Consepsys

THE **METICULOUS** & **METHODICAL DOCUMENT CONTROLLER**

DC Interfaces with Procurement

Selling Document Control to managers, engineers, users

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INSIDE THIS ISSUE:

EDITORIAL

In this issue of the Document Control Tribune, we are delighted to announce that our comics strip series "Hanging in There" with D. Ceecee, the Document Controller, is published for the first time in colour!

The concept of D. Ceecee was born in 2012 and the character was eventually brought to life with talent by graphic design artist Myranda Saffarine in November 2015. The first comic strip was published in issue #7 (December 2015) of the Document Control Tribune.

Why is D. Ceecee so important to us? Because she represents all the hard-working Document Controllers out there who fight everyday for the recognition and the respect of their profession. With a humoristic approach, D. Ceecee goes through the day-to-day tribulations experienced by Document Controllers around the world and she fiercely upholds the Consepsys TICCQS Document Control values.

So far, D. Ceecee's adventures have been captured in black and white. Not anymore!

We hope that you enjoy D. Ceecee's new colours.

This issue also covers topics related to taking the Document Control profession further, through practices of excellence and through means to positively influence the interfaces of the profession.

Let's continue working together to put Document Control in the spotlight.
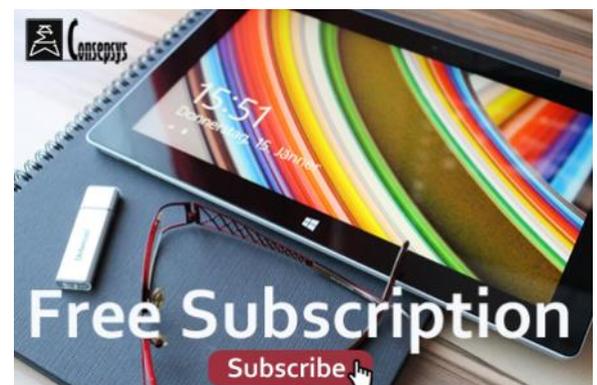
THE METICULOUS AND METHODICAL DOCUMENT CONTROLLER

In the **Consepsys TICCQS Document Control values,** one of the Cs stands for 'consistency'.

For Document Controllers, consistency means that for a given type of activity, the same approach, the same method, the same process, the same level of performance and the same level of quality are obtained each time, with no variation over time or with circumstances – such as time pressure or processing of deviations.

One concrete example for DC consistency is quality checks: if a DC checks tens of engineering drawings per day, he/she must check the same metadata for all drawings and

he/she must go over all check points for all drawings. Checking different metadata from one drawing to the other, or checking only part of metadata on one drawing, and only part of metadata for another will not result in consistent checking. Most likely, many quality problems will go unnoticed until eventually users discover them – causing loss of credibility for the Document Controller.

Consistency requires key DC qualities: consistency, meticulousness and a methodical approach, amongst others.

Each DC have their own tricks, methods, techniques and tools to ensure that they remain meticulous and methodical.

For example, the use of a ruler to check a print out of a register to en-

sure that no mistake is made on the line under check. Or the use of a yellow highlighter to cross out lines of registers that have already been checked. This highlighter method can also be applied for electronic registers.

> *"For Document Controllers, consistency means that for a given type of activity, the same approach, the same method, the same process, the same level of performance and the same level of quality are obtained each time, with no variation over time or with circumstances."*

Some DCs use checklists to ensure that they always check the same information on documents and that they check all the items of information all the time.

Some DCs use the capabilities of Excel to verify that their registers do not contain any duplicates. Still on Excel, some use dropdown menus for data entry to avoid introducing spelling mistakes.

On a more human level, some DCs take breaks when they feel that their level of focus is decreasing due to tiredness. It is better to take a short break and to come back refreshed than persisting to conduct a task when one is too tired to remain meticulous.

In the context of a team, a powerful practice is to have team mates check each other's work, just like engineers do. The idea behind this is that nobody is perfect, but a team can be. Cross-checking work allows

team members to support each other for a higher quality of work.

We could go on like this for a long time.

The importance for each DC is to find their way of remaining meticulous and methodical for consistency.

We would be interested to hear about your tricks, methods, techniques and tools to ensure that you remain meticulous and methodical.

