

## **COLLABORATION AND PUBLICATION OF PROJECT DOCUMENTS VIA THE CPM LIVELINK SYSTEM**

*This document is for internal and contract specific use only.*

### **Disclaimer**

NGG and NGET or their agents, servants or contractors do not accept any liability for any losses arising under or in connection with this information. This limit on liability applies to all and any claims in contract, tort (including negligence), misrepresentation (excluding fraudulent misrepresentation), breach of statutory duty or otherwise. This limit on liability does not exclude or restrict liability where prohibited by the law nor does it supersede the express terms of any related agreements."

### **TABLE OF CONTENTS**

|                                                                               |           |
|-------------------------------------------------------------------------------|-----------|
| PURPOSE AND SCOPE.....                                                        | 1         |
| 1 TRANSFER OF PROJECT DOCUMENTS.....                                          | 2         |
| 2 CPM PROJECT FOLDER STRUCTURES .....                                         | 2         |
| 3 CPM PROJECT FOLDER STRUCTURE TEMPLATES .....                                | 2         |
| 4 OWNERSHIP AND MANAGEMENT OF CPM PROJECT FOLDER STRUCTURES .....             | 3         |
| 5 SECURITY OF DATA WITHIN CPM LIVELINK.....                                   | 3         |
| 6 NAMING CONVENTION FOR KEY PROJECT DOCUMENTS.....                            | 4         |
| 7 SUBSTITUTE DOCUMENTS.....                                                   | 4         |
| 8 COMPOUND DOCUMENTS.....                                                     | 5         |
| 9 SHORTCUTS .....                                                             | 5         |
| 10 TRACKED CPM PROJECT FOLDER STRUCTURES.....                                 | 5         |
| 11 KEY PROJECT DOCUMENT STATUS REPORT CHANGE CONTROL PROCESS .....            | 6         |
| 12 FINAL RECORDS AND DOCUMENTATION .....                                      | 6         |
| 13 DATA RETENTION .....                                                       | 7         |
| 14 REPORTING .....                                                            | 7         |
| 15 FORMS AND RECORDS.....                                                     | 7         |
| <b>PART 2 - DEFINITIONS AND DOCUMENT HISTORY .....</b>                        | <b>8</b>  |
| 16 DEFINITIONS.....                                                           | 8         |
| 17 AMENDMENTS RECORD .....                                                    | 9         |
| 18 IMPLEMENTATION .....                                                       | 9         |
| <b>PART 3 – GUIDANCE NOTES AND APPENDICES.....</b>                            | <b>10</b> |
| 19 REFERENCES.....                                                            | 10        |
| <b>APPENDIX A–KEY PROJECT DOCUMENT STATUS REPORT CHANGE CONTROL PROCESS..</b> | <b>11</b> |

### **PURPOSE AND SCOPE**

This business procedure is to identify how CPM Livelink ([www.proj.info](http://www.proj.info)) should be used to publish information for collaboration between National Grid, its Delivery Vehicles and Contractors during the lifecycle of the project, and for retaining archives of final records and documentation.

CPM Livelink and Enterprise Content Management (ECM) are separate instances of document management systems used by National Grid to support key company processes. ECM is used predominantly for engineering records and master drawings custodianship, and control of modifications to transmission systems (gas and electricity). CPM Livelink' (or 'proj.info') delivers Collaborative Project Management (CPM) functionality. The Scope of this procedure is limited to CPM Livelink.

Responsibilities for the Operation and Management of the CPM Livelink system are described in UKBP/TP199 - Operation and Management of the CPM Livelink System.

## PART 1 – PROCEDURAL

### 1 TRANSFER OF PROJECT DOCUMENTS

Transfer of project documentation throughout the life cycle of a project should be carried out using the National Grid Collaborative Project Management (CPM) Livelink system [www.proj.info](http://www.proj.info). This is achieved through the use of the CPM Project Folder Structures.

