Supplier/Operator Review Instructions for JIP33 Specifications

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Revision History

VERSION	DATE	PURPOSE
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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 and engineering organisations who are vital to capturing the potential benefits from these new specifications. Reviewers 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 main 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. The Jama review is conducted in an open format in which comments are visible to other reviewers. Suppliers will also be issued with a Microsoft Excel spreadsheet in which they can provide their feedback in a closed (private) format, refer to section 4.

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.

NOTE Some specifications have been built-up as standalone documents as there was no applicable parent standard to overlay. In this case, the process was the same, but gaps are identified by assessing what requirements are needed to ensure procurement of safe and operable equipment. Some requirements may have been written to normatively reference a selection of industry standards to avoid re-writing requirements which already exist.

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 all components of the specification over a period of typically four to five weeks (duration depends on type of equipment). The main part of the review will be conducted in an open format in Jama in which review comments are visible to all and where reviewers can view and respond to each other's comments.

Suppliers are requested to complete a specification impact assessment 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 townhall session which is open to all reviewers will be held early in the review period, typically within the first week, to provide guidance on this process and to answer questions. We will also aim to make direct contact individually with each of the suppliers towards the end of the review process, typically with one week left, to provide any further clarifications or discuss specific issues that may have been raised by the supplier.

After the review close date, the Lead Subject Matter Expert ("LSME" – the author of the specification), will consider all of the comments made by all reviewers, 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 reviewers for clarification on certain comments.

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).
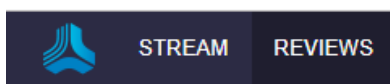
If you have not already had a Jama user account created for you, you should contact feedback@iogp-jip33.org to request an ID and password to be set up. A user account will be created for you, with the user ID usually consisting

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.
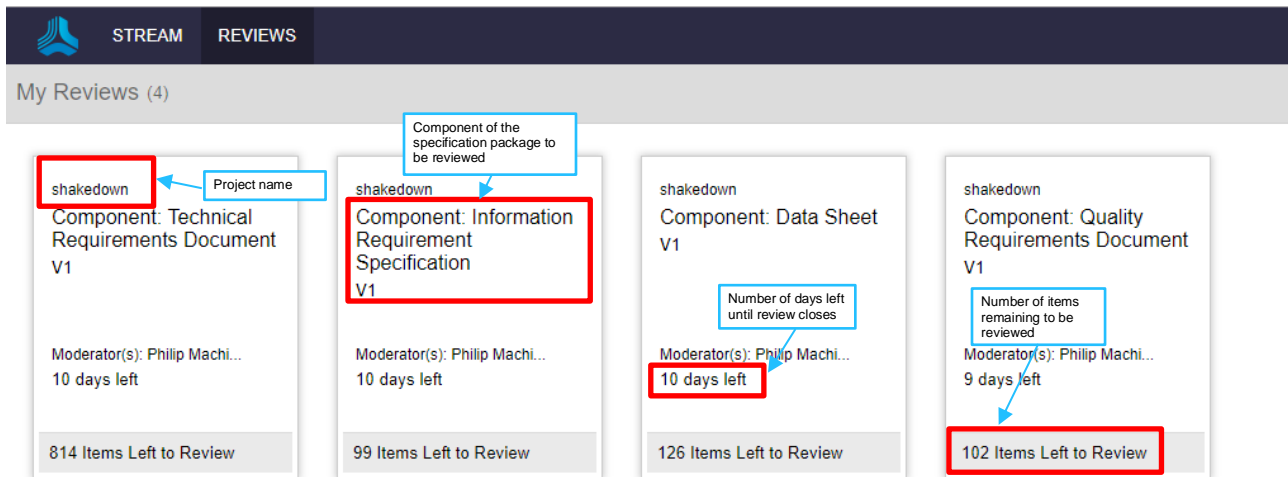
Figure 1 – Jama Reviews Window

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;
- "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.

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;
- "Justification" is an explanation of the reasoning behind the requirement;
- "Datasheet guidance" provides additional information to the user, about the data sheet item;
- "Default value" may apply where there is a pre-defined pick list of options.

