Supplier/Operator Review Instructions for JIP33 Specifications

Revision History

VERSION	DATE	PURPOSE
A01	3rd September 2019	Issued for use
A02	5th May 2020	Issued for use

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1 Introduction

The vision of the Joint Industry Programme 33 (JIP33), initiated by the International Association of Oil & Gas Producers (IOGP), is to standardize the specifications used for procuring equipment, and to enable the supply chain to become better, faster and cheaper at delivering to their customers.

Key to the success of this programme is the participation of equipment suppliers, whose perspective will add significant value to the process and the aims of JIP33. It is recognized that the ultimate success of JIP33 depends on achieving open and challenging feedback from suppliers who are vital to capturing the potential benefits from these new specifications. Suppliers are therefore highly encouraged to give unfiltered opinion on any areas of inefficiency or missed opportunities and not to feel limited to simply commenting on the specification and associated documents as presented.

Reviewers are requested to appraise the specification as a complete suite of documentation (refer to clause 2) and provide open and honest comments and feedback on the content.

The review will take place in an online tool, Jama Connect (Jama), which maintains the complete specification content in a database, providing full traceability for each specification clause. Reviewers will also be given access to more familiar Microsoft Word and Excel based documents for reference, but we strongly urge you to keep your commenting within Jama, so that we can maintain traceability and consolidation of the content.

2 JIP33 Specifications

JIP33 specifications build on existing industry standards to provide a full set of requirements with which to purchase equipment and packages. This set of requirements is structured into the follow documents:

- A supplementary specification to an industry standard, specifying a set of "minimum requirements" sufficient to purchase equipment that meets the functional needs of the users.

- An information requirements specification (IRS), specifying a list of pre-defined documents and data required to be delivered by the supplier.

- A quality requirements specification (QRS), specifying quality management system and inspection and testing requirements.

- An equipment data sheet template, specifying the options the purchaser wishes to select, and project specific information.

3 Development of the Specification Package

The technical specification was created by the following process:

- Review of the chosen parent standard to identify gaps, i.e. where it is deficient in requirements, over specifying requirements, or unclear in its meaning.

- A rationale is written to justify the requirement needed to fill the gap.

- New requirement text is written to add to or replace the clause in the parent standard, or to delete specific text or even a full clause from the parent standard.

During development of the technical specification, the requirements for data sheet elements, information requirements and quality (inspection/verification) requirements were also identified.

The data sheet was developed to support options identified in both the parent standard and the overlay and may have been based on the parent standard data sheet (if applicable).

The IRS was developed based on the parent standard and overlay requirements for the supplier to provide data/information, either by submittal of documents, or retaining documentation at their works.

The QRS was developed based on both the parent standard and the overlay, for purchaser intervention activities to verify certain requirements specified. The QRS, where applicable, may also address material certification and traceability requirements.

The reviewer should familiarize themselves with the complete suite of documents that will be available on the [JIP33 Specification Development](#) website, to ensure an understanding of the context of the Jama items in each of the documents.

4 Review Process

Suppliers and operators are asked to review the specification in parallel over a period of four to five weeks (duration depends on type of equipment).

Suppliers are requested to complete a "yes/no" spreadsheet which will be provided by email, whereby each clause is identified as:

1) standard scope of supply;

2) available as a standard option;

3) available as bespoke/custom option.

If you do not consider that it is possible to meet the requirement, then add "no" to each column (and mark as a "red flag" in Jama – refer to subclause 6.5).

A fourth option (and column in the spreadsheet) will provide a space to denote (yes/no) if you can propose an alternative solution to the clause written that would simplify the requirement or remove the need for a costed option (selections 2) and 3) above). If yes is selected, then the proposal should be made against the clause within Jama.

A common review environment will be provided whereby all operators and suppliers can view and respond to each other's comments.

After the review close date, the Lead Subject Matter Expert ("LSME" – the author of the specification), will consider all of the comments made by both suppliers and operators, starting with those identified with "red flags" (refer to

subclause 6.5). As required, the LSME will collaborate with the core team of operators who have supported the development of the specification in the preceding months.

It may be necessary, during this period, for the LSME to contact suppliers and operators for clarification on certain comments.

If time permits, as each clause is reviewed, responses to the comments will be posted in Jama. Alternatively (or additionally), the LSME may set up a meeting with suppliers to discuss the comments at a higher level.