Share your experience with us by writing to dctribune@consepsys.com

Best stories and tips will be published in next issues of the Document Control Tribune.

Selling Document Control to managers, engineers, technical team

Document Control has typically many interfaces within a Company or on a project. These interfaces are both internal and external and include for example authors, technical teams, managers, DC software users and sometimes Clients, Contractors, Vendors etc.

It is a very typical and common challenge to ensure that our interfaces both comply with DC rules and understand the need for Document Control.

Indeed, when there is a low awareness and understanding of why Document Control is even required, it is often a struggle to ensure compliance.

How to sell Document Control?

There is a variety of methods that one can use to raise awareness on both the profession and the requirement for it.

In a **recent video tip of the month,** we discussed methods such as issuing meaningful reports and KPIs, organising inductions for users, gathering users feedback, etc.

Another useful method is to organise an awareness session for all DC interfaces and users. The aim of this session is to present both the benefits of having Document Control, and the risks of non-compliance.

This session should absolutely be adapted to the users and "adapted" to their language: "boring" is your enemy here, and you should avoid it at all costs!

Which format?

You have a wide variety of options here again: one-to-one discussions, dedicated group meetings, 'lunch & learn' sessions, awareness breakfast, or dedicated training sessions for example.

Why should I even bother?

Because having awareness within your team and interfac-es helps you on a daily basis: it reduces the amount of convincing (and sometimes fighting!) that you have to do just to be able to execute your normal tasks.

For example, let's imagine that an author sends you a document with plenty of quality and formatting issues: you send it back to the author indicating what needs to be corrected, but the author refuses to do it (I am sure this scenario reminds you of a few experiences!). It's going to require a lot of your time and efforts to explain and convince. If this happens once a year, this may be affordable as an effort. It this happens every month, or every week (or every day!), then you need to do something about it: you need to educate on the role of Document Control, and on the risks attached with non-compliance.

We could also have taken other examples that may sound familiar, such as: engineers constantly sending documents outside the company without going through DC, or client giving their comments on documents over the phone without formalising them in writing, etc.

Is there an easy way to sell DC?

Consepsys has developed a half-a-day awareness session just for that. It is called "**Document Control Essentials for Non-Document Controllers**" and it is a short course module, specifically designed for interfaces of Document Controllers: managers, authors, engineers, reviewers, approvers, technical teams.

It aims at giving them, in a short, business-oriented and condensed session all the important need-to-know information about Document Control.

This course covers the essentials of Document Control with a clear, rational and objective-oriented approach: What is Document Control? Why is it essential and critical to one's business? What are the risks involved with poor documentation management? What are the proven best practices and the requirements for one's company.

Let your interfaces know if you think that it can help!

DOCUMENT CONTROL INTERFACES WITH PROCUREMENT

When you speak to Document Controllers, especially those involved on projects and/or with other parties (Client, Contractors, Vendors, Suppliers), a common issue that comes up is that very often the Document Control rules and requirements are not discussed early in the project, and not stated either in the Invitation to Tender (or Request for Proposal) or the contract

This oversight creates issues as soon as the first document is issued on the project, because both parties have different systems, ways of working and expectations. The documents may not bear the appropriate document number, or may not be published with the right template or identification information. Those issues are important as they are very costly to fix, they always cause confusion for the users, and they are sometimes at the root cause of safety incidents as the end-users might be confused about the document's information or purpose.

Like this operations engineer who caused a safety incident because he launched a maintenance campaign based on "Issued for Review" documents instead of the "As-Built" documents.

When investigating the reason why so many projects face a similar situation with poorly documented contractual rules for Document Control, one of the causes that regularly come up is a lack of awareness of the importance of Document Control in the Procurement teams.

It may initially look to some in the client company as an "overkill" to document the rules for the issuance of documents in a contract with a supplier or in the Invitation To Tender. Until you receive your first Change Order because the supplier claims that they were not made aware of your requirements.

Not documenting the DC rules will cause additional workload to the supplier (hence the Change Order), but also to the in-house resources in charge of Document Control, as this will cause re-work, misunderstanding and extra-work to process each and every document, each and every day. At the end of the project, it can easily add up to a 6 or 7 figure number for additional costs just because DC rules were not communicated.

