



## Document Control System Highlights

## 1. Controlled Document Types

Control of documents helps employees easily get access and retrieve most updated revisions of documents, prevents employees from using outdated information, prevents document loss and as a result saves the company's time.

In general at the first level two different types of information are used at Construction-Path that are managed within our management system – records and documents.

- **Record:** Preserves evidence of conformity to the Company's requirements (e.g., NCR Report, Drawing, Schedule, and Payroll). It means to provide proof that a process has been completed and usually is maintained as Historical information. Examples include a completed form, completed checklist, filled in spreadsheet or template, contract, etc. A record can be paper or electronic and must be protected from loss.
- **Document:** A means to provide instructions useful to perform your job. It can be in a written or other format such as flowchart, video, drawings, spreadsheet, audio, software, etc. Documents need to stay current with changing requirements, so that the instructions remain reliable.

Type of Document	Symbol	Description	Examples
Form	F	Standardized way to record required information documented in a structured format.	NCR form and Inspection form
Procedure	P	Step by step instruction which indicates how a job (or a process) is done across the company.	IFS, Procurement and Welding Procedures
Template	T	Includes set of tools, formulas and/or structure facilitating the job implementation and intends to be tailored for a specific application.	Estimating, ITP and JHA Templates
Manual	M	A document with contents to be used as reference or guideline. Manuals do not contain step by step instruction (like procedures), but provide helpful information for conducting jobs assigned.	SteelWorks Guideline, Handbook of Steel Construction and Safety Orientation Presentation

Different group of records are usually created and kept by different individuals in different departments. Unlike records, documents are usually centrally created and maintained (i.e., usually through the Quality Management System and the specified location).

## 2. Controlled Document Characteristics

Controlled documents may be characterized by the following attributes:

- Confidentiality (use Cf as the symbol if you want to distinguish it)
- Job specific or non-job specific (use job# as the symbol for job specific documents)
- Origin of the document- internal (document authored and controlled, i.e., sole approver, by the organization including all documents created by different Construction-Path's departments) or external (Document authored and updated by persons or organizations that are outside our company e.g., client's procedures, government forms) (use Ex as the symbol for external documents).
- Process

Process	Symbols
Accounting	AC

Administration	AD
Computer Resource Management	CR
Detailing (Drafting)	For Engineering: EN For Data Control: DC For Drafting: DR
Equipment Resource Management (Maintenance)	MA
Estimating	ES
Fabrication	PR
Financial Resource Management	AC
Human Resource Management	HR
Marketing	MK
Painting	PT
Procurement	PU
Project Management	PM
Quality Management	QA
Safety Management	SF
Shipping	SH
<b>Erection (Field or Construction)</b>	
Administration	FAD
Computer Resource Management	FCR
Equipment Resource Management	FMA
Erection	FLD
Financial Resource management	FAC
Human Resource Management	FHR
Quality Management	FQA
Project Management	FPM
Safety Management	FSF

### 3. Coding Controlled Documents

In order to locate and retrieve documents easily and prevent possible data loss, every controlled document in Construction-Path is to be meaningfully and uniquely coded.

#### 3. 1. Records

A record code is an identical data item of the record data set which distinguishes its related record from other records. Record codes usually consist of a constant part (code prefix), which represents the record and a changing part (e.g., combination of date and serial number), which varies as new records are created.

Use a proper combination of characteristics symbols, record name, record abbreviation and symbols related to the linked objects to create code prefix and use appropriate combination of date, serial number, etc. for unique codes for new records created. For example records can be coded in the following manner (some parts might be excluded):

Cf	-	Job #	-	Ex	-	Process Symbol	-	Record Title/ Related Symbols	-	Date	-	Serial #
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#### 3. 2. Documents

A document code is a complementary piece of information for the document and is separated from the document's main information stream. Compared to records, the coding structure for Documents is more specific and will be as follows (some parts might be excluded):

Cf	-	Job #	-	Ex	-	Document Type	-	Process Symbol	-	Serial #
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### 3.3. Code Display

It is recommended that codes are displayed on the document unless there are some constraints (e.g., for official governmental forms) or the document's or record's function is damaged (for WSF's logos controlled as templates).

- Record: Display the code on the first portion of the record's data set, usually at the top of the record document.
- Form: Display the code on the left side of the Form's footer.
- Procedure: Display the code on the right side of the Procedure's header.
- Template: Display the code on the left side of the Template's footer or (if not possible or suitable) on any other appropriate place on the template.
- Manual: Display the code on the cover page of the manual and/or on the left side of the Manual's footer or (if not possible or suitable) any other appropriate place on the Manual.

## 4. Controlled Documents Master List

Controlled documents (Records and Documents) are tracked on a Master List controlled within the "Management System Documents" drive.

## 5. Revisions to Controlled Documents

### 5.1. Records

It is unlikely that revisions will be necessary for most records. The use of a revision number for the first record is left to the discretion of the department involved (first record will have revision number of 0). A revision number should be added to the end of the record code (if was required) as follows:

"Code"-Rev.# (e.g., NCR11-153-Rev.1 represents first revision made to NCR11-153)

### 5.2. Document

Every controlled document must have a revision number and date (formatted as: mmm dd, yyyy) (e.g., Rev.1 Oct 31, 2011). It is strongly recommended that the revision number and date follow the document code on the document (if is possible).

Note: When developing a new document, the symbol PreRev (pre-revision document) should be used to indicate that the document is not yet controlled and is not included on the Master List. Use the PreRev designation on documents that will become later on controlled documents.

## 6. Controlled Documents File Name (Electronic Storage)

- Records which will be stored electronically shall be named as follows:  
"Code"- "Rev.#" - "Any significant information within the record"

Example: NCR11-250-ToDrafting.pdf (represents NCR number 11-250 reported against drafting)

- Documents shall be named as follows:  
“Code” “Document name” (“Revision and date”)  
Example: F-FSF-01 Contractor (Rev.01 Oct 18, 2011).docx (represents the first form for Field Safety used for Contractors Revision number 1, released on Oct 18,2011)

## 7. Controlled Document Location

### 7.1. Records

Records may be kept and stored in different locations (either electronic or hard copies) at the discretion of each Department Manager. However, the location and the people who have access to the records in that location must be specified in the Record Master List.

### 7.2. Documents

Documents will be stored centrally in the “Management System Documents” drive. There is “0JobSpecific - Controlled Documents” folder on the root of the drive for maintaining job specific documents. Non job specific documents are maintained under their related department/process folders on the root of the drive.

Note: Obsolete revisions of the controlled documents are moved to a folder called “0Obsolete” within every sub-folder. These folders are removed after annual internal ISO audits.

