

THE DOCUMENT CONTROL TRIBUNE

Issue no. 10 - September 2016



**COMPETENCY
MANAGEMENT**

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**PERIPHERAL SKILLS FOR
CAREER PROGRESSION**

**WHAT SEPARATES THE BEST FROM THE REST
CONTINUOUS IMPROVEMENT**



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EDITORIAL

We are very pleased to present you with the September issue of our e-magazine 'The Document Control Tribune'.

In this issue, find out what kind of Document Controller you are ([page 5](#)): Are you a 'Steel Gate', a 'Gate Keeper', a 'TICCCQS Document Controller', a 'Service Provider' or a 'Helping Hand'?

We also explain the use of "Master Copies": how it is used in engineering and how we can use them to update procedures ([page 4](#)).

On [page 6](#), we explore continuous improvement and how it is a characteristic of high achieving individuals and entities.

This month we invite you to meet Rimma Toleshova, from Kazakhstan for the « Portrait of a Document Controller » section ([page 10](#)).

Your favourite almost-like-real-life comics strip character, D.Ceecee, is back with a story to discover on [page 7](#).

Finally, [page 11](#) will give you useful tips to communicate with your manager, which is critical to any career progression!

As always, do not hesitate to share it with your friends and colleagues! We are very glad to see that the readership of this magazine is growing every day, and happy to see that you find it useful!

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USING 'MASTER' COPIES TO UPDATE PROCEDURES

Maintaining and updating procedures remain a frequent problem in Document Control.

Modifications and updates can be triggered by, but not limited to, any of the following reasons:

- The current procedure has missed out important aspects;
- Practices of the company/project have evolved and are somewhat different from the written procedure;
- New issues have emerged, which need to be incorporated;
- Some sections of the procedure are ambiguous and need to be clarified;
- There are mistakes, typing errors, spelling problems;
- New reference documents have been produced, which need to be listed in the procedure;
- Loopholes have been identified.

To maintain a procedure, a good practice is to apply two combined approaches:

1. Having a regular update policy – for example twice a year, in June and in December;
2. Using a 'Master Copy' or 'Master'.

Using a 'Master Copy'

The 'Master Copy' is a practice used in Engineering Control. A single 'Master' copy (hard or electronic) is used by the whole team involved in the preparation or update of a document.

The Master is stored in a physical or electronic location and it is marked up by members of the team every time the need for a modification is identified.

Everyone uses the same copy, so that all comments are captured on the same document.

'Master Copy' Circulation

In Engineering activities, the Master is usually either physically circulated within a Discipline and thereafter circulated across interfacing Disciplines with hard copies or, for electronic mark-ups, the Master can be posted

"The 'Master Copy' is a practice used in Engineering Control. A single 'Master' copy is used by the whole team involved in the preparation or update of a document"

on the DC software and an electronic review cycle is launched.

There can be a third option, whereby the electronic Master is stored on a shared drive and all team members take turns to mark-it up.

This last option requires a minimum of coordination within the team, in order to avoid the loss of comments due to simultaneous mark-ups. One must enquire of anyone else is working on the file prior to starting modifying it.

A Master copy can be created only from the latest official revision of a document, even if it is still in draft mode. Drafts can still be recorded and numbered. For example, some companies use an

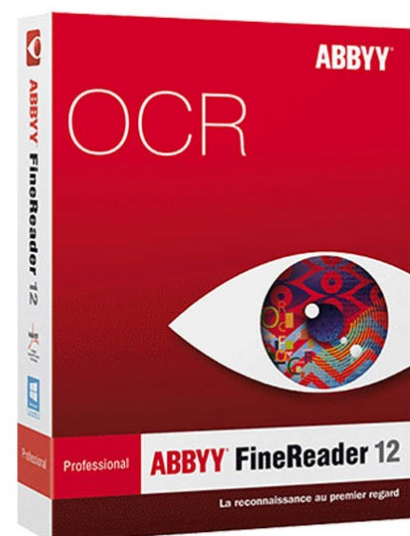
alphabetic revision index system for drafts – eg RevA, RevB, RevC etc – and a different system for official issuances – eg RevA01, RevA02, RevB01 etc. This provides a greater level of control.

