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| **Cornell High Energy Synchrotron Source** | | | | |
| **Doc#:** SOP-DOC-001 | **Procedure:** CHESS Document Control Approval and Release | | | **Prepared by:** ZB |
| **Rev.:** 6 | **Date Revised:** 06/16/13 | **Date Effective:**  06/16/13 | **Date Expires:**  06/16/14 | **Approved by:** ZB |

**Purpose**

To submit and approve a new document that conforms to CHESS documentation control standards.

**Materials and Equipment Needed**

1. Document for approval
2. Completed Document Change Request Form (F-DOC-001)

**Safety**

1. Safety Issues: none

**Procedure**

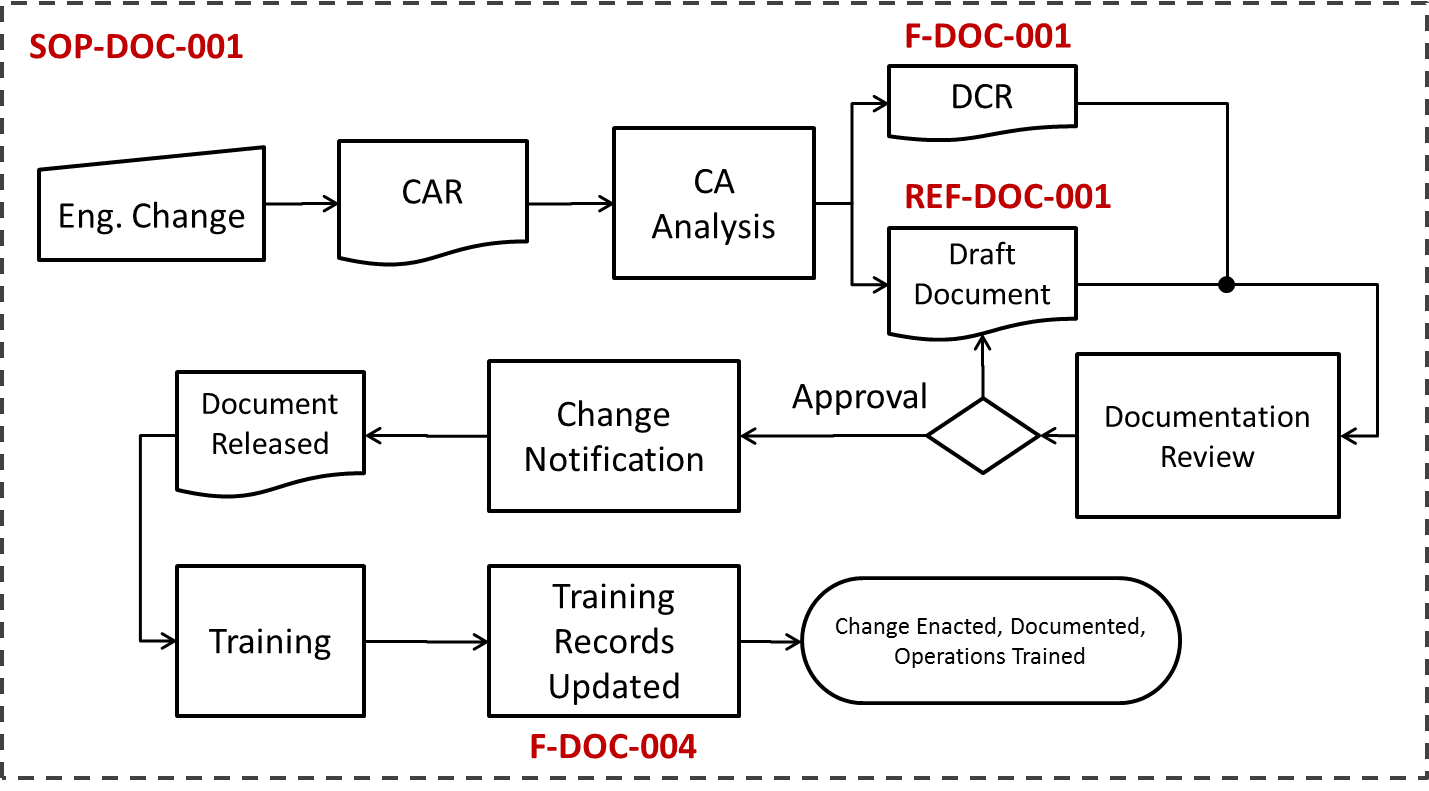
**See Figure 1 for flow diagram of the main steps of the following procedure**

