preprocessinc

Simplified Document Control

All technical and entrepreneurial pursuits live and die on clear communication. Many documents are created in any effort. The rule to live by is: less is more.

All documents should be simple in presentation and organization. The retrieval of the information must always point to the source. Specific information should reside in only one source. This is one of the most critical problems are project efforts expand. Poor communications and poor overlapping documents present conflicting information.

If the number of documents is simplified to the irreducible few, then the management of the versions of the paper copies and the electronic copies becomes paramount. Be careful of "Doc Control" software implementations. They usually come with a high activation energy.

This simple effort is also the basis for a strong Management of Change process. MOC is simply write down and communicate succinctly what you do, how it is to change, and keep it's understanding by all up to date.

Some simple rules:
1. Work the same document and reduce to the few needed.
2. Use the 10-20-30 rule for PowerPoint decks – no more than 10 slides, presented in no more than 20 minutes using 30 point font.
3. Do not create similar formatted identical documents.

Labelling and Revision Control

Naming should use a simple three element convention: <Name> - <Rev X> - <Date>

Where: Name = The Descriptive Title of the Document or Drawing
                       Following standard book titular capitalization protocols
                Rev X = Rev A, B, C, etc. for draft documents; 0, 1, 2, etc. for issued documents.
                       Rev I and O are both skipped in draft documents to avoid visual confusion
                       with issued documents Rev 1 and 0.
                Date = The date of the revision – August 2015; August 1, 2015; or YRMODA
                       format 150801 are each acceptable, but consistency is key.

The Rev gives you an idea of how many times it has been worked, the Date shows whether the information is stale. IE: "Project XYZ Monthly Spend Tracking Budget – Rev M – August 2010".

- The Name clearly and succinctly describes the document's purpose
- The Rev shows it was a regular, often worked draft
- The Date gives indication that you are working with old data and there may be something fresher out there for review.

The Major Action Item List (MAIL)

Projects can live and die by their ability or lack of ability to easily and accurately track action items. The Major Action Item List (MAIL) is the Microsoft Excel based tool PreProcess uses. Unlike most other project management software, the MAIL is readily available on everyone's computer any time any place, it is free to train and implement, and people are able to understand its use after one encounter and quickly become masters of the MAIL.

The MAIL is a sortable spreadsheet with set columns.

The action item number is recorded in Year, Month, Date, Number format. For example, the fifth action item assigned on August 1, 2015 would be 15080105. This action item format allows the team to sort items by assigned date.

The **Topic** column is to sort general categories.

The **Deliverable** column contains specific and detailed information about what will be delivered to the team. IE "A written Microsoft Word document detailing the Experimental Order to be performed in standard EO format"; or "A Microsoft Excel document detailing the current monthly project spend for the past six months and projected out monthly for one year. To include items grouped by both budget code category as well as by P&ID tag number. Rollup tab to include summary and project spend graphs using two sig figs."

The **Owner** is one individual. A whole team may be working on this but ultimately one person has the responsibility to communicate progress and deliver the action item on time.

The **Due Date** is by close of business unless otherwise arranged. For example if a MAIL is included in weekly meetings at a 6 AM shift change, the due date may be specified as due by 11AM the day prior to allow the team ample time to review and prepare prior to the meeting. If the owner is going to miss the due date for any reason it is the owner's responsibility to immediately inform the team of their delay once they are off track, seek assistance and brainstorm to get back on track, and communicate progress.

The **Status** is sortable and past action items are not deleted, their status is switched to a status that is typically hidden. Status is one of these options: Current, Completed, Accepted, Extended, Retired, or Late. Current is in progress. Completed is finished as described. Accepted was not completed as described however the team is accepting the item as is. Extended has a new due date. Retired means the team has collectively decided to move on or take a new direction. Late means the owner did not deliver.