

Classification and designation of documents for plants, systems and equipment

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British Standard

ICS 01.080.30; 29.020

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Summary of pages

This document comprises a front cover, an inside front cover, pages i and ii, the EN title page, pages 2 to 48 and a back cover.

This standard has been updated (see copyright date) and may have had amendments incorporated. This will be indicated in the amendment table on the inside front cover.

This British Standard, having been prepared under the direction of the Electrotechnical Sector Board, was published under the authority of the Standards Board and comes into effect on 15 September 1997

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Descriptors: Classifications, codes, designation, technical documents, information interchange, electrical engineering, information, electrical installation, industrial electrical installations

English version

Classification and designation of documents for plants, systems and equipment

(IEC 61355:1997)

Classification et désignation des documents
pour installations industrielles, systèmes et
matériels
(CEI 61355:1997)

Klassifikation und Kennzeichnung von
Dokumenten für Anlagen, Systeme und
Einrichtungen
(IEC 61355:1997)

This European Standard was approved by CENELEC on 1997-03-11. CENELEC members are bound to comply with the CEN/CENELEC Internal Regulations which stipulate the conditions for giving this European Standard the status of a national standard without any alteration.

Up-to-date lists and bibliographical references concerning such national standards may be obtained on application to the Central Secretariat or to any CENELEC member.

This European Standard exists in three official versions (English, French, German). A version in any other language made by translation under the responsibility of a CENELEC member into its own language and notified to the Central Secretariat has the same status as the official versions.

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CENELEC

European Committee for Electrotechnical Standardization
Comité Européen de Normalisation Electrotechnique
Europäisches Komitee für Elektrotechnische Normung

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Foreword

The text of document 3B/181/FDIS, future edition 1 of IEC 61355, prepared by SC 3B, Documentation, of IEC TC 3, Documentation and graphical symbols, was submitted to the IEC-CENELEC parallel vote and was approved by CENELEC as EN 61355 on 1997-03-11.

The following dates were fixed:

- latest date by which the EN has to be implemented at national level by publication of an identical national standard or by endorsement (dop) 1998-01-01
- latest date by which the national standards conflicting with the EN have to be withdrawn (dow) 1998-01-01

Annexes designated “normative” are part of the body of the standard.

Annexes designated “informative” are given for information only.

In this standard, Annex A and Annex ZA are normative and Annex B, Annex C, Annex D and Annex E are informative.

Annex ZA has been added by CENELEC.

Endorsement notice

The text of the International Standard IEC 61355:1997 was approved by CENELEC as a European Standard without any modification.

In the official version, for Annex E, Bibliography, the following notes have to be added for the standards indicated:

- IEC 61082-2 NOTE Harmonized as EN 61082-2:1994 (not modified).
- IEC 61082-3 NOTE Harmonized as EN 61082-3:1994 (not modified).
- IEC 61082-4 NOTE Harmonized as EN 61082-4:1996 (not modified).
- ISO 11442-1 NOTE Harmonized as EN ISO 11442-1:1996 (not modified).
- ISO 11442-2 NOTE Harmonized as EN ISO 11442-2:1996 (not modified).
- ISO 11442-3 NOTE Harmonized as EN ISO 11442-3:1996 (not modified).
- ISO 11442-4 NOTE Harmonized as EN ISO 11442-4:1996 (not modified).

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Introduction

Documentation is necessary for the provision of information for all activities during the life-cycle of technical products which include plants, systems and equipment. It may be produced in any phase or activity. Documents may be received from and delivered to other parties. Different parties may need different information or different views on the same information, depending on what is most suitable for the intended purpose.

In this standard the term “document” is used in a very general sense. It covers information on all possible media on which data can be recorded. However the description of document kinds is derived from the paper-based presentation of this information, i.e. how the information is made visible and readable for the user.

One aim of this standard is to establish a method for better communication and understanding between parties involved in document interchange. In order to get a basis for a system, it is necessary to disregard, more or less, what a document is called today. Different names are in use for the same document kind or the names may have different meanings for different parties. The purpose and object of interest are sometimes also part of document titles, which hampers general understanding. Therefore the basis for a common understanding should be a classification scheme which is based only on the content of information.

Another aim of this standard is to set up rules for relating documents to the objects they describe. For this purpose a document designation system is provided, linking the document kind designation to the object designation used within the plant, system or equipment. Following the rules and recommendations given, the documentation reflects the structure of the “real installation”. By that also guidance is given for order and filing as well as for structured searching for information, for example in document retrieval systems.

