

THE DOCUMENT CONTROL TRIBUNE

Issue no. 17
September 2018



Special Issue

PROJECT DOCUMENT CONTROL

Nurturing the relationship
between Client &
Contractor



The Document Control Professionals



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EDITORIAL

In this special issue, we discuss the relationship between client organisations and contractor organisations, especially in the context of projects.

This kind of relationship usually stems from a necessity for both organisations:

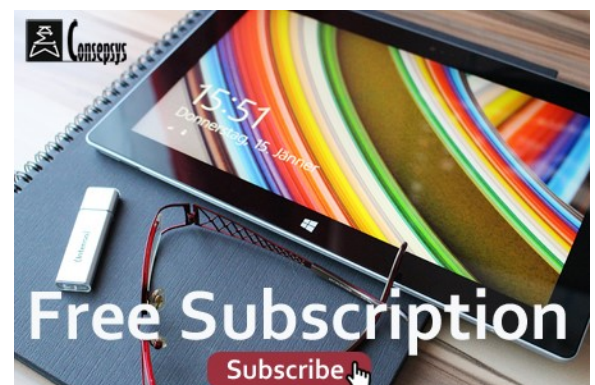
- Because Projects and Construction are not their core activity, most Client organisations outsource projects to specialised contractors.

Client organisations do not necessarily have the internal competencies and they usually are neither organised nor equipped to run projects themselves.

- Contractor companies need to run projects because projects are usually their core business and, therefore, their main or only source of revenue.

Over the duration of the relationship, hundreds and even thousands of documents are produced; Document Controllers valiantly guard the gates of exchange of documentation and comments.

At the interface, although Document Controllers each protect the interests of their own organisation, they must learn to work together to ensure that the entire project succeeds.



DOCUMENT CONTROL: MANAGING THE RELATIONSHIP BETWEEN CLIENT AND CONTRACTOR ON A PROJECT

This month we are welcoming special guests in the Document Control Tribune. Four Document Controllers, involved in projects, are giving their tips on how to manage the relationship between Client and Contractor on a project, from a Document Control perspective.

They are actually working together on the same projects, on both sides of the contractual fence: one is working on the Client side, the other one on the Contractor side.

Liz and **Jenny** are both working on the Balranald Project as well as the JA Upgrade Project, in the mineral sands mining industry. **Liz** is working on the Client side, and **Jenny** on the Contractor side (Engineering & Design).

We also have invited **Tatjana** (Client side) and **Emily** (Contractor side) to give us their tips. They worked together on the "Trianel Windpark Borkum (TWBII)" project, which is a 200MW offshore wind farm project in the German North Sea (renewable energy industry).

To find out more about **Liz**, **Jenny**, **Tatjana** and **Emily**, enjoy their interviews on pages 6 to 9 of this issue.

So, here are best practices to efficiently manage the relationship between Client and Contractor on a project, from a Document Control stand-point.

Clear requirements from the beginning of the project

It is an area which, if overlooked, can be a real challenge throughout the project.

Emily explained "The biggest challenges for DC on the Contractor side are to understand the requirements of the Client and then to figure out how to appropriately incorporate these requirements with internal procedures."

Jenny also finds that "As the Contractor, it is challenging when the Client's procedures and requirements are enforced, particularly when it conflicts with our own standards. This may be in the form of document numbering and revision protocols, or the mandate to use a certain EDMS. By the same token, depending on the project I can also be the Client, so I know that I am often the one insisting on those requirements!"

Tatjana confirms "As of Client DC point of view, one of the biggest challenges is probably to communicate your requirements in regards to the expected deliverables and to ensure that Contractors apply to the requirements throughout the project. My tip to overcome that challenge: to have Docu-

ment Control involved from the very beginning of a project. Not only to have DC covered in the contract, but prior to that, DC should be an integral part during tender and every step that follows."

Involve DC from the beginning of the project

It is indeed one of the secrets for a smooth project. Involving Document Control from the beginning (tender & proposal phase).