A number of weeks after the review closes, the full work group of operator subject matter experts and the LSME will attend a workshop to finalize the content of the specification, such that it can be adopted by all operators. The complete specification package will then be finalized in Jama and exported for JIP33 steering committee and IOGP management approval, prior to publishing.

5   Jama Connect (Jama)

The review of this specification package will be conducted within a cloud-based requirements management tool – Jama. If there is a problem or issue with using this tool, you should discuss this with your contact at Aker Solutions, to resolve the issue or make alternative arrangements for providing your comments.

The preferred internet browser for accessing Jama is Google Chrome. If Jama is used in other web browsers, some functionality may be limited.

You will receive automated emails from Jama (iogp@collab.eu1.jamacloud.com) with the invitations to the reviews that have been set up for the technical specification in question. There will be four reviews (if all are applicable), one for each:

- technical requirements specification;

- data sheet;

- information requirements specification;

- quality requirements specification.

You can access the reviews in one of two ways:

- follow the link in the email, log in and you will be in the appropriate review;

- go to Jama (https://iogp.jamacloud.com/login.req), log in, select "REVIEWS", and choose the review you wish to access (refer Figure 1).
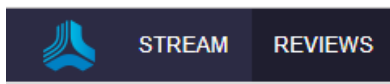
If you have not already had a Jama user account created for you, you should contact feedback@iogp-jip33.org to request an ID and password to be set up. A user account will be created for you, with the user ID usually consisting of your given name and your family name, e.g. john.smith. Your default password will be "password" which you will be prompted to change the first time you access Jama.

6   Review in Jama

For each document you receive to review, the main content that you will see within Jama will be the technical content. Most of the "boiler plate" text (e.g. disclaimer, table of contents, introduction, copyright notice, etc.) will be

excluded from the Jama review. However, the complete documents can be also be accessed via the JIP33 Specification Development website.
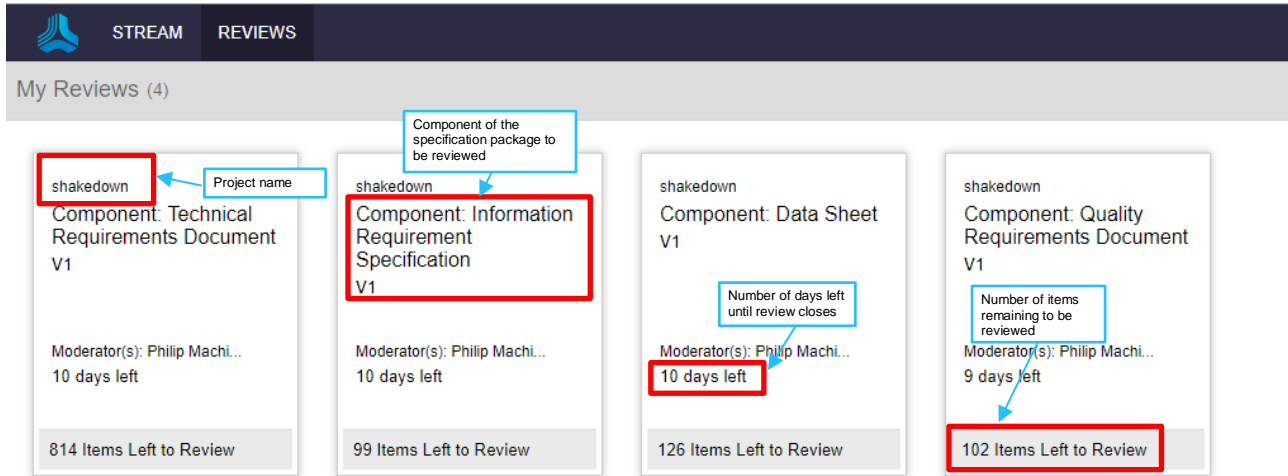

Figure 1 – Jama Reviews Window

6.1 Technical Specification

Figure A.1 shows a typical view of a technical specification review. The functions and fields have been marked and described for the purpose of a quick reference guide.

Note The default view shows 50 items and you will need to change page or increase the number on view to see more items.

Due to copyright restrictions, it is not possible to replicate the parent standard text in Jama, thus the reviewer will need to read each clause in Jama, alongside the corresponding clause in the parent standard.

Each Jama item is made up of several attributes summarized below and as shown in Figure A.1.

