

Tip of the Week

October 25, 2004

Where do all these %&\$#ing documents go?

A quick guide to using the File Server and Discussion Forum for document management

There are two fairly comprehensive SOPs that explain how to manage project-related documents – DOC-00 and DOC-03. Read these when you are bored. Until then, let's just say that it can all be boiled down to three simple rules:

1. Put everything on the Palatine Server.
2. Put *scanned images* or *adobe versions* of field-critical files on the forum (Packing List, Job Plan, Job Log and Timesheet)
3. When you have a comment about a project, post it to the forum.

The following provides a little more detail to help you answer the most common question these days – what goes where?

The CleanAir Discussion Forum

There are four types of documents that should be posted to the Discussion Forum:

1. **Completed Packing List** – not the original Excel version, but a **SCANNED** pdf version of the completed list, including all of the handwritten checkmarks, comments, etc. that the packers add to it.
2. **Job Plan** – post it in Adobe format to make it easier to view.
3. **Job Log** – normally, this would be scanned images of anyone's job log from the field. Some people have started using the electronic job log available on the intranet ([Electronic Job Log.doc](#)). If you have this, convert it to a pdf before posting it.
4. **Field Timesheet** – ideally, this will be a scanned image of the timesheet complete with the Job Leader's and client's signatures.

Of course, anyone can always post additional "discussions" concerning the project...that is, after all, sort of the point of using it in the first place.

The general idea, incidentally, is to post things in the format that is most representative of the "final" document available, and in a format that is difficult to modify. That is the reason for the emphasis on posting scanned adobe-type images as opposed to documents in their native format. Maybe the xls version of the packing list says that filter holders are to be packed, but only the packer's copy will tell you if they actually *got* packed.

The Palatine Server (K:Server)

The Palatine Server is STILL the primary resting place for all project-related documents. So, the quick answer is that everything eventually should make its way to the appropriate project folder on the server. More specifically, though, make sure that the following documents are moved to the server in a timely fashion:

1. **Request for Quotation** – scanned image
2. **Costing** – Original xls version
3. **Proposal** – Original doc version and pdf. The pdf should be a scanned image if the proposal was sent as a hard copy. If only an electronic version was sent, then a directly converted pdf is OK.
4. **Client PO or Contract** – scanned image
5. **Project Release** – original xls version is OK
6. **Protocol** – follow same rules as proposal
7. **Packing List** – xls version of original, scanned image of final
8. **Job Plan** – original doc version
9. **Project Invoices** – original xls versions
10. **Vendor Purchase Orders** – original xls versions
11. **Vendor Invoices** – scanned images
12. **Report Workbooks** – xls versions
13. **Lab Data** – scanned images or xls if available
14. **Report Document** – original doc version and pdf of copy sent to client.
15. **General Correspondence** – most appropriate format

So, you may be asking, “if I have to put all of this stuff on the server, why bother with the forum, or vice versa?” It is simple...the idea behind the forum is to create a searchable database of key information that we need to manage a project, both in the office and in the field. The forum is slightly more accessible from the field (don’t need VPN), and it is directly linkable to/from our intranet, so that intranet pages can exchange information with it.

The server is still needed because it is THE place for original documents...period. It is secure, well-organized, backed-up and everlasting (so Eric tells me, anyway). At the end of a project, it represents the file drawer for all things that happened along the way.