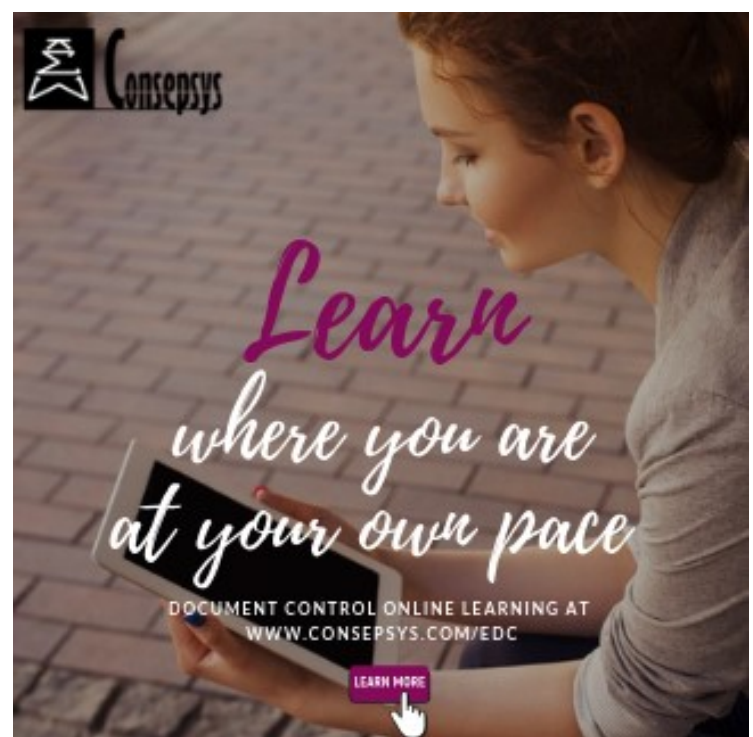
Emily explains "Document control should be involved from the beginning of the project even before the contract is signed. DC should review all documentation-related items and put forward any clarifications required. [If not], the rest of the project will be a challenge."

Awareness of the (non-DC) team & users

If users do not understand the rules and processes involved with Document Control, then it is likely that this will create struggles (both for the Document Controllers and the users) throughout the project.

Tatjana explains that: "it is paramount to have efficient processes already in place that are understood and followed by every person on the project as part of the company's and teams' working culture."

The article continues on next page



DOCUMENT CONTROL: MANAGING THE RELATIONSHIP BETWEEN CLIENT AND CONTRACTOR ON A PROJECT

... Continued from page 4

How to achieve team awareness? **Emily** has a tip: *“It is important that the project team is aware of the role that DC plays in the project. Educating your project team ensures that they will involve DC before making promises to the Client which are not possible.”*

Good communication

“Clear communication has been and always is an item on nearly every lesson learnt agenda and it is one of the most important key instruments for a smoothly running project.”

Tatjana shared.

Emily adds that *“it is also important to maintain clear and open communication with your counterpart on the Client side. In the end you are both working towards the same goal and the project goes much more easily when you can talk about it.”*

For **Jenny** it is important to *“be helpful and approachable, both with your immediate colleagues and your Client.”*

Liz sums it by saying that the key is to *“be accessible, consistent, knowledgeable and dependable (friendly helps too). Cooperation with regards to systems, processes and compliance will follow naturally from that.”*

Cooperation between DCs on Client and Contractor sides

Liz explains: *“I feel that if we want good, consistent and quality documentation, a little bit of effort goes a long way. Taking the time to help and direct somebody will time and*

time again pay dividends in good quality documentation and a good relationship. They will know exactly what to expect from you and they will know what you expect of them. For example, for cases where, on the Contractor’s side, it is a junior that gets passed the Document Control baton, I sometimes do informal training over the phone or via email.”

Considering that, as DCs, you are part of the same team, even if one is on the Contractor side and the other one on the Client side, no one wins if Document Control fails on a project!



Tatjana and **Emily** both attended together the ConsepSys Advanced Document Control course in Amsterdam in 2018. A wonderful way to collaborate & find innovative solutions!

Jump to page 6 to 9 to read the interviews of Liz, Jenny, Tatjana and Emily


 Document Control
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PORTRAIT OF DOCUMENT CONTROLLERS

This month, we interview Document Controllers working together on both sides of a project



Client side

TATJANA BURKE

Document Controller for EWE Offshore Service & Solution GmbH in Germany

Tatjana attended both the Conespsys Certified Document Controller and Advanced Document Control courses in Amsterdam in 2018

We are also in the progress of improving our processes and finding and implementing a new EDMS which is a challenging project on its own.

changes to improve efficiency.

