

GENERAL SPECIFICATION

Geoinformation

GS EP GIN 305

Indexing of corporate technical documents

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Other Approving entity(ies):	

Contents

1. Scope	5
2. Reference documents	5
3. Définitions	5
4. Roles and responsibilities	6
4.1 Reference and Master Data Manager	6
4.2 Staging Data Manager	7
4.3 Document and Content Manager	7
4.4 Data Operations Manager	7
5. Standard indexing process for corporate technical documents	8
6. Step 1: Receiving documents	8
7. Step 2: Transfer of indexation requests	9
8. Step 3: Preparing for indexation	9
8.1 Checking existing documents in the database	9
8.2 Analyzing documents received	9
9. Step 4: Indexing technical documents	10
9.1 Documents to be indexed and documents not accepted	10
9.2 Fields to be completed for indexation	10
10. Requirements and best practices	12
10.1 Using value lists	12
10.2 Writing in free entry fields	12
11. Field description	12
11.1 Geography fields	12
11.2 Title	13
11.3 Keywords	13
11.4 Confidentiality	13
11.5 Author	14
11.6 Type of report	14

Indexing of corporate technical documents

Rev.: 03

Effective date: 10/2016

Page: 3 of 31

11.7	Document date.....	14
11.8	Language.....	15
11.9	Pagination.....	15
11.10	Library.....	15
11.11	Location	15
11.12	Issuing source.....	15
11.13	Contractor.....	16
11.14	Internal ref.....	16
11.15	RFS (Request For Service).....	16
11.16	Equipment.....	16
11.17	Installation.....	16
11.18	Stratigraphy	16
11.19	Formation.....	16
11.20	Type of appendices.....	17
11.21	Abstract.....	17
11.22	Comments	17
11.23	Free words.....	17
11.24	No. of copies.....	17
11.25	Transfer	18
11.26	Archive no.....	18
11.27	Storage location	18
11.28	Media.....	19
11.29	BIA (Archive library)	19
11.30	UWI.....	19
11.31	Well name.....	19
12.	Step 5: Quality control at the end of indexing	19
13.	Step 6: Information to owner entities	20
Appendix 1	Example of a Receipt/Indexing follow-up sheet	21
Appendix 2	Indexing information sheet	22
Appendix 3	List of corporate documents to be indexed	24
Appendix 4	Documents not accepted.....	26
Appendix 5	Typology of indexing fields	27



General Specification		GS EP GIN 305
Indexing of corporate technical documents		
Rev.: 03	Effective date: 10/2016	Page: 4 of 31

Appendix 6	Additional information to be entered	30
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1. Scope

This document defines the requirements regarding the different steps in the process of indexing technical documents.

Its goal is to ensure that all technical documents are indexed according to a standard procedure in the reference "Technical reports and dossiers" database at headquarters or in the affiliates.

It is intended for discipline administrators, data receipt controllers, document correspondents and data indexing operators, whether they are at headquarters or in affiliates, under contract or external providers of indexing services.

2. Reference documents

The reference documents listed below form an integral part of this General Specification.

External Documents

Unless otherwise stipulated, the applicable version of these documents, including relevant appendices and addendums, is the latest revision published at the effective date of this document.

Reference	Title
IHS (IRIS21)	Information Handling Services
ISO 3166-1	Codes for the representation of names of countries and their subdivisions - Part 1: Country codes - Third Edition

Total General Specifications

Unless otherwise stipulated, the applicable version of these documents, including relevant appendices and addendums, is the latest revision published.

Reference	Title
GS EP GIN 103	Dematerializing geoscience paper documents
GS EP GIN 307	Unique identifier and seismic data indexing
GS EP GIN 308	Indexing and storing physical well and fields samples
GS EP GIN 309	Indexing and preservation of well logs and well seismics

3. Définitions

The following definitions serve for the purposes of this document only.

Database (DB): set of data, usually structured in fields, organized to be usable by programs corresponding to specific applications (management, searching, sorting, mapping, etc.). Structured data groups are managed by a Database Management System (DBMS) to facilitate the independent upgrade of data and programs.

General Specification		GS EP GIN 305
Indexing of corporate technical documents		
Rev.: 03	Effective date: 10/2016	Page: 6 of 31

DB Tool: term referring to the computer application used to manage the reference "Technical reports and dossiers" database.

Document bank: E&P Branch corporate documentation including technical memos and reports produced by, or for, the technical entities.

Field: description zone containing a particular category of data of the same nature, consistent and homogeneous.

Metadata: data that describes or defines information on the document data. In particular, it can provide information about the content of resources, so as to enable them to be readily found, located and accessed.

Owning entity: any entity of an affiliate (division or technical department) or headquarters (geographical or technical division) that orders, acquires, owns or generates technical documents. By definition, all technical documents are owned by an entity.