- Clause number corresponding to the parent standard, or may be a new (sequential) number if a clause has been added in the overlay;

- Requirement text which is the additional or replacement text to the parent standard;

- "Type of gap" identifying one or more categories for the gap that has been identified in the parent standard;

- "Above section amendment" identifies a new clause, figure or table added to the parent standard, e.g. "Add new subclause". It may also be used to delete or replace clauses, figures or tables, e.g. "Delete Figure 11". Sometimes it is necessary to amend a clause heading/title, or even the numbering and this field will be used for that purpose, e.g. "Replace clause heading with XXX".

- "Title" is the clause/subclause heading, if applicable. It may also be the title of a figure or table.

- "Below section amendment" is similar to the above section amendment. Only one of these fields will be completed, which will determine where the new/amended requirement text sits within the document.

- "Justification" is an explanation of the reasoning behind the requirement.

- "Action" is a simple flag identification of "add", "replace" or "delete" for the item's action on the parent standard.

6.2 Data Sheet

Figure A.2 shows a typical view of a data sheet review. The functions and fields have been marked and described for the purpose of a quick reference guide. The exported document will be an Excel spreadsheet and the Jama review represents the cells as they will appear on the spreadsheet.

Each Jama item is made up of several attributes summarized below and as shown in Figure A.2.

- The section/clause number in the parent standard or supplementary specification to which the data sheet parameter is related;
- Name of data sheet parameter to be set by the users of the data sheet;
- Value/parameter to be set by the users of the data sheet which may be selected from a dropdown pick list (pre-defined) or by entering free text, as appropriate;
- Units of measure if applicable (if appropriate, may be possible to select these from a pick list);
- Cells to be completed by the users of the data sheet for recording additional/supportive comments and the revision number/letter of the data sheet when the item was last amended;
- Indication if the parameter is to be completed by the purchaser or the supplier/manufacturer, or either. In the exported spreadsheet, colour is used to denote who is responsible for completing the data sheet item;
- "Datasheet guidance" provides additional information to the user, about the data sheet item;
- "New data field?" indicates whether the data sheet item is new (i.e. from the supplementary specification) or not (i.e. from the parent standard).

6.3 IRS

Figure A.3 shows a typical view of an IRS review. The functions and fields have been marked and described for the purpose of a quick reference guide.

Note   The default view shows 50 items and you will need to change page or increase the number on view to see more items.

Each Jama item is made up of several attributes summarized below and as shown in Figure A.3.

- Information deliverable requirement (data or a document).
- Description of the information deliverable requirement.
- "Condition invoking requirement" describes special conditions under which the information deliverable is required.
- "Typical deliverable" which would normally include the information requirement.
- Requirement for "submit at proposal", yes/no.
- Issue "purpose", for information or for acceptance.
- Reference of the parent standard or overlay clause that requires this information.
- "Format" of the delivered data.

6.4 QRS

Figures A.4, A.5 and A.6 show typical views of the QRS review, which is divided into three component parts of the document – main document, Annex A and Annex B. The functions and fields have been marked and described for the purpose of a quick reference guide.

Note 1   Annex B (material traceability) is not always applicable for review.

Note 2   The default view shows 50 items and you will need to change page or increase the number on view to see more items.

6.4.1   QRS - Main Document

The main document is mostly made up of standard text which has already been established for the JIP33 QRS documents, but comments are still welcome.

Each Jama item is made of up several attributes summarized below and as shown in Figure A.4.

- Clause/section number;
- Clause/section title;
- Clause/section (requirement) text.

6.4.2   Annex A (Conformity Assessment System)

Each Jama item is made up of several attributes summarized below and as shown in Figure A.5.

- Purchaser's assessment activity, including a reference to the source of the requirement for the activity.
- Conformity assessment system (CAS) levels A to D which reflect the intended level of purchaser's intervention for each of the four levels, where A is the most stringent and D the least. CAS A would be applied to a high risk scope of supply (e.g. unknown supplier, critical equipment or both) and CAS D would be applied to low risk scope of supply (e.g. frame agreement supplier, non-critical equipment). Intervention levels are Hold, Witness, Surveillance, Review. Refer to clause 3 and 5 of the QRS for more detail on CAS and intervention levels.

6.4.3   Annex B (Material Traceability)

Each Jama item is made up of several attributes summarized below and as shown in Figure A.6.

- Description of the component for which material traceability is required.
- Material inspection "certificate type", e.g. 2.2.
- "Material traceability level", e.g. Level III.
- Any "additional requirements".