For one year now, I have been working in the renewable sector as a Document Controller.

Can you tell us a bit about you?

My name is Tatjana Burke. I am 36 years old. I was born and raised in Germany but travelled to many countries in my twenties up until 3 years ago, when I returned to my hometown for good. In my spare time I enjoy long distance running, good food and good music.

During my travels I spent 4 years in Brisbane, Australia, where I was first employed as a Document Controller on the Contractor side constructing over 400km of gas and water transmission pipelines, compression facilities, camps and associated infrastructure.

What is your current role?

I am a Document Controller for EWE Offshore Service & Solution GmbH realising Trianel Windpark Borkum (TWWII), a 200MW offshore wind farm project in the German North Sea. This time I am working on the Client side.

We are a team of two and our daily activities amongst others are distributing all incoming and outgoing project documentation, auditing the Document Management System, expediting review processes and liaising with all counterparts of this project in regards to documentation.

Can you describe your professional experience?

I have a degree in Business Administration with a focus on Tourism. I never really worked in Tourism but used the opportunity to travel the world.

“The course helped consolidating the fundamentals and deepening my competences. It is also a great opportunity to network with other Document Controllers from around the globe“

My first contact with Document Control was in Frankfurt, Germany, where a chemical plant was relocated. I was employed as a Quality Assistant. I was primarily involved in providing vital information to the project team via 3D model, preparation and translation of work permits.

In Brisbane, I was first employed as a Document Control Assistant and in charge of typical DC tasks like updating document registers and EDMS. After only 6 month I was promoted to be the Vendor Document Controller of this project and managed 35+ Vendor packages. I have also been given the opportunity to support and consult on a project in Thailand where I assessed the processes and implemented

Which Conespsys course did you attend and when?

I attended the Certified Document Control Course followed by the Advanced Document Control Course in Amsterdam in May 2018. I am planning on completing some of the Online Course Modules (e-learning).

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

I really enjoyed how the topics were presented. Not just only having Julie's years of experience in Document Control but also having Luis there to give an understanding on the engineering point of view.

The course was put together very well to teach the best practices in DC. I have consolidated the fundamentals and deepened my competences. It is also a great opportunity to network with other Document Controllers from around the globe.

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Contractor side

EMILY DOLAN

Lead Document Controller for Seaway Heavy Lifting in the Netherlands

Emily attended both the Certified Lead Document Controller course in London (2017) and the Advanced Document Control course in Amsterdam (2018)

established DC procedures.

Can you describe your professional experience?

I began my professional career in 2013 as a Project Administrator in Calgary for a large EPC company. Although this was not a document control position I worked alongside the document controllers ensuring the quality and accuracy of work packages supplied by the engineers.

In 2015 I moved to the Netherlands and began my career in document control. I first worked as a project document controller in a company which had never had document control before. This was a challenge as I also had limited document control experience. By working with the Client DC I was able to establish a reliable document management system that the project team and Client were both hap-

"The knowledge I gained from the courses is invaluable and I wish that I had attended them earlier in my career. They reinforced my understanding of DC fundamentals and taught me how to best apply these fundamentals to my project and within my DC team."

py with. I then joined an oil and gas company to assist as DC on a number of as built/final packages.

Since 2016 I have been with SHL. I began as a document controller and in mid 2017 I became a lead document controller.

Which ConsepSys course did you attend and when?

I attended the Lead Document Control course in November 2017 in London and also the Advanced Document Control course in May 2018 in Amsterdam.

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

The knowledge I gained from the courses is invaluable and I wish that I had attended them earlier in my career. They reinforced my understanding of DC fundamentals and taught me how to best apply these fundamentals to my project and within my DC team. I was able to use what I learned immediately on my project.

I think that an added benefit from the ConsepSys courses is that many of the

skills learned there are also applicable to other roles and functions outside of document control.

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

Can you tell us a bit about you?

My name is Emily Dolan. I am 28 years old and from Calgary, Canada. I moved to the Netherlands 3 years ago with my Dutch boyfriend. We have enjoyed our time in the Netherlands immensely but are now in the process of moving back to Canada to start a new adventure.

