THE
DOCUMENT CONTROL TRIBUNE

In this issue:

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Implementing an EDMS

An EDMS stands for: Electronic Document Management Software Package. It is a software package allowing the storage and management of electronic documents.

Selecting an EDMS

The selection of an EDMS solution must be made on a detailed list of functional and technical requirements for a specific company. The selection process has to be done methodically, and objectively. All too often, companies make their decisions based on hear-say or on previous experience. However, it is not necessarily the case that if an EDMS was adopted by a previous company that it will also be adapted to your current company's requirements.

Investment decision

Implementing an EDMS can be very costly (from a few hundred thousand pounds to millions of pounds, depending on the EDMS, the size of the organisation, the degree of customization, etc.).

But this investment has to be balanced by the benefits. And if it is costly, it does not mean we should not go ahead with the investment. A return on investment calculation and a detailed business case will allow senior management to invest with confidence.

Implementation project

The project itself will contain several phases including workshops with the EDMS vendor's developers to design or set-up the solution, mock-up, tests, migration of documents and data, as well as validation. All these phases need, to say the least, an important input from the Document Control team. It is therefore crucial to plan this workload in advance, so that the Document Control team can allocate some of their time to the implementation project.

Going Live

This part is the most exciting, but also one of the most demanding phase: preparation of user guides, training materials, organisation of users' training and support.

Interested in Going Further?

ONLINE SHORT MODULE: EDMS IMPLEMENTATION

Consepsys proposes an online short course module should you wish to understand better the phases of an EDMS implementation project.

In this 3-hour e-learning module, you will learn about the process of selecting an EDMS, how to convince your management to invest in an EDMS, how to implement the EDMS successfully and what to expect in terms of actions and tasks.

How will you learn?
- Web-based material: Access to the module through our online learning platform
- Self-paced: Start whenever you are ready, learn when you can (including evenings, week-ends, or working hours), and where you can (as long as you have an internet access)

More information on www.consepsys.com

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Salary Survey

Consepsys' Annual Salary Survey will run from the 14th of October to the 1st of December 2014. The survey will be a benchmark of Document Control professionals' remuneration throughout the world and a study of factors impacting remuneration (experience, role, environment, industry, etc.).

Document Control professionals from all countries and industries are invited to take part in this important research to identify salary levels, trends and other fundamental topics

- Deadline: Survey closes on the 1st of December, 2014
- Time: The survey will take approximately 10 minutes
- Participants will receive a copy of the summary report when it is published in January, and will be entered into a drawing to win a 3-hour online course module on Document Control topics.
- The survey can be done anonymously and all individual results are confidential and will not be disclosed to any third party.

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KPIs: Monitoring Documents and Document Control

'KPIs' stands for 'Key Performance Indicators' and is a type of performance measurement. It evaluates the success of an activity, and in our case we can use them to monitor the efficiency and performance of Document Control in an organisation.

Defining KPIs

To work with KPIs, we must start by defining the KPIs that are relevant to our group, but also to the specific organisation we work for (for example, KPIs can be different whether you work in a project or non-project environment). To define the relevant KPI, the starting point would be to answer questions such as 'What is important?' and 'What do we want to achieve?'

The idea will be to define the KPIs and then to monitor the performance against each of the KPIs.
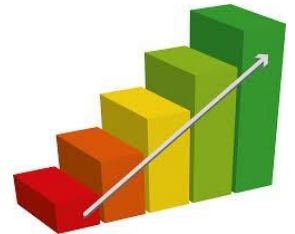
Document Control KPIs

In the Document Control area, different types of KPIs can be used. For example:

- Performance indicators to measure the performance of the Document Control Group
- Average time to respond to queries
- Incoming document: Average time between receipt of a document and validation (or rejection) of the delivery (includes quality checks on documents)
- Incoming document: Average time between acceptance of a the document delivery and distribution of documents to stakeholders
- Percentage of documents rejected due to quality / compliance issues
- Percentage of documents rejected by clients (for document control related reasons)
- After a review cycle: Average time between close-out of the review and distribution of comments to relevant party (author, or external company)
- Percentage of users having been trained to the DC procedure and processes
- Percentage of users having been trained to the DC software package

Challenges

The challenge with KPIs is two-fold: First, defining the right KPI can be difficult. But in addition, there is no point defining KPIs if they cannot be easily monitored.

Special attention should indeed be given to the monitoring aspects when designing the KPIs: for example, any KPI being about an 'average time' means you should have the means to easily measure this time (for example using data tracked in your EDMS, or helpdesk/ticketing software package).

Communication Tool

KPIs are definitely great tools to communicate issues regarding Document Control and to ensure visibility of our discipline in projects and corporations. They can be used in progress reports, presentations and performance reviews.

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Sharing documents with Third Parties

Most projects involve at least two companies (the Client company and their main Contractor), often even tens of companies (including all subcontractors, vendors, etc).

