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DEMOLITION DRAWINGS

DEFINITION AND EXPLANATION

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FOLLOWING UP PROJECT DOCUMENTS WITH THE

MASTER DELIVERABLE REGISTER

INSIDE THIS ISSUE:

EDITORIAL

This month we are excited to present the new design of The Document Control Tribune, which has evolved from a simple newsletter to an e-magazine format!

In this issue, we focus on a few critical Document Control concepts: explaining the use and benefits of using a Master Deliverables Register (MDR) to monitor project documentation deliverables, the importance of checklists in our daily Document Control tasks and good practices associated with the autorisation of documents.

We also publish an article on « Demolition Drawings », a type of documents many Document Controllers have seen and wondered about their purpose. Our article clarifies what they are, and why they are used by engineers.

We hope you like the new look and feel of the Tribune, we have a few new features and a re-visted design, but you will still find what has made the success of the newsletter: interesting articles on Document Control subjects as well as their work environment, the fun comics strip series « Hanging in There » with D.Ceecee the Document Controller, and the interview of a Document Controller (this month David Orphey).

We hope you enjoy reading it!

And as always, don't hesitate to share it with your friends and colleagues!

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MDR : FOLLOWING UP PROJECT DOCUMENTS

*M*DR is probably one of the first acronyms we hear about, when starting a career in Document Control, and more specifically when working in a project environment.

The MDR acronym stands for "Master Document Register" or, to avoid any confusion with other registers, "**Master Deliverable Register**".

The MDR is basically a list of all the documentation deliverables for a specific project, with additional infor-

Though the MDR template might that of the Client, the MDR itself is usually a document owned by the Contractor's Document Controller. He/she is usually in charge of updating the MDR and of regularly sending it to the Client: usually on a weekly basis, sometimes (more rarely) on a monthly basis.

In that sense, the MDR can be considered as a **communication document** between the Contractor(s) and the Client, about the status of project deliverables: here is the list of docu-

Contractor, late comments from the Clients, lost documents, potential delays with deliverables, and therefore the impact on the project schedule and overall any documentation-related problem for the project.

It is also a document that is used during project progress meetings (both internal and Client/Contractor meetings) to follow up actions on documents and to ensure their progress.

It is one of the key documents on a project, and although it is maintained

Example: Extract of a MDR Template

Document Number	Document Title	Company Code	Discipline Code	Type Code	Rev	Revision Date	Status	Document Progress (%)	Forecast date for IFR	Forecast Date for IFA	Forecast date for AFC	Actual date for IFR	Actual Date for IFA	Actual date for AFC
1502-CPY-PRO-PFD-653210	Process Flow Diagram	CPY	PRO	PFD	03	12/Apr/15	AFC	90	12/Feb/15	14/Mar/15	13/Apr/15	13/Feb/15	10/Mar/15	12/Apr/15
1502-CPY-PRO-DRA-653211	Heat & Mass Balance	CPY	PRO	DRA	02	10/Mar/15	AFC	90	31/Dec/14	30/Jan/15	01/Mar/15	03/Jan/15	30/Jan/15	10/Mar/15
1502-CPY-CIV-MTO-653212	Material Take-Off	CPY	CIV	MTO	01	11/Jan/15	IFA	70	07/Dec/14	06/Jan/15	10/Feb/15	07/Dec/16	11/Jan/15	
1502-CPY-	Electrical Design	CPY	ELE	SPE	00	07/Apr/15	IFR	50	07/Apr/15	07/May/15	06/Jun/15	07/Apr/15		

mation on each of these documents, for example:

- Identification information (number, title, discipline, document type)

- Documents status and progress information (revision index, date, status, etc)

- Information on expected delivery dates

- Information on actual delivery dates

It is usually an **Excel spreadsheet** as this widely-spread format makes it easy to share information between companies, and it also allows to easily sort, filter, highlight, process the data included in the MDR, both from the Contractor side and the Client Side.

ments we intend to deliver to you over the course of the project, with an indication on the progress for each one of them.

Upon receipt, it is also the opportunity for the Client's Document Controller to check the information, and to cross-check whether what is indicated by the Contractor as "issued" as actually been "received" by the Client.

The MDR is an essential tool both for the Document Control team and for the Project Management and Project Controls/Services team in general to **follow up on the progress** of the project and to identify any potential problems as early as possible.