I try to take any opportunity I can to travel. I also like to ski, spend time with my friends and family and eat good food in my spare time.

What is your current role?

Until recently I was the Lead Document Controller at Seaway Heavy Lifting (SHL), a leading offshore Contractor in the global Oil & Gas and Renewables industry. I worked on an EPCI project where our scope included the design, fabrication and installation of foundations for an offshore wind farm in the North Sea.

As the Lead Document Controller I was responsible to ensure the quality and consistency of everyday document control tasks carried out by my DC team. I also liaised with and balanced the needs of the many project stakeholders (internal project team, Client DC, and Subcontractor DC) with the

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Client side

LIZ-MARI CARSTENS

Project Administrator at Iluka Resources, in Adelaide, Australia

Liz attended both the Consepsys Certified Document Controller and Certified Lead Document Controller Control courses in Perth in 2018

Can you tell us a bit about you?

My name is Liz-Mari Carstens. I am 41 years old, married to my high school sweetheart (we started dating when we were 13), and the mother of a teenage daughter.

I was born in Keetmanshoop, Namibia. I've lived in Namibia, South Africa, Ghana, and New Zealand, and have settled in, and become a citizen of, Australia.

I enjoy cooking, doing anything creative, and travelling.

What is your current role?

I joined Iluka Resources as a Project Administrator in 2011. Currently, I am based in Adelaide, where I man the reception desk, and oversee document control activities on various national and international projects.

I also train and support other employees involved with the 'Dark Art' of Document Control and help them apply that knowledge in the current EDMS.

Can you describe your professional experience?

My career started in the South African retail industry, where I ended up managing several stores.

I then did front office and quality control work in a sign making and screen-printing business (also in South Africa), before joining a copy shop in New Zealand as a front office and printing assistant.

I've since worked as an office administrator in Melbourne, and held

"It was absolutely fantastic to talk to like-minded individuals (who actually understood what was coming out of my mouth), and empowering to receive recognised qualifications and certificates"

Project Administration roles in Hamilton and Adelaide.

My role has gone from assisting Document Control staff, to becoming one of them, to providing Document Controllers and team members with training and support.

Which Consepsys course did you attend and when?

I did the Certified Document Controller Course and Certified Lead Document Controller Course in June 2018.

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

As somebody who has only had on-the-

-job training (like most of my colleagues), it was difficult for me to know if I was approaching Document Control in the right way.

I felt an enormous sense of responsibility, as I became the point-of-contact for all project team members, particularly when they needed

Document Control help or guidance.

The Consepsys courses solidified a lot of what was good and correct, and helped me change what was not.

It was absolutely fantastic to talk to like-minded individuals (who actually understood what was coming out of my mouth), and empowering to receive recognised qualifications and certificates.

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:
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Contractor side

JENNY BOARDS

Senior Document Controller for Mineral Technologies, a division of Downer Group, on the Gold Coast of Australia

Jenny attended both the ConsepSys Certified Document Controller and Certified Lead Document Controller Control courses in Perth in 2018

Can you tell us a bit about you?

My name is Jenny Boards. I am 39 years old, married and have a 13-year-old fur-child, a rather spoilt ginger cat named Rupert.

I live on Australia's Gold Coast, but I am originally from Sydney.

I love to cook at home, but am also quite happy to go out to fine dining restaurants and experience amazing food and wine.

What is your current role?

I am Senior Document Controller at Mineral Technologies, a division of Downer Group.

I have been with the company for almost 16 years. I work in the Engineering department, where our team of engineers and drafters design mineral separation plants for a wide range of Clients worldwide.

I am the only Document Controller in our team, so I am the go-to person and the "last line of defence" for ensuring quality deliverables are presented to our Clients.

Can you describe your professional experience?

I have always worked in administrative support roles, starting out at a large investment bank, then on to real estate, and now in the mining industry.

After 8 years of being with Mineral Technologies, the opportunity arose for me to move into the specialised

principles for document control.

Being essentially self-taught, it was not only good to know that the majority of what I have been doing has been done correctly, but also interesting to understand where improvements can be made both personally and within our company.

