



Prifysgol Cymru
Y Drindod Dewi Sant
University of Wales
Trinity Saint David

Document Control and Management System

Deliverable Quality Control Document Checking and Approval Guidance

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L5 – GROUP PROJECT

ACDA5017

BENG ELECTRICAL & ELECTRONICS ENGINEERING

Document owner:

FREDDIE WILSON

2413880



REVISION CONTROL

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1 PURPOSE

The purpose of this guidance note is to provide guidance on the quality control of all deliverables issued to the client across the chosen group project. The quality control focuses on the deliverable product to find defects that remain after development.

2 SCOPE

This procedure is applicable to all types of deliverables created and modified by the group in all areas of the project. This procedure covers the process of checking and approval of deliverables, so that an auditable trail is maintained.

It does not provide guidance on issuing and transmitting of documents.

This guidance note should be read in conjunction with the Detailed Project Document Workflow.

3 DEFINITIONS

- **DCAMS** – Document Control and Management System
- **Deliverable** – Specific outputs, products or results that a project intends to produce and deliver to its stakeholders, these can be in many forms including documents, technical reports, drawings, calculations, and applications.
- **SQEP** – Suitably Qualified and Experienced Person
- **MDI** – Master Document Index
- **SDI** – Supplier Document Index
- **PFD** – Process Flow Diagram
- **P&ID** - Piping & Instrument Diagram
- **CP** – Check Print
- **PO** – Purchase Order
- **IFC** – Issued For Construction
- **IFI** – Issued For Information
- **IFR** – Issued for Review
- **IFD** – Issued For Design
- **TQ** – Technical Query
- **WIP** – Work In Progress
- **KPI** – Key Performance Indicator
- **AB** – As Built
- **GA** – General Arrangement

4 REFERENCES

- This document has no references.

5 PROCEDURE

5.1 Roles and Responsibilities

The table below details the responsibilities associated with each role.

Table 1: Roles and Responsibilities	
Role	Responsibility
Document Creator	Creates new document or modify existing document. Responsible and accountable for the accuracy and completeness of the document before signing off.
Document Checker	Ensures the document is technically correct and complies with InSite document nomenclature.
Document Approver	Ensures the document is required, meets the schedule and does a final check.
Documents User	Ensure they are using and referring to the latest issued revision.

5.2 Checker and Approver Requirements

All project deliverables require thorough checking and authorisation prior to final issue to the client, by a suitably qualified and experienced persons (SQEP).

5.3 Document Checking Workflow

Figure 1 below sets out a high-level standard workflow of a documents from inception to approved for issue. This is part of an overall document quality assurance system to ensure the accuracy, quality and integrity of the groups documents. Most documents will follow this workflow, however there are occasions when the full workflow is not required, these are set out in section 5.11 below. When a document is approved for issue, it is passed on to the delegated Document Controller. It is the responsibility of the delegated Document Controller to issue and transmit the document.