The data from the MDR can be used to identify late documents from the

by Document Controllers, it contains information useful to many other disciplines.

This is why it is also in general a good practice to agree from the beginning of the project on the template, format and periodicity of issuance of this critical document.

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CHECKLISTS: AN ESSENTIAL TOOL FOR DOCUMENT CONTROLLERS

We can never emphasize enough the need for checklists in the Document Control Profession.

For example, a key document that every Document Control team should share is a Quality Checklist for documents.

Document Controllers are indeed in charge of checking the compliance, quality, consistency of documents in their project / department / company.

Although this is the basis of our discipline, you will find that not everybody works in the same way, especially when it comes to Quality Checks.

method.

A great and efficient way to achieve this is through checklists: for example, by having a common checklist listing out all the checks to be done by Document Controllers on documents:

- Prior to registering a new revision
- Prior to sending a document outside the company
- Upon receipt of an incoming transmittal package
- Etc.

The checklist will ensure that everyone covers the same checks, and this regardless of whoever is in charge of the checks.

"The use of checklists ensures consistency and quality"

In many cases even if you give the same document to 10 Document Controllers for quality checks, they will all come back with a different list of errors and discrepancies.

This variation is something we want to avoid in Document Control. Two of the values we must focus on are indeed consistency and quality.

This means that the end-product must be consistently the same, regardless of the person who processed it.

Within a same the project / department / company, documents must all be checked with the same

It is also a great way to train new comers about the level of quality expected from them.

For more efficiency, client companies can even share this checklist with their contractors and suppliers so that they perform the same checks prior to issuing documents.

In the battle for quality and consistency, checklists are definitely great tools, if not "weapons", to reach our goals and maintain our values.

Example:

Extract from a Document Control Quality Checklist

Check presence, accuracy and consistency of:

- ☐ Document number
- ☐ Title
- ☐ Revision number
- ☐ Date
- ☐ Status
- ☐ Page numbering
- ☐ Identification of Company
- ☐ Revision history table
- ☐ Signatures

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WHAT ARE « DEMOLITION DRAWINGS »

Imagine that you want to refurbish and modernise the kitchen in your house.

If you are not a handy person, you will hire construction contractors to do the job.

Now, imagine that you want to change or remove:

- All cupboards;
- The worktop;
- The oven;
- The fridge and freezer;

But you want to keep:

- The cooker and the air extractor;
- All wall-mounted electrical sockets;
- All grey water drains outlets;
- All fresh water supply connections.

If you hire contractors and tell them "I want my kitchen refurbished" with no other instructions, you run the risk that some of the items that you want to keep are thrown away ("My cooker!") or destructed by the contractor.

You also run the risk that some items for which you have paid for removal are forgotten and left behind by the contractor – like a big, heavy fridge/freezer that you cannot carry and throw away by yourself.

To protect yourself against such risks, you will probably talk to the contractor, make lists, and maybe prepare schematics or layout plans.

Let's transpose the above situation to an oil and gas platform, a process plant, a maintenance workshop, a pharmaceutical factory, a helicopter, or any technical environment where machines, equipment and appliances are used.

Whenever they make modifications to their platforms, plants, workshops, factories, machinery or aircrafts, companies need to find a precise way of communicating their "to be removed / destructed / changed" list and their "to be kept" list to their construction or destruction contractors.

If they do not, they run the risk that some of the items that they want to keep are thrown away or destructed, and they also run the risk that some items for which they have paid for removal are forgotten and left behind by the contractor – like heavy machinery, mechanical parts, large pieces of metal or even aircraft engines.

The cost of such mistakes can range from a few tens of thousands of dollars (x $10,000) to a few million dollars (x $1,000,000).

To protect against such risks, indus-trial environments have developed various ways and means. One of those methods is Demolition Drawings.

