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AA

CONTACT

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The AA
Creating a Culture of Quality and Continuous Improvement

Issue 35 // December 2018 - May 2019

Also in this issue //

Welcome

This is such an exciting issue of the Connector - landmark even!

We start traditionally, with an extremely interesting case study of a Triaster customer: the AA. The AA have been working with Triaster for many years, so their case study covers not only their evaluation, choice and implementation of a Triaster System, but also details the quantified business improvements that they now achieve - of between £250K and £350K per annum.

Next its all new, as we introduce a brand new Triaster software tool: Ask the Crowd. Ask the Crowd is a simple and intuitive way to ask your users to suggest and vote on feature requests - in order to improve your products and services. We are delighted to introduce it to the Triaster Community and ask you to start using Ask the Crowd straight away - to feedback on all of Triaster's products, including Ask the Crowd! There is a substantial thank you built-in.

Thirdly, we announce the unprecedented benefits which the release of the Triaster Platform 18.2 will bring - including free Process Navigator!

Amazingly there is even more, but you will need to read the rest of the Connector to find out about it.

 Enjoy!

Emma

Emma Harris // Operations Director
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TRIASTER

The Process Improvement Company

The AA

Creating a Culture of Quality and Continuous Improvement

In the run-up to the September 2018 deadline for transition to ISO 9001:2015 Mark Braham - CQP, FCQI and CQI category A liaison at ISO/TC176, the international working committee responsible for writing ISO 9001:2015 - generously shared his extensive knowledge about ISO 9001:2015 with us all, in a series of Connector and blog articles and also the white paper, 'How to Achieve ISO 9001:2005'.

Mark does however also have a day job…Head of Business Assurance at the AA. In this role, Mark heads-up the team that evaluated, chose and implemented a Triaster System as the core Integrated Management System for most of the AA. In this article he shares that process with us warts and all, as well as the results and what's next.

