

# THE DOCUMENT CONTROL TRIBUNE

Your tribune, your say

Issue no. 2 - December 2013



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## Editorial

By Julie Tchao

Welcome to this second issue of the 'Document Control Tribune'.

Once again, the aim of this newsletter is to provide information, content and news about Document Control, to those who are interested in this discipline.

This issue will be the last one for the year, so it is already time for an assessment of the year.

I travelled a lot the last two years, around the world, to train and certify document controllers and lead document controllers from 15 different industries.

It is always a great moment to meet new people, discuss with them about their ways of seeing the profession, and about their practices.

It is also very interesting to see that, around the world, the document control discipline and philosophy is now well spread out and shared throughout countries, industries, people...

Obviously, there is still a lot to do to promote our profession, be recognized as we should in terms of added-value to the projects or companies where we are involved... but we are getting there.

More and more document control professionals are getting trained and certified, more and more lead document controllers also learn about management techniques that will help them to convince, communicate, and manage the DC group within their company.

More and more professionals are also coming into our courses to update their knowledge with the latest techniques or best practices. This is only by professionalizing our practices that we will get recognized truly as a core and critical discipline and activity within our companies.

What I really enjoyed this year was also about making sure that, whenever we hear about a new good practice or a good idea during our training courses, we actually integrate it. We contribute more and more to the spread of best practices around the world.

I hope this issue of "The Document Control Tribune" will get you interested, and do not forget that this newsletter is also meant to be an open tribune: feel free to propose articles about Document Control, and we will be pleased to publish the best ones here! If you wish to do so, please contact us at [dctribune@consepsys-im.com](mailto:dctribune@consepsys-im.com)



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# Engineering Control, Control of Documentation and Safety

By Luis Heng <sup>CEng</sup>

All businesses and all industries rely on documents to function and to operate. In businesses involved in engineering activities, the management of technical documentation carries a significant level of responsibility, directly related to personnel safety.

Engineering Control can be described as the set of activities required and the set of measures taken to ensure that technical information displayed on a document has been checked, reviewed and approved by competent and authorized individuals in a systematic, consistent and thorough manner. The objective is to ensure that the content of each document reflects the current intention of the authors and their stakeholders at the time of its issuance, and that displayed information is correct at the time of issuance.

In a sense, Engineering Control may somewhat be compared with Document Control, as a means to control documents; however, the fundamental difference is that the scope of Engineering Control focuses essentially on the content of documents, whereas the scope of Document Control is limited to the 'shell' or the 'container' of documents – typically templates, drawing borders, metadata etc.

Failure to enforce Engineering Control can lead to such catastrophes as the Flixborough accident of 1974, whereby the explosion of a chemical plant claimed the lives of 28 people and seriously injured 36 people.

On a different level, there exists a category of documents which focuses on processes and procedures. On industrial sites, for example, the Permit to Work (PTW) system aims at ensuring that, if an 'unusual' activity is to be carried out:

- All potential risks have been identified, assessed and measures have been taken to minimize or eliminate those risks;
- There is one individual who centrally coordinates, supervises and monitors all ongoing activities and who keeps all parties informed; this person is the Permit to Work (PTW) supervisor;
- All individuals working on the affected facility are aware of other activities that will be conducted in parallel with their own;
- All individuals and groups report on the progress and status of their tasks to the PTW supervisor;
- No deviations to the planned works are initiated and, if they are, they must be centrally agreed with the PTW supervisor.

The objective is to maintain safety at all times within the facility.

Examples of 'unusual' activities may include earth moving, welding, isolation and partial dismantling of equipment items, opening of an electrical cabinet for maintenance etc.

Failure to enforce the Permit to Work system can lead to such catastrophes as the 1988 accident on the Piper Alpha platform, whereby fire broke out, spread out, escalated, completely destroyed the platform and claimed the lives of 167 people.

Although they were not directly linked with Document Control, in both cases, accidents were partly caused by a failure in properly managing important documents.

This shows that, in general, the mismanagement of documentation can have serious consequences. In this respect, Document Control requires a strong quality and safety mindset.



## DOCUMENT CONTROL TRAINING COURSES

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- Document Control Training Courses
- Lead Document Control Training Courses
- Face-to-face and in-company training sessions

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# Tablets and Businesses By Julie Tchao

Tablets are now widely used for personal purposes, an increasing number of companies have been adopting them for business purposes. And one must admit that, especially for business travellers, the use of tablets in a professional environment completely makes sense.

Not only they allow to communicate easily (emails, Skype, etc), but they also allow to always have access to business contacts, calendars and, more importantly, to the company's documents (with applications such as DropBox, Goodreader, QuickOffice, etc.).

You can also easily edit documents, save them, review them and synchronise them.

Tablets also allow remote conferencing and presentation sharing (Webex, GoToMeeting).

Note that you will need to have a good bandwidth to run a smooth video conference.

And that's not it: Obviously, with the huge catalogue of available applications (many of them are business oriented), possibilities are exponential, and there is no doubt that, in the near future, the use of these tablets will spread even more within companies, with integration with EDMS (Electronic Document Management Systems).

## Document Control requires competencies.... And a lot of patience!

I bet you have had this feeling before: just feeling either angry or depressed when you receive documents to manage and when they always come with the same problems or errors.

We thought that handling this situation with humour could help a lot of Document Controllers facing these problems and we launched the "Keep Calm and Reject the Transmittal" campaign. We have created a fun poster that you can keep on your desk and share with your friends. Don't hesitate to download it, print it, share it and have a look to it each time you feel the need :-)



## Did you know : What's ISO 9001 ?

The ISO 9001 standard is an International Standard, published by the International Organization for Standardization. It is the Quality Management Standard, and describes the requirements to have a proper Quality system. It includes a section on Document Control, so this is an important standard to know for Document Controllers. The standard can be applied to all industries and all countries.

Many companies, including the contractors and vendors in the construction industries have to be certified by this Standard to obtain new contracts.



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# Prepare now for your next year's training programme

By Julie Tchao

The end of the year is usually the best period to plan for training programme for the next year!

Should you wish to develop your knowledge in the document control area, Consepsys proposes a wide range of training courses, certification programs and seminars.

- **Document Control Courses:** Learn new skills; 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)
- **Seminars:** Develop your knowledge in specific areas of document control, such as audits, implementation of EDMS (Electronic Document Management Systems), Document related business risks, etc.
- **Certification programme:** Certify your experience through a formal 3-hour examination

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## THE DOCUMENT CONTROL TRIBUNE

Issue no. 2 - December 2013

### PUBLISHER

**Consepsys Limited**

1 Berry Street AB25 1HF Aberdeen – United Kingdom

[www.consepsys-im.com](http://www.consepsys-im.com)

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