Collaboration and sharing of the latest approved information is therefore key to any project. With this requirement, comes a wonder: how to make sure that all stakeholders have access to the relevant information, on time but also with the right level of quality, reliability and auditability.

Several options exist, each of them used by companies in different industries:

Full collaboration

In this option, all the companies involved (client, contractors, sub-contractors) use the same Document Control software package / EDMS. This option means that documents are registered in one single location, independently from where they were originated, which is usually good for quality (if the same document has to be registered in several EDMS, it increases the risk of mistakes). The gain in terms of man-hours to manage documents is evident. However, this option is sometimes not the preferred one as it raises questions in terms of ownership of documentation, legal protection of companies' interests and security of information.

Gated collaboration

In this option, each company involved has their own system. Documents are formally exchanged between parties through a legal and traceable transmittal process. Ownership and protection of legal interests are ensured, however, this option induces delays in the sharing of information, and therefore has to be implemented along with the right processes and tools to compensate the formality of document transmittals.
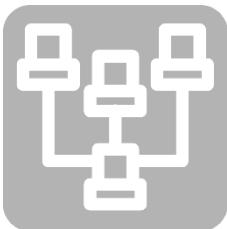
Other options, usually situated in-between the two above options also exist. However, it is important to remember that, whenever we start a new project, we should not only focus on tools (such as EDMS) but also on the processes and roles and responsibilities.

DOCUMENT CONTROL TRAINING COURSES

Acquire, consolidate, validate and deepen competencies:

- Document Control Training Courses

- Lead Document Control Training Courses

- Face-to-face and in-company training sessions

- Online Modules

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Book Recommendation

GLOSSARY OF DOCUMENT CONTROL TERMS

Author: Julie Tchao – Publisher: Consepsys

JULIE TCHAO

GLOSSARY OF DOCUMENT CONTROL TERMS

Over a hundred Document Control definitions

Consepsys Publications
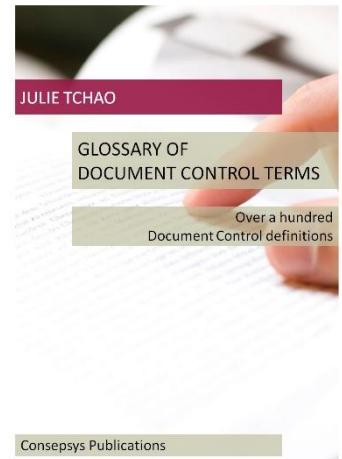
This book defines and discusses more than a hundred terms commonly used in the Document Control profession.

This glossary is targeted at Document Controllers, and any professional involved in Document Control and Document Management activities.

Entries are arranged alphabetically and can be found easily through the Index.

Have you ever wondered what 'Metadata' is? An 'ITT'? An 'As-built'? A 'Watermark'? A 'Cut-off date'?

Or do you want to know more about Disposal, Distribution, Lifecycle, Revision, Traceability or Approval?

Then this book is for you!

http://www.consepsys.com/publications/books/

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Andrea, Lead Document Specialist at Atacama Large Millimeter/submillimeter Array (ALMA), Chile, attended a Consepsys Course in 2013

Portrait

Andrea, Lead Document Specialist in Chile

Can you tell us a bit about you?

I am a Translator and Interpreter. However, I have developed my career in Technical Publications for multinational companies. I am a very motivated individual and always enjoy challenges. I love languages and apply them when travelling. In my spare time I undertake a wide range of activities; I am particularly keen on mixing music, and snowboarding in the winter.

What is your current role?

I am the Lead Document Specialist at Atacama Large Millimeter/submillimeter Array (ALMA).

Can you describe your professional experience?

I started as an editor for General Electric (GE) Aviation in Repair Engine Manuals. Then I was promoted to control the documentation for GE Energy under the concept of single sourcing. Later, I worked as a Document Specialist at ALMA and after a year I took the leadership within the team.

Which Consepsys course did you attend and when?

I attended both the Document Controller and Lead Document Controller courses during the sessions in Paris, France in November 2013.

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

The courses were great. I did not have any formal background in Document Control and the courses helped me to confirm my self-study and also to learn more about the discipline that this job requires. The courses are very well-implemented and the Certification Exams are very difficult and exacting, which makes you fell rewarded once you know you have passed both exams. In addition, it was personally very comforting to share experiences with colleagues from all over the world.

Take your career one step further!

Consepsys run a wide range of training courses, certification programs and seminars. Our catalogue includes:

- **Document Control Courses**: Learn new skills and consolidate and formalize your knowledge and experience
- **Lead Document Control Courses**: A managerial course where you can learn how to lead teams, manage interfaces, implement, improve or run DC systems (procedures, resources, software, etc.)
- **Certification programme**: Certify your experience through a formal 3-hour examination
- **Online Short Modules** on selected subjects: web-based, self-paced and fully flexible

You can enquire or register online on our website: www.consepsys.com

Download our Course Catalogue from our [Website](#)

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The Document Control Professionals