The principle of classification also covers the needs of computer-based documentation in general. An increasing amount of information will be stored and interchanged in a standardized data base format. The information to be delivered may be specified in such a way that each document kind required and agreed by parties can be derived from that data base by the receiver’s computer system. This may initiate future standardization work, for example on information and data elements, detailed document kind definitions and detailed presentation rules.

Although this standard has been prepared mainly by experts from the field of electrotechnology, high value was set on the integration of non-electrotechnical documents. Experts from the more ISO-related fields of technology made considerable input to this document.

1 Scope

This International Standard provides rules and guidelines for the classification and designation of documents. It serves as a basis for agreements about the preparation of a structured documentation, primarily required for larger installations, for example plants with their systems and equipment. It covers all technical areas and is open for further development of documentation and documentation systems. Guidance is also given for applications such as communication in the field of documentation and for document identification.

Documents from non-technical areas are included to the extent required for and during the engineering process.

2 Normative references

The following normative documents contain provisions, which through reference in this text, constitute provisions of this International Standard. At the time of publication, the editions indicated were valid. All normative documents are subject to revision, and parties to agreements based on this International Standard are encouraged to investigate the possibility of applying the most recent editions of the normative documents indicated below. Members of IEC and ISO maintain registers of currently valid International Standards.

IEC 61082-1:1991, *Preparation of documents used in electrotechnology — Part 1: General requirements*.

IEC 61346-1:1996, *Industrial systems, installations and equipment, and industrial products — Structuring principles and reference designations — Part 1: Basic rules*.

ISO 639:1988, *Code for the representation of names of languages*.

ISO 3166:1993, *Codes for the representation of names of countries*.

ISO 7200:1984, *Technical drawings — Title blocks*.

ISO 9000, *Quality management and quality assurance standards*.

ISO/IEC 8613-1:1994, *Information technology — Open Document Architecture (ODA) and interchange format: Introduction and general principles*.

3 Definitions

For the purpose of this International Standard, the following definitions apply.

3.1

data medium

material on which data can be recorded and from which they can be retrieved

3.2

document

NOTE The term “document” is not restricted to its legal meaning.

- a) Information on a data medium. Normally a document is designated in accordance with the type of information and the form of presentation, for example overview diagram, connection table, function chart. [IEC 61082-1]

NOTE Information may appear in a static manner on paper and microform, or dynamically on (video) display devices.

- b) Structured amount of information for human perception that can be interchanged as a unit between users and systems. [ISO/IEC 8613-1]

- c) Information on a data carrier treated as a unit. (Definition from ISO/TC10/SC1 WG5)

3.3

document set

composition of documents logically belonging together

3.4

documentation

collection of documents related to a given subject. [IEC 61082-1]

NOTE This may include technical, commercial and/or other documents.

3.5

document kind

type of document defined with respect to its specified content of information and form of presentation

3.6

document kind class

group of document kinds having similar characteristics concerning the content of information independent of the form of presentation

3.7

object

entity treated in the process of design, engineering, realisation, operation, maintenance and demolition. [IEC 61346-1]

NOTE 1 The entity may refer to a physical or non-physical “thing”, or to a set of information associated with it.

NOTE 2 Depending on its purpose, an object may be viewed in different ways called “aspects”.

3.8

system

set of interrelated objects with the purpose of performing a common function

3.9

plant

assembly of different systems on a specific site

3.10

equipment

components and parts used or required for a particular purpose

3.11

project

generic term for the sum of commercial and technical activities related to a specific object

3.12

object designation

identifier of a specific object

NOTE Examples of such designations are: reference designation (formerly called “item designation”), type number, serial number, name.

3.13

document designation

identifier of a specific document in relation to an object to which the document is assigned

4 Classification of document kinds

4.1 General

Documents provide information necessary for different activities and purposes during the life cycle of a plant, system or equipment. The term “document” is not restricted to a paper-based presentation of the information. It also covers other forms of information storage, such as data files on electronic media or in a data base.

Information by itself is not understandable for a human reader, unless it is presented in an agreed readable and interpretable form. In most cases, such a form is defined only for traditional paper-based documents. Therefore the descriptions of document kinds are derived from the paper-based presentation. Other forms of visualisation, e.g. presentation on a video screen or on a display, are assumed to be equal or at least similar to the paper-based presentation.

A document may be classified according to different aspects:

- object (to which it belongs);
- content of information;
- purpose (for what activity it is needed);
- form of presentation (see Annex C).