As a result of attending the ConsepSys

"As a result of attending the ConsepSys courses, I was promoted to Senior Document Controller, ready to lead a team as our workload increases."

document control function, so I decided to give it a go.

That was 8 years ago, and I'm still here!

Which ConsepSys course did you attend and when?

I attended both the Certified Document Controller and Certified Lead Document Controller courses held in Perth in June 2018.

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

I really enjoyed both courses, and it was great to learn of "best practice"

courses, I was promoted to Senior Document Controller, ready to lead a team as our workload increases.



Liz & Jenny both attended together the ConsepSys courses in Perth in 2018.

A great way to align on DC practices & philosophy too!

RELATIONSHIP BETWEEN CLIENT AND CONTRACTOR: OVERCOMING TYPICAL ISSUES

One of the biggest challenges when working as a Document Controller on a project is that every project is different.

Every project is different

Indeed, you could have a project with a Client company and a Contractor company that know each other, have worked together in the past, on a similar technical scope, and the project specifics would still be different from the previous project.

On the Document Control stand-point, it frequently translates to different numbering systems, different lifecycles, different tools, or different procedures, processes, people.

Acknowledge the specifics

One of the ways to overcome typical issues for a new project is to acknowledge the fact that it is going to be different from what you have been doing so far.

Start with a fresh mind and perspective and review all the project specifics. In terms of Document Control, that would be for example: what will be the lifecycle of documents on this project? What will be the big steps in the life of

documents? When will they need to be reviewed internally? By a Client? By a third party? And how will they be reviewed (tools, turnaround, traceability of comments, etc).

Do not assume that it is going to be similar to the previous project, and have a pro-active approach.

Clarify the requirements between Client and Contractor

When we hear about a project where Document Control went wrong or where the challenges to overcome were significant, it can very often be traced back to:

- Either the Client requirements were not clear or simply not provided from the start. That causes problems because very often the other entities are discovering requirements along the way, which causes frustration for both parties
- Or the implementation of Client requirements on the Contractor (or sub-contractor) side was not thorough or simply not done, which causes a very high Client dissatisfaction

To make sure that the requirements are clear, the Client's DC should make

sure that they are documented in a clear way and that they are communicated to contractors and third-parties at the 'request for quotation' (or ITT) stage and then at contract signature.

The Contractor's DC should also make sure that those requirements are received, clarified if need be, understood and implemented. This should be done even before the first document is issued, so that all parties can be aligned before the project starts.

Keep the lines of communication open

No project goes perfectly smoothly from start to finish without any hurdle at all. It is the same for Document Control on a project.

Building a relationship with other DCs involved on that project (Client's DC, Contractors' DC, Vendors' DC, etc) is one of the key elements that will allow you to solve any issues that may arise.

Communicating clearly and frequently about the progress, the challenges, the issues and the successes will help anticipate and resolve issues along the way.