These drawings show the details of what needs to be removed and what needs to be kept. They represent a previse, unequivocal way of giving instructions. In many industries, the parts to be removed / destructed are shown within hashed clouds (see
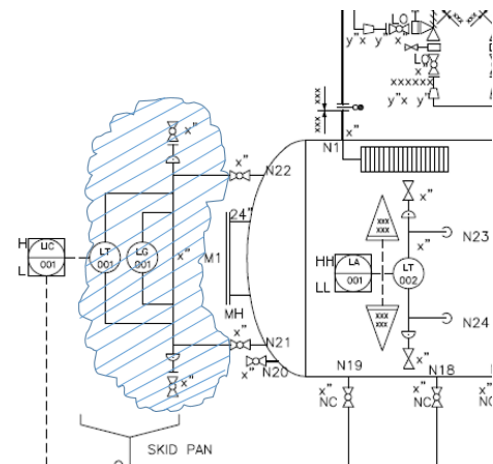
above) on the Demolition Drawings.

In Document Control, the management of Demolition Drawings requires special processes to ensure full traceability of the modifications.

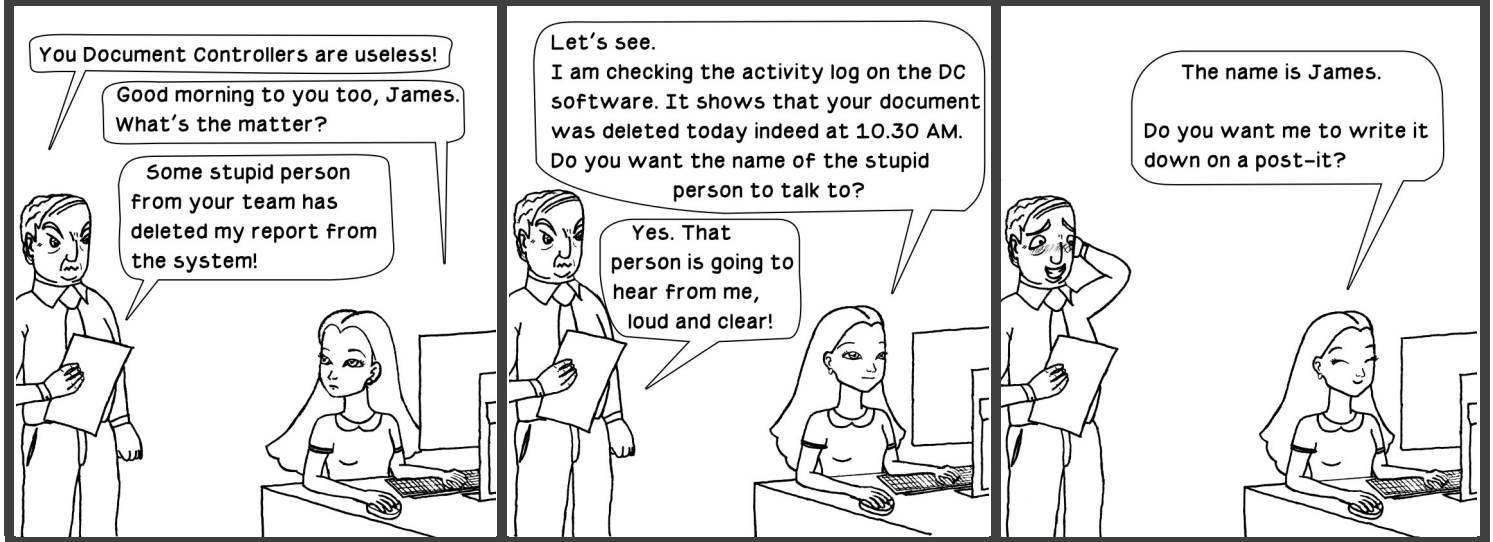Are you familiar with the Demolition Drawings procedures within your company?

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

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Panel 1:
- You Document Controllers are useless!
- Good morning to you too, James. What's the matter?
- Some stupid person from your team has deleted my report from the system!

Panel 2:
- Let's see. I am checking the activity log on the DC software. It shows that your document was deleted today indeed at 10.30 AM. Do you want the name of the stupid person to talk to?
- Yes. That person is going to hear from me, loud and clear!

Panel 3:
- The name is James. Do you want me to write it down on a post-it?