Reference list: list of predefined validated values which should serve as a reference for attributing value to metadata. A reference list may come from an external source (e.g. [IHS](#)) or an internal source (e.g. the reference "Well header" database).

Reference "Technical reports and dossiers" database: database hosting all the corporate technical documents of the entities, in headquarters or an affiliate.

Reference "Well header" database: central database, situated at headquarters, which manages all Group "well header" data.

Sender: the entity at headquarters or in an affiliate, in charge of dispatching technical documents.

Technical document: any document (report, note, memo, etc.) containing technical know-how or knowledge.

UWI: the Unique Well Identifier identifies a well and/or its branches and guarantees that it is identified in the same way throughout the different databases. The Company's unique internal identifier comprises two letters WB followed by 6 figures (WBxxxxxx). It can be obtained from headquarters on request from the reference "Well header" database administrator.

4. Roles and responsibilities

4.1 Reference and Master Data Manager

The "Reference and Master Data Manager" (RMDM), sometimes called "Functional Data Administrator":

- Ensures the global consistency of the content of the reference "Technical reports and dossiers" database.
- Updates the predefined lists of values for field entries.
- Controls indexing quality.

4.2 Staging Data Manager

The Staging Data Manager (SDM) is responsible for receiving and controlling technical data. As such, s/he:

- Checks that data received corresponds to the information mentioned in the delivery slip, mailing list, email, etc.
- Ensures that the physical media (CD/DVD, hard drives, etc.) are readable.
- Ensures that the formats are readable and guarantee the integrity of the document.
- Ensures that the documents s/he receives fall within the scope of the reference "Technical reports and dossiers" database.
- Ensures that the confidentiality level is attached to the documents received.
- Triggers any action required if the media are non-compliant or unreadable.
- Checks in the reference "Technical reports and dossiers" database that the document to be indexed does not already exist, to avoid creating duplicate entries.
- Tracks the reception of documents (cf. Appendix 1).
- Passes on the information concerning documents to be indexed to the "Data Operations Manager" (an example of an information sheet is given in Appendix 2).
- Sends the documents to be indexed (paper, physical support media, digital files) to the "Data Operations Manager".

4.3 Document and Content Manager

The "Document and Content Manager" (DCM) is the interface between the owning entity and the "Data Operations Managers", s/he sends an inventory to entities who request it.

