

THE DOCUMENT CONTROL TRIBUNE

Your tribune, your say

Issue no. 3 - May 2014



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Editorial

By Julie Tchao

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

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

We want to discuss here any subject that may be of interest for Document Controllers, so please do not hesitate to make suggestions.

I want to take this opportunity to remind you that this newsletter is also meant to be an open tribune: feel free to contribute with 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

Document Control is definitely increasing in profile and priority across multiple industries. We can see that, over the past few years, more and more industries have implemented Document Control: we ourselves already trained people from 20 different industries! This is just an illustration of how widely adopted the Document Control discipline is now.

All around the world, there is a community of Document Controllers. Each time we go into a new country, the Document Control professionals are always eager to know about each others' practices, about return on experience, and about learning best practice.

We hope this issue of "The Document Control Tribune" contributes to this experience sharing, and that it will get you interested.

Don't hesitate to share this free newsletter with your colleagues, friends and any person who may be interested by these subjects.



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A Roadmap for Implementing Document Control

How to make sure your Document Control system is complete. How to enhance your current system. How to implement a new system

When it comes to a Document Control system, we tend to forget how many activities and items are to be taken into account.

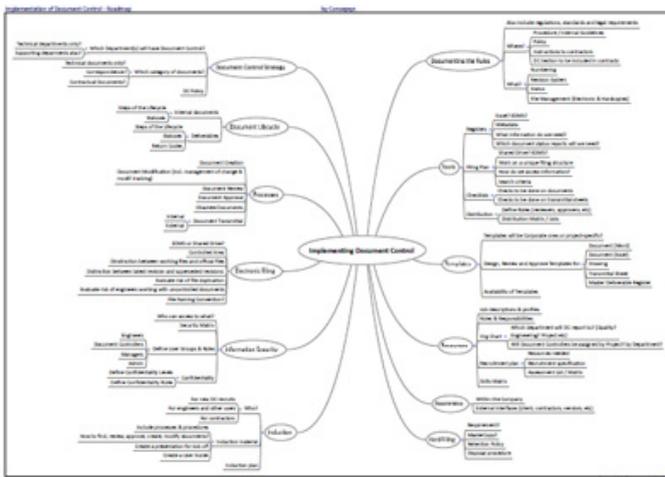
This is why we have created a roadmap that can be used to assess your current DC system or in implementing a new system.

Indeed, a Document Control system is not only a procedure or a software package. It is much more than that. It should at least cover the following:

- Strategy: What is the Company's strategy in terms of Document Control? Which department should work with DC? Which category of documents?
- Documenting the rules: Procedures, Instructions to Contractors, etc.
- Document Lifecycle: What is the lifecycle for internal documents? For external documents?
- DC Processes: Who does what and when, when it comes to creating documents, modifying documents, etc.
- Electronic Documents Filing: Which file plan? Where do we file documents? How?
- Hardcopy Documents Filing: Where? How? What are the requirements?
- Information Security: Who can see documents? Which information must be restricted?
- Tools: Registers, checklists, distribution matrices, templates.
- Resources: Resource plan, job description, roles & responsibilities, skills management.
- Awareness about Document Control in the Company.
- Induction: How to make sure that every DC and every user knows about the rules, the tools, the processes.

We have created a complete roadmap to give you food for thought regarding your current system. The roadmap can be downloaded from our website:

<http://www.consepsys.com/publications/articles/roadmap-for-the-implementation-of-document-control/>



Interested in going further?



Book Recommendation:

DOCUMENT CONTROL RECOMMENDED PRACTICE

Author: Julie Tchao – Publisher: Consepsys

This book is a practical tool that can be used as a guide for implementing a Document Control System, or for enhancing or auditing an existing one. It goes into detail and provides you with the list of all the essential elements that a proper Document Control system should entail. The requirements are intended to be applicable to all organizations, regardless of the type, the size and the nature of their activities.