However, this can be easily avoided:

- By ensuring that DC requirements / instructions to contractors are clearly documented

- By ensuring that these requirements are listed in all Invitations to Tender (ITTs) or Requests for Quotation (RFQs)

- By ensuring that these requirements are listed in all contracts with companies that will deliver documents during the frame of their contract

- By clarifying the requirements with interfaces (internal and external) when necessary

- By ensuring that rules are understood prior to the issuance of the first document

There are many horror stories that Document Controllers can tell about how bad it turned on a project on which they worked, because of a lack of agreement on Document Control between parties.

In order to avoid the recurrence of these issues, Document Control professionals must take ownership of this issue and ensure that Procurement teams are aware of these issues and of the requirement to include DC rules in their ITTs and contractual documents. Again, it is an awareness and education initiative that can be addressed by sending Procurement personnel to the Consepsys **Document Control Essentials for Non-Document Controllers**" short course session.

"Hanging in there" with D. Ceecee - the Document Controller   by Tuffmee

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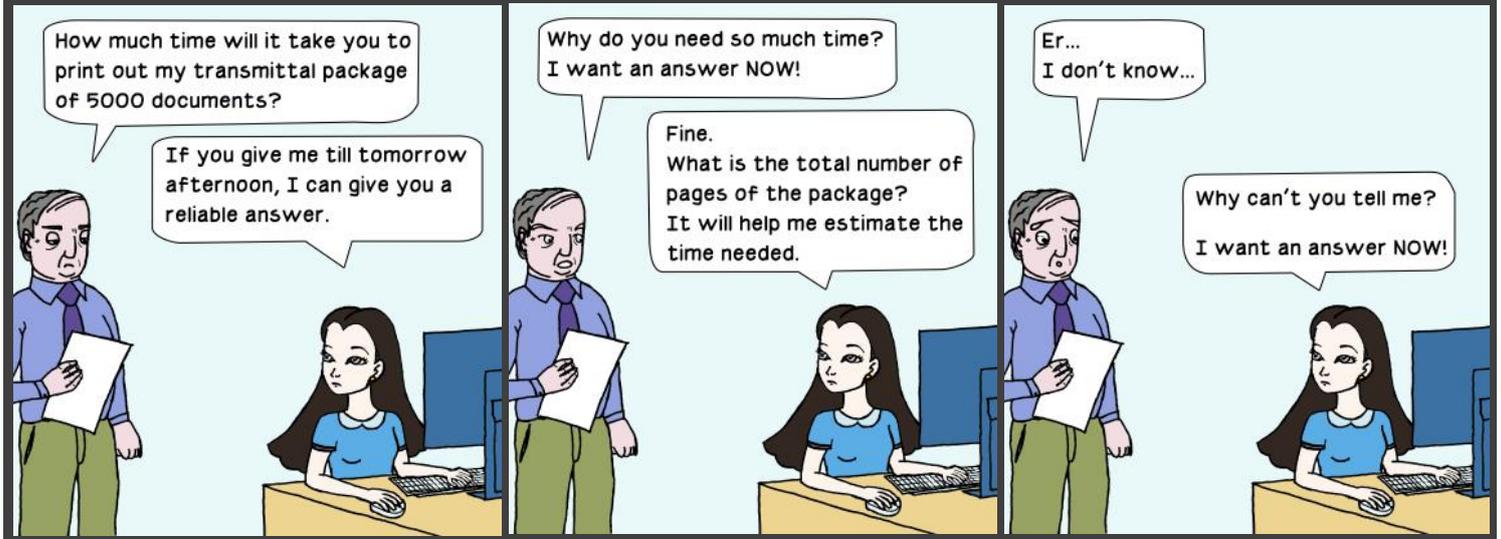
Follow D. Ceecee on Consepsys and on f

WORKING WITH MULTIPLE SCREENS

*B*y essence, Document Control is a multi-task profession.

Document Controllers are always conducting simultaneous activities. Examples include:

- Going through a register AND checking their Document Control software; or

- Setting up a deadline for the review of a document AND checking their calendar for the end-of-review date.

It takes organisational skills, methods and techniques not to get entangled in these complex combinations of tasks.

It also takes the right tools, such as a good ruler, a set of highlighter pens, a calendar or a wheel-chart date-forecaster.

