



Document Management Assessment

Please provide thoughtful responses to the following prompts. Your responses will give a foundation of understanding, allowing you to identify trends and deficiencies to get in front of any problems. Please be open and frank in your responses as this diagnostic tool is only as good as your

1. Have you issued the wrong revision of a document for negotiation, purchase, fabrication, inspection, construction, etc.?	All the time <input type="checkbox"/>	Occasionally <input type="checkbox"/>	Never <input type="checkbox"/>
2. Is your document management system built for your industry?	Not at all <input type="checkbox"/>	Not so much <input type="checkbox"/>	Definitely <input type="checkbox"/>
3. Does your document management system integrate with tools used by other disciplines (engineering, procurement, QS, construction, completions)?	Not at all <input type="checkbox"/>	Not so much <input type="checkbox"/>	Definitely <input type="checkbox"/>
4. Can any person authorized to access a document easily find it, with absolute confidence that it is the latest revision?	No <input type="checkbox"/>	Sometimes <input type="checkbox"/>	Always <input type="checkbox"/>
5. Are review and approval workflows executed online?	No <input type="checkbox"/>	Sometimes <input type="checkbox"/>	Always <input type="checkbox"/>
6. Are review and approval workflows executed without manual handoff delays?	No <input type="checkbox"/>	Sometimes <input type="checkbox"/>	Always <input type="checkbox"/>
7. Is each player's participation in review and approval workflows accountable and reportable?	No <input type="checkbox"/>	Sometimes <input type="checkbox"/>	Always <input type="checkbox"/>
8. Are all project documents (engineering docs, specs, contracts, POs, etc.) centralized in a single place/system?	No <input type="checkbox"/>	Sometimes <input type="checkbox"/>	Always <input type="checkbox"/>
9. Can clients, partners, and subs easily plug into your review and approval workflows?	No <input type="checkbox"/>	Partially <input type="checkbox"/>	Yes <input type="checkbox"/>

10. Are transmittals delivered to clients in consistent, easy-to-process formats?	No <input type="checkbox"/>	Sometimes <input type="checkbox"/>	Always <input type="checkbox"/>
11. Can you produce consistent, timely, accurate document progress and status reports online (without excel)?	No <input type="checkbox"/>	Sometimes <input type="checkbox"/>	Always <input type="checkbox"/>

Calculate your results	Column A Total	Column B Total	Column C Total
Step 1 Add the checkboxes marked for each column. Step 2 Column A Total + Column B Total = _____ Step 3 Look at the sum of column A and Column B to rate your document control health 0-2 = Healthy 3-4 = Needs work 5+ = Deep reaching problems			



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Cost Control Assessment

1. Is your cost control system accounting-centric / spreadsheet based?	No <input type="checkbox"/>	Partially <input type="checkbox"/>	Yes <input type="checkbox"/>
2. Does scheduling and accounting data integrate with your cost control system?	No <input type="checkbox"/>	Partially <input type="checkbox"/>	Yes <input type="checkbox"/>
3. Is your cost control system cloud-based with role-based user permissions?	No <input type="checkbox"/>	Somewhat <input type="checkbox"/>	Yes <input type="checkbox"/>
4. Do your projects follow standardized WBS and CBS formats?	No <input type="checkbox"/>	Sometimes <input type="checkbox"/>	Always <input type="checkbox"/>
5. Are cost reports produced without using spreadsheets?	No <input type="checkbox"/>	Sometimes <input type="checkbox"/>	Always <input type="checkbox"/>
6. Does your cost control system lock and enforce a baseline budget?	No <input type="checkbox"/>	Partially <input type="checkbox"/>	Yes <input type="checkbox"/>
7. Does your cost control system enforce the use of change orders to manage cost?	No <input type="checkbox"/>	Partially <input type="checkbox"/>	Yes <input type="checkbox"/>
8. Do your procurement and other commitments flow to your cost control system via software integration?	No <input type="checkbox"/>	Partially <input type="checkbox"/>	Yes <input type="checkbox"/>
9. Does engineering, procurement, and document progress flow to your cost control system via software integration?	No <input type="checkbox"/>	Partially <input type="checkbox"/>	Yes <input type="checkbox"/>
10. Does your cost control system produce reports that indicate earned % Complete?	No <input type="checkbox"/>	Sometimes <input type="checkbox"/>	Yes <input type="checkbox"/>

11. Are reports structured and formatted consistently without manual intervention?	No <input type="checkbox"/>	Sometimes <input type="checkbox"/>	Always <input type="checkbox"/>
12. Does your cost control system produce reliable forecasts?	No <input type="checkbox"/>	Partially <input type="checkbox"/>	Yes <input type="checkbox"/>
13. Does your cost control system maintain accountability among your team?	No <input type="checkbox"/>	Partially <input type="checkbox"/>	Yes <input type="checkbox"/>

Calculate your results	Column A Total	Column B Total	Column C Total
Step 1 Add the checkboxes marked for each column. Step 2 Column A Total + Column B Total = _____ Step 3 Look at the sum of column A and Column B to rate your document control health 0-3 = Healthy 4-6 = Needs work 7+ = Deep reaching problems			



