

THE DOCUMENT CONTROL TRIBUNE

Issue 28
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How to:
Digital
Signature

How to improve
visibility of
Document Control

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EDITORIAL

Our work environment plays an important role in our performance and in our well-being. A good desk, a good window, a good spot in the open space or in a closed office can make the difference between a motivating work atmosphere and a depressing ambiance.

The culture of the organisation, of the team and our relationships with co-workers also form part of this environment that can boost us or bring us down.

The trick is not to be a 'passenger' in the work environment, but instead to be a driving force of one's well-being. By grabbing the bull by the horns, by actively affecting, influencing and impacting our own work environment, we can create the warm feeling of being more in control of what happens to us. Our desk is too 'cold'? We can place a plant on it, we can decorate it with photographs of our loved ones, or of our favourite holiday spot.

To feel well, to feel supported and empowered at work, we also need a culture where we can be respected, valued, included; we also need an environment where we can ask questions to continue learning and growing, without being judged, mocked or ridiculed.

Today's post-Covid world has become a bit tenser, a bit harsher according to what we hear from people around us, and from what we see around us.

Let's be like those well-behaved pit bulls trained by the extremely talented Cesar Millan: when the world barks at us, let's face it with calm, detachment and amused curiosity, and let's focus on making our environment more pleasant for ourselves, but also for others.





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WHAT IS THE DIFFERENCE BETWEEN DIGITAL SIGNATURE AND ELECTRONIC SIGNATURE?

Digital signature or electronic signature? Even though we commonly use these two terms interchangeably, they actually cover two different concepts. Let's delve in.

Difference in format

An **electronic signature** may be the scanned image of your wet signature, or your name typed in the signature box of a document. It can be generated with any software (e.g. Microsoft Word, Adobe Photoshop, etc.).

Whereas **digital signature** is a very special form of electronic signature, because it provides traceability with full details on who signed, when, how, from which device. It also protects the content of the document using cryptography so that we have the full certainty on the integrity of what has been actually signed. Therefore, digital signature needs to be generated from a fully secured and legally recognised e-signature software package (for example DocuSign, Adobe Sign, Hello Sign, etc.).

Legally binding or not

Because the electronic signature may have been generated from any software, with no unchallengeable trail of who has placed it on a document, when and how, it might give room for later dispute because **one may argue that the image of their signature (or name in the signature box) was actually added to the document without their knowledge nor their consent.** This actually happens in more organisations than you may think.

A digital signature software will give you an audit trail that is like a fingerprint: it makes that signature unique and fully traceable, it leaves an audit trail that can be independently audited and verified.

Therefore, in case of dispute or litigation, the proof and evidence provided by a digital signature will be much stronger and more difficult to challenge than with an electronic signature.

How easy is digital signature to use on a daily basis?

Very. If you **select a reputable digital signature software**, the process is made very easy: in a matter of seconds, you can send a document for signature, and it will also take only a matter of seconds for the recipient to sign and for both of you to receive a copy of the signed document.

What is also great is that only the sender needs a license for the digital signature software. The recipient does not.

5 criteria to mind when you select a digital signature software:

#1 How many documents can you send for signature monthly (ideally, unlimited)

#2 Recipients should be able to sign easily (user friendly app) without having to sign up or register

#3 Can you send to multiple recipients at the same time and can you decide if they will receive it all at the same time, or one after the other (workflow in sequence or in parallel)

#4 Can you bulk send documents (ideally yes, for these situations where you have to send 300 drawings to the same people to sign)

#5 Does it comply with the security and compliance regulations applicable in your country (or does it comply with more stringent security and compliance laws).

Also compare the various plans offered by each software company, as there are different options based on what you need (make the selection based on your own list of criteria and requirements).



PROCEDURES, TEMPLATES, CHECKLISTS

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PICK IN OUR
TOOLBOX

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DOCUMENT MANAGEMENT OR DOCUMENT CONTROL?

They are sister disciplines, because they deal with documents and records, but the difference between Document Management and Document Control is really key. And the key lies in the word 'Control'.

Why are the two terms confused?

These are two professions that deal with documents and records on a daily basis.

They both make sure that documents are well organised, and accessible by the relevant users.

Both professions spend time using their computers to handle documents.

And both will be the first port of call in case anyone has a question related to documentation in an organisation.

So why are they different?

It is not because all your documents are uploaded into a document management software package that you have **control** over your documentation.