One of the most useful tools and techniques that Document Controllers can harness is the use of multiple computer screens.

It can be very tedious and time-consuming to conduct simultaneous activities using a single screen only: one constantly has to minimise and maximise windows to go from one activity to another, from one program to another, from one file to another. This takes a lot of time, it causes significant inefficiency and it opens the door to mistakes.

Using multiple computer screens saves a significant amount of time by allowing a Document Controller to keep two programs or two files or a program and a file open simultaneously.

Let's look at a few examples wherein using multiple screens dramatically increases the efficiency of a Document Controller.
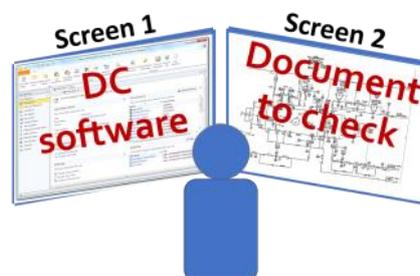
1 - Email & Document to Check

Very often, DCs receive documents by email.
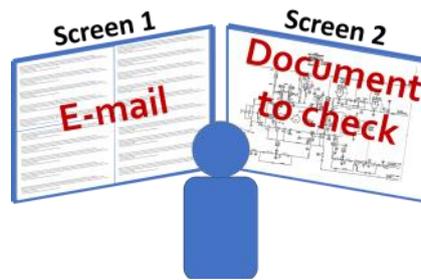
Having the email program open on a screen and opening an attached document on another screen allows to check an incoming transmittal, for example, and whether the received document corresponds to the metadata on the transmittal.

2 - DC Software & Document to Check

When DCs need to upload a document onto their DC software, they need to populate the software with the metadata of the document. Having the DC software on one screen and the document to upload on another screen allows to efficiently read out the metadata on the document and to fill out the appropriate fields in the software at the same time.

3 - Register & Document to Check
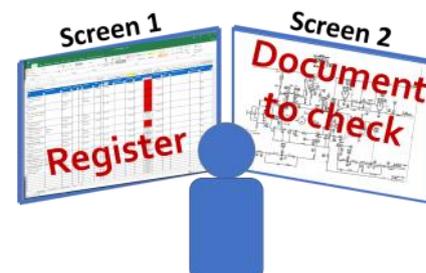
Similarly to the previous example,

when DCs need to register a document onto their Master Deliverables Register or Master Document Register (MDR), they need to populate the register with the metadata of the document. Having the register on one screen and the document to register on another screen allows to efficiently read out the metadata on the document and to fill out the appropriate fields in the register at the same time.

This applies to any sorts of other registers, for example Transmittals Registers.

4 - Register & DC Software

When a DC receives a set of new revisions of documents and an updated register from an external company, he/she has to have the updated register open on one screen and the DC software open on another screen, in order to simultaneously check – for example – that each new revision shows the correct revision index compared to the previous revision.

For example, if the last uploaded revision of document ABC-001 in the software was Rev00, the updated document received with the last transmittal must be ABC-001 Rev01 (and NOT Rev02, for example).

…….

For greater efficiency, all DCs should work with multiple screens

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Course Summary

Short course aiming at defining the change of mindset required for individuals moving from an employee level to a Managerial position.

Through a combination of theoretical sessions and hands-on workshops, the mindset of participants is transformed to embrace the shift of focus from detail to overview, which they must go through to be successful Managers.

Audience

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PORTRAIT OF A DOCUMENT CONTROLLER

YASMIN BASRIAH

Executive Document Controller at Macgregor Pte Ltd in Singapore

Yasmin attended the Certified Document Controller Course with Consepsys in Singapore in September 2016

Can you tell us a bit about you?

My name is Yasmin and I am 34 years old. I am a mother of a lovely daughter named Afrah who is nine years old.

I was born and raised in Singapore.

I am a very disciplined and detail orientated person and maybe that's why I think the document control work scope interests me a lot.

I am also a certified IMS auditor at my company. So coupled as a document controller and auditor, you can say that I am like a document policemen, trying to catch and correct any kind of document irregularities here and there!

In my leisure times, I like to read a lot and spend quality time with my family.

What is your current role?

My current role is Executive Document Controller in Engineering Department in Offshore Business Line at Macgregor Pte Ltd.