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

Comments should include the following three components:

1. Comment – your opinion; agree or disagree.
2. Rationale – what is the reasoning behind your comment?

3. Solution – what would you do differently?

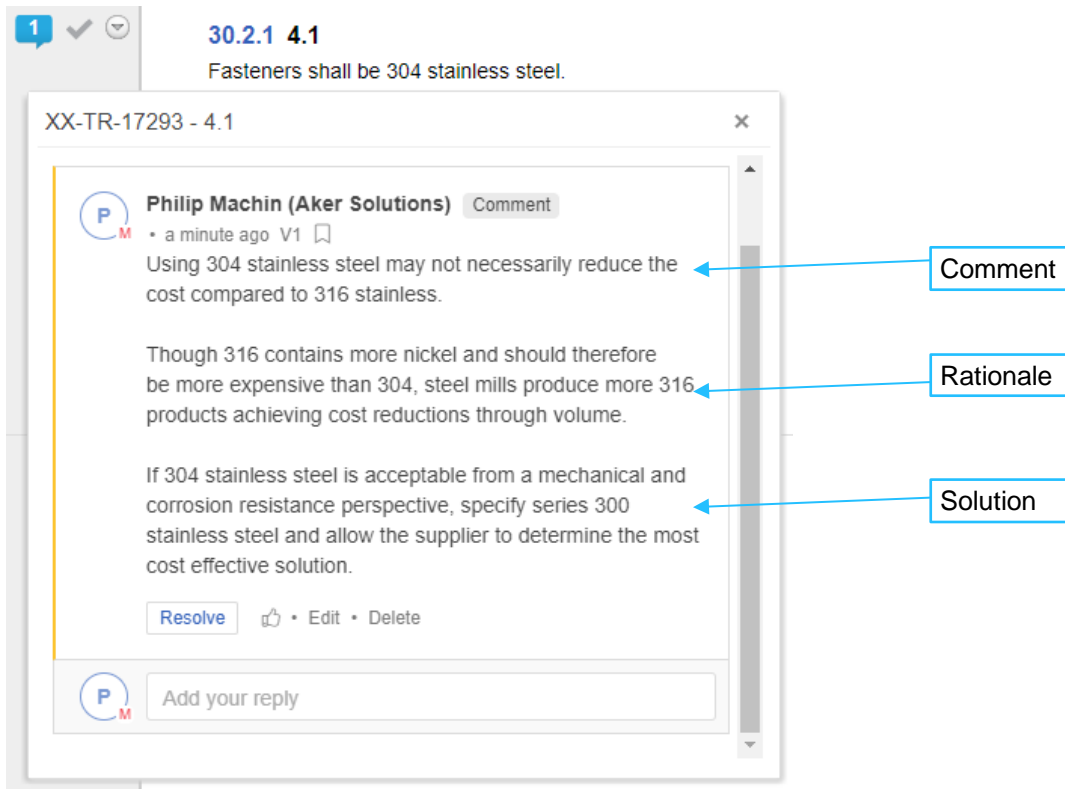Figure 2 shows an example of a correctly structured comment containing the three components.

30.2.1 4.1
Fasteners shall be 304 stainless steel.

XX-TR-17293 - 4.1

Philip Machin (Aker Solutions) Comment
• a minute ago V1
Using 304 stainless steel may not necessarily reduce the cost compared to 316 stainless. ← Comment

Though 316 contains more nickel and should therefore be more expensive than 304, steel mills produce more 316 products achieving cost reductions through volume. ← Rationale

If 304 stainless steel is acceptable from a mechanical and corrosion resistance perspective, specify series 300 stainless steel and allow the supplier to determine the most cost effective solution. ← Solution

Resolve • Edit • Delete

Add your reply

Figure 2 – Comment structure

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 requirement text by clicking and holding the left mouse button. Releasing the mouse button will automatically open the commenting box and display the highlighted text as shown in Figure 3.

30.2.1 4.1
Fasteners shall be 304 stainless steel.
ID:
XX-TR-17293

Above section amendment:
No information entered

Title:
No information entered

Below section amendment:
No information entered

Justification:
No information entered

Add highlight   ×

"Fasteners shall be 304 stainless steel."