What do we mean by control?

Can you always be certain that the document you have found on the system is the latest one? That it has been formally reviewed and approved? Can you be certain that old and superseded documents have been removed from the hands of users? Could you trust

this document with your life if you were operating on a construction site or on an energy production platform?

What is Document Control, then?

Document Control is a document management profession whose purpose is to **enforce controlled processes and practices** for the creation, review, modification, issuance, distribution and accessibility of documents.

The role ensures that documentation available at official points of use within an organisation is **trusted** by its users and **contains up-to-date, reliable, checked and formally approved information**.

Managing documents throughout the entire lifecycle

Another major difference is also that Document Control manages documents throughout their entire life (enforcing controlled processes at each step of the way from the creation to the obsolescence, including review, approval, official issuance, change, etc).

In opposition, document management typically deals with documents once they have become final and official. So, document management is typically not very involved with teams that actually produce or review documentation throughout the various stages of its development.

Gatekeeping

Gatekeeping is also a major difference, as a Document Controller is also in charge of making sure that all controlled documents comply with the applicable set of rules (document control procedure, instructions to contractors, legal requirements).

Which means that a Document Controller needs to open each document to check their compliance, quality, integrity before this document can be officially released.

Compliance with ISO 9001 standard

Document Control is one of the requirements from the ISO(*) 9001 international standard about 'Quality Management Systems - Requirements'.

This standard includes requirements about approval of documents, review and update, identifying changes, document legibility, preventing the unintended use of obsolete documents.

If you have not watched it yet, we recommend our video "[What is Document Control](#)" which gives the expert definition in less than 3 minutes!



DOCUMENT CONTROL Competency Matrix

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Formally manage your competencies



PEACE IN THE OFFICE: MYTH OR REALITY?

The extreme 'working from home' experience that we all went through during the Covid-19 pandemic had - at the time - a significant impact on work practices; incidentally, it wound up proving that it was possible for a Document Controller to work from home (which a lot of organisations did not believe before the pandemic).

Now that, in many regions around the world, the pandemic has stabilised, we are back in the office (on a full-time basis for some, or on a basis of part-in-the-office / part-working-from-home for others) and we realise with shock that we have to learn to work together again, in the same office space.

Have you encountered issues with it? Challenges? Talking to a lot of professionals throughout the year, through our training courses and consultancy work, we have had the feedback that coming back to the office has not necessarily been that easy.

Here are **7 tips on how to maintain peace in the office**:

#1 - Manage your stress level so that you don't contaminate others with it

Sometimes stress comes from the amount of work that we have... and sometimes it just comes from other people who are stressed out and who transfer it to others either verbally (loud voice, impolite or abusive way of talking to others) or because they are banging on their desks or constantly sharing their negativity. Just don't be that person for others.

#2 - Practise relaxation, mindfulness, visualisation, or deep slow breathing: anything that will help you get along with your day in a more relaxed manner.

#3 - Avoid taboo topics, gossips, cliques: these will always have a negative impact on others, even if they seem harmless to you.

#4 Greet others with a smile rather than a poker face, be respectful and polite. Basically be the colleague you would love to interface with.

#5 Be aware that not all human beings in the office space have the same needs, values, feelings and ways to communicate. Take it into account when discussing with others, and really listen: replace judgement with open-mindedness and tolerance.

#6 When things get heated, take a step back and don't react while in a state of anger or frustration. We always see better alternatives when our mind is quieter.

#7 Become an expert at communicating, integrating, and support: when there is lack of communication, people may feel ignored and that has an impact on mental health and on teamwork.

What are **your** tips on maintaining peace in the office? Share them [here](#).