Our offshore business line in the Smart Ocean Technology division deals primarily in the manufacturing and supply of offshore deck machinery like winches and cranes.

My main duties are to support the engineering department to ensure the entire document deliverables are issued in a timely manner, managing the engineering drawings & document database, archiving & filing project documents and controlling engineering work procedures and related documents.

Can you describe your professional experience?

I have been working in MacGregor for the past 10 years and this year I will accept my 10th Year long service employee award at our company dinner event! My previous work experiences include working in a legal firm and in the tele-communication industry.

I would say the best and most fulfilling experience so far is my current job in Macgregor. Working with a world class developer of deck machineries, I

"Learning from 'The Document Control Professionals' has boosted my own confidence and passion for my work by leaps and bounds"

have been given ample exposure in dealing with documentation for various kinds of vessels such as FPSO, Offshore vessels, Rigs, Barges etc. The work is extremely enriching as you learn every day and you get opportunities to perform in an encouraging work environment.

Which Consepsys course did you attend and when?

I attended the Certified Document Controller course conducted by Consepsys in September 2016 in Singapore.

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

I would say the course is definitely a "Must Go" training for all document controllers.

The content covered in the course is very detailed, spanning for 3 days with a wide range of all the "Must Know" topics of document control.

I was able to reinforce my foundation knowledge of document control, further learn the correct ways on how to develop procedures and, most importantly, learning from the documents control professionals has boosted my own confidence and passion for my work by leaps and bounds.

And I am also delighted to share that I was recently promoted and I believe my training at Consepsys was a reason for my career advancement.