B I U S

Comment   Cancel
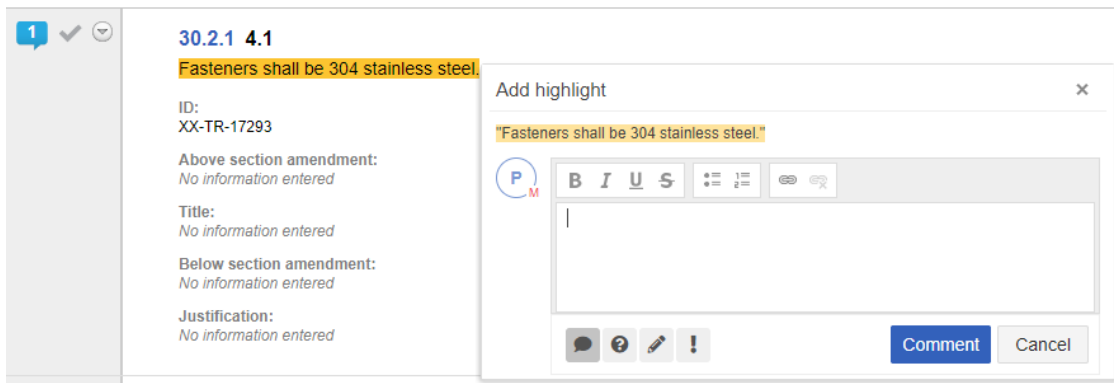
Figure 3 – Commenting on Specific Text

Comment text can 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 "!") as shown in Figure 4.

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.
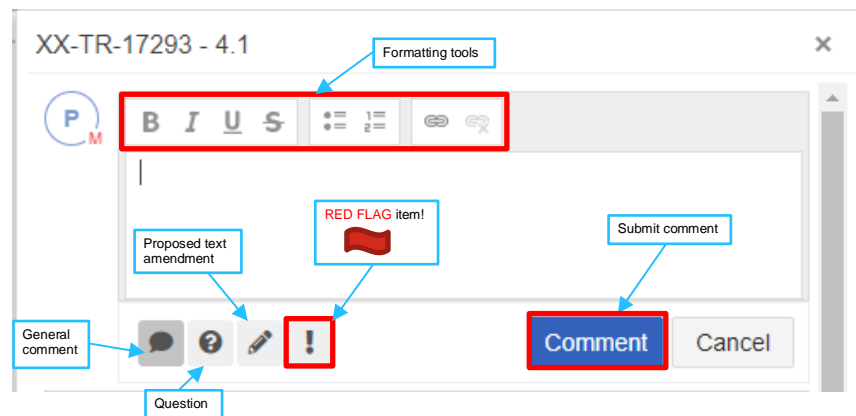
Figure 4 – Commenting Box

It is also possible to add some formatting to the comment text using the formatting toolbar shown in Figure 4.

Red flags should be applied with careful consideration and must always be accompanied by a structured comment (see Figure 2).

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. **Please note that in line with competition law no actual commercial or pricing information is requested and should not be provided to support the use of a supplier red flag. Any commercial content in Jama will be removed by administrators.**

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

Once a comment has been made against an item there will be two options for entering a comment. Either "Add a new comment" which will start a new comment thread, or "Add your reply" which will allow you to respond to existing comments by appending your response to the existing comment as shown in Figure 5.
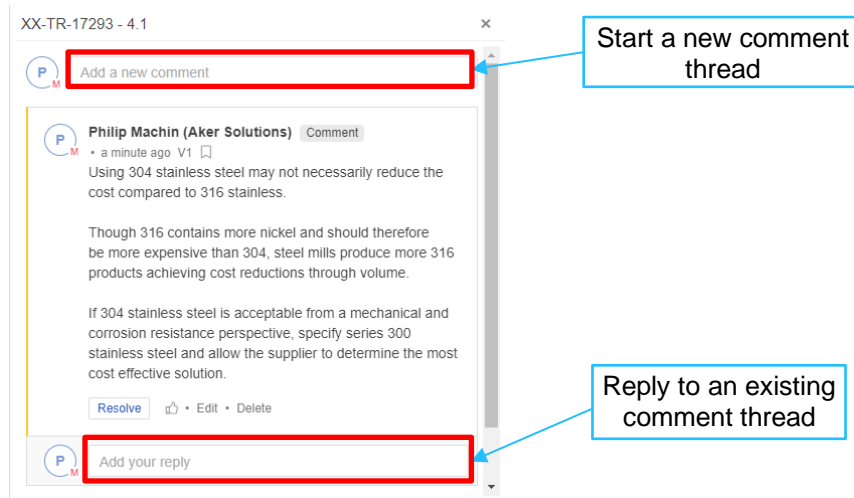
Figure 5 – Replying to a Comment