Follow D. Ceecee on Consepsys   and on [f]

Credits
Graphical concept: Myranda Saffarine
Scenario & Design: Tuffmee & Nwash
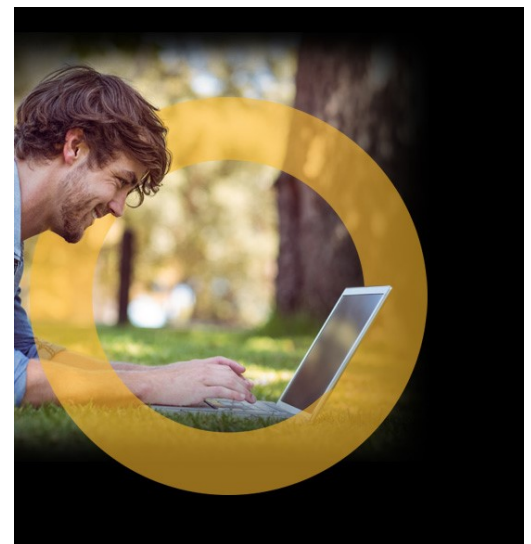
AUTHORISING DOCUMENTS: GOOD PRACTICES

Authorisations on documents are essential. It is even one of the requirement of the ISO 9001 International Standard: documents must be approved prior to being issued.

This approval can come in various forms, including wet signatures, electronic signatures, approval through an electronic workflow, etc.

The best practice in this area always lies with methods that allow the end-user to be certain, when opening and reading a document, that the document has been approved for release.

Therefore, any method allowing to show signatures or official stamps of approval on the first page of the document itself, should be favoured, as opposed to systems where the approval trail is only kept in a software

Revision History						
Current	Revision Index	Revision Date	Status	Author	Checker	Approver
☐	00	01-Mar-2013	IFR	JD	MG	JT
☒	01	31-Mar-2013	IFA	JD _J.Doe_	MG _garcia_	JT _JT._
☐						
☐						
☐						
☐						

package managing workflows for example.

The reason for that being: if the document is printed, sent to a third-party, or used on site, the user must still be able to determine if the document was approved or not. Without having to consult the audit trail in a separate software.

This requirement for a formal authorisation system comes with its own challenges, including:

- Ensuring that only authorised personnel actually signs / authorises documents
- Ensuring that, if using initials, those refer to a unique person

- Ensuring that we use the authorised signature of each person, if using wet signature
- Ensuring that we use a secured e-signature system, if opting for electronic signatures
- If using an electronic workflow to approve documents, ensure that the approval is reflected on the actual document

These challenges are encountered on a daily basis by Document Control professionals.

A few good practices can be listed here to show how Document Controllers from around the world and across industries come up with solutions to these challenges.

At the very least, if the company uses initials on documents (or in registers, such as the MDR), they should have a unique initials register. This can be maintained by the HR department for example: each employee is allocated a unique set of initials. This requires maintenance and constant update, and it is also recommended to keep a record of each revision of this register, so that we can refer back to an older revision, in case for example of audit or investigation on a document.

More advanced, one of the good practice we have seen is to maintain an authorisation register: that is a list of personnel authorised to sign, with an indication of which documents they are authorised to approve, their named deputy in case of absence, as well as the record of both their initials and signatures.

Also, in terms of the good practices,

if a Company decides to go for electronic signatures on documents, it must implement it through a dedicated e-signature software package. This will address a certain number of concerns and limitations that occur when using a non-speciliased software package , for example: problems when several persons need to sign documents, concerns about the security of signatures used, issues with the set-up of e-signatures.

Software such E-sign or Docusign for example, definitely help tackling all these e-signatures challenges.

For those who are using an EDMS that integrates approval workflows for example, we have seen good and bad practices here too.

In this case, usually the document does not circulate from one desk to another to gather signatures for example: the program does it for you: you can set up the workflow either in parallel or in sequence, so that each person who needs to approve gets to formally approve the document electronically, by simply clicling on a button. The concern is that, if that process replaces the actual signature on documents, the end-user loses the ability of knowing that a document was approved, if it is viewed outside of the EDMS.

So, in this case, the best practice is to configure the EDMS so that it reflects on the document itself that the document was approved through an electronic workflow: for example, by automatically including a watermark on approved documents, or by automatically showing the electronic signatures on documents.

In any case, we need to think first about the end user: the Document Controller will always know whether a document is approved or not, but do we make it easy enough for the end-user not to be mistaken?

PORTRAIT OF A DOCUMENT CONTROLLER

DAVID ORPHEY
Document Control Lead in Lumut, Malaysia

David attended both the Certified Document Controller Course & Certified Lead Document Controller Course with Consepsys in Singapore in September 2015

Can you tell us a bit about you?