'Master Copy' and DC

A DC team can keep a Master in the Document Control area of the office, in a location known to all team members. It can also be on the shared drive or in the DC software. Team members have to methodically record instances whereby modifications to the procedure are required and to make notes on the Master. It can

periodically be reviewed as a team and the procedure can thereafter be updated.

Following the update, a new 'Master' copy is created using the latest revision and it is kept available for future changes. And so on and so forth.



More

WHAT KIND OF DOCUMENT CONTROLLER ARE YOU?

We all know the ConsepSys **TICCQS** Document Control philosophy (see [DCT issue #7](#)).

However, how do you position yourself within the **TICCQS** spectrum? Are adjustments required to hold a more balanced posture in your role as a Document Controller?

We describe below the five (5) main types of Document Controllers, from the most compliance-oriented to the most service-oriented.

Type 1: The Steel Gate

The 'Steel Gate' has a very strong sense of compliance. He/she objects to any deviation from the rules whatsoever, without exception.

Positive: He/she has a good knowledge of processes, procedures and rules. He/she is strong at gate-keeping when interfaces attempt to bend the rules.

To be improved: The world is not black-and-white and some situations are actually better handled through a controlled deviation. Being too rigid eventually isolates the Steel Gate from the rest of the team.

Type 2: The Gate Keeper

The 'Gate Keeper' is focused on following the rules and is rarely willing to consider deviations. Occasionally, an exceptional situation may push him/her to venture outside of the steel path.

Positive: Good knowledge of processes, procedures and rules. Strong at gate-keeping. He/she also recognises that some situations can be better handled through a controlled deviation.

To be improved: His/her challenge is to fully develop an understanding of what is absolutely essential and what is optional, in terms of Document Control and interactions with interfaces.

Type 3: The **TICCQS** Document Controller

The **TICCQS** Document Controller operates with a balanced approach and

knows when to be in a gate-keeping posture and when to be in a service posture.

Positive: Good knowledge of processes, procedures and rules. Strong at gate-keeping. He/she has a strong understanding of situations that can be handled through a controlled deviation.

To be improved: Person-specific. One can always improve.

Type 4: The Service Provider

The 'Service Provider' is more service-oriented than compliance-oriented and very often seeks compromises.

Positive: He/she is customer-oriented and flexible.

To be improved: He/she makes compromises at the risk of hardly ever following rules and procedures. He/she can receive appreciative feedback from interfaces who do not wish to follow the rules and this can give him/her a false sense of job well done, at the expense of real business interests. He/she must learn to be assertive and to enforce non-negotiable rules.

Type 5: The Helping Hand

The 'Helping Hand' is entirely in a service posture.

Positive: He/she is customer-oriented and service-conscious.

To be improved: He/she can have a false sense of job well done. He/she plays no gate-keeping role whatsoever and puts business interests at risk by not playing his/her protective role. He/she must learn to be assertive and to enforce non-negotiable rules.

Note: depending on the team, the company, the country and the culture wherein you work, but also on your own culture, background and personality, it may be more or less difficult to develop the compliance side that is an inherent part of the Document Controller role.



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WHAT SEPARATES THE BEST FROM THE REST: CONTINUOUS IMPROVEMENT

The success of businesses is a function of how effectively they optimise their costs and how efficient their operation is.

The most successful businesses are often those which have developed the mechanisms to learn, improve and transform mistakes and failures into lessons for future success.

This does not happen on its own. It takes strategy, vision, adapted mechanisms to collect, capture and analyse, and sharp insight to draw correct conclusions and to devise appropriate correction plans.

A culture of Continuous Improvement is required to sustain such a level of excellence.

Strategy and vision

A Continuous Improvement culture starts with the desire to be the best and with a master plan to get there or to stay there. It takes goals to achieve. It also takes a strategy, involving an approach, a method, tools to develop, frequent progress checks and means to measure success.

Problems = learning opportunities

Continuous Improvement is a state of mind.

It is embracing each situation, each problem, each crisis with an open mind and the desire to learn a lesson and to integrate it in our own professional culture.

Many people see problems as something of which to get rid as soon as possible and to forget. High-achieving individuals and entities see problems as an opportunity to learn and, instead of trying to forget what happened, they reflect on it and they promise them-

“High-achieving individuals and entities see problems as an opportunity to learn”

selves not to ever make that same mistake again, not to ever let the problem grow to such proportions again, or not to ever ignore the warning signs again.