1. Submission
   1. Create new document or edit existing document
   2. Document shall be written and categorized in accordance with REF-DOC-001 with a placeholder Document ID #.
   3. Complete *Document Change Request Form* (F-DOC-001)
      1. Note changes made when editing existing documents.
   4. Submit electronic copies of new/revised document and completed F-DOC-001 via email to party responsible for approval. **See Table 1** for list of responsible parties.
2. Review
   1. Team leaders shall be responsible for approval of documents pertaining to their area.
   2. New Documents:
      1. Verify integrity of information in document.
      2. Verify that document contains required Document Control information and sub-sections in accordance with REF-DOC-001.
      3. Verify References made within the document are accurate.
      4. Verify Revision history (Date, name).
         1. New documents should be Revision 1 and described as “Initial Document”.
      5. Submit completed F-DOC-001 and new document to Document Control staff.
   3. Revised Documents:
      1. Using the submitted F-DOC-001, verify the integrity of the edits made.
      2. Examine the document to verify all changes made were listed in submitted form.
      3. Verify References made within the document are accurate.
      4. Verify Revision history (Revisions, Date, Name).
      5. Submit completed F-DOC-001 and new document to Document Control staff.
3. Release
   1. Document Control Staff shall be responsible for conformance and final release of documents.
   2. New Documents:
      1. Assign document next sequential Document ID# by changing file name and Doc# fields in document.
      2. Upload new document into web system:
         1. Open Google Drive *CHESS\_DOC* folder.
         2. Drag local document into window to upload the document.
            1. NOTE: Do NOT format the document for Google Docs.
         3. Select the newly added document and click **[“Share Settings…”]** button to change sharing settings.
         4. Change *“Who has access:”* to “Anyone who has the link can view”.
         5. Copy the *“Link to share:”* to the clipboard.
      3. Update Document Control Index.
         1. For Manuals: Click *MANUAL\_INDEX* Google Spreadsheet to open the sheet for editing.
         2. For All Other Documents: Click *DOC\_INDEX* Google Spreadsheet to open the sheet for editing.
         3. Type =hyperlink(“COPIED\_LINK”, “DOC\_ID”) in “*Document ID”* column.
            1. Ex: =hyperlink("https://docs.google.com/...", "SOP-DOC-001")
         4. Drag entries from *“Type”* and *“Designation”* columns down to current row to fill in *“Type”* and *“Designation”* automatically.
         5. Add Document Title to *“Document Title”* column.
         6. Add Revision number (1) to *“Revision”* column.
         7. Add Revision Date to *“Revision Date”* column.
         8. Add Verified Date to *"Verified Date"* column.
         9. Add Author to *“Author”* column.
         10. Click newly added hyperlink under *“Document ID”* to verify link to correct document.
      4. Post update to *CHESS WebBoard* in Documentation conference.
   3. Revisions:
      1. Rename and archive existing version in OBS- directory:
         1. Select existing document and click **[“More…”]** and select *“Rename”*.
         2. Change Document Name to *OBS-DOC\_IDvX*, where X is the revision number.
         3. Drag renamed file into appropriate OBS- directory.
      2. Upload revised document into web system:
         1. Follow steps 3.2.2.1 – 3.2.2.5.
      3. Update Document Control Index.
         1. Follow steps 3.2.3.1 – 3.2.3.8.
      4. Post update to *CHESS WebBoard* in Documentation conference.

**Figures**

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| **Department** | **Doc ID Designation** | **Responsible Party** |
| Beam Position Monitoring | BPM | Revesz |
| Computer | COMP | Sorenson |
| CESR-TA | CTA | Lyndaker |
| Detectors | DET | Chamberlain |
| Documentation | DOC | Brown |
| Electronics | ELEC | Chamberlain/Edwards |
| MacCHESS | MAC | Smith |
| Motors | MOT | Edwards |
| Operations | OPS | Conolly |
| Safety | SAF | Richter |
| Vacuum | VAC | Seeley |

**Table 1 – Document Designations and Responsible Parties**

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**Figure 1- Flow diagram for Approval and Release Process**

**References**

F-DOC-001. Document Change Request

REF-DOC-001. CHESS Document Control Standards

**Revision History**

Rev. 1 – Initial document (05/24/12 - ZB)

Rev. 2 – Detailed Google Docs upload process 3.2.2, 3.2.3, 3.3.1, 3.3.3 (07/30/12 - ZB)

Rev. 3 – Added watermark header. Added page numbers. Revised 3.2.2.4 for accuracy. Clarification on entering hyperlink to Document Index and added example 3.2.3.2.1. (09/27/12 – ZB)

Rev. 4 - Added flow chart for overview of approval and release procedure. (11/15/12 - ZB)

Rev. 5 – Added instruction for listing uploaded documents vs. uploaded manuals. (05/17/13 – ZB)

Rev. 6 - Added Verification Date references to 3.2.3.9 & 3.3.3.1. (06/16/13 - ZB)