FORMS & DOCUMENTS

FEEDBACK

PF

AA
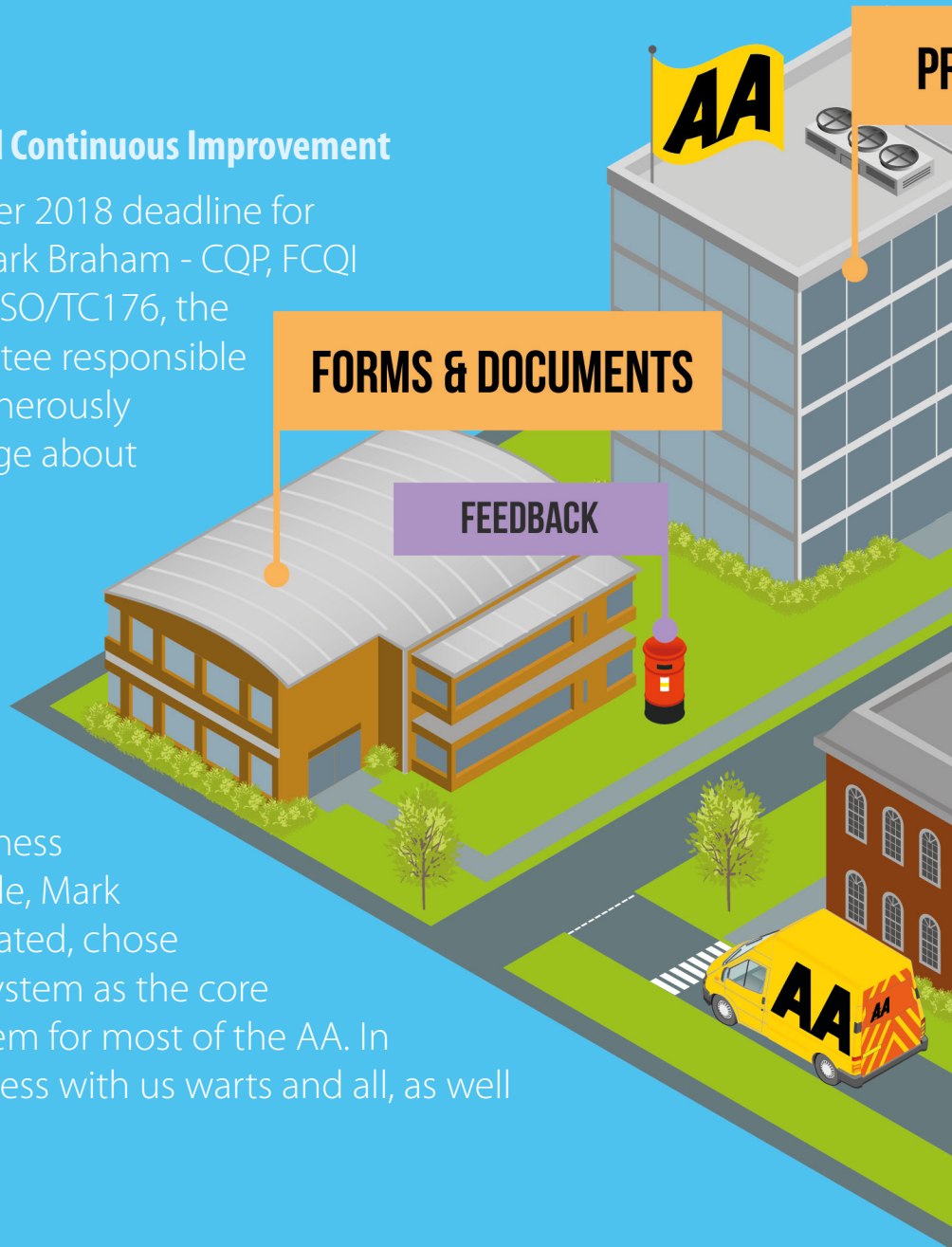
Introduction to the AA

The AA was founded in 1905 and is the UK's largest motoring organisation with over 15 million members and with more patrols than anyone else in this industry. It currently provides car insurance, driving lessons, emergency breakdown cover, loans, motoring advice, road maps and other services

Quality culture and management is very important to the AA and their Integrated Management System (IMS), known as AAIMS (Aims to be the best, Aims to Continuously Improve) is now central to this, as Mark says, "Our IMS sits firmly at the heart of the AA".

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The problem: an IMS in need of an upgrade
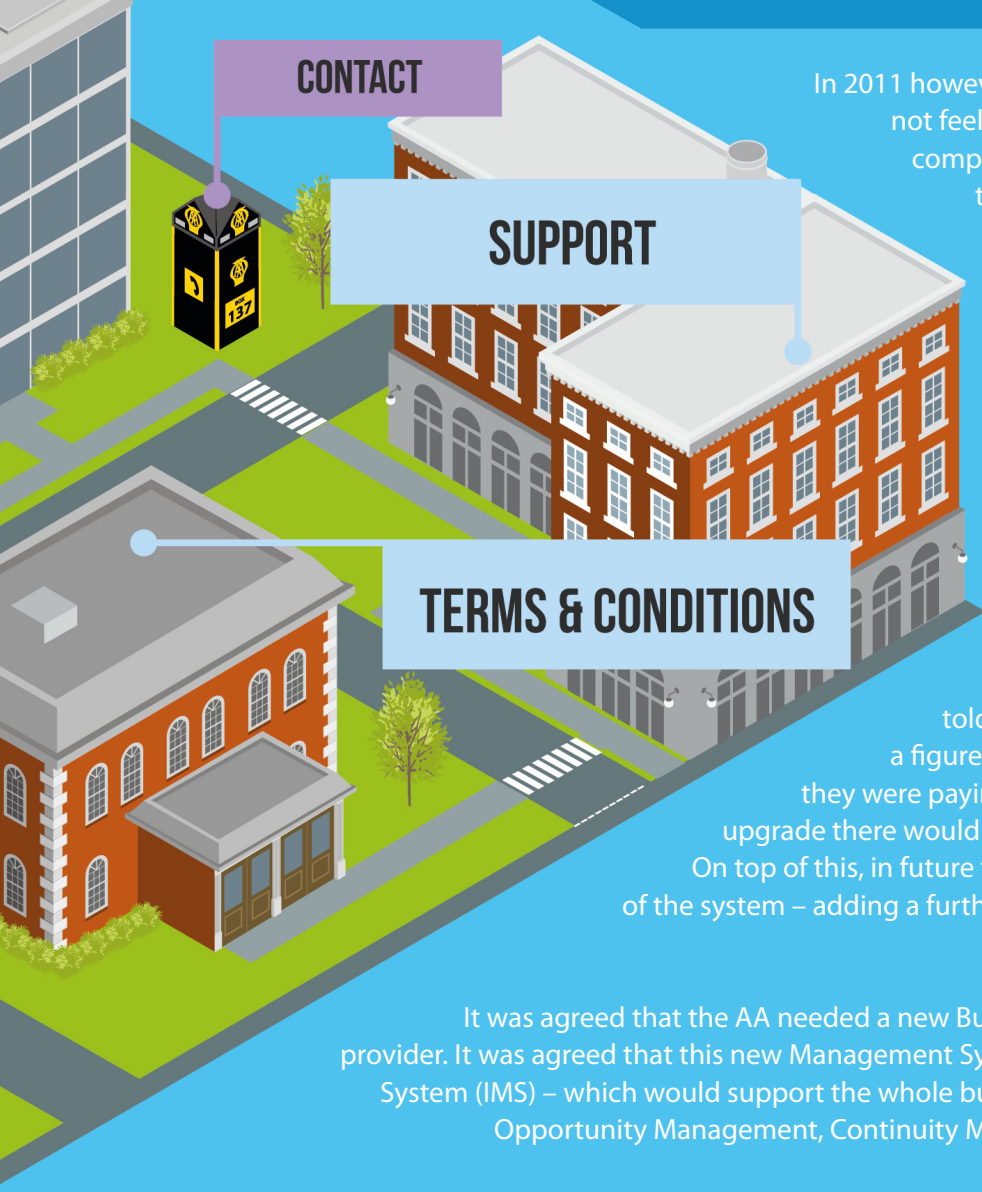
In 2011 however, Mark Braham and his team certainly did not feel that their IMS was firmly at the heart of the company. They knew that they needed to update their Business Management System in order to both ensure compliance with new ISO standards and to support a culture of continuous improvement within the AA.