Shortcut learning

Businesses usually learn best after they have made a mistake and suffered its consequences. However, some of the very best have an even more clever approach: they observe what happens around them and they actually learn from the mistakes of other businesses. This mindset speeds up their learning process, by multiplying opportunities to learn. It

would take a lot of time to learn only from one's own mistakes. It takes a lot less time to learn from the mistakes of other's and one's own at the same time. This applies to businesses, but it also applies to individuals.

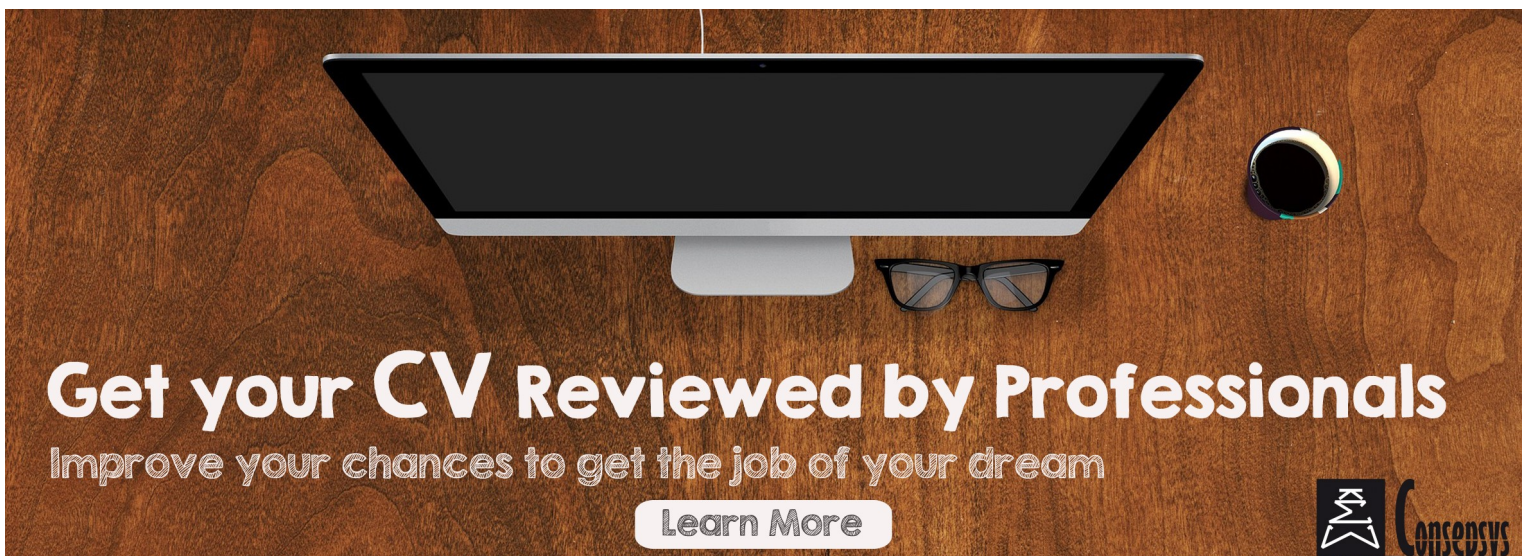
Creating a culture

In a company with a strong safety culture, people must be aware of safety in all their day-to-day activities. Applying Continuous Improvement resem-

bles living in a safety culture: people must be aware of Continuous Improvement in all their day-to-day activities and they must be encouraged and empowered to contribute to the overall effort.


Being empowered can involve going on training courses, being kept informed of advances, new techniques methods and practices, having accessible and transparent mechanisms to capture improvement ideas and celebrating improvements as a team.

Being the best is a continual commitment that can be achieved with vision, method and tools.



