Documented Information Where the Work Is

GUIDING QUESTION *Take the most important operating procedure your property has and walk to the place where it would be used: the plant room, the laundry, the kitchen at six in the morning. Stand there and try to read it, in the state your hands and your time are actually in at that moment. If you cannot, the document exists and the requirement does not, because what the standard asks is that it be available and suitable for use where and when it is needed.*

Property: _____ Completed by: _____ Date: _____

How to use this sheet: work through the five parts with the people who own the process. The text in the left-hand columns comes from the book; the empty columns are for what is true in your property.

1. Verification Pact: what is commonly believed, what actually holds, and your property

What is commonly believed	What actually holds	In our property
«The procedure is available to everybody.»	It is accessible. The requirement is available and suitable for use, where and when it is needed, which is a basement at five in the morning.	
«Language is a courtesy.»	Language is named as an element of format, which the standard requires to be appropriate.	
«He knows the sequence, so the document is a formality.»	Competence reduces how much must be written; it does not cover the non-routine case, which is the only one the document is for.	
«Our document control is exemplary.»	Control includes distribution and use, not only storage and versioning. Most properties implement the second pair.	
«The manufacturer's manual is with the installer.»	External documents determined to be necessary must be identified and controlled. A manual held by somebody else is neither.	
«More documentation is safer.»	The extent may differ with competence and complexity. What has to be at the point of use is a short list, and everything else is elsewhere.	

2. What the standard requires, and what demonstrates it

From Table 2.12.a. The third column of the book (what is method, not requirement) is left out here: write what your property actually holds as evidence.

What is required	What demonstrates it in a hotel	In our property
Required and necessary documented information included	A short list of what the system actually needs	
Appropriate identification and description	Title, date and author on the document	
Appropriate format and media, including language	The plant procedure in the language of the person who performs it	
Appropriate review and approval	Somebody competent has signed it as fit for its purpose	
Available and suitable for use where and when needed	A laminated sheet on the plant room wall	
Control of distribution, access, retrieval and use	A record of where each controlled copy is posted	
Preservation including legibility	A sheet replaced when it becomes unreadable	
External documents identified and controlled	The boiler manual in the property's own possession	

3. The instrument: Table 2.12.b, The point-of-use test

The instrument of this subchapter. Walk to each place and try to use the document there.

Document	Where it is needed	In what state the user is	Reachable there
Plant start-up and shutdown	Plant room, before five	Cold hands, gloves, alone, in a hurry	
Restart after an isolation or repair	Plant room, under time pressure	Doing something rarely done	
Seasonal closure and opening sequence	Across the building, over two weeks	Several people, different departments	
Kitchen switch-on schedule	Kitchen, before six	First arrival, often seasonal	
Villa or room preparation procedure	On the floor, between rooms	Carrying things, no screen	
Manufacturer manual for significant plant	Plant room, when something is unusual	Needs it in minutes, not days	
Energy policy	Nowhere operational	Nobody needs it at a machine	

The rows above are the book's; the empty rows are for lines your property needs to add.

4. Common mistakes: self-check

Common mistake	Present here? (Yes / Partly / No)	Where we see it
Treating accessibility on a server as availability at the point of use.		
Leaving a procedure in the language of the contractor who wrote it.		
Assuming that a competent operator makes the written sequence unnecessary.		
Writing for the routine case, which is the one nobody needs a document for.		
Leaving the manufacturers' manuals with the installer.		
Printing and posting everything, which trades control for availability.		

5. Action plan

Step from the book / gap found	Action in our property	Owner	Deadline
Walk each operating document to its place of use, at the hour it is used, and try to use it there.			
Decide which four or five documents belong at the point of use. Keep the list short.			
Put those on the wall, laminated, in the room where the work happens.			
Translate them into the language of the person performing the work, not that of the contractor who wrote them.			
Solve the version problem with a dated, numbered copy and one line in the change procedure.			
Collect the manufacturers' manuals from the installers; they are external documents you must control.			

Step from the book / gap found	Action in our property	Owner	Deadline
Write for the non-routine case: the restart after a repair, the start after a long shutdown.			
Hand the sheet to the person who will use it and ask them to follow it.			
Add one question to every review: has the person who performs this ever opened it?			

In brief

The requirement that decides this subject is not that documents exist, are approved or are version-controlled. It is that documented information be available and suitable for use, where and when it is needed; and where and when, in a hotel, means a basement before five in the morning, a kitchen at six, a floor between rooms, with cold hands and no screen.

Source: The Helm and the Lens, Volume 4a: The Helm, subchapter 2.12. This sheet does not reproduce the text of the standard; work with your own copy of ISO 50001:2018 from an authorised source.