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Procurement Assessment

1. Do you manage procurement in a true procurement system rather than an ERP (SAP, Oracle, etc.) or spreadsheets?	No <input type="checkbox"/>	Partially <input type="checkbox"/>	Yes <input type="checkbox"/>
2. Does your procurement system integrate all procurement players (Engineers, Buyers, Document Control, Suppliers, Project Management, etc.) in the same system?	No <input type="checkbox"/>	Partially <input type="checkbox"/>	Yes <input type="checkbox"/>
3. Have you sent the wrong documents or revisions out for bid?	All the time <input type="checkbox"/>	Sometimes <input type="checkbox"/>	Never <input type="checkbox"/>
4. Do you have standardized formats and controls for identifying and tracking project equipment?	No <input type="checkbox"/>	Sometimes <input type="checkbox"/>	Always <input type="checkbox"/>
5. Does your procurement system allow suppliers to tender/bid and submit vendor documentation online?	No <input type="checkbox"/>	Sometimes <input type="checkbox"/>	Always <input type="checkbox"/>
6. Do your workflows adapt to properly handle different procurement categories (eg. major equipment vs bulks)?	No <input type="checkbox"/>	Partially <input type="checkbox"/>	Yes <input type="checkbox"/>
7. Are all relevant documents readily available to buyers, suppliers, and clients?	No <input type="checkbox"/>	Partially <input type="checkbox"/>	Yes <input type="checkbox"/>
8. Suppliers never successfully give you the runaround?	No <input type="checkbox"/>	Sometimes <input type="checkbox"/>	Yes <input type="checkbox"/>
9. Are your commercial procurement documentation, instructions and forms currently standardized for each of your procurement categories?	No <input type="checkbox"/>	Partially <input type="checkbox"/>	Yes <input type="checkbox"/>
10. Is the required technical documentation is always available to your procurement team for issue to vendors and inspectors?	No <input type="checkbox"/>	Sometimes <input type="checkbox"/>	Always <input type="checkbox"/>

11. Are your procurement processes and approval workflows standardized by procurement category and consistently enforced?	No <input type="checkbox"/>	Sometimes <input type="checkbox"/>	Always <input type="checkbox"/>
12. Are there controls to ensure that bid tenders are issued only to approved vendors?	No <input type="checkbox"/>	Sometimes <input type="checkbox"/>	Always <input type="checkbox"/>
13. Are you able to quickly and accurately report on Equipment that has been procured or not procured against project equipment lists to ensure progress and status?	No <input type="checkbox"/>	Sometimes <input type="checkbox"/>	Always <input type="checkbox"/>

Calculate your results Step 1 Add the checkboxes marked for each column. Step 2 Column A Total + Column B Total = _____ Step 3 Look at the sum of column A and Column B to rate your document control health 0-3 = Healthy 4-8 = Needs work 8+ = Deep reaching problems	Column A Total	Column B Total	Column C Total



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Commissioning Assessment

1. Do your projects begin commissioning planning during engineering/design phase?	No <input type="checkbox"/>	Sometimes <input type="checkbox"/>	Yes <input type="checkbox"/>
2. Are completions and commissioning activities always completed on time and on budget (realistically within 110% of schedule and budget)?	No <input type="checkbox"/>	Sometimes <input type="checkbox"/>	Yes <input type="checkbox"/>
3. Do inspectors always have on-demand access to the latest drawings and specs?	No <input type="checkbox"/>	Sometimes <input type="checkbox"/>	Always <input type="checkbox"/>
4. Does construction, completions, or commissioning ever happen in the wrong order?	No <input type="checkbox"/>	Sometimes <input type="checkbox"/>	Always <input type="checkbox"/>
5. Do you have a cloud-based system to manage completions and commissioning data?	No <input type="checkbox"/>	Partially <input type="checkbox"/>	Yes <input type="checkbox"/>
6. Do updates to critical Equipment TAG data flow automatically to your completions system?	No <input type="checkbox"/>	Sometimes <input type="checkbox"/>	Yes <input type="checkbox"/>
7. Do you have a dedicated team of people building check sheets and assigning them to equipment and completions team?	No <input type="checkbox"/>	Sometimes <input type="checkbox"/>	Yes <input type="checkbox"/>
8. Are you able to create accurate progress and status reports in minutes?	No <input type="checkbox"/>	Sometimes <input type="checkbox"/>	Yes <input type="checkbox"/>
9. Can you produce skyline reports in minutes?	No <input type="checkbox"/>	Sometimes <input type="checkbox"/>	Yes <input type="checkbox"/>
10. Does your commissioning management system enforce Certificate progression dependencies (ITRs, Punchlist) as you define them?	No <input type="checkbox"/>	Sometimes <input type="checkbox"/>	Always <input type="checkbox"/>

11. Does your commissioning management system enforce workflows that ensure systems and sub-systems are completed in the correct order?	No <input type="checkbox"/>	Sometimes <input type="checkbox"/>	Always <input type="checkbox"/>
12. Does your commissioning system automate the handover of data to the owners and operators?	No <input type="checkbox"/>	Partially <input type="checkbox"/>	Always <input type="checkbox"/>
13. Does your system link Punchlist items to Equipment, TAG Sets, ITRs, Systems, Sub-Systems, etc.?	No <input type="checkbox"/>	Sometimes <input type="checkbox"/>	Always <input type="checkbox"/>

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