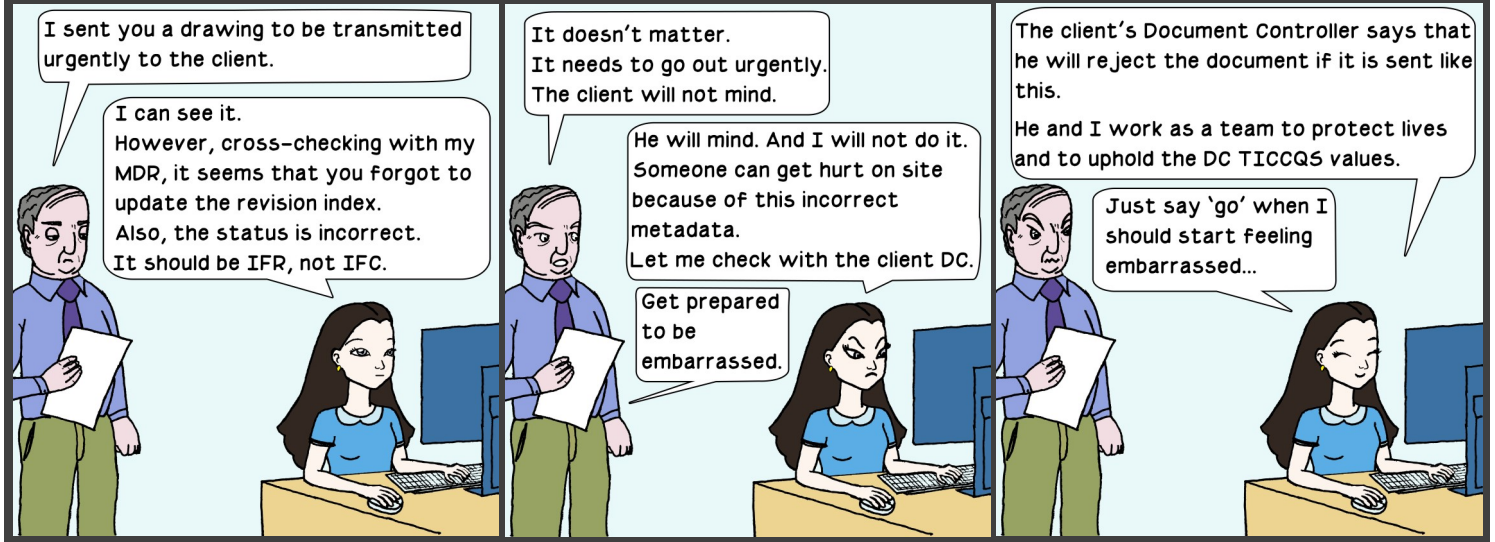


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Scenario & Design: Tuffmee & Nwash



COMMUNICATING DOCUMENT CONTROL PROGRESS ON A PROJECT

Document Controllers are not only here to number, register, file, distribute documents.

They can also play an important role when it comes to knowing where the project stands from the deliverables stand-point and what are the potential issues.

As we explained in a [previous issue](#) of the Document Control Tribune, when working on a project, Document Control is part of the Project Controls team (group of disciplines that plans, measures and monitors the project). Read the article on Project Controls [here](#).

What is 'Progress' and why is it important to communicate it

Progress can be defined as the extent of the advance towards the completion of the project.

So, for example: if we planned to finish the project in March 2020, where are we right now compared to that objective. How can we know where we are? We need to monitor Key Indicators such as: to deliver the project in March 2020, we were expected to have all the documentation Issued for Review at the latest in June 2018. Was it the case? And if not, what is the extent of the delay? The planner and the project manager will then be able to see if that delay has an impact on the delivery date of the project or not, and what are the corrective measures that can be taken to avoid any negative impact on the final delivery date.

Reporting the progress on a project, and especially progress on documents and deliverables is therefore essential.

How does Document Control report progress?

It is first a matter of defining with the

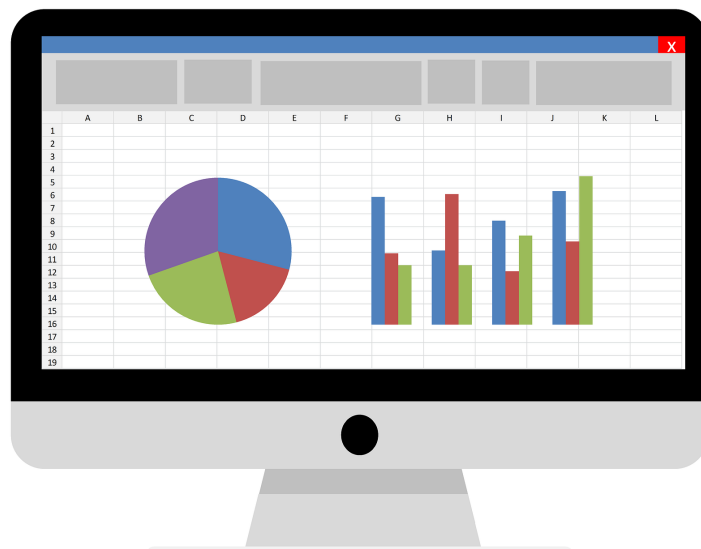
project management team what kind of performance indicators they are interested in receiving from the Document Controller. A few examples include: late documents, late comments received by the client, documents issued to client, documents rejected etc.

Once those are defined, then the Document Control team should issue **regular reports** to the Project Manage-

able Register) to the Client and asking them to cross check information. This helps identify gaps and potential issues.