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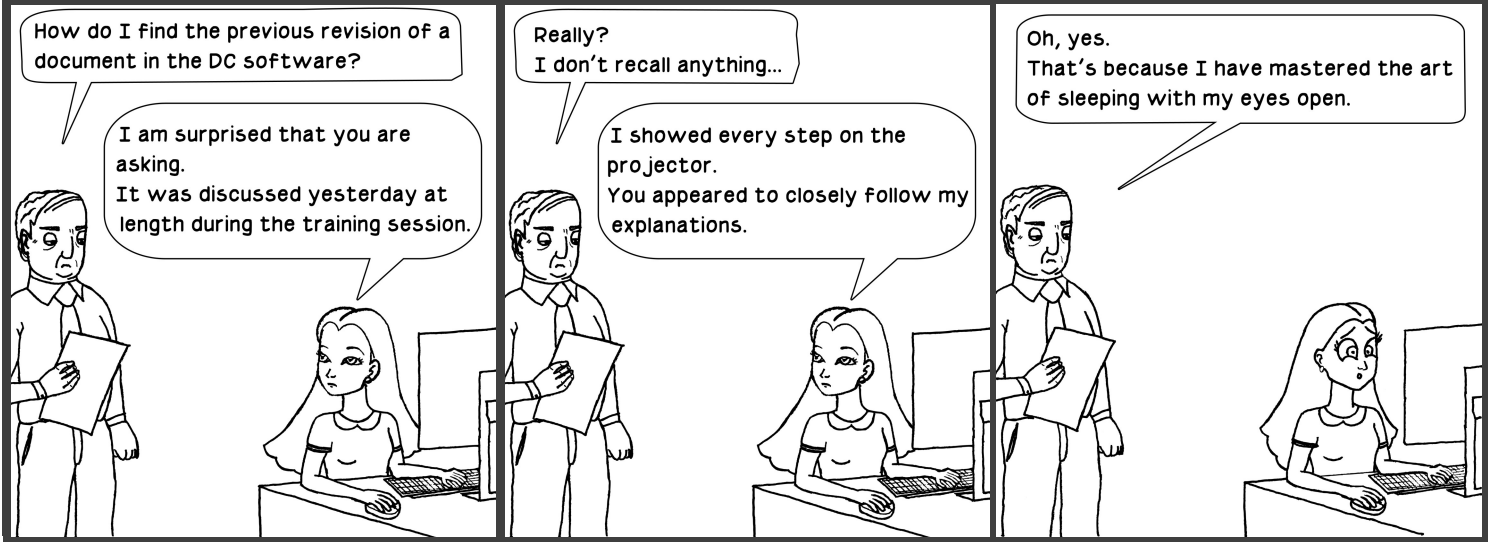
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“Hanging in there” with **D. Ceecee** - the Document Controller by Tuffmee

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PERIPHERAL SKILLS FOR CAREER PROGRESSION

Professions like Document Control require a set of specialised competencies and skills, which are necessary to effectively meet the position's objectives.

Those core competencies are different from those of engineers, planners, architects, pilots, technicians, chemists, foremen etc, with whom Document Controllers interface daily.

Do not nurture a narrow view of skills required

However, it is important not to nurture a very narrow view of the skills that Document Controllers think they require to perform their job.

To illustrate this, let's take the example of a common life situation: opening a door. Every healthy adult can open a door without even thinking about it. Many people would not even consider that this task requires any particular skills or competencies. Now, let's decompose the movements involved in opening a door and let's identify the skills that humans must develop and master prior to being able to open a door. One needs to: look at the door; approach the door; slightly lean forward; grab the door knob; rotate the door knob; pull or push the door; straighten up; and walk through the door.

Simple, isn't it? Think twice. To look at an object, human babies need to learn to coordinate their eyes so as to focus on it; to approach an object, babies must learn how to stand on their feet, how to remain stood up and how to keep their balance and they need to learn to walk, without falling; to learn forward towards an object, babies must learn how to keep their balance; to grab an object, babies must learn how to coordinate their eyes to focus on an object, then, they must coordinate their eyes and their hand movements in order to reach the object at which they are

looking. And so on and so forth. Not so simple, if you ask a 3-month old baby.

Peripheral competencies

Similarly, Document Controllers need core competencies (grabbing door knob, rotating knob and pulling/pushing door) and peripheral competencies (keeping one's balance, walking, coordinating one's eyes etc) to do their job correctly.

Those peripheral competencies may, for example, include the ability to correctly assess the workload behind a task, the ability to manage one's time effectively, the ability to negotiate deadlines with interfaces or a proficiency level in the use of spreadsheets. They may also include personal qualities, such as consistency, being meticulous and methodical or the ability to understand and follow instructions and procedures.

Doing the job on a daily basis requires more skills than first meets the eye.

