

## Category 1 Standard

# S1760 Common Data Environment (CDE) Process

Issue No.: A1

Issue date: April 2015  
Review date: April 2018

MAYOR OF LONDON

 **Documents**  
Document Sharing Hub



## Contents

|     |                                           |    |
|-----|-------------------------------------------|----|
| 1   | <b>Purpose</b>                            | 3  |
| 2   | <b>Scope</b>                              | 3  |
| 3   | <b>Minimum System Requirements</b>        | 3  |
| 3.1 | General Minimum Requirements              | 3  |
| 3.2 | Document Control                          | 4  |
| 3.3 | Meta-data                                 | 4  |
| 4   | <b>System Support / Training</b>          | 6  |
| 5   | <b>Minimum Configuration Requirements</b> | 7  |
| 5.1 | General                                   | 7  |
| 5.2 | Process Requirements                      | 7  |
| 5.3 | Work in Progress (WIP) Area               | 8  |
| 5.4 | Shared Area                               | 8  |
| 5.5 | Published Area                            | 10 |
| 5.6 | Archive Area                              | 11 |
| 5.7 | Document Security (access control)        | 12 |
| 5.8 | Metadata                                  | 13 |
| 6   | <b>Supporting information</b>             | 15 |
| 6.1 | Background                                | 15 |
| 7   | <b>References</b>                         | 15 |
| 7.1 | References                                | 15 |
| 7.2 | Abbreviations                             | 15 |
| 7.3 | Definitions                               | 15 |
| 7.4 | Technical content manager                 | 16 |
| 7.5 | Document history                          | 16 |

## LIST OF TABLES

|                                                   |    |
|---------------------------------------------------|----|
| Table 5-1 – Suitability (WIP)                     | 8  |
| Table 5-2 – Suitability (Shared)                  | 10 |
| Table 5-3 – Suitability (Published Documentation) | 10 |
| Table 5-4 – CDE Roles                             | 12 |
| Table 5-5 – CDE Competencies                      | 12 |
| Table 5-6 – File ID (meta-data)                   | 13 |
| Table 5-7 – Meta-data                             | 14 |

## 1 Purpose

The purpose of this standard is to define the minimum system and configuration requirements for the Common Data Environment (CDE).

## 2 Scope

The generic CDE process is described in BS1192:2007, which is the foundation to the production, use and management of all project and asset data and information. This standard covers the basic process (in line with BS1192:2007), Rail and Underground specific requirements and requirements for systems used to manage the CDE process.

## 3 Minimum System Requirements

### 3.1 General Minimum Requirements

- 3.1.1 The system shall be accessible from any location at any given time.
- 3.1.2 The system shall have the functional capability to allow standard templates to be created; as a minimum, these templates should include:
  - Folder structure
  - Document security
  - Workflow
- 3.1.3 The system shall have the functional capability to capture iterative document revisions, compliant to BS1192:2007.
- 3.1.4 The system shall have version control functionality.
- 3.1.5 The system shall have full text search and retrieval functionality.
- 3.1.6 The system shall have the functional capability to manage alternate file formats against a single file designation.
- 3.1.7 The system shall be configurable to allow document security (see 5.7) to be assigned to each area of the CDE.
- 3.1.8 The system shall be configurable to enforce a defined file naming syntax.
- 3.1.9 The system shall be configurable to concatenate a number of meta-data fields to record unique file identification against each file.



- 3.1.10 The system shall be configurable to provide a BS1192:2007 compliant CDE solution for Capital Projects, Minor Works and Maintenance within 24 hours of a registered request.
- 3.1.11 The system shall have the functional capability to capture an audit trail of data and information passing between each area of the CDE.
- 3.1.12 The system shall have workflow capabilities to track data and information approvals (accept / reject).
- 3.1.13 The system shall have the functional capability to bulk import / export files.
- 3.1.14 The system shall have the functional capability to allow users to view and mark-up documents without needing access to the software they were created in.

## 3.2 Document Control

- 3.2.1 The system shall have the functional capability to manage and record data and information approvals.
- 3.2.2 The system shall have the functional capability to prevent inadvertent use of obsolete documents.
- 3.2.3 The system shall have the functional capability to create and manage distribution lists.
- 3.2.4 The system shall have the functional capability to produce transmittals for the distribution of data and information.
- 3.2.5 The system shall have the functional capability to provide notification via e-mail.

## 3.3 Meta-data

- 3.3.1 The system shall have the functional capability to capture meta-data.
- 3.3.2 The system shall be configurable to create specific meta-data fields.
- 3.3.3 The system shall be configurable to mandate meta-data entries.
- 3.3.4 The system shall have the functional capability for manual entry of meta-data.
- 3.3.5 The system shall have the functional capability to bulk import / export meta-data, from / to tabular form.
- 3.3.6 The system shall have the functional capability to search and retrieve data and information based on meta-data.



- 3.3.7 The system shall be configurable to manage meta-data entries based on area of the CDE.

