THE
DOCUMENT CONTROL
TRIBUNE

Consepsys

INTEGRATING DOCUMENT CONTROL AS PART OF PROJECT CONTROLS

HOW TO IMPROVE THE RECOGNITION OF THE DOCUMENT CONTROL PROFESSION

Consepsys
The Document Control Professionals

INSIDE THIS ISSUE:

EDITORIAL

This first issue of the Document Control Tribune for 2018 focuses on a very common hurdle encountered by Document Control professionals: the lack of recognition of our profession.

That lack of recognition is often perceived as unfair and wrongful by Document Controllers.

But don't ask us to resign ourselves to accepting that as an inevitability.

In this issue, we explore the different ways that we can use to fight back and to improve the recognition of our profession.

The truth is that there is a lot that Document Controllers can do by themselves, without even waiting for their inferfaces to realise how important Document Control is and how useful it can be.

We hope that this issue will inspire you to continue promoting the profession around you and to be the best version of your professional self!

As for all the past years, you can count on us in 2018 to continue gathering and disseminating best practices around the world and to continue promoting the profession, in every possible way, every day.
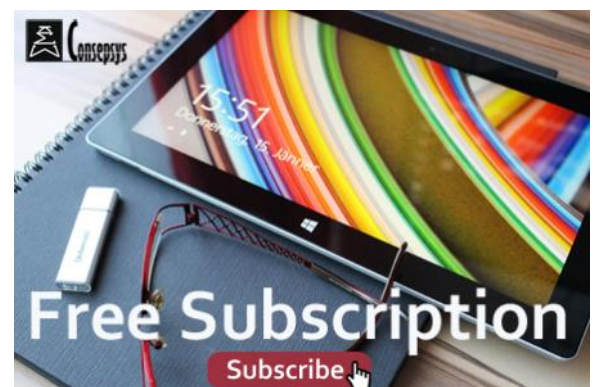
HOW TO IMPROVE THE RECOGNITION OF THE DOCUMENT CONTROL PROFESSION?

It is unfortunately a finding that many Document Control professionals have come to make: our discipline is not well known and understood.

This leads to countless misunderstandings and misinterpretations of what the profession is about, what the role is about and what its focus should be.

But most importantly, this lack of understanding leads to a lack of recognition of the profession as a discipline that one should learn properly, as a role that one can take pride in being part of, and as a career that can offer many interesting opportunities.

Lack of recognition leads to many consequences for Document Control professionals.

Lack of recognition — consequences on recruitment

Some managers do still think that Document Control is an easy job, and that almost anyone could do it. It leads to recruiting people with no prior knowledge or experience of the profession. This often comes with another side problem: it is that once in the position, the newly appointed Document Controller sometimes gets little to no on-the-job training.

Even if many DCs have managed to transform that challenge into a success, we can surely agree that this is a less-than-optimal way to enter the profession.

Lack of recognition — consequences on role & tasks

A lack of recognition of competences can lead to giving to Document Control professionals only half the tasks that they should be doing, and sometimes on the opposite giving them tasks that are not Document Control tasks.

We have defined previously **What Document Control is** and **what the tasks of a Document Controller are**: Document Control is much more than just someone who files documents or does data entry all day long.

The role is much more varied and includes protecting the company's interests by keeping all legal evidence in case of litigation, audit, investigation; as well as protecting the safety of the company's personnel and of the users by ensuring that they only work with the latest approved and authorized documentation.

So what can we do to improve recognition?

We can do a lot. But we need to start with putting our own house in order:

Formally learn about the Document Control discipline

Many Document Controllers have learnt the discipline "on-the-job" and there is nothing wrong with that. But the on-the-job learning has flaws that only a theoretical understanding of the discipline can fix: attending a **formal professional course in Document Control** will give the understanding of what are the best practices (and on the contrary what are the unsafe, unrecommended practices), what the focus and core of Document Control are, and most importantly will ensure that you can perform the role in a different company or environment than the one you started in.

Promote the discipline daily (and relentlessly)

Do not make the mistake to think that if you do your job well, people will naturally notice and will automatically see the value that DC has. It is actually part of your role to promote DC: explain what is DC, what the role consists of, why is it so important, how it helps people to be efficient and safe, how it protects everyone's job by protecting the company's interests.