You can keep track of requirements you have reviewed by checking the tick mark next to the speech bubble. Content not yet reviewed can then be filtered for by opening the filter tab and checking the box next to "Needs review ()" (refer Figure 6).
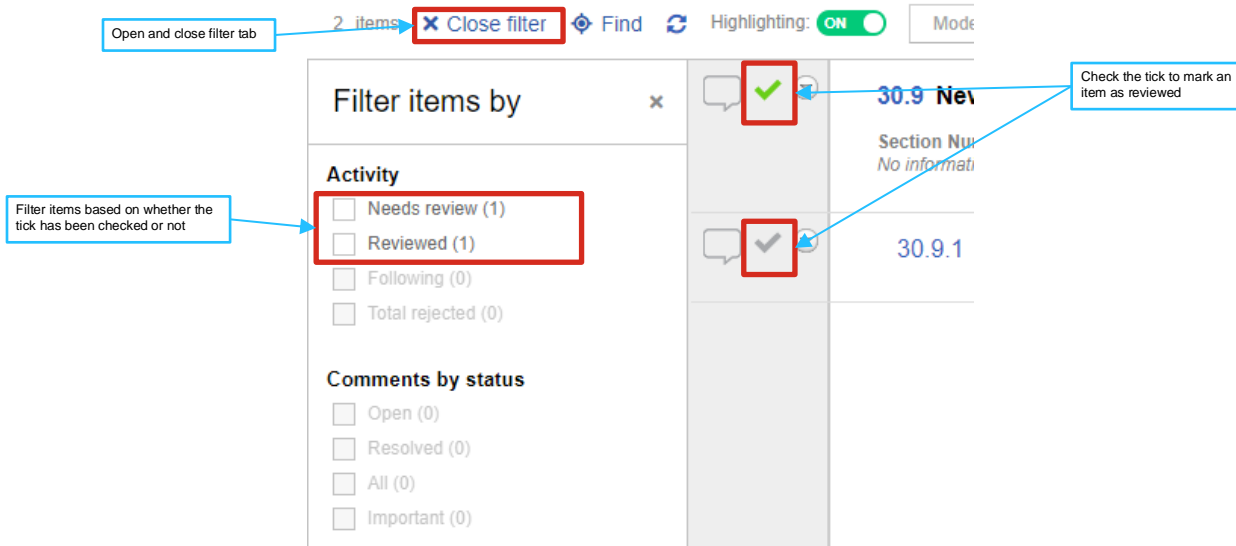
Figure 6 – Filtering

Once you have completed your review of all the clauses/requirements, you should finish the review by selecting "Finish".
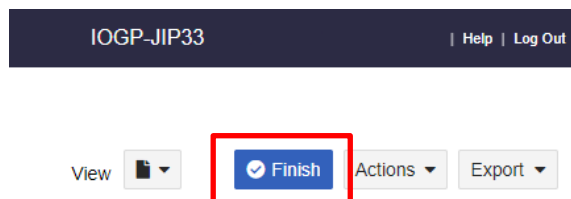
You will be presented with a "Review finished" dialogue box which will summarize your review (refer Figure 7). You will be advised of how many items were marked reviewed and how many have not been marked as reviewed.

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

Click on the "Finish" button to complete the review.