More

Training Course

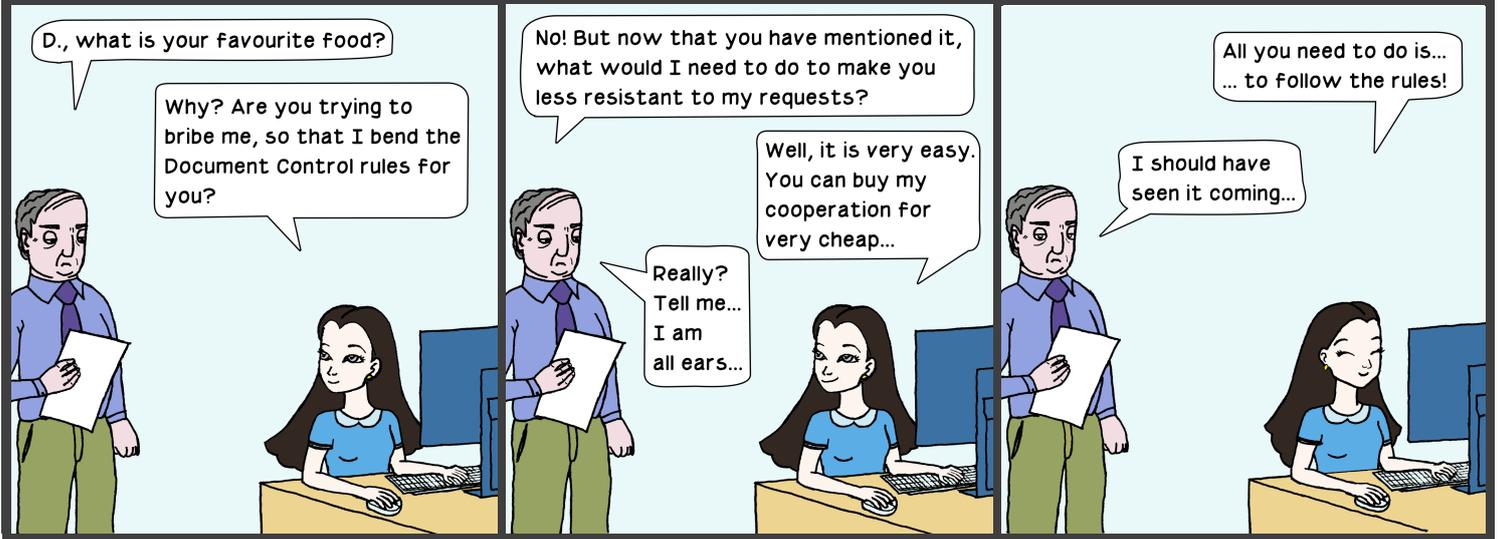
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“Hanging in there” with **D. Ceecee** - the Document Controller by Tuffmee

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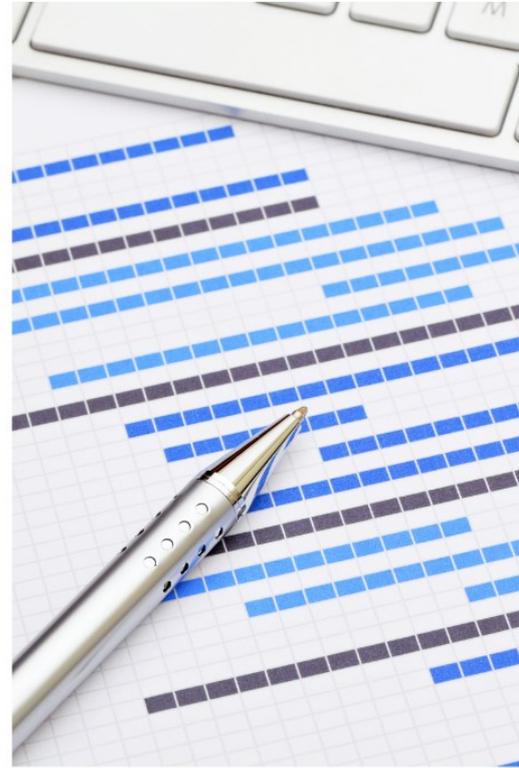
Have you ever felt as if you were invisible within your organisation? That Document Controllers lacked recognition of what they can do to support a team? Or that people tend to forget to involve Document Control in meetings, contractual discussions, or procurement processes?

If so, you are not alone: this is a recurrent issue encountered by many Document Controllers in many different organisations, industries and countries.

We have covered useful measures in our article '[How to improve the recognition of the Document Control profession?](#)', which we recommend you to read as a reference.

Here, we focus specifically on improving visibility and on measures that go hand-in-hand with the aforementioned article related to improving recognition.