Promoting DC is not something you do one day and that's it. You have to continue doing it on a daily basis, take all the opportunities given to do it, and of course sometimes (most times actually), create your own opportunities to talk about DC: why not for example organise a Lunch & Learn session to discuss the impacts of a lack of DC on companies through actual examples of failure to comply?

HOW TO IMPROVE THE RECOGNITION OF THE DOCUMENT CONTROL PROFESSION?

What else can we do to improve the recognisation of the Document Control profession?

Add value and show what real good DC can do

There is a common misperception from stakeholders who sometimes see Document Control as filing clerks or data entry operators. But real Document Control is much more and people can be amazed at what a good DC can do.

Let's take a couple of examples here:

- What about the real good DC who can find in less than 2 minutes the piece of evidence that will save the company from a costly litigation

- And what about the real good DC who can provide in real time a dashboard on the progress of the documentation to their manager, giving them real-time and accurate information on the progress of the project?

- And let's not forget about the real good DC who avoids a safety accident on site by gatekeeping and avoiding the access to uncontrolled and unchecked information?

Do you think that the interfaces of that real good Document Control professional will still think that he / she is just a data entry operator? No, they won't. But of course, only if we also promote the value of DC on a daily basis as seen in our previous point.

So it's all about adding value, being proactive instead of reactive, and keeping a constant communication with interfaces in order to understand what they need and how we can add value. And if you are not sure about how to do that, again the attendance to a good course will definitely help: the **Consepsys Advanced Document Control Training course** is entirely dedicated to adding value as a Document Controller.

Build trust and credibility

Document Control professionals must be conscious of the fact that if their users (e.g. managers, engineers, technical interfaces, etc) do not trust them, then their daily interfaces will be difficult and the tasks given to them might be restricted to a minimum.

How to built trust? By building your credibility. But how does one build their own credibility?

- By demonstrating expertise: know what you are talking about, endorse the expert role, provide innovative solutions

- By demonstrating integrity, upholding the **Consepsys TICCQS values**, and being the trusted gatekeeper of the rules

- By delivering on time and with high quality

- Through a transparent communication regarding successes but also improvements and lessons learnt

Improving recognition starts with us

Recognition will not come on its own, it is up to us, Document Control professionals, to show and demonstrate on a daily basis what real Document Control means and the value that we provide.

LIFELONG LEARNING:
A METHOD TO IMPROVE OPPORTUNITIES

Is learning only something we do between childhood and the early 20s?

Should we consider that once we are professionals and we fulfil a role on a daily basis, then we do not ever need to go back to class?

It would probably be a mistake to think so. Actually learning throughout one's life improves not only on the personal development side but also helps generate better opportunities for oneself and increases competitiveness and employability.

Never stop learning

When you stop learning once you land a job, you are bound to remain in a self-fuelled environment, repeating the same tasks in the same way and most times not benchmarking yourself against others in the same profession.

That becomes a problem especially when you need to find a new job as you will be competing for the same role as other Document Control professionals who may have been taking all opportunities to learn along the way and therefore may be more attractive for future employers.

Do not assume that you already know everything there is to know

Sometimes people think: I do not need to learn more that, because I am already doing it on a daily basis.

That is another common mistake to avoid: how do you know if what you do on a daily basis is the best practice? And the most efficient way to do a task? When you come to a course or attend a class on a subject that you think you know, you are most times surprised by the things you learn and sometimes discover.

Assuming that you know already everything there is to know on a subject means a missed opportunity to learn and grow. And to ensure your long-term employability.

So what is lifelong learning?

It is defined as the "ongoing, voluntary and self-motivated" pursuit of knowledge.

It is about understanding that we are no longer in a world where you learn in school when you are young, and then apply what you learnt in the professional environment. It is about taking all possible opportunities to learn more, to acquire in-depth knowledge, and to learn new skills. It is done through **formal professional courses** and through "informal" learning for example through daily interactions and exposure, and in general through the understanding that when you miss an opportunity to learn it sometimes does not come by again.

What are the benefits of lifelong learning?

There are lots of benefits; for example:

- **Improve skills** to remain on top of your game, especially in a rapidly changing world

- **Improve employability**: be conscious that in this day and age people will on average change jobs between 5 and 15 times during their career

- **Transferability of skills:** Make sure that you will still be able to be a good DC in another company, environment, department or industry

- **Purpose, pride and satisfaction**: DC is a role in which one can take pride. Lifelong learning will fuel that pride and will improve job satisfaction.