It is also important to keep track of both the **provisional dates of delivery** and the actual dates of delivery of each document, in order to identify any late document (which may have an impact on the whole project plan later).

The



ment & Project Controls team, showing the progress of the documentation.

It is also helpful to keep an up-to-date and accurate Document Control dashboard that displays the status of the documentation key performance indicators.

Cross-checking information between parties

The key to measuring progress from the DC stand-point is also to make sure that all parties (e.g. Client, Contractors, Sub-Contractors, Vendors) are all aware and all agree on the actual progress.

We can achieve that for example by issuing, at least on a weekly basis, the **latest updated MDR** (Master Deliver-

"How" is as important as the "What"

The way you communicate the data is as important as the data itself.

Put yourself in the shoes of the recipients of your reports and see whether the format would suit them or not. Some interfaces will prefer statistics instead of long lists. Others will find relevance only in a detailed list.

Of course, the best way to do that is to discuss with your interfaces and to understand their requirements both in terms of information and format.

When it comes to progress reporting, a tailor-made approach has always more success than a one-size-fits all.

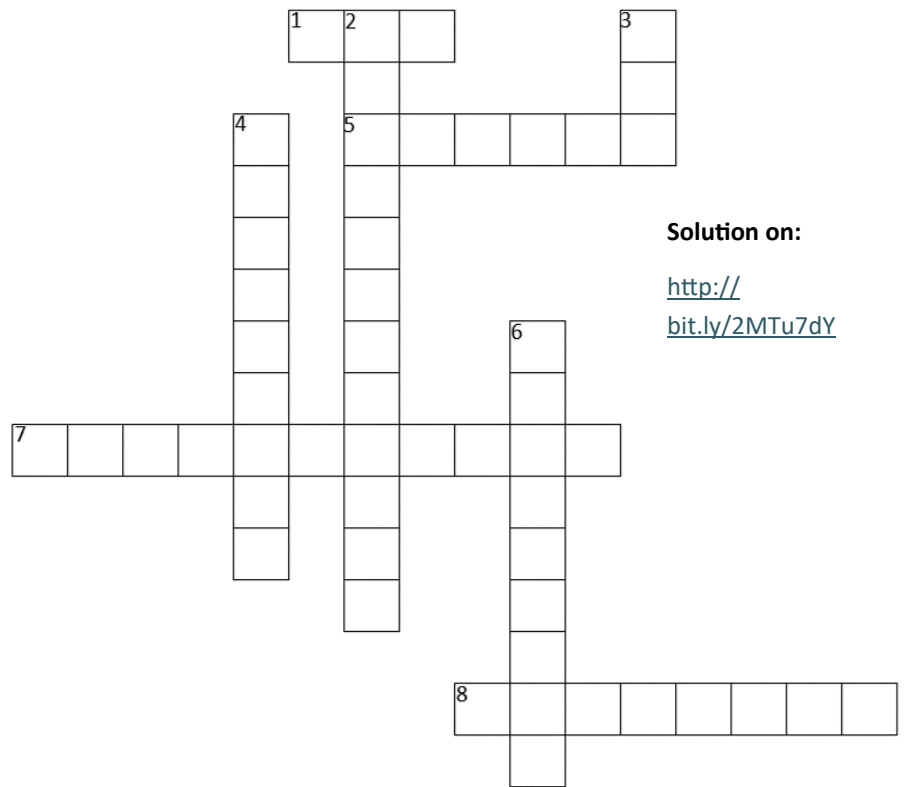
CONSEPSYS DC CROSSWORD #0002

Horizontal

- 1. Acronym for the main integral list of documents on a project.
- 5. The reason for the publication of a document, displayed on the document itself.
- 7. Behaviour that leads to an even level of work quality over time.
- 8. Profession of James, one of D. Ceecee's interfaces.

Vertical

- 2. Activity involving the supply of documents to relevant parties.
- 3. Answer to the question: "Can poor Document Control lead to fatalities (deaths)?"
- 4. Form intended to be used as a list of verification points.
- 6. Person or party receiving a document.





Solution on:
<http://bit.ly/2MTu7dY>

Consepsys Competency Matrix

for Document Control Professionals

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