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

Roles & Job Functions in the Document Control Area

There are various job titles used in the Document Control area. We define here the most common ones, and include a description of the typical roles for each of the titles:

	Document Controller	Senior Document Controller	Lead Document Controller	Document Control Manager
General description	In charge of the daily management of documents on a Project or in a Department	Experienced professional, in charge of the daily management of documents on a Project or in a Department	Team leading position on a Project or in a Department	Management position overseeing document control systems & teams for a Company
Typical activities	<ul style="list-style-type: none"> Manages documents (internal & external) Checks compliance and quality of documents Maintains a list (register) & files documents Distributes documents to relevant people Liaises with Client / Contractor / Subcontractor Reports on the progress of documents 	<ul style="list-style-type: none"> Manages documents (internal & external) Checks compliance and quality of documents Maintains a list (register) & files documents Distributes documents to relevant people Liaises with Client / Contractor / Subcontractor Reports on the progress of documents 	On a project or Department: <ul style="list-style-type: none"> Leads / Coordinates a team of Document Controllers Sets up the DC system (procedures, processes, templates, applications, etc.) Runs & administrates the DC system for a project or department First line of contact in the case of an escalation of a DC related issue Gate keeper of the DC rules and procedures Clarification, arbitration, technical authority role regarding DC issues 	On a group of Projects or Departments / For an entire Company: <ul style="list-style-type: none"> Manages / Coordinates a team of Document Controllers Sets up the DC system (procedures, processes, templates, applications, etc.) Runs & administrates the DC system First line of contact in the case of an escalation of a DC related issue Gate keeper of the DC rules and procedures Clarification, arbitration, technical authority role regarding DC issues Ensures commitment, support and buy-in from internal and external interfaces Closely supervises difficult / sensitive phases
What is the difference with the other roles?		The activities are the same as the Document Controller's one, but the senior DC is usually an experienced professional	This role is on more the management side of the discipline: leading a team, setting up a system (procedures, tools, etc.) for a project, arbitrating and clarifying on DC issues	This role is a management role, entailing stakeholder management, implementation of an integrated system (including procedures, software, tools, etc.), clarification, gatekeeping and management of resources

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Ten tips for beginners in Document Control

1. Read the Company's or Project's document control procedure: you are the guardian of the rules, therefore you have to know the rules!
2. Don't be afraid to say "no" to a request.
3. The Document Control function is a gatekeeping function: this means that only the documents that comply with the procedure should be accepted. If they do not comply, they should be rejected and corrected.
4. Take every opportunity to learn: What is this document? Why do engineers need it? What project phase are we in? What is the next phase?
5. A Document Controller who never opens the documents to check them only does half of the job.
6. Attention to detail is key. Do things right!
7. "Quick" is the enemy of "Quality". Always make sure you put Quality before Quickness.
8. Accuracy should be your focus. You'll agree that 1 and 2 are different when it comes to baking a cake. It is the same in Document Control!
9. Be exhaustive when you perform quality checks on a document: don't stop your check after the 3rd error. Make the list of all the discrepancies and non-conformities that must be corrected.
10. Authors are writing documents, Draughtspersons are creating drawings, and Document Controllers are controlling documents and drawings! The roles are not to be mixed up!

DOCUMENT CONTROL TRAINING COURSES

Acquire, consolidate, validate and deepen competencies:

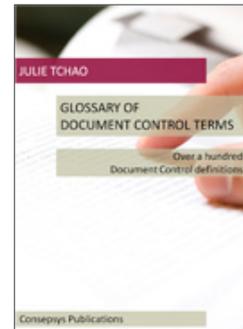
- Document Control Training Courses
- Lead Document Control Training Courses
- Face-to-face and in-company training sessions



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Book Recommendation: GLOSSARY OF DOCUMENT CONTROL TERMS

Author: Julie Tchao – Publisher: Consepsys



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/>

Take your career one step further!

Consepsys run a wide range of training courses, certification programs and seminars. You should definitely consider them if you want to:

- ❖ Formalise your knowledge
- ❖ Consolidate basics
- ❖ Acquire competences
- ❖ Learn new skills
- ❖ Develop a robust foundation
- ❖ Compare your experience with best practices
- ❖ Network with other Document Control professionals

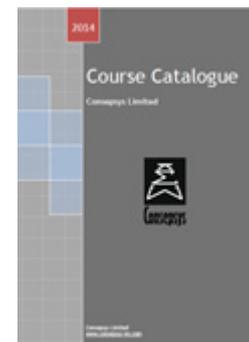
Our catalogue includes:

- ❖ **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.)
- ❖ **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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Download our Course Catalogue from our Website : www.consepsys.com



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