The classification of document kinds is based on the content of information. The class definition is independent from the object to which a particular document belongs. The purpose for which a document is made cannot serve as a basis for classification, because a document normally serves more than one purpose. The same applies for the phase in the life cycle of a plant, system or equipment, in which a document is prepared or used. Nor is the form of presentation an adequate means for classification, because the information contained in a document may be presented in different ways.

A document kind is defined with respect to its characteristic information content and its form of presentation. Two different documents are of the same kind if they have similar characteristics concerning the content of information, and if they have the same form of presentation.

A document can be defined as a document kind with a specified content of information and form of presentation, prepared for a specific object and/or purpose.

A large variety of names of document kinds is used. Many of them are not standardized but may be well known to a specific group of users. The same kind of document may have different names among different groups of users. The use of names of document kinds is for this reason not sufficient for communication between different parties.

In order to reach a common understanding among parties about documents to be exchanged or delivered, a document kind classification code (DCC) has been established in this standard. This code shall be the common basis of understanding about the content of information, independent from the non-defined or standardized names of document kinds.

Each document kind classification code is accompanied by a short description of the content of information and examples of document kinds belonging to that class (see Annex A). Examples of established document kinds, which are standardized or commonly known, are also presented, together with a short description of the content of information. Where feasible, the description has been divided into two parts: a list of the minimum content of information and possible additional information (see Annex B).

The object of this standard is to cover all document kinds which are in use during the life cycle of a plant, system or equipment. The fact that documents from different technical areas may come together within one project and that they must be clearly distinguishable from one another shall be taken into consideration. Future development will establish new document kinds which shall fit into the defined structure. These aspects have been dealt with in the following ways:

- at top-level, document kinds may be separated according to the “technical area” aspect. Each technical area shall use the same classification scheme below that level;

NOTE Not all classes defined below the top-level may exist in each technical area. In such cases these classes remain empty.

- the division into main classes is valid for all technical areas;

- subclasses of document kinds have been established in a generic way in order to allow appropriate assignment of document kinds within all technical areas;

- within the letter code for main classes and subclasses of document kinds, space for future extension has been provided;

- user groups may define their specific document kinds which are not listed in this standard. This shall be done within the established subclasses of document kinds.

4.2 Document kind classification code

4.2.1 Basic principles for classification of document kinds

The main subject for the classification of document kinds shall be the content of information. If a document kind contains more than one kind of information, the leading aspect shall govern its classification.

Document kinds can be classified according to different levels and aspects (see Figure 1).

Level A0 represents all existing document kinds.

NOTE According to structuring principles, the top-node is not associated with a designation.

Each node in level A1 represents all document kinds which are in use in a specific technical area. The node designated, for example, by letter E represents all document kinds used in electrotechnology. Each node in level A1 shall make use of the same substructure represented by levels A2 and A3.

Each node in level A2 represents a main class of document kinds. The main classes represent a subdivision of all document kinds related to one node in level A1. Document kinds belong to the same main class if they contain the same type of leading information.