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

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Panel 1:
D., I need you to send a package of working documents to Brothers Company by email.
It is quite urgent – no need for a transmittal.

Grmbl >:[

Panel 2:
No problem.
As soon as you bring me a nice cup of coffee, I will get started.
Two sugars!

Making you coffee is not my job!

Panel 3:
Well, sending out uncontrolled, working documents with no traceability is not my job either!

Sorry!

Follow D. Ceecee on Consepsys   and on f

Credits

Graphical concept: Myranda Saffarine

Scenario & Design: Tuffmee & Nwash

INTEGRATING DOCUMENT CONTROL AS PART OF PROJECT CONTROLS

When working on projects, Document Control is one of the roles that help control the project and help monitor its progress.

It is therefore an essential function to the Project Management team, providing them with the key performance indicators of the documentation.

What are Project Controls?

Project Controls can be defined as the group of disciplines that plan, measure and monitor the project.

It is about monitoring the difference or gap between the planned variables and the actual performance. An example, from the Cost Control area: We were planning expenditures of 125,000$ this month, but we actually spent 250,000$: what happened there? Does that come from an overspend or is it just expenditures planned for another month that came in early (or late)? Is there any corrective actions to take?

How does Document Control fit into Project Controls?

Document Control, when properly implemented and executed, is one of the key roles to help measure the performance of a project and its progress.

Indeed, the progress of most major projects is monitored through the provision of the agreed documentation deliverables.

To take a simplified example, if we were supposed to deliver 10 documents during the design phase of a project and we have delivered 5, then the progress is 50%.

And if we were supposed to send those 10 documents by a certain date, and this delivery is overdue, this is something the Project Manager needs to know as soon as possible.

How Document Control can help control the project?

- By issuing **regular reports** to the Project Management & Project Controls team, showing the progress of the documentation

- By keeping an up-to-date and accurate Document Control dashboard that displays the status of the documentation key perfor-

mance indicators.

- By issuing, at least on a weekly basis, a **report on late documents / late comments** to the project team, so that they can take immediate action

- By **keeping lines of communication open** between Client Document Control team and Contractor(s)/Supplier(s) Document Control teams so that we can identify and fix easily any potential issue that may arise regarding documentation

- By issuing, at least on a weekly basis, the **latest updated MDR** (Master Deliverable Register) to the Client and asking them to cross-check information. This helps identify gaps and potential issues

- By sitting down as early as possible with the **Planner**, in order to integrate the **provisional dates** for documentation delivery in our DC system. This helps then to measure where we are compared to where we were supposed to be.

- By ensuring that the **Project Manager understands** the Document Control team's **capabilities** and how we can support him/her along the way.

- By discussing with project team their **reporting needs** as well as defining thresholds for red-flagging during the project

- By ensuring that project users receive an **induction** to the Document Control essentials at the start of the project, and that they know who to ask questions if they have any

- Finally, by ensuring that the **mechanism for spotting and correcting** non-conformities is in place.

Training Course
Transitioning to a Manager Position
Shift your mindset for success

Course Summary
Moving up to a Manager position requires a profound change of mindset and perspective.

This course introduces new and future managers to the new environment that awaits them: team leading, business administration, commercial and strategic concepts.

The mindset and focus of participants is shifted from detail to overview – a change that they must go through to be successful Managers.

Audience
Individuals moving up to a Manager position.
Team leaders, managers.
Individuals seeking to progress their career.

Find out more

www.consepsys.com/mgr

PORTRAIT OF A DOCUMENT CONTROLLER
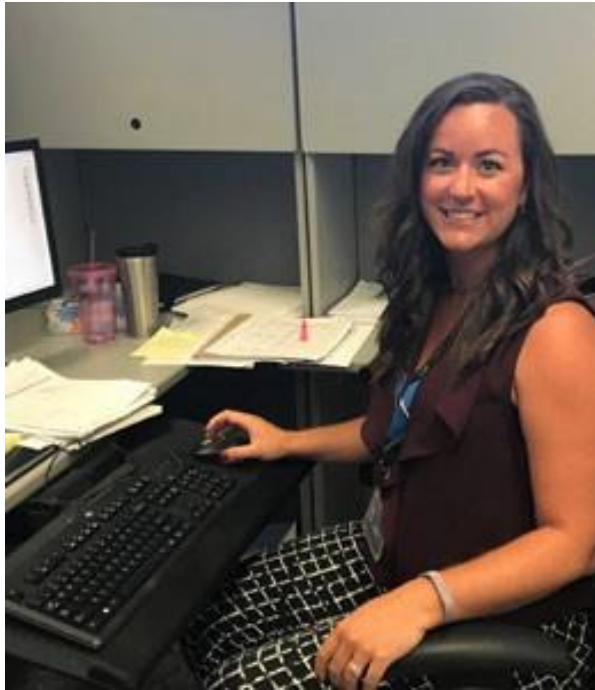
TORI PEHKONEN

