



QMS Core

Rolf Keitel, Chair
Ken Buckley
Don Dale
Remy Dawson
Phil Jones

QMS Leaders

Pierre Bricault
Ken Buckley
Iouri Bylinski
Don Dale
Barry Davids
Remy Dawson
John Drozdoff
Greg Hackman
Andy Hurst
Phil Jones
Rolf Keitel
Shane Koscielniak
Amiya Mitra
Colin Morton
Roman Ruegg
James Somerville

Editor

Ken Buckley

Associate Editor

Tim Meyer

Design/Photos

Mindy Hapke

Production/Circulation

Sharina Duprey
Niki Martin

We want to hear from you on this issue.
qualitytimes@triumf.ca

TRIUMF

4004 Westbrook Mall,
Vancouver, BC
V6T 2A3

Tel. 604 222-1047
Fax. 604 222-1074

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Document Controllers – Our friends & yours

Controlled documents, released, approved, pdfs, docushare, document IDs, what is it all about?

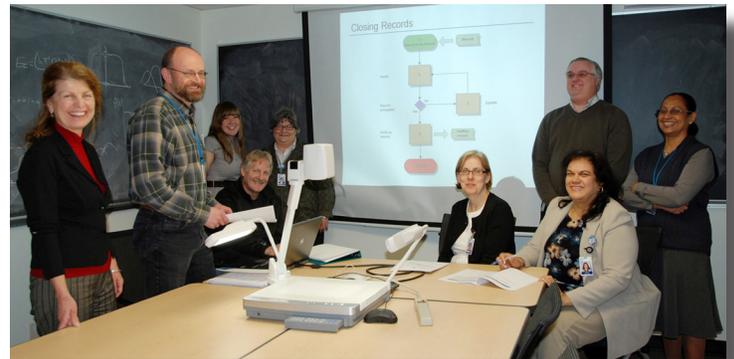
Sooner or later, you may have to write a procedure, a safety report, a policy document, or perhaps a group manual. Any document that defines how we do our work at TRIUMF should be a controlled document – meaning it does not get released for use without the appropriate review and approval. As a TRIUMF author you probably won't make the bestseller list (maybe QT should start one?) but we want you to feel like a famous writer anyway. So we have created and trained *Document Controllers*. You only need to focus on the document content and getting the document reviewed and approved, and then your assistant - the Document Controller - will handle the rest. A trained Document Controller will take your document & files and verify that they meet the requirements of the Quality Management System as defined in TSOP-01. This will include verifying that the necessary approvals have been obtained, that the correct template was used, that all the required source files for creating a new version were submitted, and verifying or assigning a document ID. Once the Document Controller has verified all of this information he or she will create the unalterable (Adobe pdf) version to be filed in the appropriate collection under 'Controlled Documents-Released'. The Document Controller will also store the editable sources, which you provided. During this process the Document Controller may ask you, as the author, for a list of keywords to add to the Docushare properties to assist others in searching for and finding your document.

Why can't I add content to the Controlled Document collections?

Only the Document Controllers have access to add content to 'Controlled Document' collections to ensure that only verified and approved documents that have all of the required document control elements are added and that they are added to the correct location.

How do I release a new version of an existing document?

The first step is to ask the Document Controller to provide you with the editable source files of the previous version. The Document controller has stored these on Docushare so that we can ensure that the new version is being created from the latest release. Once you have the source files, you draft your new version, have it reviewed and approved, and submit the updated files back to the Document Controller who then takes care of the rest.



Document Controller Training - Lynn De Caire, Ken Buckley, Niki Martin, Gord Wood, Kristina Gildert, Eileen Conning, Phil Jones, Pauline Dela Zilwa, and Raso Samarasekera

I already have a lot of documents on Docushare. What do I do with those?

If they are documents called for by the Quality Management System (e.g. procedures) then you should update the location of these documents so that they appear in the appropriate Controlled Documents-Legacy collection. These collections will act as a transfer station for existing Docushare content. The Document Controllers will verify that the required elements exist on these documents prior to moving them to the Controlled Documents-Released collections.

So who are these Document Controllers?

Currently we've trained all of the Divisional Administrative Assistants and a few other key personnel as Document Controllers and will evaluate the need for more as the implementation of the QMS progresses.



Do all my controlled documents have to be on Docushare?

You must have an exceptionally good reason not to use Docushare. All controlled documents and records must be managed in a way that meets the requirements outlined in TSOP-01 Documents and Records Management and in the TRIUMF Quality Manual. If this is not Docushare you should be aware that our smiling Document Controllers won't be there to help you.

All of this information is available in the Document Manual available from the QMS Resource link on the Docushare homepage. *by Phil Jones*

Group Manuals – What & Why

Are group manuals just another make work project? Surprisingly (some would say inconceivably) the elements of a quality management system are intended to make less work – particularly less of the unproductive work.

Now, you might not think that writing a group manual is productive but bear with me a minute. In an effort to make the TSOPs apply site wide they only specify the required elements of a quality management system and not the implementation which is relegated to the group manuals. This approach allows flexibility so that each group (that's you – the expert) can choose their own methods of implementation. Maybe you were way ahead of us and want to continue using an existing method. That is ok if, and only if, that system already supplies the necessary features (e.g. controlled documents and records). All you need to do is document that method in your group manual.



“This approach allows flexibility so that each group... can choose their own methods of implementation.”

Ok, so maybe you are thinking this makes sense, but so what? Well, in your group manual you should follow the structure that the TSOPs delineate. They divide the activities at TRIUMF into twelve categories. Your group manual should follow these categories and map your processes onto the TSOPs. For example, if your group receives “work requests” then your group manual would describe how they are received, how they are assessed, and what constitutes the record of assessment.

Now that you are sold on group manuals being a great idea, don't stop there. The group manual can also be used to record policies and procedures specific to your group. You can even think about a group manual as something that you could hand to a new employee and, armed with the documentation of the QMS system, they should have a pretty good idea of what the group does and how they can interact with the rest of the group and the site to accomplish their job duties.

The QMS pages on the engineering wiki, accessible from the home page of Docushare, have a suggested outline for a group manual as well as several examples. These show how the Electronics Development group, and others, implements the required elements of the QMS. There are examples from groups with primarily engineering or operational duties available for comparison. The ISAC Controls and Electronics Development groups use a database to manage their work. While this is an all electronic system, the mechanical engineering group uses a system based largely on paper records; both are equally acceptable and suit the group's functions.

Any of the QMS Leaders will be thrilled to help you start. *by Don Dale*