# Measure	Details
1 Raise your profile at work	<p>It can be easy to blend into the background at work: Document Control is a role that is very demanding in terms of workload, number of interfaces and deadlines to manage...</p> <p>We are often too busy working, focusing head-down on day-to-day tasks, and we forget that raising one's own profile demands an active stance: to get noticed, you'll need to take yourself out of the shadows.</p>
2 Develop your skillset	<p>Improve your knowledge, develop your specialist skillset, get certified, become a trusted advisor in the field of Document Control for your company.</p>
3 Develop your self-confidence	<p>Often we tend not to speak up because we are shy, or unsure that what we have to say has value or is an unchallengeable truth.</p> <p>If you follow measure #2, this will greatly help with self-confidence.</p> <p>And it is also a very common feedback we get from participants to the Consepsys Certified Document Controller Course:</p> <p>96% said that they gained more confidence with their stakeholders after attending a Consepsys course and 96% said they have been a better advisor.</p>
4 Make a conscious effort towards more communication	<p>Make a conscious effort to participate more in meetings, to provide better visibility on your work, to maintain KPIs for yourself, to improve your network by joining events and socializing at work.</p>
5 Take on more responsibilities	<p>Without jeopardizing your workload, it may be a good idea to accept more responsibilities when you think that it could increase your skillset and provide better visibility.</p>
6 Discuss visibility with your manager	<p>Why not discuss openly with your manager at the next one-on-one meeting and let them know that you would like to increase your visibility?</p> <p>Discuss ways to achieve that, ask for suggestions and discuss opportunities to raise your profile.</p>
7 Work on increasing the team's credibility and visibility	<p>Increasing visibility is not just something you do individually; it should also be done as a team (for example, all Document Controllers of the same organisation or same project).</p> <p>Make sure the team is represented at every important meeting, discuss together the ways you could reach to stakeholders, develop together awareness material to be presented to engineers, managers, users.</p>



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COURSE OUTLINE

Module 1

The Role of the Lead Document Controller

Module 2

Planning & Organising Document Control Tasks

Module 3

Stakeholders Management

Module 4

Implementation of Document Control Systems

Module 5

Implementation of Document Control Rules

Module 6

Management of Document Control Team

The course includes a 3-hour certification examination.

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PORTRAIT OF A DOCUMENT CONTROLLER



MELISSA BALL

Lead Document Controller and Technical Lead – Document Control at Wallbridge Gilbert Aztec (WGA), in Adelaide, Australia

Melissa attended the Advanced Document Control course in May 2019 and the Certified Lead Document Controller Course in July 2022, both in Perth, Western Australia.

Can you tell us a bit about you?

My name is Melissa Ball, I'm 35 years old from Adelaide, Australia. Outside of work, I enjoy watching AFL and Formula 1, travelling, live music and spending time with friends and family.

What is your current role?

I'm the Lead Document Controller and Technical Lead – Document Control at WGA, a multi-disciplinary, award-winning engineering design and project management consultancy with offices throughout Australia and New Zealand.

As the Lead Document Controller, I manage and mentor my growing team whilst actively leading document control activities across a wide range of projects. Every day provides a different challenge and I never dreamt that I'd be contributing to a maritime project one minute, and a transport, hospital, or defence project the next.

My role as Technical Lead – Document Control sees me operate across the business – educating colleagues and clients on the importance of document control, implementing processes and procedures, and ensuring document control and quality are represented in key business decisions.

I have recently been appointed as an Associate. It's an honour knowing that not only am I being personally recognised, but Document

Control is also acknowledged as a valued part of our employee-owned business.

Can you describe your professional experience?

Like many Document Controllers, I came across the profession by accident.

I was working in engineering administration when I took a temporary Document Control assignment to assist a project team for 6 weeks (that lasted 12

essential service and being able to drive change whilst building long-lasting relationships.

Which ConsepSys course did you attend and when?

I attended the Advanced Document Control course in May 2019 and completed the Lead Document Controller Certification in July 2022. I attended both courses face-to-face in Perth.

What did you think about the course? How did it help you in your current role and career development?

I loved attending both courses. It was

“Each course has helped me refine how I am working and ignited a confidence to continue developing Document Control initiatives and myself as a leader.”

months), and 12 years later, I'm still as excited by this career as I was all that time ago.

Over the 12 years, I have worked on the contractor's and client's sides, predominately on road and rail projects, before making the jump to design with WGA nearly five years ago.

I have loved the challenge of building the reputation of our profession as an

great to be in a room with like-minded people, learning the course content while also accessing support, experience and mentoring from ConsepSys and the other participants.

Each course has helped me refine my work, reconsider what's best for the business, and ignited a confidence to continue developing Document Control initiatives and myself as a leader.