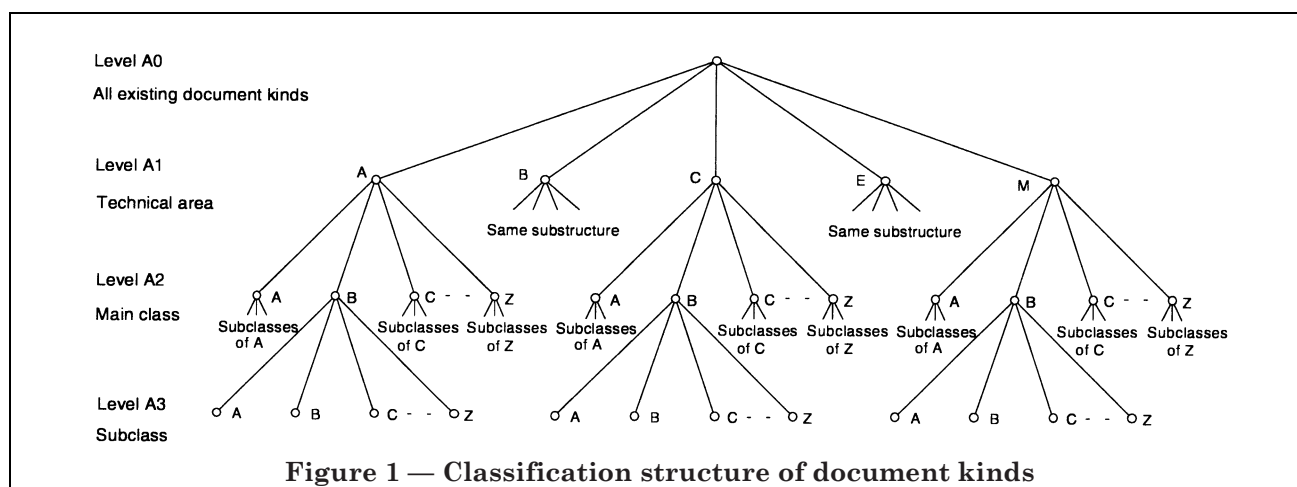


Figure 1 — Classification structure of document kinds

Each node in level A3 represents a subclass of document kinds. The subclasses represent a subdivision of the main classes existing in level A2. Document kinds belong to the same subclass if they have a common description of the content of information within the description of the main class in level A2.

4.2.2 Layout of document kind classification code (DCC)

Figure 2 shows the layout of the DCC. It consists of the prefix sign “&” (ampersand) followed by three code letters which are defined in this standard. The position of each code-letter is indicated by A1, A2, A3. The prefix sign may be omitted if there is no risk of misunderstanding.

NOTE The prefix sign occupies an additional data position e.g. in a data base.

Each position in the DCC is defined as follows:

- A1 represents nodes in level A1 of the classification structure (see Figure 1). It is reserved for the indication of the technical area (see Table A.1);
- NOTE The term “technical area” is to be taken in a more general sense; it also covers, for example, management aspects.
- A2 represents nodes in level A2 of the classification structure. It is reserved for the code letter for the main class of document kinds (see Table A.2);
- A3 represents nodes in level A3 of the classification structure. It is reserved for the code letter for the subclass of document kinds defined individually for each main class. A3 shall only be used in combination with A2 (see Table A.2).

For A1, A2 and A3 all characters A through Z, except O and I, are allowed.

Table A.1 presents the code letters that shall be used when documents from different technical areas come together in one project and confusion is likely. The technical area assigned to the document should be agreed upon. Other letters than those shown in Table A.1 may also be used for specified purposes, if agreed.

Examples:

- a building drawing prepared by an architect will be designated as “civil engineering”;
- a building drawing prepared in an electrical engineering department will be designated as “civil engineering”;
- a building drawing prepared by an architect and supplemented by an electrical engineer to become an electrical installation drawing will change its designation from “civil engineering” to “electrotechnology”. (It actually becomes a new document kind.)

The code letters A and B may be used for those document kinds, that are related to more than one specific technical area.

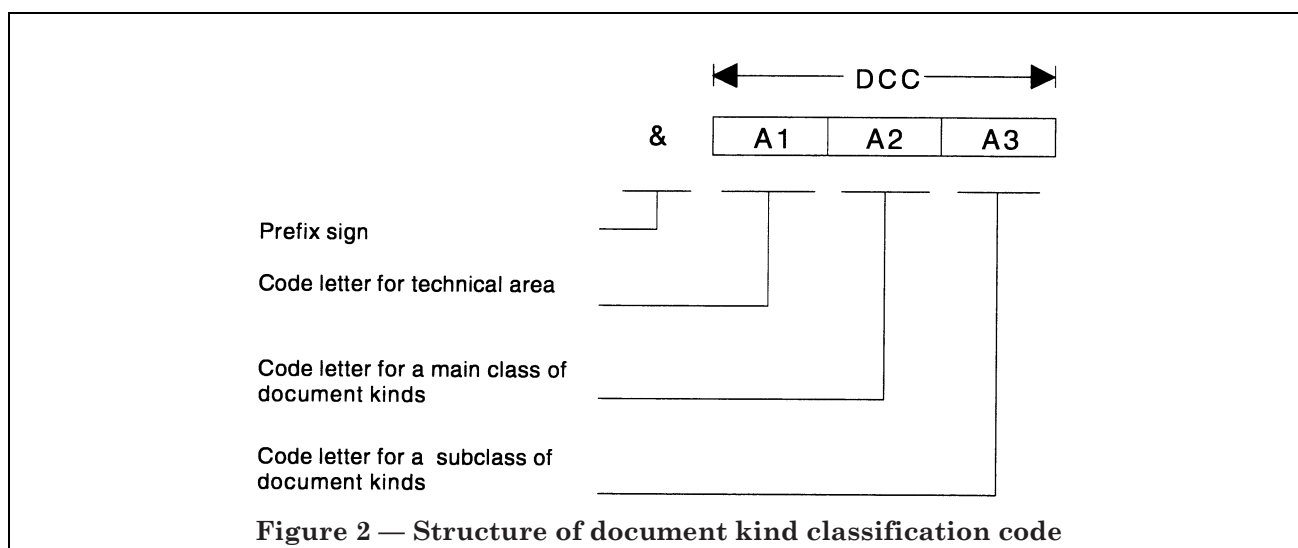
Table A.2 presents code letters for the main classes and subclasses of document kinds. The use of A2 and A3 is mandatory whenever a DCC is applied. The presentation of A2 and A3 shall not be split.