At that time their Business Management System was eight years out of date and five releases behind the technical version. This situation had arisen because their system provider (Nimbus) had been acquired (by TIBCO) and the new owners did not upgrade the AA's system.

When they approached TIBCO, the AA were told that it would cost £370K for the upgrade – a figure totally disproportionate to the £2.5K a year they were paying for the system. In addition, following the upgrade there would be lost functionality and negative changes. On top of this, in future there would be a fee to license all end users of the system – adding a further £5.5K cost a year, plus the administrative burden to update leavers and joiners.

It was agreed that the AA needed a new Business Management System and a different provider. It was agreed that this new Management System would be an Integrated Management System (IMS) – which would support the whole business, with Quality Management, Risk and Opportunity Management, Continuity Management, Health and Safety and more…

Finding the Solution: A Rigorous Journey

Mark and the Business Assurance team began by compiling a list of candidate systems drawn from referrals, networking, contacts and research. This included six potential systems.

All six commenced a rigorous three-round process in order to find which was the most suitable system for the AA.

Triaster's cost model is clear and transparent with nothing hidden.

Round One
Round one was a two-hour meeting with each company. At the end of these the team eliminated three BPM organisations due to their lack of technical support, training, general help and user interaction at the front end.

This left them with a short list of three systems to take into the next round.

Round Two
The Business Assurance team then asked the three remaining companies to map a few of the AA's current processes in each of their software and present them back. Each presentation was measured against 25 high-level criteria set by the team, including:

- Accessibility
- User Friendliness
- Customer Support
- Ease of use

Triaster scored 24/25, with the one mark lost because of the number of activities per page - although Mark has now admitted the benefits outweighs the negatives. The two other systems' scores were nowhere near Triaster's.

Mark started to worry that Triaster was over-promising on what they could deliver, so he and the Business Assurance team decided to speak with several of Triaster's customers, to hear their feedback.

They first spoke to Fugro, who gave them a demonstration and were clearly very happy with Triaster. Mark worried that as Fugro work in the same building as Triaster, they might get special treatment. However, the AA also received very positive feedback from all the other Triaster customers they spoke to.

"Triaster told us we could contact any customer about their user experience, rather than just a couple of their favourites."

Round Three
For the final part of the evaluation process, the AA undertook a free trial of the Triaster system.
The end- result was assessed by high frequency business management system users, who rating it on a scale of Poor to Excellent. They were asked to evaluate the system against a set of criteria, some of which were:

1. Speed
2. Ease of Navigation
3. Look and Feel of the Homepage
4. Process Maps
5. Search
6. Ease of Following Process
7. Ease to Find Attachments
8. Ease of Locating Documents

The majority of users rated Triaster Good to Excellent in all criteria and the decision was made to proceed.

"Triaster scored particularly highly on user-friendliness and customer support."

" Triaster develop their system constantly and listen to end users via the User Group. Not only that, they have implemented changes that delivered on the AA's specific requests.