My name is David Orphey, I am a tenacious 33 year old Houstonian from USA, working as an expatriate in Malaysia for almost two years.

When it comes to work/life balance during my downtime I've developed a strong penchant for a wide range of activities such as; all genres of music, photography, inspirational quotes, foreign languages/cuisines, parasailing, hiking, voiceover training,...

I consider myself a very proud uncle of 10 nephews, 7 nieces, loving brother of 5 siblings, grateful son of 2 parents and countless number of cousins, fraternity brothers and friends from all 4 corners of the world.

What is your current role?

I currently serve as Document Control Lead for a LNG Project with a major global contractor - I'm responsible for supervising, maintaining and supporting document management work processes for a major scope on the project. I lead an integrated team of 20 staff members, comprising of 7 nationalities, working in two international locations. Daily execution of project activities; coordinating, collaborating, and expediting documentation related to the needs/goals of the project including all phases i.e. construction, retention, turnover, closeout and ultimately handover.

Can you describe your professional experience?

Since graduating with 2 Bachelor degrees in Business Management & Marketing from Grambling State University (Class 2007). I've embarked on a myriad of career experiences totalling to over 17 years I have executed some form of Document Control throughout numerous areas/dimensions of my life; 2 continents, 5 countries, 25 states, and 5 industries. I've held positions from Territory Retail Sales Representative Representative

"2 continents, 5 countries, 25 states, 5 industries"

(with a top confectionary company) to Document Control Technician, Senior, Lead and Manager with various EPCM companies.

Which Consepsys course did you attend and when?

Without hesitation, I attended both courses Document Controller and Lead Certification Training during fall 2015 in Singapore while on my vacation as a personal investment in my career. My objective was simple as I wanted this for myself, a chance to prove that I still have the skills, knowledge, and energy to run with the best in the business

What did you think about the

course? How did it help you in your current role and career development?

This course has elevated me into becoming the first International (Consepsys) Certified Document Controller/Manager within my company.

It's absolutely amazing and first class from start to finish. This course was certainly refreshing in meeting, and exchanging experiences with like minded professionals from all corners of the world. Sort of like a private "think tank" as we could literally use the Document Controller jargon without having to breakdown or provide explanations while debating a hot issue. The discussions are very engaging and informative.

This course offers you with something not too many courses can provide: a sense of achievement, inspiration & pride to be a Document Controller. Since the course I've become rejuvenated, motivated and elevated as this course was definitely a sound investment for myself professionally and personnaly.

# OFFICE ERGONOMICS: WHY YOUR BACK SHOULD NOT SUFFER FROM YOUR JOB

A common problem encountered by Document Control professionals is a very practical one. How to ensure that, after a full day of thorough quality checks and meticulous data entry, your back, shoulders and neck do not suffer too much.

The answer to this very regular issue lies with ergonomics of the workplace environment.

Many of the most common sources of pain may be fixed by making a few fittings adjustments.

1. Position of the screen. If its position forces you to either look up or look down, it will create neck and back pain. Your eyes should be at the same height as the « address bar » when you have an internet window open. If not, then you will need to adjust the height of the monitor. This is especially significant when you work with a
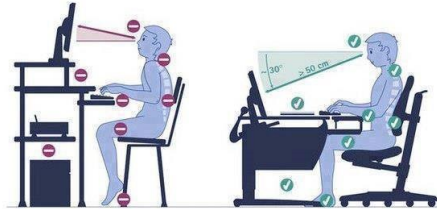
laptop, which by essence forces your head down and therefore creates tensions in your neck and back.

2. Position of your arms, keyboard and mouse. The keyboard and mouse should be positioned in a way that keeps your elbows to your sides, and your arms at (or below) a 90-degree angle.

The tilt of the keyboard also has its importance: It should ideally be positioned with a negative tilt — down and away from you.

The keyboard and mouse should be shoulder-distance apart and as level as possible.

3. Back & feet. Also make sure that your **back** is supported and straight, and that your **feet** are on the floor (not hanging) in front of you.

With a few adjustments, you can definitely avoid or reduce the work-related pains that one may feel after a long day of Document Control!

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THE DOCUMENT CONTROL TRIBUNE
 Issue no.8 - March 2016

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