4.3 Assigning document kinds to classes

4.3.1 Classification method

As pointed out in 4.2.1, the classification of document kinds is based on their content of information.

The main classes are defined in this standard by a short description of their content of information (see Table A.2). All documents to which this description is applicable belong to this main class.



A more detailed specification of the content of information is given by a short description for each subclass (see Table A.2). This description, together with the description of the main class, is valid for all document kinds assigned to this subclass.

The method of assigning document kinds to classes shall follow a top-down approach. First the leading aspect of the content of information shall match the description of the main class, in the second step it shall match the description of the subclass.

Where the description of the leading aspect of the document kind matches the description for a main class and subclass given in this standard, this document kind shall be assigned to that main class and subclass.

There may be cases where the content of information matches only the main class but no adequate subclass description is suitable. In this case the letter Z shall be used. If this code letter is used for the purpose of agreements on documents to be prepared and interchanged, it is highly recommended to prepare a short description as well.

If no appropriate main class description is suitable, the letter Z shall be used also for the main class.

4.3.2 Classification of established document kinds

Document kinds are called “established” in connection with this standard, if they are

- defined by an International Standard, or
- commonly known, for example by tradition.

Examples of established document kinds have been classified and listed under the corresponding subclass in Table A.2.

The level of standardization among these document kinds is very different. Furthermore, the names of document kinds are, in many cases, not unique. A great variety of synonyms is in use, very often related to the object or purpose of the document in question.

To be more independent from the names of document kinds, a short description of the content of information is provided (see Table B.1). These short descriptions have been prepared according to the following rules:

- the short description shall provide a brief summary of the main kind of information, which the document in question is expected to contain. Wherever possible, the content of information should be divided into two parts:
 - an enumeration of the minimum content of information (MI), and
 - examples of information elements which may be included (additional information: AI).
- in the case of document kinds established by an International Standard, a few sentences from the standard are quoted. It is not intended to give an interpretation of the source document, but to help an informed reader to have a quick overview of the essentials.

NOTE The short description of standardized document kinds is not normative. Users are encouraged to refer to the source documents for detailed information.

4.3.3 Classification of non-established document kinds

Non-established document kinds shall be classified, as stated above, by analyzing the leading aspect of the content of information and relating them to one of the main classes or subclasses described. For communication purposes, it may be helpful to prepare a short description following the description method used for established document kinds.

4.3.4 Classification of composite document kinds

Composite document kinds are to be understood as combinations of different generic document kinds, each part being normally related to a different class according to Table A.2.

Following the philosophy of classification for all document kinds, composite document kinds shall be classified according to the leading aspect of the content of information, in this case according to the main constituents of the combination. For example, a circuit diagram containing a parts list shall be designated as a circuit diagram if this is the leading part.

If no leading constituent is obvious, any of the constituent document kind classes may be chosen.

NOTE Each individual constituent of a composite document may be associated with its individual DCC as information element. This may be advantageous for the use of computer-aided documentation systems.

5 Designation of documents

Documents are always prepared for specified objects. It is important to indicate to which object a document is assigned.

For this reason, each document should be designated by a combination of the object designation of the object to which the document is assigned (for example a function, a location or a product) and the DCC, as shown in Figure 3.

NOTE The object designation chosen for document designation may be different from the reference designation of the object presented in the document itself.

For the object designation a standardized or at least recognized code, e.g. a reference designation as described in IEC 61346-1 should be used, but generally any object designation is possible, e.g. type designation or even descriptive text.

NOTE Examples in this standard mainly show the use of a reference designation system according to IEC 61346-1 for the designation of objects.

Different kinds of documents related to the same object can be differentiated by means of the DCC. The DCC may be supplemented by a numerical counting number (maximum three digits). This supplement may be used to differentiate between two or more document kinds associated with the same DCC that are related to the same object, for example when two different document kinds of the same subclass are applied to one single object (example: operation instruction and maintenance instruction). In general the use of the counting number in addition to the DCC is free and may be chosen according to other purposes as well.