### 2 CPM PROJECT FOLDER STRUCTURES

The primary purpose of CPM Livelink is to ensure that all Key Project Documents and Supporting Material are made available and fully auditable for all key stakeholders and appropriate parties as and when required, both during the lifecycle of the project and as archived records against the relevant project and associated asset. Documents and deliverables identified in UKBP/TP146 – Investment Process and other procedures will not be deemed to be complete unless they have been stored in the designated folder within the appropriate CPM Project Folder Structure and named using the defined naming convention.

Documents and supporting information which form the audit trail should be stored in the Livelink CPM Project Folder Structures at the point of production. Examples of such documents are minutes of meetings and comments or approval emails from key stakeholders. By storing a document in CPM Livelink, Delivery Vehicles/Contractor Organisations will be deemed to have discharged all responsibility for circulating a document. It is the responsibility of the recipient to set notification on the relevant folder to ensure they are aware of the publication of a document.

A summary of basic principles leading to the establishment of the CPM Project Folder Structures are listed below:

- a) Information should be stored once only.
- b) Information should be stored in its final destination from day one. There should be no requirement to copy or move information during a project.
- c) The structure should facilitate management of security by folder and group. Although Livelink can facilitate allocation of permission to view information by file and by individual, the business overhead of maintaining the security of such a system renders it impractical.
- d) The structure should facilitate a project having one or many sites.
- e) Commercial or financial information should only be uploaded to any area of CPM Livelink where appropriate permission restrictions have been applied (see Section 5).

### 3 CPM PROJECT FOLDER STRUCTURE TEMPLATES

The use of the CPM Project Folder Structures is mandated for all projects included in the Capital Plan and their associated workbooks, as described within UKBP/TP146 – Investment Process. A template folder structure appropriate to the requirements of the Delivery Vehicle will be replicated in CPM Livelink for all Project information and these will sit under the Enterprise Workspace (Home Page) level of Livelink. A template folder structure for each site associated with the project will also be created within this structure to be used for storing SHESQ, design and commissioning information etc. Separate templates are available for Substations, Overhead Lines and Cable Routes. (For Cable Routes contained within the boundary of the electricity substation or associated operational land the appropriate Substation site folder structure should be used.)

As Built, Survey and Maintenance Information for each site is held in Livelink for the lifetime of the asset. Shortcuts to all associated project works can also be found here.

## 4 OWNERSHIP AND MANAGEMENT OF CPM PROJECT FOLDER STRUCTURES

The Capital Delivery Project Assurance Livelink Team (National Grid Livelink Team) own and are responsible for the creation and security of the CPM Project Folder Structures based on agreed folder structure templates and permission levels.

It is the responsibility of National Grid Electricity Network Investment (ENI) to advise as and when there is a requirement for a new CPM Project Folder Structure to be created. The creation of a CPM Project Folder Structure will be triggered by the production of the Investment Proposal Stage 1 documentation, which must be uploaded by ENI to CPM Livelink. On production of the Investment Proposal Stage 1 the ENI Capital Programme Team will request via proforma that an appropriate CPM Folder Structure is created for the scheme. All requests for new folder structures will require approval by the Capital Delivery Project Assurance Livelink Team Manager (Process Engineering Manager). The National Grid Livelink Team will meet once per week to review requests. This proforma is made available in the Livelink Best Practice Folder in CPM Livelink.

<https://proj.info/livelink/livelink.exe/properties/16607500>

The Capital Delivery Programme Team will provide up to date information as to the Investment Delivery Phase and Delivery Vehicle allocation. The Project Manager is responsible for confirming when required each substation, overhead line and cable route to be added to the project.

## 5 SECURITY OF DATA WITHIN CPM LIVELINK

### 5.1 CPM Project Folder Structures

Scope and definition of CPM Project Folder Structures is outlined in Section 16

Access and permission levels to all folders within the CPM Project Folder Structures are applied according to agreed templates appropriate to the Delivery Vehicle associated with the project. Most Pre Construction Project Information will be restricted to National Grid Users, with most site specific information (including commissioning and SHESQ documentation) will be made available to All users of CPM Livelink.

