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IMPACTS ON DOCUMENT CONTROL

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INSIDE THIS ISSUE:

EDITORIAL

After inaugurating the new design of the newsletter in March, having evolved to an e-magazine format, we are pleased to present you with the June issue!

In this issue, we explore the impacts of the Oil and Gas and Mining industries on Document Controllers over the world: direct impacts and indirect ones (page 4).

As many Document Control professionals are currently looking for a new job, we publish an article on how to stand out in a tough job market (page 5): we hope this helps!

Building credibility is also an essential key to any professional and contributes to a happy life at work. We tackle the subject in page 6.

We also address a few common issues for Document Control professionals: how to select the best EDMS? (page 11) or how to deal with the growing presence of emails: do we need to record them? How to handle them? (page 8).

This month we invite you to meet Nicole Larsen from Denmark for the « Portrait of a Document Controller » section (page 10).

Finally, D.Ceecee, the fun comics strip character is also back a new real-life story! It will surely remind you of your daily worklife, with a fun twist to it!

And as always, don't hesitate to share it with your friends and colleagues!

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CRISIS IN THE OIL & MINING INDUSTRIES: IMPACTS ON DOCUMENT CONTROL

For those of us working either in the Oil and Gas industry or in the Mining industry, the past two years have been challenging on many levels.

For the Oil industry, for example, while the price of oil was ranging between 90 and 108 US Dollar a barrel back in 2013, it went as low as 29 USD a barrel early 2016. That's a slump of up to 73% in less than 3 years.
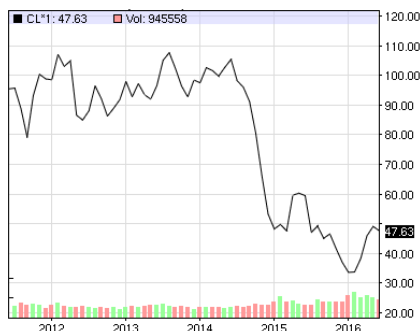

Chart: Oil price between 2012 and 2016

The mining sector has also been confronted to a very difficult environment: From its peak in 2011 to the beginning of 2016, the global mining sector has gone through a 90% reduction in global market capitalisation.

Any drop of this dimension obviously has a direct impact on business, how they operate, and on jobs.

The first impact of the crisis on these industries is direct: many companies had to let people go due to new budget constraints. Many companies actually had to go through massive scale redundancies. This process impacted Document Control professionals as any other job role or functions.

The second impact of the crisis is a direct consequence of the first: the job market is now flooded with many applicants, most of them very experienced and able. While a few years ago the phone was ringing every week with a new job opportunity, it has now got much harder to find job

ads to apply for.

This time of crisis has forced a certain number of Document Controllers

> *"The crisis also forces us to think about what can we do differently? Better? More efficiently?"*

to either relocate, rethink their career strategy, learn new skills, or move to another industry.

There has been other consequences in the daily lives of Document Controllers. Indeed, with higher constraints on budgets, it is now more difficult to recruit help (even temporary) when it is needed. This means more work to be done by fewer people, which usually comes with higher stress levels but also with risks in terms of quality and safety.

It actually comes with a good side too: it forces Document Control teams to think about their processes and tools and to see what could be done to be more effective: to do more with less, without compromising quality in the process.

We have seen the surge of optimized workflows, streamlined processes, enhanced communication, more moves from paper to electronic processes, and an overall and careful thought about: what can be done differently? Better? In a more efficient way?

In the process, we have to make sure that safety, control and quality are not sacrificed over budget constraints and tight deadlines.

In a word, it forces us to be creative, to think outside of the box, and that is, in the short term as well as on the long run, a positive outcome.

The crisis will not run for ever. Prices will come up again, and business will resume eventually, maybe not « as usual », but it will pick up again.

We can only hope that this difficult period has made the DC discipline, stronger than ever before.

HOW TO STAND OUT IN A TOUGH JOB MARKET

When the job market gets tense, it does not mean that you can't get a job. It usually means that you will have to work harder to land the job of your dreams and that competition will be fierce.

But rest assured: there are many things that you can do to dramatically improve your chances.

Research the job market

To beat the 'competition' and get your CV selected instead of someone else's, you have to think first about your profile: take a moment to think about your skills and experience.

How would you say you compare to other Document Controllers? : Is there any specific knowledge or experience that you have acquired and that is not so common?

It is also beneficial to have a thorough look at the current job ads: is there any specific knowledge, certification, tasks, that are required or preferred by employers?

Studying both the market (what's on offer) and the competition (who else is looking for a job), should give you a clear idea about where are your strengths, but also what are your weaknesses.