PORTRAIT OF A DOCUMENT CONTROLLER



REBECCA MURRAY

Document Control Lead
for Downer Group in Australia

Rebecca attended the “Transitioning to a Manager Position” Course in 2021, and the “EDMS Implementation” course module in 2020.

There is a big focus on developing smart solutions that support improved efficiencies for our project delivery and supporting our continuous improvement as well.

Can you describe your professional experience?

I've been doing Document Control for over 15 years now. Five of those years have been in a leadership role.

At the beginning of my career, I fell into DC with a Steel Detailing company back in New Zealand. Following this I did Records Management while temping for a while.

DC has proven to be where my heart is and I've continued in this space since moving to Australia. I've worked across a variety of industries including commercial, civil and construction, minerals

“The ‘Transitioning to a Manager Position’ course has definitely helped me in my current role to adapt to a bigger picture mindset and to step away from

and mining, infrastructure and agriculture.

I enjoy the Design and Construction scopes the most, where Document Control has a presence from project start up through to completions and close out (I believe we add the most value when we are included for the entire project lifecycle).

Which ConsepSys course did you attend and when?

In September 2020 I attended the “Implementing an EDMS” course and in September of 2021 I attended the “Transitioning to a Manager Position” course. Both were completed online and provided me the flexibility to fit the training into my busy schedule.

What did you think about the course? How did it help you in your current role and career development?

The “EDMS Implementation” course has given me confidence to both initiate the process of vetting appropriate EDMS options and then present a case to the business that supports adoption of the preferred EDMS, in addition to understanding the overall process of working with the vendor and undertaking the required user acceptance testing that should be conducted.

The “Transitioning to a Manager Position” course has definitely helped me in my current role to adapt to a bigger picture mindset and to step away from the finer details. I learned to adopt a work persona and I found it interesting to learn about the benefit of ‘good’ politics. It has also validated a lot of the practices I was already implementing and assured me that I am a good fit for a management role.

Can you tell us a bit about you?

My name is Rebecca Murray (just call me Bec). I'm originally from New Zealand and have now lived in Australia for 10 years.

I enjoy exploring Australia and travelling to other places in the world. It has taught me a lot about myself and has been fundamental in shaping me into the person I am today.

I'm a multipotentialite too, so I love learning new things – self development and growth are a key focus in my life. I also love to spend time with friends and family, so I plan regular catch ups and events.

What is your current role?

I am a DC lead for Downer Group, developing solutions for the Engineering team in the Utilities Business Unit. Our team works across the water, technologies, facilities, assets, power and renewables sectors.

My responsibility is to create the processes and procedures that will support our department and provide DC support and guidance to the Engineering department.

FIRST DC JOB? HOW TO SLIP INTO YOUR NEW ROLE

When you are first appointed as a Document Controller, it can be intimidating at first: What to do first? What should you know that you don't? How not to make mistakes?

LEARN

There is a common misconception about Document Control, which is that anyone who loves filing or organising will be able to do Document Control. Of course this is a misrepresentation as we explained in our article '[Document management or Document Control?](#)' You can start by self-studying on the topic, Consepsys has lots of free material to get started (blog articles, magazines, videos, etc). It would however be recommended to quickly learn about the profession in detail, for example via [Consepsys Certified Document Controller Course](#), which is the reference for all Document Controllers around the world.

ASK

We sometimes are afraid to ask questions at work because we fear that this will mean that we are not qualified for a role. But this is a mistake because it's actually by the questions that they ask that one identifies someone who wants to learn, who wants to be the best at what they do and who wants to progress; it's a precious quality. You can for example group all your questions together and ask when would be the best moment to sit down with the reference person in your organisation to review these questions.

READ

Read the existing Document Control-related material in your organisation: Document Control procedure, Document Control instructions to contractors, Client requirements, should have no secret for you: you should read them, understand them thoroughly, and ask for clarification when required. If they don't exist yet, you could start from the [Consepsys templates](#), and develop and produce them for your organisation.

DEVELOP YOUR TOOLBOX

It is immensely useful to have step-by-step flowcharts showing what are the steps required when creating a document, modifying, reviewing, sending a document. If they don't exist yet in your entity, consider creating them, in order to have a better understanding of where you fit within the processes of your organisation. Also [create checklists](#) for your tasks and use them thoroughly. They will be useful for your entire career as a Document Controller.



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