6.5   Commenting in Jama

To comment on any clause in Jama, click on the speech bubble to open up the commenting box.

Alternatively, to comment on any specific component of the clause, first highlight the component text by clicking and holding the left mouse button. Releasing the mouse button will automatically open the commenting box.

Comments should be constructive, complete and justified. If you disagree with the content of a clause, make a proposal for how you think it could be amended.

As shown in Figure 3, comment text can simply be added to the commenting box as a general comment (default), or comments can be posed as questions (by selecting the question mark "?"), as proposed amendments (by selecting the pencil) or as a "red flag" (by selecting the exclamation mark "!").

Note that these functions may not be available if the browser used is not Google Chrome. To work around this, use the following text in front of your comment (including the square brackets):
[QUESTION], **[PROPOSAL]**, **[ISSUE]**.
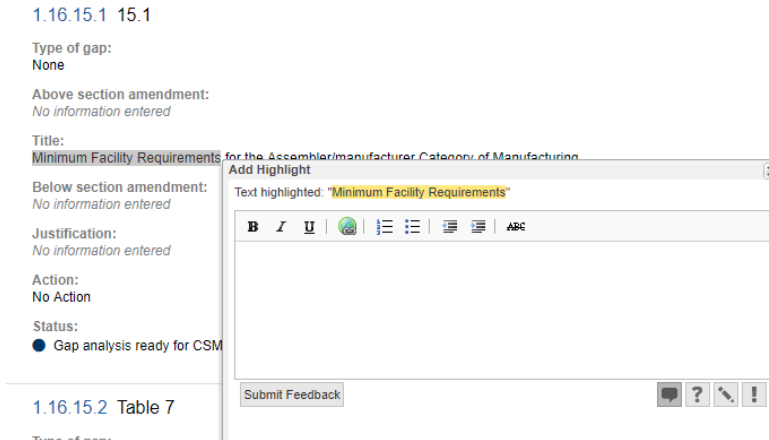General comments can be left without a prefix.
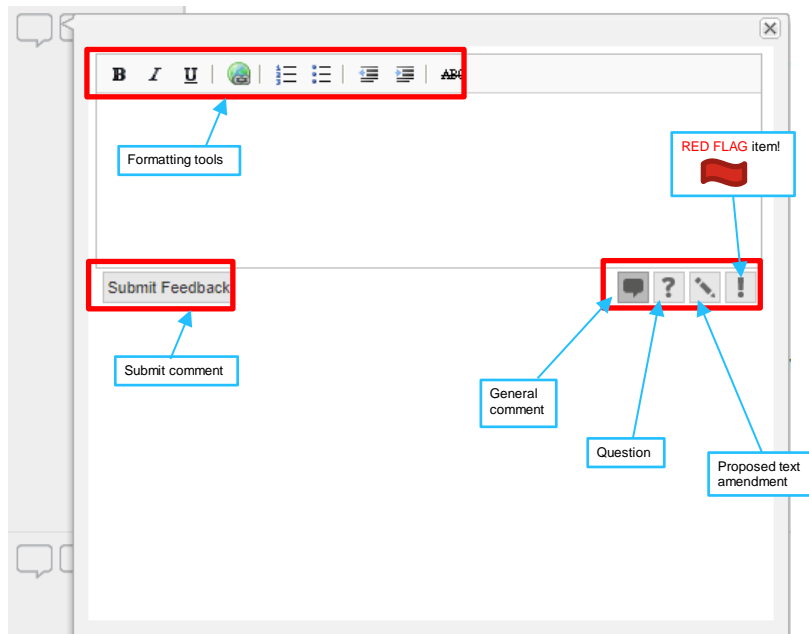

Figure 2 – Commenting on Specific Text

Figure 3 – Commenting Box

It is also possible to add some formatting to the comment text using the formatting toolbar shown in Figure 3.

Red flags should be applied with careful consideration and must always be accompanied by a constructive, complete and justified comment.

For suppliers of equipment or services, red flags should be applied where it is considered that the requirement is adding excessive cost (or adding no value for the cost), if the requirement is impossible to meet or if the requirement requires a proprietary solution.

For operators, red flags should be applied to requirements (or lack of) which may risk your organization's adoption of the specification.

Should a comment be necessary against a clause which is not shown in Jama (e.g. where it has been identified as no gap and thus no overlay), the comment should be made against the clause of the next level up, e.g. to comment against subclause 7.1.3, if not in Jama, then the comment should be made against subclause 7.1.