Make sure that your strengths stand out in your CV / resume.

Make your CV stands out

As recruiters only spend on average 5 to 7 seconds to review a CV for its first screening, you have to make sure that your CV can convince in less than 5 seconds.

This means a careful choice of words, a spotless formatting and proofreading as well as a thoughtful summary of skills and experience.

Once you have finalised your CV, have it reviewed by friends and family.

Get help from professionals

You can also get professional advice on your career and CV.

Having your CV reviewed by experts can dramatically improve your chances too.

They will give you their expert advice on what to improve to maximise your potential, and to give your CV the best possible odds!

Manage your online presence

Once you have passed the first screenings, more and more recruiters now check the online presence of potential candidates.

A good profile on LinkedIn can help you: only if you remember that professional social networks like LinkedIn are part of your professional image and credibility. Your profile, pictures, posts and likes have to be targeted at a professional audience.

More challenging to manage sometimes is your online presence elsewhere on the web: other social networks such as Facebook, Twitter, participations on forums or group discussions, etc. You mostly have two ways about it: either restrict access to these media only to people you authorise (for example through the « manage confidentiality » option of Facebook), or ensure that all your public contributions are either anonymous or risk-free from the public image point of view.

Little 'plus' that can make the difference

Getting recommendations from former managers, clients, interfaces is a good way to reassure the recruiters on your skills and behaviour at work.

Don't forget also that formalising your knowledge, getting your skills certified, or learning new skills helps to improve both your profile and your work life.

BUILDING CREDIBILITY

Establishing credibility is one of the most difficult things to achieve in the professional environment. Loosing credibility however can happen very quickly and sometimes irreversibly.

What is credibility?

The word comes from the Latin 'credo' meaning 'I believe'. Credibility is the quality of being believable, worthy of trust.

Why do you need to build your credibility? Because without credibility, you are likely to struggle on a daily basis to get your point across: in the Document Control area for example, it will help you when you reject a document, when you explain the DC procedure to a user, when you train an engineer to the DC software package, etc.

Would you buy a car from a sales professional who does not seem trustworthy, does not know about the product, or seems to be hiding things because of his lack of knowledge? Surely you would not.

This is the reason why, if you want to convince people to follow DC rules and processes, you have to start by building your own credibility and that of your DC group.

How to built credibility?

No matter what your role or position are, credibility is something that you have to earn.

It takes time, patience, and consistency to build it.

Start by identifying the core values of the profession (think for example about the TICCQS philosophy) and your own values. Ensure that everything you do and say is compatible, consistent and in line with these values.

Integrity and authenticity are essential to build credibility. You need to be known as someone who does the right things for the right reasons.

Develop your expertise

The more expertise you demonstrate, the greater your credibility.

This means developing your knowledge and skills, by attending courses and industry conferences for example, but also not taking anything for granted. It means taking every opportunity to learn and integrate lessons.

Develop your role of domain expert but don't oversell yourself either: giving false information when you do not know something leads to making bad decisions and will undermine your reputation.

Work on transparency

Being open and honest helps building credibility as others will therefore understand your intentions and goals.

It means making sure the lines of communication are never interrupted or blurred, especially when you have bad news to announce.

"No matter your role or position, credibility is something that you have to earn"

Sometimes we also tend to work hard without really communicating about what we do: this does not help your credibility. Although you may be doing a great job, no one knows about it. Take some time to communicate about achievements too.

You establish credibility when you inspire trust in others. Demonstrating honesty, integrity, transparency and expertise will go a long way to help you achieving your goals.

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

Panel 1:
Hi D.
Remember the package of 5000 documents that I asked you to send to the client on Thursday?

Yes...

I want it sent today.

But today is Tuesday and it is already 3.00 PM.
We had agreed for Thursday.

Panel 2:
I know, but it is not my problem.

This is very short notice.
My team and I would need to work late.
Is there a reason for this change?

No. I just want it sent earlier.

There are thousands of quality checks to perform.

Will you stay late to help us?

No. I am leaving work at 5.00 PM.

Panel 3:
Well, given your attitude, I guess I will be leaving at 4.30 PM, then.

...