Document Control Team Lead at Canadian Nuclear Laboratories (CNL) in Chalk River, Ontario, Canada

Tori attended both the Consepsys Certified Document Controller and Certified Lead Document Controller in Houston in 2016

Can you tell us a bit about you?

My name is Tori Pehkonen. I am 30 years old, married, and a mother of two young daughters. I was born and raised in the Ottawa Valley in Ontario, Canada. I attended Lakehead University in Thunder Bay, and graduated with an HBA in Sociology. On the weekends, I enjoy spending time in my kitchen cooking/baking, and playing competitive volleyball in our local co-ed league.

What is your current role?

I am the Team Lead of 12 document control staff at Canadian Nuclear Laboratories (CNL) in Chalk River, Ontario, Canada. Currently, I am assisting with revising our control of information procedure, and preparing for the transition/migration to our new EDMRS, Content Suite by OpenText.

Can you describe your professional experience?

As a university student, I worked three summers in the Records/IM Department at Atomic Energy of Canada Ltd. (now Canadian Nuclear Laboratories). As I was enrolled in schooling unrelated to this field, it was my first exposure to records and information management. I began as a full time document controller at CNL in January 2012, and became the Team Lead in 2016.

Which Consepsys course did you attend and when?

I attended two courses back-to-back in Houston, Texas in December 2016: "Certified Document Controller" and "Certified Lead Document Controller".

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

I was thoroughly impressed with both courses!

The Document Controller course provided me with concrete assurance of the best practices we were currently upholding at CNL, and also helped me to identify areas that we could improve in.