Appointed Local Security Officers (LSOs) with additional system privileges to create folders, shortcuts, custom views or edit permissions on folders/documents should not utilise these rights within the CPM Project Folder Structures. These privileges are granted following nomination by the Senior Manager of their respective Delivery Vehicle/Business Unit for the management of their own specific Delivery Vehicle/Business Unit Areas. All LSOs are required to achieve a level of competency commensurate with their duties as outlined in UKBP/TP199 – Operation and Management of the CPM Livelink System, Section 1.2.2.

Any changes required to the standard templates for the CPM Project Folder Structures must be agreed by the Major Stakeholders and approved by the Process Engineering Manager. . Process outlined in Appendix A.

### 5.2 Enterprise Level, CPM Project Folder Structures & Delivery Vehicle/Business Unit Own Areas

The following applies to all usage of the CPM Livelink System

**Under no circumstances should the Public Library Folder or any other non restricted folder be used as a document storage facility for any commercial or financial documentation. Where the CPM Project Folder Structures mandate upload of documents and supporting information which may contain financial or commercial information to a non restricted folder the specific data should be removed from the document before being uploaded to CPM Livelink.**

Where independent folder structures have been created within a Delivery Vehicle/Business Unit own area of CPM Livelink the appointed LSOs have full responsibility for maintaining these folder structures and the permission levels applied. Please note mandatory documentation uploaded in Delivery Vehicle/Business Unit own areas will not be deemed to be complete unless the original documentation has been uploaded to the relevant CPM Project Folder Structure.

Individual users uploading documentation to any area within CPM Livelink are responsible for ensuring that they adhere to the permission levels defined and set by the CPM Project Folder Structures, or by the National Grid Livelink Team/LSOs for Public Library/Pan Delivery - Restricted Access Areas and Delivery Vehicle/Business Unit Own Areas.

Users are able to see which permission levels have been applied to a particular folder via the 'Who has permissions?' option available from the function menu against all folders in CPM Livelink and should be aware that documents created in these folders will automatically adopt identical permissions to that of the parent folder. Before uploading a document to CPM Livelink users should always check the permission levels applied to that folder to ensure that these are suitable for the content of that document. Documents should only be uploaded to folders with the appropriate permission level and the document owner or creator should not change the permission of that document once loaded.

Should there be a requirement to transfer a document already stored within CPM Livelink to an alternative location (including the CPM Project Folder Structures) this should be done using the 'Copy' functionality and deleting the original to ensure correct permission levels are maintained. (Using the Move functionality to transfer documents will result in the document maintaining the permission levels of the original folder the document was created in.)

Where the user is in any doubt with regards the suitability of document content for the designated permission levels applied by the folder they are uploading to they should refer this in the first instance to their appointed LSO, who may then escalate the query to the National Grid Livelink Team where appropriate.

## 6 NAMING CONVENTION FOR KEY PROJECT DOCUMENTS

When uploading project documents to Livelink the following naming convention should be observed:

- Delivery Vehicle/Business Unit/Contractor Organisation
- Project no. (including suffixes if applicable)
- Document name as it appears on the Key Document Status Report or alternative guidance note for non tracked folder structures
- Any additional text (optional)

E.g. ENI 20490 Investment Team Minutes January 10

(For Tracked CPM Project Folder Structures where a document is not named exactly as it appears on the Key Document Status Report the document will not be deemed to be completed.)

## 7 SUBSTITUTE DOCUMENTS

Where there is a valid reason for a document or supporting information not to be uploaded a substitute document should be placed in the designated folder of the relevant CPM Project Folder Structure using the standard naming convention. This should clearly state why the document has not been uploaded, and where appropriate provide a link to an alternative document providing the data required, or for duplicates the location of the original document