Follow **D. Ceecee** on **Consepsys** and on **f**

Credits

Graphical concept: Myranda Saffarine

Scenario & Design: Tuffmee & Nwash
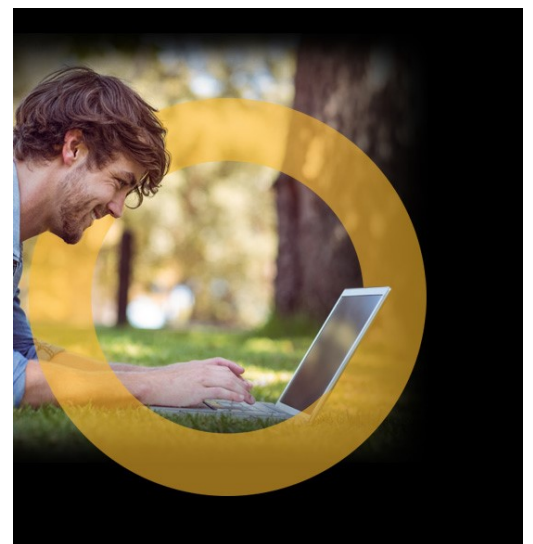
EMAIL MANAGEMENT: CHALLENGES & SOLUTIONS

We usually define correspondence as communication by exchanging letters. By extension, the term 'correspondence' covers official letters, as well as emails, faxes and memos.

Although managing correspondence is not typically under the scope of Document Controllers (usually focused on technical documents, drawings, management documents), more and more Document Control professionals are faced with new challenges linked to correspondence management and tracking.

Fewer letters, more emails

The first challenge comes from the rampant use of emails. We used to formalize any official discussion by an official letter. This was a clear and traceable way of discussing or officially clarifying a point.

Managing letters was not different from managing a document, from the Document Control stand-point: ensuring that the letter had a unique number, that it contained the relevant identification information, that it was registered and filed.

Nowadays, we can see that a trend is emerging for using more emails, and fewer letters. Important topics are sometimes discussed endlessly by exchange of emails and are rarely formalised officially in letters.

Although in many companies email have been declared « not official » and unfit to discuss contractual, financial or legal matters, the reality is here: we observe a surge in the use of emails to discuss official topics.

Traceability requirements

If official matters are discussed by email, including decisions made, legal and contractual agreements, technical comments, etc., then we need to have a way to track and archive those important emails.

Traceability is key in Document Control: one of the functions of Document Control professionals is to ensure that there is traceability in projects /departments / companies: traceability of documents, comments, decisions, transmittals, etc.

If an incident happens, or if the company is investigated or audited, we have to be able to provide evidence of what was done, why, when, by whom, etc.
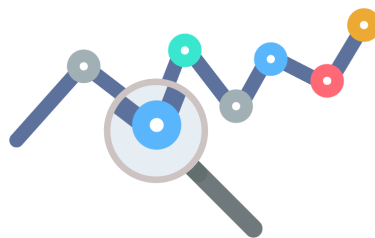
It means that 'important' emails have to be tracked, traceable, retrievable, recorded.

Challenges of emails management

- Number of emails: Everyone can send an email and does it daily countless times. Same goes for the replies to emails. This means that there can be thousands of emails exchanged every day in a single project or department.

- Numerous replies: While with official letters, the number of letters and replies on the same subject was limited, with emails you can have dozens of emails exchanged to discuss the same topic.

- User resistance: tracking of emails is sometimes perceived by users as interference, or prying. This implies resistance of some users to formal email management.

Tackling emails

To tackle the challenges lying with emails management, even before thinking about a technical solution, the first thing to do is to issue corporate policy / guidelines about emails.

Are there any subjects that should not be discussed by email? Any requirement to formalise by letter or in documents when it comes to certain topics?

Email management is also far easier when emails follow a certain convention in terms of subject line (for example *« Contract XXX - Accurate description of the subject matter »*).

Along with these guidelines, there should also be clear rules about which emails need recording and which ones do not.

Indeed, there is no need to record all emails, just those containing '*important*' information (what is considered as 'important' has to be defined by the company).

The next step is about technical solutions to email tracking and recording. Some EDMS integrate a feature to record emails automatically. For example each folder in the EDMS is allocated an email address. When the user sends an important email that needs recording, he/she will just have to copy this address and the EDMS will do the rest: record the email, the information (from, to, date, etc), as well as the attachments.

When no such solution is available in the company, Document Controllers usually use a dedicated mailbox, that users copy when email needs recording. Then, they either archive emails in the mailbox, or make a PDF of the email at the end of the conversation and register them.

PORTRAIT OF A DOCUMENT CONTROLLER

NICOLE LARSEN
Project Coordinator with Siemens Wind Power in Denmark

> Nicole attended the Certified Document Controller Course with Consepsys in Aberdeen in June 2016.

Can you tell us a bit about you?

My name is Nicole Larsen, I am a 30 year old German-Filipino, working and living in Denmark for almost 8 years.

I grew up in Manila, Philippines and moved to Denmark, initially to pursue my graduate studies. Then life happened, I met my partner, found a good job and had a son who is turning 4 years old this year.