6 Document sets

A complete documentation may contain many documents of different kinds. The documentation shall be structured by taking different aspects into consideration, for example

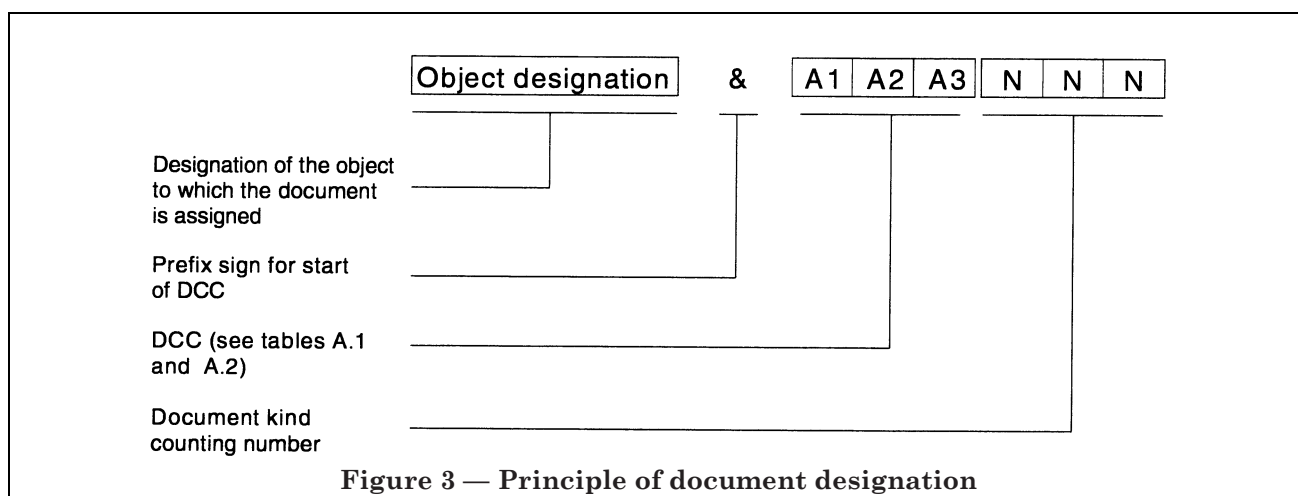
- flexible adaptability of the information requirements for the different stages (for example: engineering, installation, commissioning);
- practical structure following, for example, the function-oriented and/or the location-oriented structure of the plant;
- centralised and/or decentralised availability;
- organisation of the parties involved.

Each of the above-mentioned aspects states a requirement for a logic grouping of the documents. The main aspects for grouping shall be agreed upon by the parties involved.

A recommended method for an appropriate grouping of the documents is to divide the documentation into document sets that are related to the structure of the object (plant, system, etc.) to be documented.

The structure of a plant or system is normally represented by a reference designation system. By using a reference designation in combination with the DCC within the document designation, a direct relation between a document and the object to which it belongs is established (see Figure 4). All documents belonging to the same object form a document set.

Figure 4 shows an example of two different structures of a system and their relationship to the documentation. Within the tree structures those nodes are indicated to which documents are related. Accordingly, the documents are designated with the reference designation of the corresponding node in combination with the DCC and, where it is needed, with a document kind counting number. In this way document sets are composed and can be filed as illustrated.



NOTE Which document kinds are needed, and how they are related and filed is subject to agreement between parties in a contract.

The following principles should be followed

- all documents designated for a defined node contain information valid for all objects represented by the nodes below;
- for objects represented by lower-level nodes more detailed information is often required, presented in separate documents. This information should then be excluded from the documents assigned to higher-level nodes to avoid redundancy.

In Figure 4 the principle is shown by dotted triangles. The top of the triangle contains the node within the structure to which document kinds will be attached.

7 Application guidelines

7.1 Tools for communication about document interchange

The main object of this standard is to provide means for better communication about documents and documentation to be prepared or delivered within a project. The document designation should be used for this purpose.

The document kinds which are required depend on the object and purpose for which information is to be provided. It is highly recommended first to agree on the structure and reference designation of the plant, system or equipment in question, and then to relate the necessary document kinds to that structure (see clause 6 and Figure 4). The reference designation later on becomes an integral part of the document designation (see clause 5 and subclause 7.2).

Different phases in a project or in the life cycle of a product, such as engineering, manufacturing, installation, commissioning, operation and maintenance, require different information and possibly different document kinds. Very often only subsets of information from specified document kinds are needed for a specific purpose. Therefore, it is of importance to know

- which phases are to be considered;
- which document kinds are required for a specific phase;
- possibly which subset of information is required for this purpose as a minimum.