Career Progression

Let's go further now. What if a Document Controller wishes to progress his/her career? To become a Lead? A Manager? Or even to move into a different field?

To illustrate this, let's take a very common life example: becoming a parent. Most people will agree that it is a big step in a person's life, because it represents such an important responsibility and it requires countless competencies. It is the hardest job in the world. However, hardly anyone goes on a course to become a parent. So, why do people decide that they can take up the most delicate job on the planet, which is being responsible for the survival of another human being and guiding this being into becoming an independent adult?

It may be that, up to the point where they decide that they are going to be




parents, people acquire peripheral competencies in their lives that give them the confidence to care for another life. For example, people have to learn to be responsible, to make a living, to manage their own time, their own resources, their own feeding, their own comfort and safety, their own health, their own supplies, their own social bonds. Thereafter, they can use those competencies to care for children.

Similarly, Document Controllers can accumulate non-core competencies, which, if and when the time comes, will give them the tools to tackle more important responsibilities, or to move into a different field altogether. These non-core competencies may, for example, include the ability to positively influence and motivate others, the ability to drive Continuous Improvement, the ability to develop budgets, the understanding of the role and the purpose of each department within the company and how they contribute to the overall effort etc.

The [Consepsys Document Control Competency Matrix](#) gives a broader idea of the competencies that should be on a Document Controller's radar.




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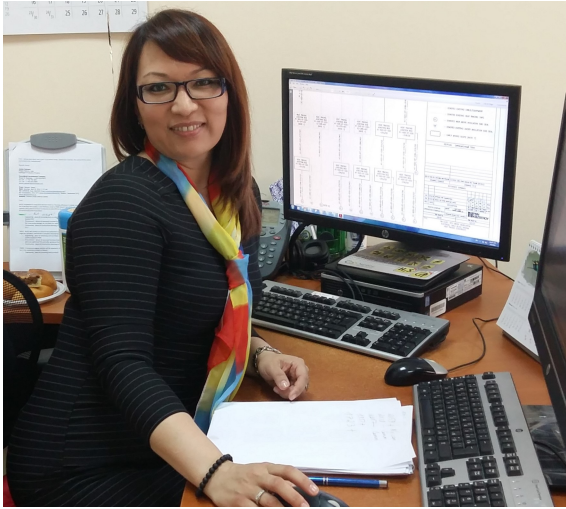
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PORTRAIT OF A DOCUMENT CONTROLLER



RIMMA TOLESHOVA

Data Management Engineer with North Caspian Operating Company in Kazakhstan (Kashagan Project)

Rimma attended the Certified Lead Document Controller Course with ConsepSys in Aberdeen in September 2014.

Can you tell us a bit about you?

My name is Rimma Toleshova. I am a 37 years old mother of two lovely children. I was born and live in Atyrau, in Kazakhstan.

I have two degrees: Teacher of Kazakh Languages & Civil Engineering.

I am a focused and hard-working individual with experience in civil engineering, site service coordination and technical document management.

I have worked in a number of key projects in Kazakhstan (Oil & Gas and Mining) holding various onshore and offshore roles.

What is your current role?

My current position is Data Management Engineer at North Caspian Operating Company N.V, Kashagan Project.

My responsibility is to manage sections of the production and wells data, providing services to visualize and improve data quality activities, as well as managing data related to technical disciplines to enable business to achieve its goals.

Can you describe your professional experience?

I have more than 10 years experience in Oil & Gas, Mining, and Construction Projects. I started my career as a school teacher and later I held the po-

sition of Deputy Director in the Engineering and Humanitarian College for eight years.

Due to family reasons, I had to make a career change and I initially joined SGP Project on the Tengiz field, as a QA/QC Assistant.

“The course knowledge helped me to improve my skills, increase my effectiveness, and even to further progress in my career path”

Thereafter, I moved to the Information Management Area starting as a Document Controller, followed by Senior and later Lead Document Controller.

Now, I have a new role and a chance to get new experience and knowledge in the Data Management Area.

Which ConsepSys course did you attend and when?

I attended the Certified Lead Document Controller Course in Aberdeen, UK in September, 2014.

In addition to my Attendance Certificate, I passed the examination and I obtained my Examination Pass Certificate.

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

I learned many new things, such as managing & leading teams and organizing DC activities.