During my spare time, I love to travel in order to see new sights, experience different cultures and taste local cuisines. At home, I enjoy cooking Asian food and meeting up with friends for a cup of coffee.

What is your current role?

I am a Project Coordinator, focusing on Documentation at Siemens Wind Power, currently the largest offshore wind turbine supplier in the world.

I'm responsible for collecting, organising, storing and transmittal of project documentation. Aside from that, I also support the project group in relation to planning, execution and completion of projects.

Can you describe your professional experience?

I have a degree in B.A. Humanities and Management from the University of Asia and the Pacific in the Philippines, and I also have a MSc. International Business from the Aarhus University in Denmark.

I have worked in the logistics, airline and energy industries. I started working for Siemens Wind Power back in 2011 and have been working in various offshore wind farm projects since then, such as the London Array Offshore Wind Farm, which during its time, was the largest offshore wind farm in the world.

Which Consepsys course did you attend and when?

I completed the Certified Document Controller course of Consepsys in Aberdeen, UK back in June 2016.

Early on, I informed my manager that I was very interested in documentation, and I wanted to learn more about the job. I was told that I could attend a training course that I found useful to grow in this direction. I presented the Consepsys course content to my manager, and we both agreed that this course would be perfect for my development.

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

This course has left a very positive impact on me. Understanding the basic principles in document control has boosted my confidence at work. Passing the exam and receiving the certificate, has given me a sense of accomplishment and is proof to myself

> *"The course has left a very positive impact on me and has boosted my confidence at work"*

and to others that I am knowledgeable in Document Control.

I was so excited to share my experience with my manager, telling her the course was a "must have" for all my colleagues working on documentation in the company. Personally, the course has allowed me to have a solid understanding of the documentation requirements of the client, as well as improve the existing procedures in the company, and planning for future projects.

I am looking forward to attending the Advanced Document Controller course, I believe that this will enhance the knowledge that I received from the Certified Document Controller course.

To read the full interview on our website:

Click here

SELECTING AN EDMS

EDMS stands for Electronic Document Management System. It is a generic term covering all software packages / programs used to store and manage electronic documents.

EDMSs are day-to-day tools for Document Controllers. You usually either work with a secured area on the shared drive and an Excel spreadsheet to register documents, or with an EDMS which, in most cases, replaces both the shared drive and the Excel DC spreadsheet.

More and more companies choose to implement an EDMS, as it makes it easier to manage electronic documents and there is usually an immediately visible added value to implementing it.

One of the most recurrent questions when it comes to EDMS is « What is the best EDMS ? ».

As often in life, there is not one single answer to that. The reason for that it is that the selection of an EDMS is a project in itself and it must be done properly and methodically.

What is the best EDMS? The one that is adapted to the requirements and specific needs of the Company.

Not all companies need the same thing when it comes to document management: some of them focus on collaboration, while other require a focus on control.

Some company need to have a shared system for all subsidiaries and interfaces, while other companies make a different choice.

Some need collaboration on documents across continents, others just need a system that allows collaboration in a single local office.

The list of specifics goes on. If you chose an EDMS without answering these questions first, the risk is to have a system that no one will adopt and use because it is perceived as not adapted to their way of working.

To be successful, the process of selecting an EDMS and implementing it has to be a gated process.

An online course (see Module 4) has been designed to help with the EDMS selection and implementation project. It explains all the steps required to a successful implementation.

PREPARE FOR YOUR END OF THE YEAR TRAININGS

DCC **Certified Document Controller Course**

Covers all day to day document control task, including basics (document checks, numbering, identification, filing, distribution) and more advanced subjects (such as lifecycle, as-built, procedures, reports, interfaces).

DCM **Certified Lead Document Controller Course**

Prepares DC professionals to manage and lead teams of DCs, to manage and organise DC activities and tasks, to manage stakeholders and to run, implement or improve DC management systems (procedures, tools, software, etc).

DCA **Advanced Document Control Course**

Covers advanced non-routine Document Control tasks. Learn how to better start and finish a project, issue useful reports, statistics and KPIs, write fool-proof procedures, raise awareness about DC, and formally manage your professional competencies.

Give your career the best chances and join the largest community of Document Control professionals in the world.

Join our training programme and ensure that your competences and skills compare with those of your peers.

Give your career the best chances and join our courses!

Register now for the last 2016 sessions:

- Singapore - September / October 2016
- London - November 2016
- Houston - December 2016

Register on one of our courses

Stay tuned for 2017 dates in London, Aberdeen, Amsterdam, Singapore, Kuala Lumpur, Houston, Perth, Brisbane, Dubai, Muscat! The 2017 catalogue will be out soon!