Once you have completed the review, it can be reopened by selecting "Reopen". Additional comments can be made and modified in the review, up until the review deadline.
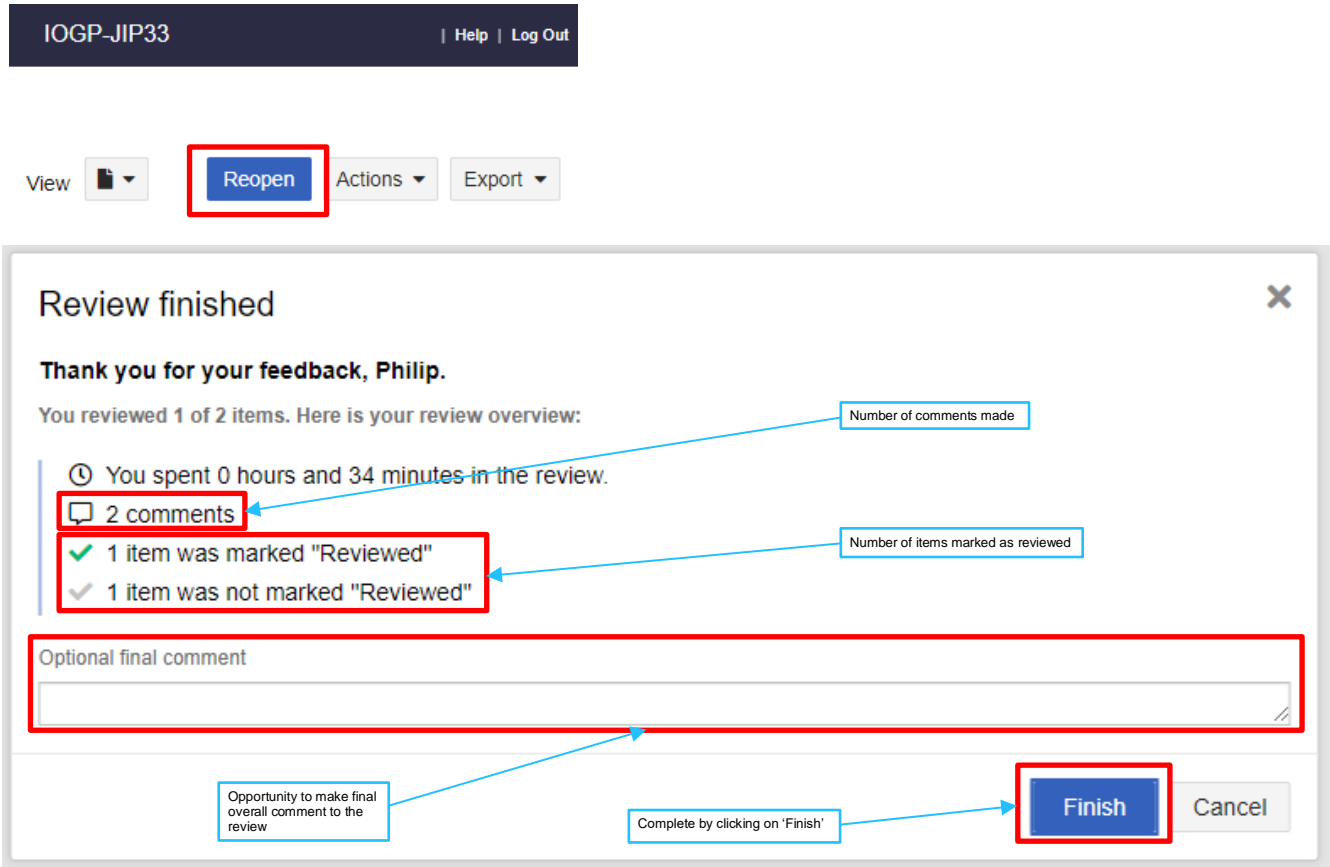
Figure 7 – Finishing the Review

Annex A Jama Review Screenshots

Figure A.1 – Technical Specification Review

JIP33
JOINT INDUSTRY PROGRAMME

Click to complete

Open and close the navigation and filter tool

MY STATUS
● In progress

Deadline: 22/03/2021

Closing date of review

Change view to switch between: review, statistics (stats), comments (feedback)

2 items | ▼ Filter | ◆ Find | Highlighting: ON

View 📄 ▾ | ● Finish | Actions ▾ | Export ▾

30.5.1 Maximum ambient temperature

Row#	Section Ref.	Maximum ambient temperature	input data	°C, °F	Additional notes	Issue

Item reviewed check

Cell used by the purchaser or supplier to denote revision of data sheet when data sheet entry was last edited

ID:
XX-DSE-1935

Data sheet element or optional parameter

Where applicable, units of measure will be displayed and may be selectable, or pre-defined

Justification:
No information entered

explanation of the reasoning behind the requirement

Completed by:
● Purchaser

Optional parameter to be set by the purchaser or the supplier as applicable. May be selected from a pre-defined dropdown list, or input as free text as appropriate

Datasheet guidance:
No information entered

Additional text to provide guidance on the purpose of the data sheet item

Default value:
No information entered

Subscribe and unsubscribe to automated notifications

30.5.2 Special weather protection

🔗 Follow item

		Special weather protection	tropicalization, winterization, not required		Additional notes	Issue

Cell for additional comments made by the purchaser or the supplier, relating to the data sheet item

Open comment dialogue box

ID:
XX-DSE-1936

Justification:
No information entered

Completed by:
● Purchaser

Responsibility for completion of the field in the data sheet:
Purchaser, Supplier, Either

Datasheet guidance:
No information entered

Default value:
No information entered

Default values (if applicable) have been set according to essential minimum requirements as an integral part of this specification

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

3.13.1.2 Delivery schedule

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

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]
Schedule details typically** include;

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

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.

ID:
XX-IR-2

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

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

Submit At Proposal:
Yes

Purpose:
For Information

Purpose
(Deliverables Tab – Col F)
Purpose for submission

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

Reference:
No information entered

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

Format:
PDF

Figure A.3 – IRS Review

Figure A.4 – QRS Main Document Review

Figure A.5 – QRS Annex A Review

Figure A.6 – QRS Annex B Review