If you attended one of our courses and would like to apply to be featured in one of our upcoming issues, drop us an email at:
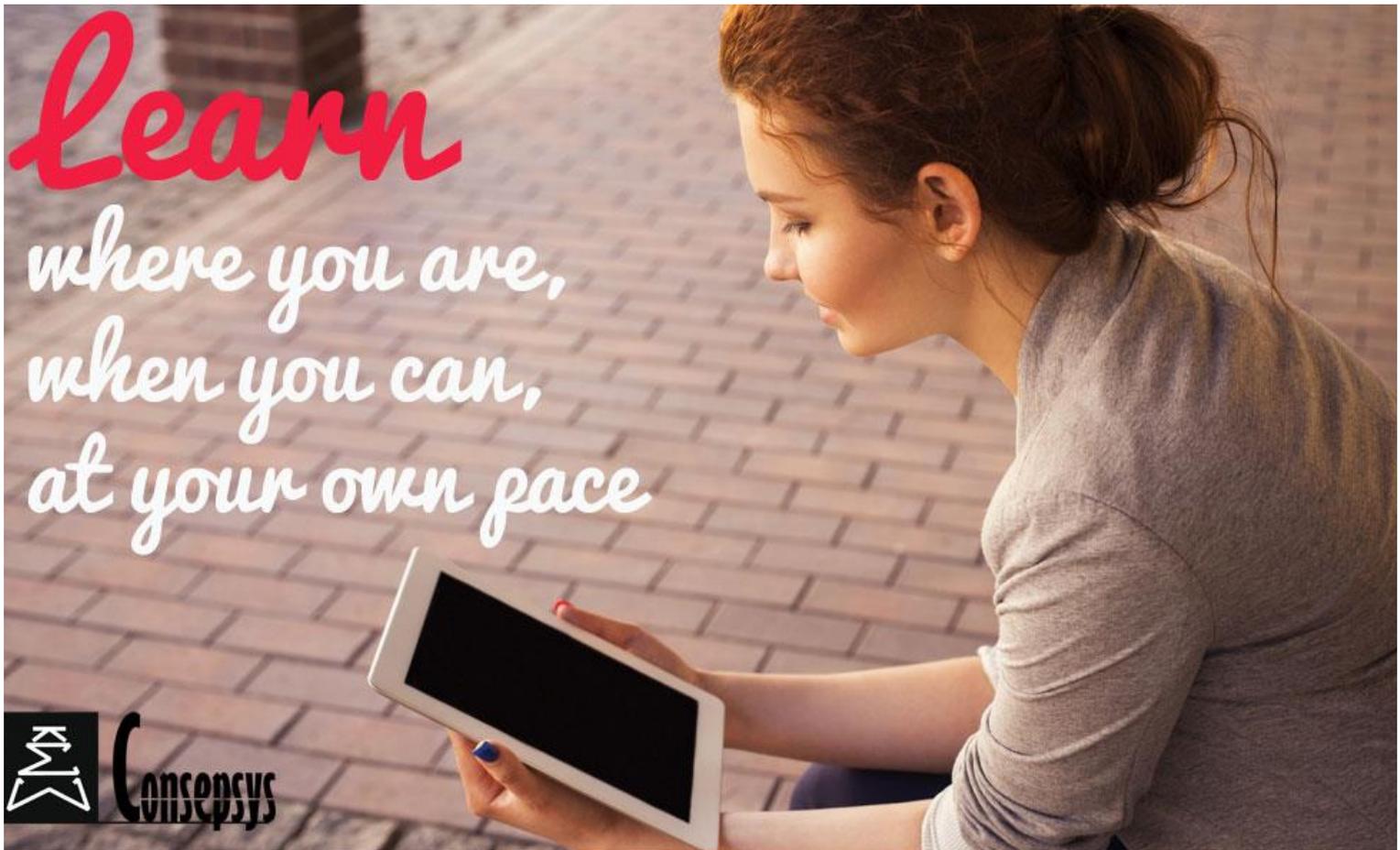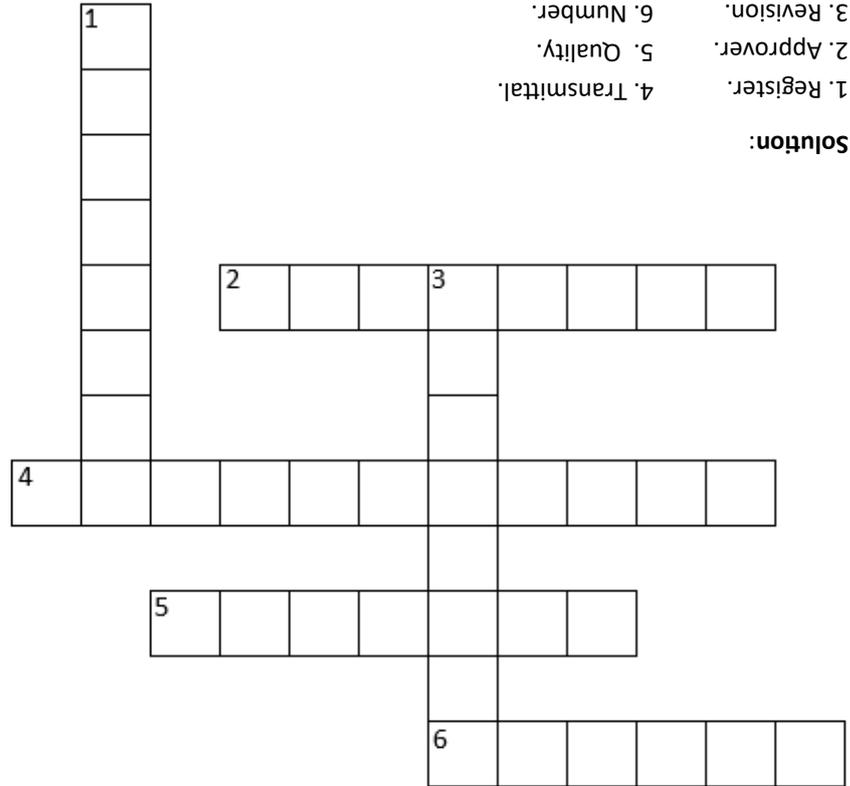dctribune@consepsys.com

CONSEPSYS DC CROSSWORD #0001

Horizontal

2. A person who ultimately authorises the publication of a document, typically by signing it.

4. Form giving traceability information about documents transmitted from one party to another.

5. The word represented by the letter Q in the Consepsys TICCQS Document Control values.

6. The reference used as a unique identifier for a document.

Vertical

1. List of documents containing a variety of metadata.

3. The frozen state of a document published officially, with a date, a content and an author.

Solution:

1. Register.
2. Approver.
3. Revision.
4. Transmittal.
5. Quality.
6. Number.

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