineering document controllers and EDMS administrators on oil, gas and energy projects, in which each participant builds an EDMS Configuration and Vendor Document Control Plan. Engineering, procurement and construction contracts generate tens of thousands of drawings, data sheets and supplier submittals that must reach operations complete and correct. Jupiter Prime Training delivers this course for experienced energy-sector practitioners.

Why Electronic Document Management for Oil and Gas Projects Matters Now

Three pressures shape engineering information on energy projects. Contractors work across several design offices and fabrication yards, so deliverables pass through many hands. Suppliers often submit drawings and certificates late or incomplete, delaying fabrication. Operators now expect asset data, not just PDFs, at handover so maintenance systems can start on day one. Projects that configure their EDMS around these flows protect schedule and start-up safety; others face rework and missing certificates. The course draws on ISO 19650 for information exchange and ISO 16175 for system requirements.

Who Gains Most from Electronic Document Management for Oil and Gas Projects

- Controllers who run engineering deliverables registers
- Administrators who configure EDMS workflows, permissions and metadata
- Coordinators who chase supplier data and track vendor submittal status
- Leads who assemble handover packages for operations and maintenance teams
- Specialists who manage brownfield drawing updates

An owner's project team gains most when its document controllers, EDMS administrator and vendor data coordinator attend together and leave sharing one tag-aware register.

Electronic Document Management for Oil and Gas Projects Capabilities

The capabilities follow a pump from first supplier drawing to start-up data.

- Design EDMS metadata, tag links and workflows for engineering deliverables — the project engineering manager
- Specify vendor data requirements and submittal schedules in purchase orders — procurement and expediting leads
- Apply review codes and revision rules to drawings, data sheets and calculations — discipline lead engineers
- Build a handover specification linking documents to asset tags — operations and maintenance readiness teams
- Test EDMS reports for overdue, rejected and missing deliverables — the project controls manager
- Communicate as-built and modification rules to site and brownfield teams — construction and asset integrity managers

Key Electronic Document Management for Oil and Gas Projects Terms

- Vendor data requirements list — the purchase order schedule of documents a supplier must submit and when.
- Engineering deliverables register — the controlled list of design documents a project must produce, with status and dates.
- Tag number — the identifier of an item of equipment, instrument or line, used to link documents and asset data.
- Piping and instrumentation diagram — a schematic of process equipment, piping, instruments and control loops.
- As-built red-line — a marked-up drawing recording construction changes before formal revision.
- Handover dossier — the documents and data passed from project to operations at completion.

Electronic Document Management for Oil and Gas Projects Day by Day

Day 1: Information Flows on Energy Capital Projects

- Project Phases From Front-End Engineering to Start-Up — Information Peaks and Risks
- Owner, EPC Contractor and Supplier Roles — Who Produces and Approves What
- ISO 19650 Information Exchange Concepts — Status, Suitability and Shared Environments
- Typical Document Failures in Oil and Gas — Lessons From Delayed Start-Ups
- EDMS Landscape on Energy Projects — Contractor Systems Versus Owner Platforms

Day 2: Engineering Deliverables and Tag Structures

- Deliverables Register Construction — Disciplines, Document Types and Planned Dates
- Tag Numbering Philosophy — Equipment, Instrument and Line Identifiers
- Linking Documents to Tags — Many-to-Many Relationships in the EDMS
- Drawing Types and Their Owners — Plot Plans, Isometrics and Data Sheets
- Progress Measurement From Document Status — Earned Value Inputs

Day 3: Configuring the EDMS for Engineering Work

- Metadata Model for Energy Projects — Area, Unit, Discipline and Tag Fields
- Workflow Design for Inter-Discipline Checks — Squad Reviews and Comments
- Permissions by Company and Role — Owner, Contractor and Supplier Access
- Status and Review Codes in the System — Automated Return Routing
- EDMS Reports and Dashboards — Overdue, Rejected and Pending Items

Day 4: Vendor Data Requirements and Supplier Submittals

- Vendor Data Requirements Lists in Purchase Orders — Scope and Timing
- Supplier Document Index Validation — Matching Submittals to Requirements
- Supplier Portal Submissions — Format, Naming and Metadata Checks
- Expediting Late Vendor Data — Escalation Linked to Fabrication Milestones
- Certificates and Test Reports — Material, Pressure and Factory Acceptance Evidence

