



# Procedures and Documentation



Well-documented procedures are an integral part of any maintenance management initiative, especially the implementation of a CMMS. This is because the business case rests with implementation of new processes, not simply upgrading or installing new software.

David Berger

Procedures are detailed instructions on how to complete an activity within a process. Good documentation should

- ❖ be a series of logical steps that optimizes productivity and quality of output,
- ❖ outline who does what, where, when, how, and why (if appropriate),
- ❖ leave no room for sub-optimal interpretation, and
- ❖ minimize risk to your company by providing adequate controls.

This column provides you with standards for evaluating the procedures and documentation supplied by a CMMS vendor, or for developing and writing your own.

## Types of Procedures and Documentation

On-line help is probably the most common and most critical form of procedures and documentation offered by a CMMS vendor. However, few vendors have sufficient procedural or "how to" help (eg, how to dispatch a work order). More sophisticated procedural help has plenty of screen shots, examples, flow diagrams, hyperlinks, embedded videos, and even wizards or coaches that help users walk through the procedure. In some cases, on-line help is supplemented by printed or electronic manuals, Q&A, website-based bulletin boards, quick reference cards, and "cheat sheets" that provide more extensive procedural help.

The reason why many CMMS vendors fall short on providing good procedural documentation is that there are often many ways users can achieve the same results. To document all the possibilities would be impractical. Furthermore, many of the processes consist of activities outside the CMMS, such as the differences between day shift and night shift procedures.

Properly documented procedures are vital to ensure you get the most out of your CMMS, ie, meeting efficiency and effectiveness targets. It is therefore critical for management and workers from all the stakeholder

groups to work with the vendor to design the processes around the CMMS. Then all documentation can be customized to reflect the optimal/standard procedures agreed upon.

People learn procedures in different ways. Some CMMS vendors have become quite creative in accommodating these variations. Computer-based training, online tutorials, and learning kiosks are but a few examples of some of the innovative ways used to decrease the learning time and increase retention. Multiple languages may be required especially for companies that operate in many countries.

## Guiding Principles

The following are general guidelines for drafting your own documentation (eg., preventive maintenance routines), or to be used as a basis for comparing procedures prepared by CMMS vendors:

- ❖ Make sure all procedures and documentation are written adequately for the people who will be using the information. Users have varying degrees of expertise, cultural backgrounds, and learning styles.
- ❖ Documentation should be easy to read and understand. If it is too long, too wordy, or written too formally, it may be misunderstood or ignored. Clear, short, familiar words should be used, to a maximum of 15 words to a sentence.
- ❖ Writing style should be somewhat informal or personal where possible. Ask yourself, "Is this how I would explain it to someone sitting next to me?"
- ❖ Only gender-neutral words should be used, and cultural biases should be avoided.
- ❖ Graphics, charts and tables should be employed wherever appropriate and useful.
- ❖ Examples help to clarify complex procedures.
- ❖ Cross-references should be used only to avoid repeating large amounts of text. For a few lines or words, it is better to restate the information.
- ❖ Jargon and acronyms should be avoided.
- ❖ Use bold or italic for emphasis. This is preferred over underlining or block capitals, but it should be used sparingly for maximum effect.
- ❖ Procedures should be numbered when they are to be performed in a rigid sequence. Roman numerals or alphabetical sequences should be avoided.
- ❖ The same terminology should be used throughout the document to avoid confusing the reader. For example, data can be described as "entered", "keyed" or "typed" into the computer. The term selected should be the one least likely to be misunderstood.
- ❖ Procedures should be properly organized, that is, in a logical sequence starting with an overview.
- ❖ The level of detail used in writing procedures should be sufficient for a new user to effectively do their job.
- ❖ Manuals, whether paper-based or online, should have a title page, table of contents, glossary, and index. Tabs are a good way of grouping information for easy access. ✨