



Asset Type: **Gas**  
Function: **Design, Construction, Maintenance,  
and Operations**

Date Issued/Updated: **February 2009**

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**Title: Gas Document Development and Update Process**

## **Overview**

This work procedure provides the steps that Pacific Gas and Electric Company (Company) personnel must follow when developing or updating gas documents.

The Company develops and updates gas documents to help employees and supervisors conduct work in accordance with all applicable governmental codes, Company standards, manufacturer's instructions, and industry best practices.

Employees developing new or updating existing gas documents must follow the steps in this procedure to ensure that the impact on other processes and departments is addressed.

The process for developing or updating a gas document is similar to other Company processes, as outlined in [Utility Standard S0500, "Processes for Authorized Documents,"](#) and supporting material. This work procedure provides more detail about how to implement these processes in the gas transmission and distribution lines of business.

[Attachment 1, "Gas Document Development and Update Process Flowchart,"](#) provides a flowchart of the steps that Company personnel must follow when developing or updating a gas document. The [Gas Document Development Procedure](#) section in this work procedure provides instructions to follow in conjunction with the flowchart.

## **Governing Document**

[Utility Standard S4000, "Gas Standards Documentation Requirements"](#)

## **Safety**

This work procedure must be conducted in accordance with [Utility Standard Practice \(USP\) 22, "Safety and Health Program."](#)

## **Gas Document Development Procedure**

### **1. Needs Assessment**

A. Subject matter experts (SMEs) assess the need for developing or updating a gas document. A gas document developer must understand the purpose the documentation must fulfill. Gas documentation needs can originate from a variety of sources, some of which are listed below:

- Business imperatives, goals, or metrics.
- Introduction of new products, tools, or technology.
- Changes in applicable government codes or regulations.
- Changes in Company standards or requirements.
- Changes in Integrity Management Program procedures.
- Changes in suppliers or existing products (e.g., obsolescence).
- Changes in manufacturers' maintenance and operations instructions.
- Changes in cost drivers (e.g., repair vs. replacement, life extensions, asset utilization).
- Results from audits.
- Information gained from incidents.
- Required changes resulting from Material Problem Reports.
- Requests from third parties.
- Identification of best practices.
- Employee suggestions.
- Need to clarify or correct text or illustrations.
- Need to improve readability.

B. SMEs submit their standards recommendations to the appropriate gas technical team.

C. The appropriate gas technical team validates that the needs are a high priority before initiating work on a gas documentation project.

**Note:** Gas technical team operations are described in Work Procedure [WP4000-03, "Gas Technical Team Work Procedures."](#)

D. If the changes involve implementing a new tool or technology, the gas document developer must ensure completion of the procedures defined in [Engineering Material Specification 4000, "Process for Introducing, Evaluating, Approving, and Retiring Products."](#)



## 2. Document Development and Updates

The gas document developer must perform the following tasks:

- A. Choose the proper gas document to update or the applicable document type to develop for a new document based upon directions from gas standards personnel.

**Note:** Utility Standard S0500, "Processes for Authorized Documents." also provides directions, supporting documents, and templates to assist in document development.

- B. Ensure that the procedure conforms to the requirements of Utility Standard Practice (USP) 4, "Records, Retention, and Disposal."

- C. Ensure that all gas maintenance and operation forms provide spaces to record the following entries for the person performing the maintenance and the reviewing supervisor when required:

1. The employee's printed name, printed initials, or printed LAN ID.
2. The employee's initials or signature.
3. The maintenance or review date.

- E. Specify the frequency for performing repetitive processes with the following language:

"...<period of time>, not to exceed <maximum period of time>, to the date."

For example, "Perform inspections annually, not to exceed 15 months, to the date."

- F. Prepare the documented process if it affects employees outside the immediate audience by performing the following steps:

1. Identify the impact the document has on Company personnel other than the document's target audience (usually the Company's design, construction, maintenance, and operations personnel).
2. Address any issues with the affected personnel before releasing the document.

The following are examples of Company activities that could be affected by a new process:

- Training programs and materials.
- Operator qualification programs.
- Integrity management programs.
- Auditing processes.
- Strategic sourcing processes (material codes).
- Estimating processes (e.g., Jet Set).
- Computer programs (e.g., the Integrated Gas Information System [IGIS]).
- Development of an effective communication plan.

**3. Document Approval**

Gas documents must be routed for approval in compliance with Utility Standard S0500, "Processes for Authorized Documents." Each document type has its own required approval level (e.g., supervisor, manager, director, senior director, vice president).

**4. Publication**

Company personnel responsible for publishing standards documents on the Company intranet in the Technical Information Library (TIL) and in other media (CD or paper) publish the approved document at the direction of the assigned gas standards personnel.

**5. Communication**

A. The gas technical team notifies Company personnel when a new or revised gas document is available. The team chooses the method of notification based upon the level and importance of the new information, as illustrated by the examples listed in Table 1.

**Table 1. Methods of Communicating the Availability of New Gas Standards Documentation**

<b>Change Level</b>	<b>Communication Methods</b>	<b>Documentation Examples</b>
Minor	Email	Update of material codes Minor procedural changes
Mid-level	Email Conference call with affected supervisors	Introduction of procedural changes to existing processes
Major	Email Conference calls or meetings (road shows) with supervisors Supervisor roll-out of changes to target audiences with verification	Introduction of new manual Rollout of major new procedure Issuance of major new tools or a major piece of new technology

B. Company gas standards personnel verify that target audiences and their direct supervisors receive notification of new or changed document.

**Note:** When it becomes operational, the Company's Learning Management System (LMS) will be used to verify communication of major changes (the system is estimated to be in operation in second quarter of 2009).

C. Gas standards personnel must ensure that the next publication of the appropriate gas manual includes updated documentation that has been processed since the last release of the manual.



**Definition of Terms**

**Gas Document:** A formal document that provides instructions to Company personnel on how to design, build, maintain, or operate gas facilities or tools. Examples of such documents include the following:

- Gas numbered documents (design and construction standards).
- Gas utility standards (for Maintenance and Operation [M&O] activities).
- Gas work procedures.
- Engineering material specifications.
- Training materials.
- Manuals.
- Job aids.

**Gas Document Developer:** A subject matter expert, gas standards employee, or other employee who is developing or updating a gas document.

**Gas Standards Personnel:** Employees assigned to ensure that the Company's gas documents are reviewed and updated in a timely fashion.

**Gas Technical Team:** A cross-functional team of individuals representing appropriate stakeholders for a specific subject matter. At a minimum, each team must be composed of subject matter experts and field stakeholders.

**LMS:** Learning Management System.

**SME:** Subject matter expert.

**Recision**

This is a new document.

**Reference Documents**

[Utility Standard S0500, "Processes for Authorized Documents"](#)  
[Standard Developer's Handbook](#)

**Attachments**

[Attachment 1, "Gas Document Development and Update Process Flowchart"](#)

**Contact for More Information**



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**Approved by**



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**Revision History**

<b>Chg No</b>	<b>Date</b>	<b>Description</b>	<b>By (LAN ID)</b>
00	February 2009	Initiated and issued new document defining procedures for employees who develop and update gas documents	[REDACTED]

Work Procedure

February 2009

Gas Document Development and Update Process Flowchart