Day 5: Review, Revision and Interface Control of Engineering Documents

- Discipline Review Cycles for Vendor Drawings — Turnaround Targets
- Revision Rules for Drawings and Calculations — Issued for Review, Design and Construction
- Interface Registers Between Contractors — Battery Limits and Tie-Ins
- Technical Queries and Deviation Requests — Linking Answers to Documents
- Clash and Consistency Checks — Data Sheets Versus Drawings

Day 6: Construction, Commissioning and As-Built Information

- Field Copies and Site Distribution — Preventing Use of Superseded Drawings
- As-Built Red-Line Capture — Site Mark-Ups to Formal Revisions
- Commissioning Dossiers by System — Test Packs and Punch Lists
- Quality Records From Fabrication Yards — Weld Logs and Inspection Reports
- Mechanical Completion Certificates — Evidence Required for Sign-Off

Day 7: Handover to Operations and Asset Data

- Handover Specification Design — Documents and Data Operations Require
- Asset Data Templates for Maintenance Systems — Attributes by Equipment Class
- Operations and Maintenance Manuals — Supplier Content Assembly
- Data Quality Checks Before Acceptance — Completeness and Consistency Tests
- Transfer to the Operator's Repository — Mapping and Import

Day 8: Brownfield Modifications and Long-Term Integrity

- Management of Change and Drawing Updates — Keeping Plant Records Current
- Master Drawing Restoration Projects — Backlog Reduction Approaches
- Safety-Critical Documents — Process Safety Information and Its Control
- Turnaround and Shutdown Document Packages — Preparing Work Packs
- Retention of Engineering Records Over Asset Life — Decommissioning Readiness

Day 9: Performance, Risk and Improvement

- Document Control Key Performance Indicators — Turnaround, Backlog and Rework
- Risk Register for Information Delivery — Late Data and Schedule Impact
- EDMS Health Checks — Metadata Accuracy and Orphaned Files
- Lessons Learned From Petrochemical and Power Projects — Repeating Patterns
- Continuous Improvement Plans for Project Information — Prioritised Fixes

Day 10: Practising the EDMS Configuration and Vendor Document Control Plan

- Metadata and Workflow Set-Up — Applying Day Three Design to a Gas Processing Unit
- Vendor Data Exercise — Applying Day Four Requirements to a Compressor Package
- Handover Simulation — Applying Day Seven Specifications to a Power Plant System
- Peer Review of Plans — Testing Reports, Codes and Escalation Rules
- EDMS Configuration and Vendor Document Control Plan — Metadata, Workflows, Supplier Rules and Handover

Applying Electronic Document Management for Oil and Gas Projects After the Course

- Audit the vendor data requirements lists of three open purchase orders and set an expediting schedule tied to fabrication milestones.
- Review the EDMS metadata for one process unit and add missing tag links so every equipment data sheet is retrievable by tag.

Electronic Document Management for Oil and Gas Projects Questions FAQ

What is electronic document management for oil and gas projects and why does it matter now?

Electronic document management for oil and gas projects is the control of engineering drawings, supplier data and handover information in an EDMS throughout a capital project. It matters now because operators demand complete asset data at start-up and late supplier documents delay fabrication and commissioning.

Which roles gain most from electronic document management for oil and gas projects training?

Engineering document controllers and EDMS administrators on energy projects gain most. Vendor data coordinators and handover leads also benefit.

How does an electronic document management for oil and gas projects course differ from a general records management course?

An electronic document management for oil and gas projects course centres on engineering deliverables, tags, vendor data and handover on capital projects. A general records management course addresses organisation-wide classification, retention and disposal of business records.

What do you bring back from electronic document management for oil and gas projects training?

You bring back an EDMS configuration and vendor document control plan covering metadata, workflows, supplier rules and handover data.

Electronic Document Management for Oil and Gas Projects: The Way Forward

The EDMS Configuration and Vendor Document Control Plan sets metadata, workflows, supplier submittal rules and handover requirements for the project's engineering information. Its first use is configuring the EDMS before the next purchase orders are placed, agreed between the document control lead and the project engineering manager. Revisit its handover section at mechanical completion, when operations reviews the first system dossiers.