

1 Purpose of this Standard

The purpose of this standard is to establish the minimum quality checking requirements that the Document Management department must adhere to before distributing any files for any reason.

2 Risks of non-compliance

The risks of not complying with this standard include:

- Published files may be distributed with confusing instructions
- Drawing or document numbers may have been incorrectly used
- Revision numbers may be incorrect causing confusion
- Legibility of files may be compromised
- Approval and authentication requirements may not be met
- Customer or client requirements may not be met
- Modifiable files may be incorrect, or not to standards
- Correction of poor quality files may be extremely difficult once files are distributed

3 Quality Control

Document Management is the final group of professionals to review documentation and data before the information is made available to the general users, or the specific group the information is directed towards.

This group is also concentrating on elements of the information that are not the responsibility of other departments, ensuring that all aspects of the communication methods and intent of the data is reviewed and accurate.

It is vital that the Document Management groups perform quality checks on all files that are processed for any purpose. This includes outgoing and incoming documentation.

The quality assurance will already have been embedded into the processes and procedures that are followed by all departments and groups pertaining to the creation of the files. The Document Management quality check/control is to ensure that those processes and procedures have been followed accordingly.

It is not the responsibility of the Document Management group to review documentation and data for technical quality or content.

If any errors or omissions relating to the Document Management requirements are found during the quality check process, those should be communicated via email or markup (for internal informal non-compliance) or via a formal non-compliance forms that are completed, issued, and expedited to closure.

There are different quality checks that are required depending on the category and classification of file that Document Management is processing. Below is a minimum list of checks. Not all checks will apply to all files.

Common quality checks:

- Ensuring the legibility of the documentation (hard copy or electronic copy)
- Ensuring the integrity of the data file/correct file format of data file
- Correct use of nomenclature or naming conventions
- Correct use of revision numbers and issue stages
- Correct notes included for any documentation related activities
- Ensure relevant change identifiers are used (clouding or highlighting/strikethrough, etc.)
- Ensure proper approvals/authentication has been met on documents and drawings
- Ensure proper titleblocks or headers have been used
- Ensure any customer or client standards and requirements have been met
- Confirm that modification rights have been given to modify various files
- Ensure no duplication of various numbers have been used (invoice numbers, drawing numbers, equipment id numbers, revision numbers, etc.)
- Ensure title or description of documentation is accurate and without spelling errors
- Ensure any secondary or legacy numbers are properly used
- Ensure any engineering record has been properly completed, when applicable
- Ensure any modifiable drawing files meets corporate or client standards before sign in or sign out
- Ensure proper distribution requirements are available to Document Control
- Confirming incoming documentation and data meets all standards and requirements
- Confirm accuracy of incoming transmittal information
- Ensure the quality of any markups on documentation
- Ensure any corporate formatting standards are met on documents (font, headings, date format, etc.)
- Ensure all reference numbers are accurate (job number, order number, client codes, etc.)

The level on control on each event of quality checking documentation and data, in any format, will depend on the situation. A list of mandatory requirements and preferred requirements for each issue stage must be established.