

## CMS Procedure – Key Stages

- **Identify need for new or revised CMS Documents**

The Functional Head ensured that a regular review of their CMS documents was undertaken so that documents were current and fit for purpose.

- **Production of new or revised CMS documents**

The Functional Head nominated a competent person to act as author. The author agreed with the Management System Manager document numbering, templates, reference check and if a cross-functional review was required.

- **Review Process**

The review process was conducted via review meetings, email or other as agreed between the Author and the Functional Head. The Director was usually the document approver although this responsibility was sometimes delegated in line with a CMS Delegated Authority Register.

- **Uploading the draft document into eB**

The final draft document was uploaded into the eB placeholder and eB meta-data was completed. Documents did not contain tracked changes, bar marks, coloured text or review notes. Any files created in other applications (eg pdf or excel for appendices) were also uploaded into the eB placeholder.

- **CMS Work Order Approval Process**

This process controlled the various document approval stages

The following work tasks were completed as a minimum:

- T01 - SUBMITTER
- T02A - CMS REVIEWER
- T03 - INCORPORATE COMMENTS
- T04 - CMS QA
- T05 - FUNCTIONAL HEAD APPROVE
- T06 - CHECK AND RELEASE

- **Publishing of approved document on CMS**

The output of the CMS Work Order Approval Process was the eB approved document published on the CMS.

- **Communication of new CMS documents and changes / additions to existing ones**

Where a new process / procedure was developed and a CMS document produced, briefings by process owners and CMS Contributors were carried out to those people that were required to follow the procedures. Where formal training was required, attendance records were maintained for auditing purposes.

With changes / additions to existing documents this was done by emailing users and other interested parties where information regarding the update was cascaded to others within their directorate, department or contracting organisation. In addition a list of CMS documents issued each period was published through the CRL Intranet system 'Connect in Brief'.

- **CMS Reporting**

Periodic Reports were produced and Key Performance Indicators (KPIs) maintained to demonstrate progress and to focus on any areas that need attention. This was reviewed in the Management Review.

- **Archiving of CMS Documents**

Documents determined to be of no further use on Crossrail were archived and made obsolete.