As all of my document control expertise had been accumulated on the job, and in the context of one company, it was greatly beneficial to have formalized education to back it up. It was wonderful to network with other document controllers from across the US who could relate to the unique daily challenges faced in this profession.
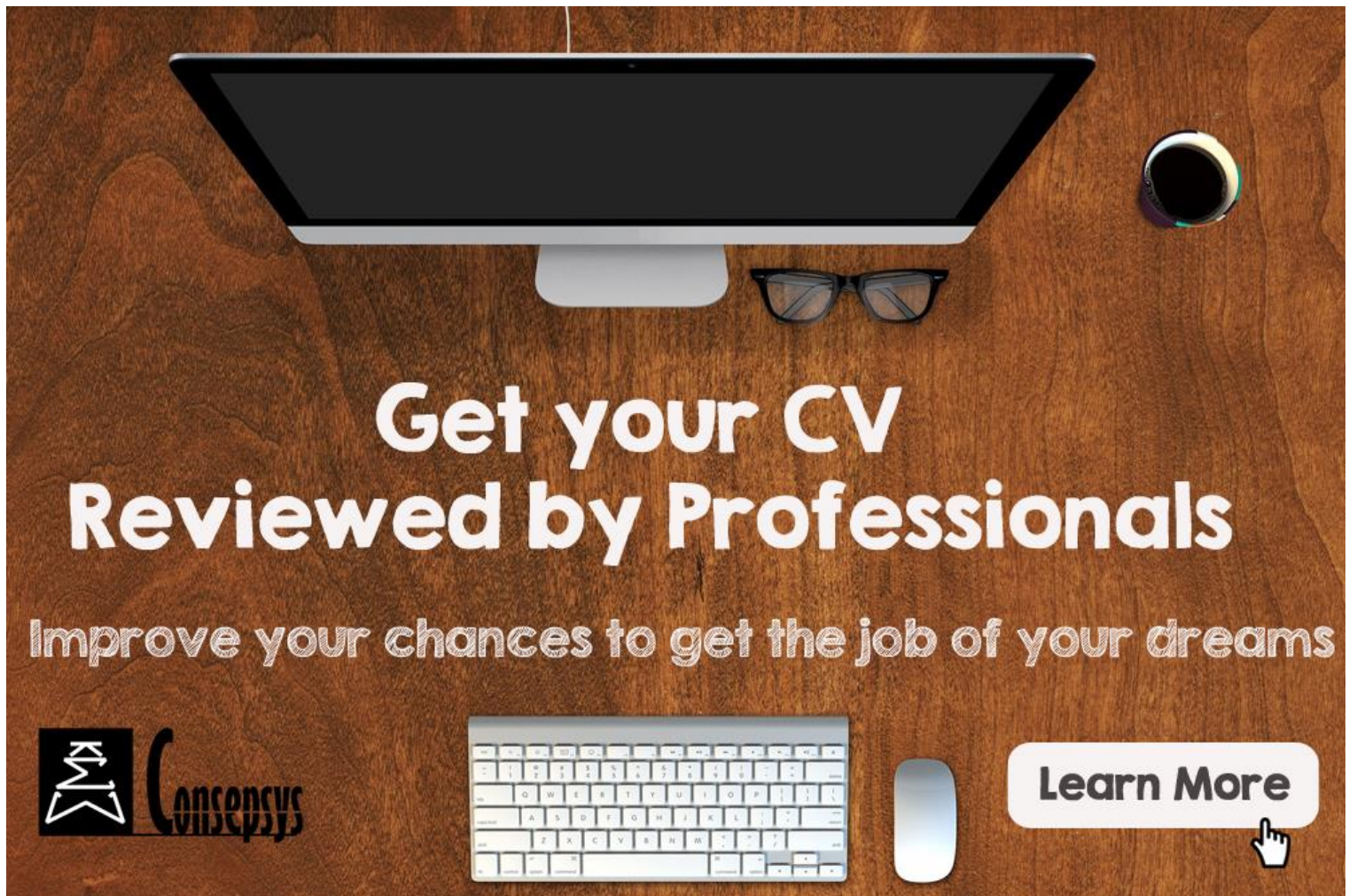
The Lead Document Controller course helped to prepare me for my new leadership role. The hands-on and intimate setting contributed to an environment of sharing, which in turn fostered an atmosphere of troubleshooting and

"The hands-on setting contributed to an environment of sharing, which in turn fostered an atmosphere of troubleshooting and guidance from the instructors and more experienced Lead Document Controllers who attended the course"

guidance from the instructors and more experienced Lead Document Controllers who attended the course. Not only was I introduced to valuable formulas and methods used to plan document control work and budgets, the informal discussions I participated in with those present became the highlight of my experience.

If you attended one of our courses and would like to apply to be featured in one of our upcoming issues, drop us an email at:
dctribune@consepsys.com

10 TIPS TO IMPROVE CAREER DEVELOPMENT

1. Start by **determining what you want to achieve.** Without a goal clearly defined and stated, it will be difficult to reach anything.

2. Once the goal is determined, it is not yet time for action, but **time for planning**. The questions you need to answer now are: how can you make sure that you will eventually reach that goal and what is your strategy to reach that objective

3. **Brainstorm about the different ways** to reach your goal. There is also more than just one way to get where you want to be. If you think about all options. it will allow you to have a back-up plan in case plan A does not unfold as expected.

4. When the forum is right, **proactively discuss** your career goals **with your manager** and **create a career development plan.**

5. Participate in or **lead challenging projects in your company**: use your expert knowledge to propose innovative solutions to a current problem that the company faces. Then drive the solution to completion. This is very effective to raise one's profile.

6. **Consider your work-life as a career** instead of a succession of jobs. This will maximise your opportunities as it will give you the overview of where you are, where you want to be and how you can ensure that you get where you want to be.

7. **Explore areas** for development in your company: would they be ready to sponsor the course you need to attend, if you convince them with a clear plan (defined in step 2) and a good return on investment? Is there any other internal program that can help you achieve your goals, such as mentoring or placement?

8. **Benchmark** against other professionals in the same discipline: who else is out there? What are their skills, experience, knowledge? How do you up your game to be the first in line when there is a job opening? A great way to do that is to attend Document Control courses and events.

9. **Update your knowledge**: always make sure that you have an up-to-date understanding of your profession and its challenges

10. Develop your **soft skills**: those skills that allow you to successfully interface, communicate and convince.

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