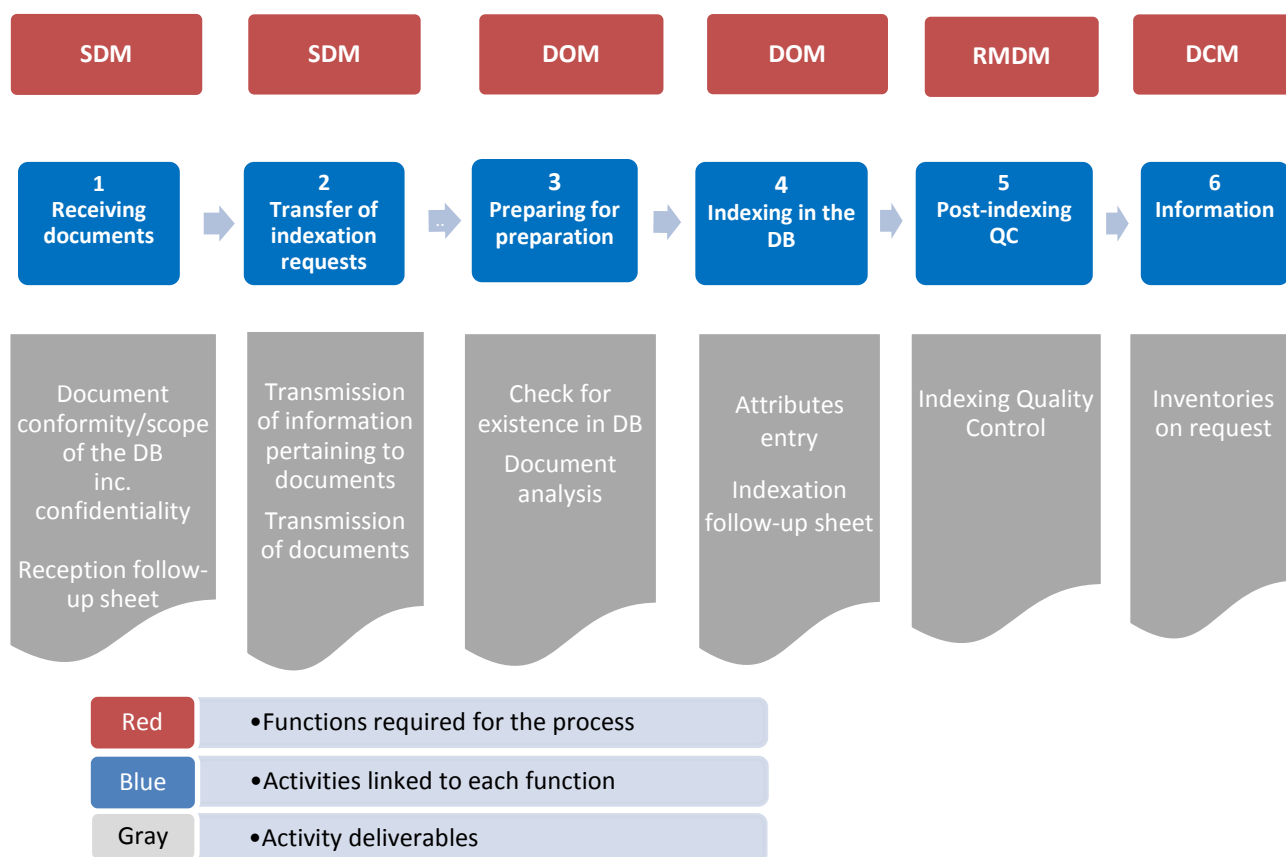
4.4 Data Operations Manager

The "Data Operations Manager" (DOM) also called the "Indexer", indexes documents in compliance with the instructions given by the SDM. S/he:

- Tracks the steps for indexing documents throughout the entire process.
- Checks that the document to be indexed is not already present in the database.
- Analyses the document content to extract the elements required to enter metadata.
- Informs the SDM if the data is non-compliant or unreadable.
- Allocates the document archiving number.
- Indexes the data in the database.

5. Standard indexing process for corporate technical documents

This document describes the steps in the standard indexing process, from the receipt of documents up to informing the client, and defines the deliverables for each one:



Note: In certain affiliates, the SDM, DOM and even DCM functions can be held by the same person.

6. Step 1: Receiving documents

{Rule 1:

The SDM shall report to the sender the results of the acceptance control.}

The SDM is required to check in particular:

- That the documents received correspond to the information given on the delivery slip, mailing list, email, etc.
- The eligibility of documents received within the scope of the documentary database.
- The readability of physical media (CD/DVD, hard drives, etc.).
- That the confidentiality level allocated to the documents is marked on the documents.
- The document origin (data-rooms, affiliates, partners, etc.).

- The formats received: only printed or digital documents in PDF format are accepted (cf. **GS EP GIN 103**).

The SDM enters the reception date and any pertinent comments in a follow-up tool (an example of a Reception/Indexation follow-up sheet is given in Appendix 1).

{Rule 2:

The SDM shall request a new dispatch from the owning entity if:

- **The physical media is non-compliant or unreadable.**
- **There is an integrity fault on the document(s).}**

For documents with a contractual retention deadline (e.g. data-room data), the SDM is required to check that the contractual retention deadline is specified, and if not, contact the owning entity to obtain it.

7. Step 2: Transfer of indexation requests

{Rule 3:

The SDM shall send the documents to be indexed and the information pertaining to them to the DOM, including the confidentiality level.}

An example of an information sheet is given in Appendix 2.

8. Step 3: Preparing for indexation

The DOM looks through the elements sent by the SDM.

8.1 Checking existing documents in the database

{Rule 4:

Before proceeding with a new indexation, the DOM shall check that the document received does not already exist in the "Technical reports and dossiers" database.}

If the document already exists in the "Technical reports and dossiers" database, the DOM is required to compare the documents to identify in particular, the most comprehensive document and the one which guarantees the best readability.

8.2 Analyzing documents received

It is advisable to group the documents to be indexed in a workspace where access is restricted to the DOM and SDM.

The DOM is required to analyze the documents received in preparation for their indexation, so s/he:

- Identifies the type of report for each document to be indexed. The list of types of reports is given in Appendix 3.
- Checks, for reports concerning one or more wells, the existence of the well(s) in the "Technical reports and dossiers" database.

If a well does not exist in the document database, the DOM is responsible for looking for it in the reference "Well header" database. If it is not there, the DOM sends the "Well header" database administrator the information required to create the unique internal identifier (e.g. a copy of the End of well report, a Log header).

{Rule 5:

The DOM shall inform the SDM if the documents are incomplete or cannot be used.}

The SDM is required to claim them from the owning entity.

9. Step 4: Indexing technical documents

9.1 Documents to be indexed and documents not accepted

Technical reports, notes and memos are to be indexed in the reference "Technical reports and dossiers" database.

On the publication date, the list of documents to be indexed in the document database is available in Appendix 3, and a list of the documents not accepted in the database is given in Appendix 4.

{Rule 6:

The documents shall be indexed in their finalized version sent by the owning entity.}

9.2 Fields to be completed for indexation

There are three types of fields:

- Mandatory fields: fields that are to be completed.
- Required fields: fields that are to be completed when applicable, according to the type of document (if the value is not available then the field remains empty).
- Optional fields: information that is useful to the users consulting or searching the document database.

These fields are described in section 11.

{Rule 7:

Fields shall be completed in compliance with the content of the table "List of fields and entry type".}