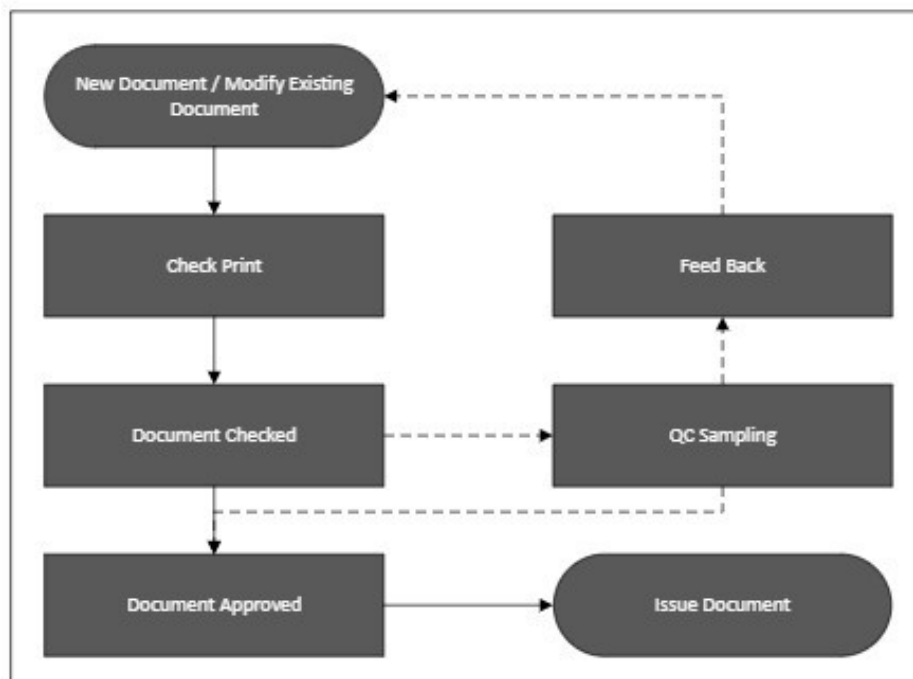


Figure 1: Document Checking Workflow

5.4 New Document / Modify Existing Document

The requirement to produce a new document or make a modification to an existing document is usually driven by the Project Manager in this case the engineer.

5.5 Modification Of Existing Document

Modifications to existing documents requires a copy of the existing native file. A copy of the existing native file is taken and pasted into a new folder created for the next revision. Full guidance on this procedure and the document filing structure are given in the following guidance document.

5.6 Check Print

On completion of a document the following shall be performed by the document creator/owner.

- A PDF copy of the document is saved in a check print folder within the transmittal folder as CP_1.
- A copy of the “Checklist for Issued Documents”, and any relevant document specific checklists are saved in the transmittal folder.
- The creator section of the checklist shall be completed and signed following the methodology for checking.
- The creator then emails the checker and discipline lead that the document(s) and check lists are ready for checking and approval.

Several checklists have been created to ensure all documents are checked thoroughly so that high quality is maintained across all disciplines.

As a minimum, the creator should use the “Checklist for Issued Documents”.

5.7 Document Checked

It is a requirement that all documents are checked by the SQEP, who is relevant to the discipline that the document relates to.

The following points must be completed by the checker to ensure the deliverable is verified as complete and error free.

- The checker completes the required checklist(s) and confirms the deliverables meet the project requirements. The document checker goes through the entire document to ensure it is technically correct and meets the necessary standard for the deliverable.
- The checker should prepare for the assessment by gathering all necessary information.
- Update the checklist as and where appropriate.
- The checker should keep to the agreed scope and timeframe (Update the document owner / project manager if deviating).
- Where multidiscipline verification is required, it is the document owner’s duty to ensure the checks are performed.
- Deliverable owner must close out any actions arising from the checking procedure.

5.8 Document Approved

The SQEP reviews the document and electronically signs off as approved if satisfied that the document is required, meets the relevant objectives (i.e. project schedule in the case of project engineering documents) and has been created and checked by competent personnel, including electronic sign-off of a document-specific checklist (where applicable). The approver should also complete the relevant section of the “Checklist for Issued Documents” checklist.

There are minimum quality assurance requirements that must be approved by the authorised approver:

- Approver reviews the document

- Confirms that the document is required
- Confirms the document meets the objectives of the project

- d) Confirms the document has been checked by a competent person
- e) Completes the relevant section of the checklist

If the approver is not satisfied that the relevant objectives have been met, the approver returns the document to the creator with comments.

When the approver is satisfied that the document is correct and ready to be issued the PDF copy is signed off as approved.

The document creator then electronically completes the sign-off boxes with the relevant initials of the creator, checker and approver on the native file.

A copy of this electronic version is pasted into the transmittal sub-folder.

Final Authorisation to transmit the documents is required from either the Lead Project Engineer or the Project Manager, they will confirm this by digitally signing the Issued Document Checklist.

An email is sent to the Document Controller informing them of the transmittal to be issued, transmitted and filed.

The document check prints are to be retained in the transmittal folder. It is important to note that several documents can be issued and distributed via one common transmittal.

--- END OF DOCUMENT ---