Release Notes 4.8 - Change Requests

Release Date

5th Dec 2022

Overview

Centrik provides a platform to upload, distribute and track company documentation through the Documents module. In addition to existing functionality Centrik is introducing the ability to capture changes that impact company documentation throughout the Centrik management system.
The Change Request functionality comprises two parts, a Change Request (CR (the parent)) and a Document Amendment (DA (the child)).

This enhanced functionality will allow organisations the ability to link Safety cases, Audit findings and Regulation changes to any document in Centrik that might be impacted by an event or occurrence and potentially require amendment.

As an example:

- A finding has been raised during an audit, this finding impacts a training process that is not currently documented in the company training manual. A Change Request can be raised on the finding and a DA issued to the appropriate manuals, thus creating a link between the finding corrective action and the document that was affected.
- An amendment to a regulation requires a new procedure to be put in place. A Change Request can be raised and DAs linking the regulation item to the documents that are affected by the regulation change.
- A form is submitted by a staff member proposing a change to a manual. A Change Request can be raised and DAs linked to the affected documents..

The document manager is the key individual in this, upon being notified of a CR they are able to view the suggested change request, the documents affected by the change in the form of Document Amendment, and decide to 'accept' or 'reject' the change request depending on the applicability to the document that they own.

What is new?

- An optional enhancement that allows the ability to capture and record changes to documentation through ‘Change Requests’ (CRs) to documents as ‘Document Amendments’ (DAs).
- The ability to view an evidential audit trail for document change resulting from Regulation changes, Safety cases or Audit findings.
- The ability to create a clear connection between any changes to company documentation.
- Notification to the document owner that a Document Amendment has been submitted.
- The ability for the document owner to ‘Accept’ or ‘Reject’ a change and for this to be recorded.

Why are we doing this?

Company documentation is becoming increasingly scrutinised by NAAs. It is vital that company documentation is not only kept up to date to include regulation or legislation changes but that it also evolves to capture events or occurrences that are impacting your organisation.

Change Requests draw clear connections from an operator’s management system to company documentation. Change Requests show how a mitigating action in a safety case, a finding in an audit or a change in regulation can drive amendments in company documents.

When a document is in review, the reviewer will see exactly what is waiting to be incorporated in the next revision. Change Requests therefore are a key management tool in controlling change in all company documentation.

Who does this affect?

Management personnel are the key users of Change Requests. Anyone with the ‘Manage Documents’ permission for a document will be able to see Change Requests and Document Amendments logged against their documents.

Other module managers, those that have the ‘Manage’ permission access rights, will be able to raise a Change Request and assign Document Amendments against any document they have ‘Read’ access to.

In general users without a ‘Manage’ permission will not see Change Requests or Document Amendments, however, individuals that have been delegated items such as a safety report or a compliance finding will be given permission to raise a Change Request from the delegated case or finding and assign Document Amendments to any document they have ‘Read’ access to. Change Requests will not be visible to basic users.

How do I use Change Requests on my site?

Click on the following link to see a 'How to' video.

- Change Request video

This video will highlight an overview of the new Change Request functionality within Centrik, including how to create change requests, how to accept or reject a change request and view all change requests within your system.

FAQ

Q. If I want Change Requests enabled how can this be done?
A. The support team at Centrik can enable this function for you.

Q What is the difference between creating an Action and creating a Change Request?
A. Actions form a large part of Centrik by giving the ability to assign actions and make individuals, roles or departments accountable for that action. A change request differs by providing evidential audit trails to highlight the change management processes and procedures within an organisation. A Change Request can be linked to any Action.

Q. Who can raise a Change Request?
A. If enabled on your site, Change Requests can be created by anybody that can raise or create an 'Action', however you will only be able to create a Change Request related to a specific Safety case, or Compliance Finding if you are able to add an 'Action' within these modules. This is determined by your access rights related to your role.

Q. Who can see / view Change requests?
A. If enabled on your site, and enabled at folder level, those with 'Manage Documents' access rights for a particular subsystem or folder will be able to view Change Requests and modify any subsequent Document Amendments.