The document kinds which are required should be stated by means of the DCC, clearly separated for the objects in question and for the phases (purposes) in the project. By the use of the DCC, the reader is led to the description of the main classes and subclasses of document kinds (see Table A.2). This provides a preliminary idea of the type of information that is required.

A further specification should be made by using the names of established document kinds. The short descriptions of those (see Table B.1) provide more detailed information about the contents and also about the International Standards where the document kinds in question are defined.

Other administrative information should be provided as well, for example:

- who is responsible for the preparation of the documents;
- who shall receive the documents;
- specification of storage medium;
- number of copies to be delivered.

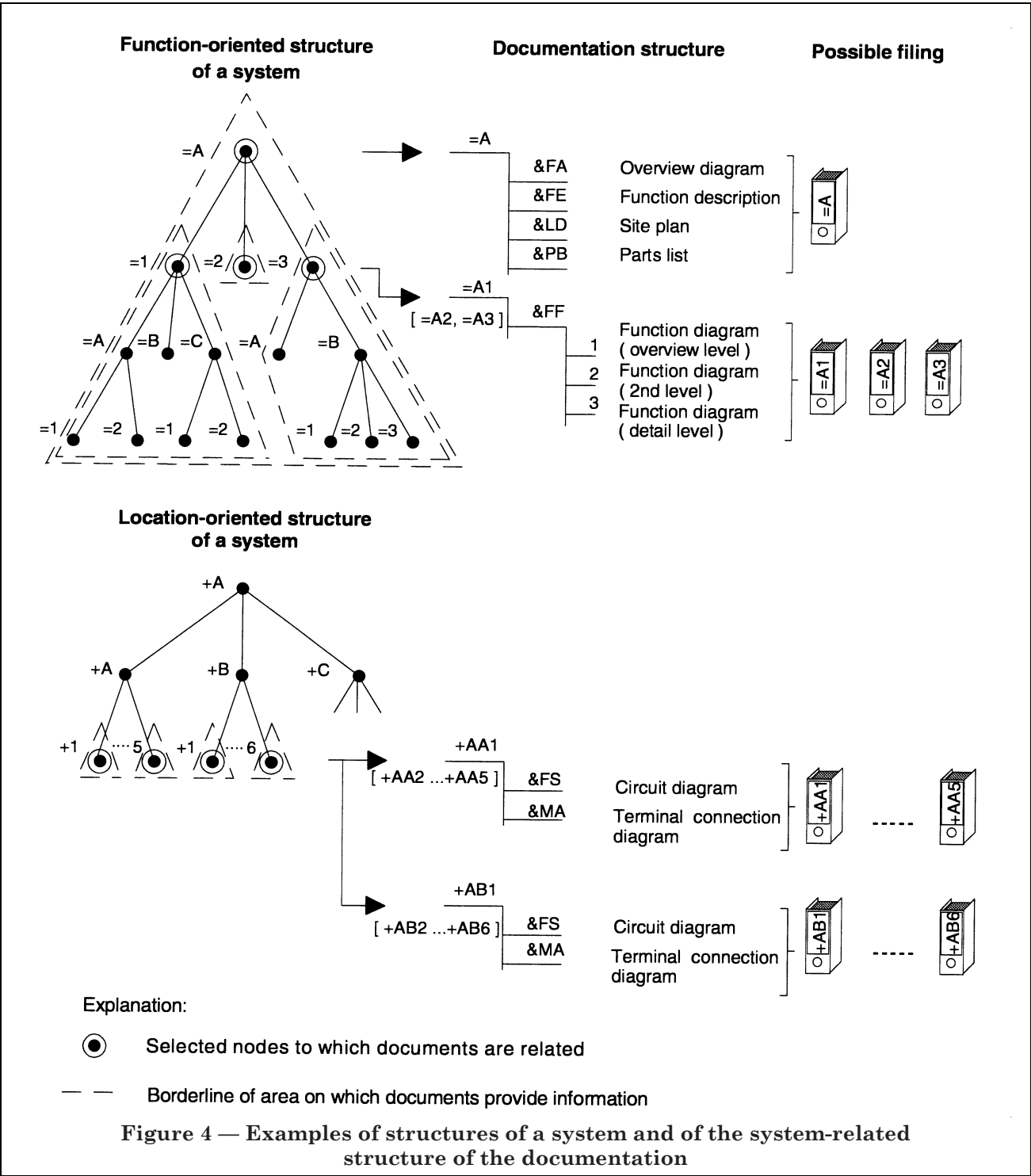


Figure D.1, Figure D.2 and Figure D.3 give examples of document interchange lists. It is recommended to use these as a basis for communication. The forms should be adjusted to the specific needs of a project.