It is possible to respond to a comment that someone else has made in Jama by opening up the comment and clicking on reply or agree. Clicking on reply will open up a commenting box below the original comment. Comments should be entered and then click on reply at the bottom of the screen (refer Figure 4). Clicking on agree will enter a notification of your agreement against the comment.

Once you have completed your review of a requirement, you should finalize this demonstrating your acceptance or rejection of the requirement.

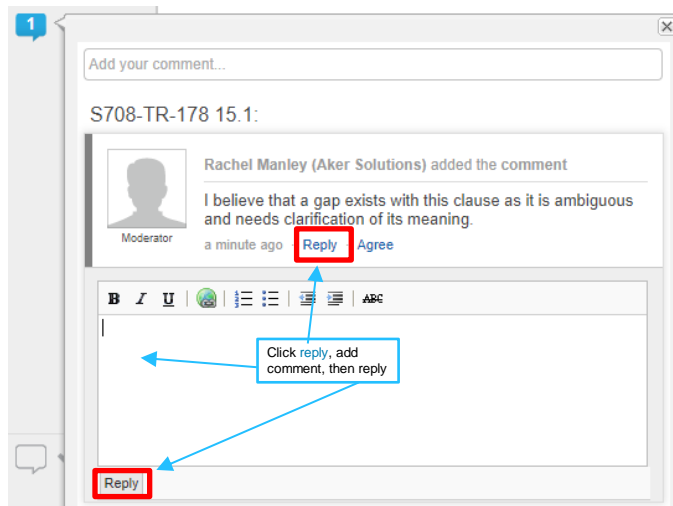To accept, simply click on the tick, noting that acceptances must NOT be accompanied by any comments:

Figure 4 – Replying to a Comment

To reject a requirement, click on the cross. If you have ANY comment, however minor, you must reject the requirement. All rejections must be accompanied by a constructive, complete and justified comment.

Once you have completed your review of all the clauses/requirements, you should finish the review by selecting "Actions", "Finish review".
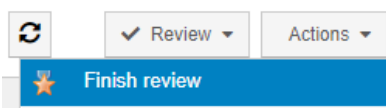
You will be presented with a "Review Complete" box which will summarize your review (refer Figure 5). You will be advised of how many items were marked approved and how many were marked as rejected, along with the option to mark any remaining items as approved.

At this stage, you have the opportunity to make a final overall comment to the review.

If any items have been marked as rejected during the review, you will only be given the option to "Request New Revision". This will notify the lead subject matter expert that the review is completed, but note that in this case, a new revision will not be issued.

If all items have been marked as accepted during the review, then you will be given the option to click on the "Approve" button to complete the review.

Once you have completed the review, it can be reopened by selecting "Actions" and then "Reopen review". Additional comments can be made and approvals/rejections modified in the review, up until the review deadline.
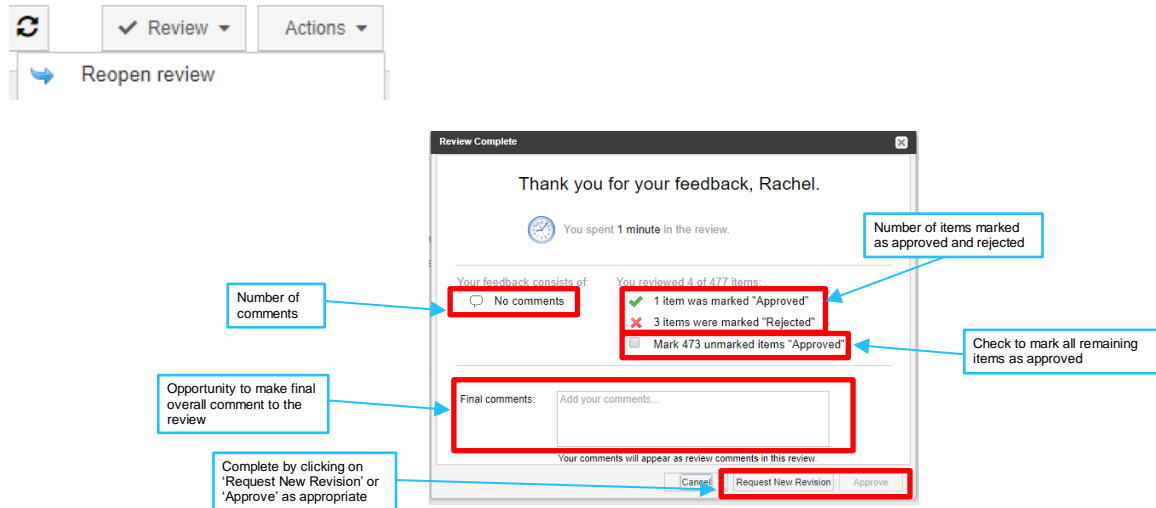