I improved my understanding of DC requirements & processes, and learned how to run, implement, and improve Document Control management systems, business processes, as well as managing projects.

I have found the course very useful and effective. The course knowledge helped me to improve my skills, increase my effectiveness, and even to further progress in my career path.

I highly recommend the course to Document Management professionals.

To read the full interview on our website:

[Click here](#)

COMMUNICATION WITH YOUR MANAGER

Do you know how to talk with your supervisor? Your manager?

Below are a few tips on how to communicate effectively with your boss or his/her boss(es):

Involve / do not involve?

When you face a problem at work and you feel like involving your boss, the first question you should ask yourself is: "Do I really need to involve him/her on this issue?"

Remember that you are employed to solve problems and to take those problems away from your boss – not to burden him/her with problems that you are expected to solve as a professional.

Think about what is really important and consult your manager only when it is necessary.

Attitude

Never go and see your boss, present a problem and expect him/her to solve it.

Your boss or manager expects you to solve problems. But if you need to consult him or her, think about options to solve those problems. Only then you can go to your boss and present those options. All that your boss has to do is select an option. Then you are expected to implement it.

Language

Remember that, very often, your manager does not do the same job as you. He/she does not have the same background: he/she could be an engineer who is now a Project Manager.

Avoid using DC jargon, acronyms and speak in generic terms that someone who is not a DC can understand.

Level of detail

Bear in mind the level of operation of your boss. You can discuss the details of a problem with a transmittal with your Lead DC, but all that your Project Manager wants to know is if the transmittal has been sent or not and, if not, that you have a plan to solve the problem.

Whereas your most urgent problem may be that a batch of documents from the Civil Engineering discipline are going to be late for delivery to the client, his most urgent problem may be that the project has over-spent by USD 2 Million.

Go straight to the point, summarise and focus on essential points. Or you may quickly lose your boss's attention and be perceived as the person who constantly adds problems to his/her plate.



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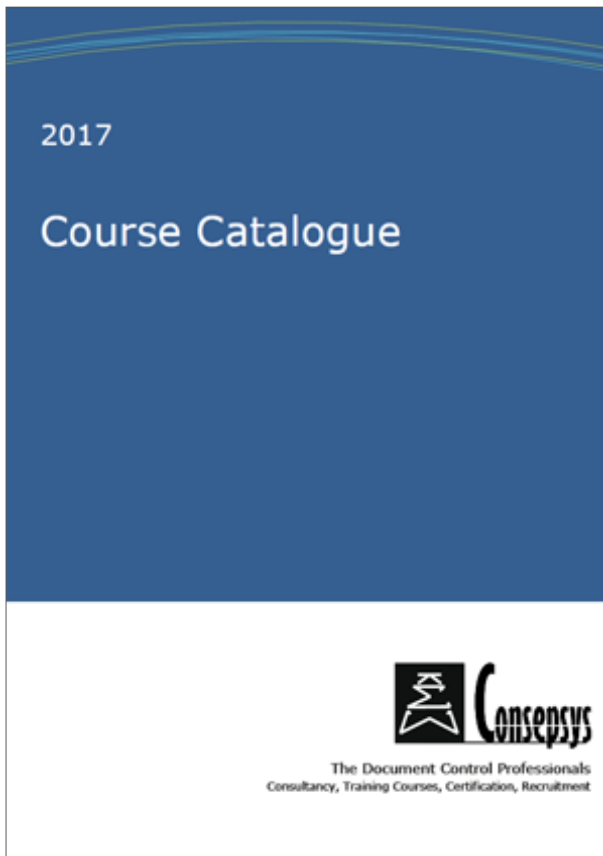
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DCC Certified Document Controller Course

Covers all day to day document control task, including basics (document checks, numbering, identification, filing, distribution) and more advanced subjects (such as lifecycle, as-built, procedures, reports, interfaces).

DCM Certified Lead Document Controller Course

Prepares DC professionals to manage and lead teams of DCs, to manage and organise DC activities and tasks, to manage stakeholders and to run, implement or improve DC management systems (procedures, tools, software, etc).

DCA Advanced Document Control Course

Covers advanced non-routine Document Control tasks. Learn how to better start and finish a project, issue useful reports, statistics and KPIs, write fool-proof procedures, raise awareness about DC, and formally manage your professional competencies.

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