Figure D.1 shows an example of a form for general information which is common to all documents to be delivered.

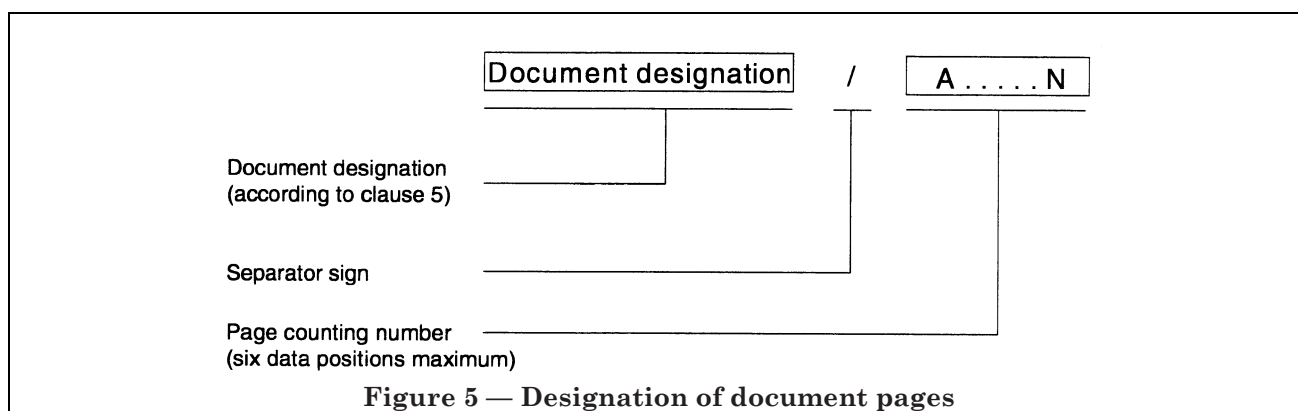


Figure D.2 shows an example of a form of an object-related document interchange list. This may be applied separately for each defined object (cubicle, functional system, software, etc.), stating also the reference designation of the object, if it exists and if it is known.

Figure D.3 shows a filled-in example of the document interchange list presented in Figure D.2.

7.2 Application of document designation for identification purposes

For the purpose of identification of documents, a drawing numbering system or other numbering systems are normally used. In most cases they fulfil both identification purposes and company-specific requirements. Therefore these numbering systems cannot be subject to standardization.

Identification in the following paragraphs means a unique designation of documents with regard to the object to which it is assigned.

NOTE 1 It is not the object of this standard to eliminate or replace any existing numbering system. It only provides an additional possibility for identification which can generally be applied.

NOTE 2 The document designation according to the method described depends on the object designation. Therefore the document designation changes when the object designation changes. This designation is not identifying in a very strict sense. This can only be solved by an identifier that remains unchanged during the lifetime of the document.

In future a commonly used and standardized identification system may be required, for example for computer-based document retrieval systems. The rules and recommendations given below may serve as a basis for this purpose. The borderline of an identifying document designation may reach from “documents for one single plant or system” to “all documents worldwide.”

For an identifying document designation within the borderlines of a plant or system, the combination of the object designation and the DCC should be used as described in clause 5.

Very often it is required to identify each single page of a document, especially for the application of cross-references. For this purpose a page counting number should be used. The page counting number shall be separated from the document designation part by the character “/” (solidus) if presented in a single line (see Figure 5). The separator sign may be omitted if there is no risk of confusion, for example when the page counting number is presented in a separate section in the title field of a document or in a separate column in a table.

The page counting number may contain alphabetical characters (letters A ... Z, except I and O) and/or numerical characters (figures 0, 1 ... 9). For better readability it should be restricted to a maximum of six data positions.

The page counting number may also contain sorting and grouping criteria. These are free for further application-related definitions.

NOTE 1 The page counting number is normally not identical to the page number related to a drawing number.

NOTE 2 The sequence of designations according to Figure 5 provides no rules on how the different information parts are to be presented in the title field of a document.

Normally the designations described above need to be supplemented by a revision index (for example: 2nd modification; revision after factory test; as built) and/or a status designation (see Annex C) to make them unique within the life cycle. The revision index and status designation shall be treated as separate information elements, independent from the document designation.

In addition to the principles described above, additional information is required to make a document designation unique in a general sense. For this reason the following information may be considered for inclusion:

- international country code (two-letter code) according to ISO 3166, indicating the country where the document in question was prepared;