Figure 5 – Finishing the Review

Annex A   Jama Review Screenshots

Figure A.1 – Technical Specification Review

Figure A.2 – Data Sheet Review

Requirement
(Deliverable Tab – Col B)
A short description of the Information Deliverable that would typically provide the Information required

3.14.1.2 Delivery schedule

Number auto-generated by Jama. Hyperlink to open "single item view"

Schedule depicting, as applicable to the service or product scope, design, supply, manufacture, inspection, testing and delivery activities to be executed by [vendor/sub-vendors]

Description
(Definitions Tab – Col C)
An excerpt from the Parent Standard, IOGP Supplement or Industry Standard

Schedule details typically** include;

a. contractual milestones
b. activity early/late start/completion dates, durations, dependencies (Calendar Dates)
c. critical path and float
d. outsourced services and equipment (cross referenced to purchase order and sub-vendor)
e. information deliverable submission dates identifying any execution activity dependencies

Condition Invoking Requirement
(Deliverables Tab – Col C)
Describes special condition(s) under which the Information Deliverable is required

Once agreed , changes to planned dates are subject to agreement by [purchaser].

Progress against planned dates is measured and the schedule updated and reported to the [purchaser] in accordance with contract reporting agreements.

** Schedule development tools, formats and submission protocols follow the [vendor's] standard practice unless otherwise agreed in the contract.

Submit at Proposal
(Deliverables Tab – Col E)
Information Deliverable is required to be submitted with Suppliers Proposal

Condition Invoking Req.:
No information entered

Typical deliverable
(Deliverables Tab – Col D)
Purchaser to advise the short description of the Information Deliverable that would typically include this Information Requirement

Typical Deliverable:
Delivery/Production Schedule

Submit At Proposal:
Yes

Reference
(Definitions Tab – Col D)
Parent Standard, IOGP Supplement or Industry Standard that the Information Deliverable is identified in

Purpose:
For Information

Purpose
(Deliverables Tab – Col F)
Purpose for submission

Reference:
ANSI/API Std 610 10.2.3.d

Format:
PDF

Format
(Definitions Tab – Col E)
Defines the required format of the relevant Information Deliverable to be submitted

Status
Internal use only

Status:
⦾ Draft

Figure A.3 – IRS Review

Figure A.4 – QRS Main Document Review

2.14.2.1 Quality plan

Quality plan (ISO 9001, 8.1 and ISO 10005)

Purchaser's assessment activity
Description of activity and references to the source of the activity

CAS A activity:
Review

Conformity Assessment System level
Different levels of assessment of the vendor's control activities based on evaluation of the vendor's capability to conform to the product or service specification and obligatory requirements

CAS A reflects the highest risk and associated extent of verification. CAS D is the lowest

CAS B activity:
Review

Intervention level
Hold, Witness, Surveillance, Review

CAS C activity:
Review

CAS D activity:
-

Status:
● Draft

Status
Internal use only

Figure A.5 – QRS Annex A Review

2.15.1 Centrifugal Pump

Equipment / System

Above section amendment:
No information entered

Title:
No information entered

Below section amendment:
No information entered

2.15.1.1 Metallic Components

Metallic Components ANSI/API Std 610, Annex H or as specified in IOGP S-615D

Component
Description of component

Certificate Type:
3.1

Material traceability
Level I – Full traceability
Level II – Type traceability
Level III – Compliance traceability

Material inspection certificate
Declaration of compliance "2.1"
Test report "2.2"
Inspection certificate "3.1"
Inspection certificate "3.2"

Material Traceability Level:
Level II

Additional Requirements:
NACE MR0175 (all parts) or NACE MR0103 if and as specified in IOGP S-615D. Refer to IOGP S-615, 6.12.1.8

Type 3.2 Certification is applicable as per the Design Requirements

Status:
● Draft

Additional requirements

Status
Internal use only

Figure A.6 – QRS Annex B Review