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The Business Case

To secure the budget a business case was of course needed. This stated that purchase of the Triaster BPM system would deliver the following benefits:

- Transition to ISO 9001:2015 certification
- Reduced business operation costs
- Increased business efficiency
- Deliver business improvements of approximately £200K a year

Funds secured, the implementation could begin.

ASK THE CROWD

Introducing the new Suggestion Tool from Triaster.

See article on page 8.

The Triaster System Implementation

The technical implementation of the Triaster system was straightforward, but the conversion of the approximately 12,000 process maps which had been created using their Nimbus system, initially looked to be a massive challenge.
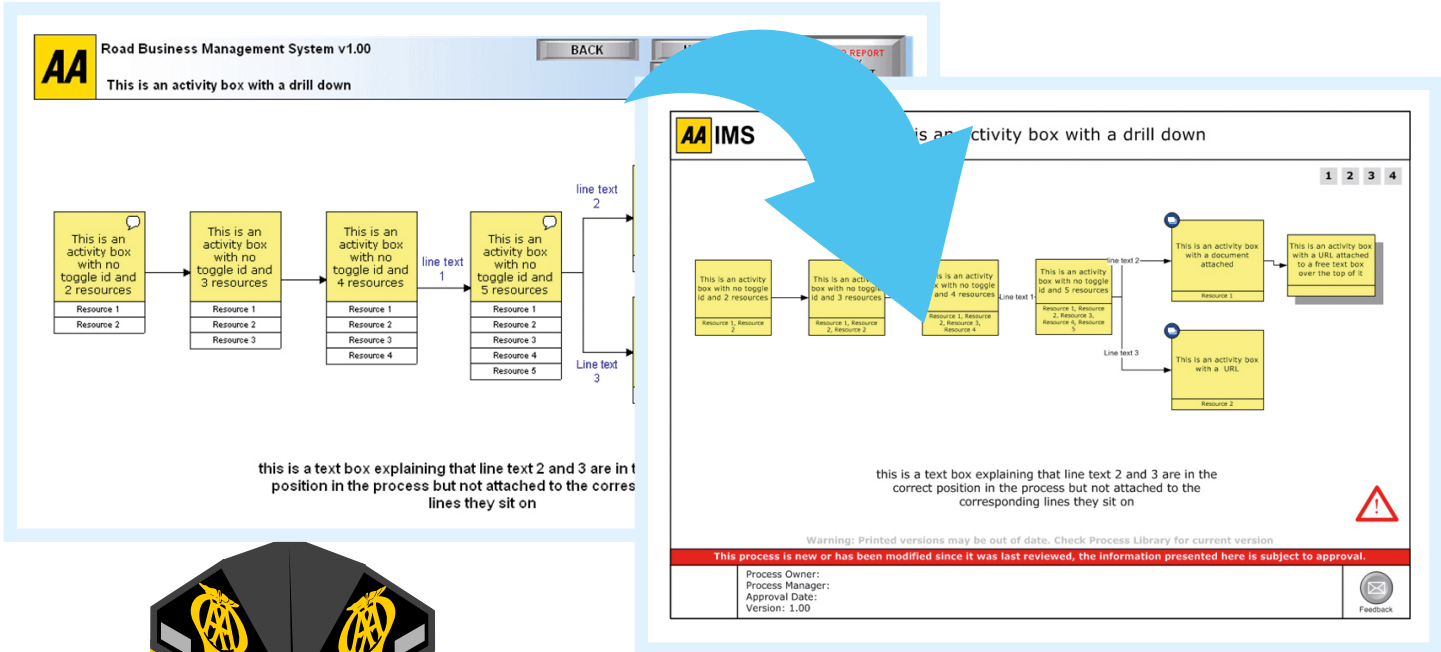
> Triaster work hard to keep their customers informed. The Connector newsletter, the blogs, and all the information they supply - it's very, very good.

However, Triaster developed an automated conversion route, which saved the AA many thousands of person hours and significant cost.

That said, with the benefit of hind-sight Mark would do things differently next time and start the process mapping afresh with the new system – thus ensuring that none of the legacy system issues are carried forward into the new system. At the time though, the business assurance team was very small and lacked the time to do the detailed process mapping required. Especially since the AA goes beyond process mapping, and maps at the procedure level or work instruction level because this is the preferred method for their end users.

"It's extremely complicated to update an outdated Quality Management System with limited company resources."
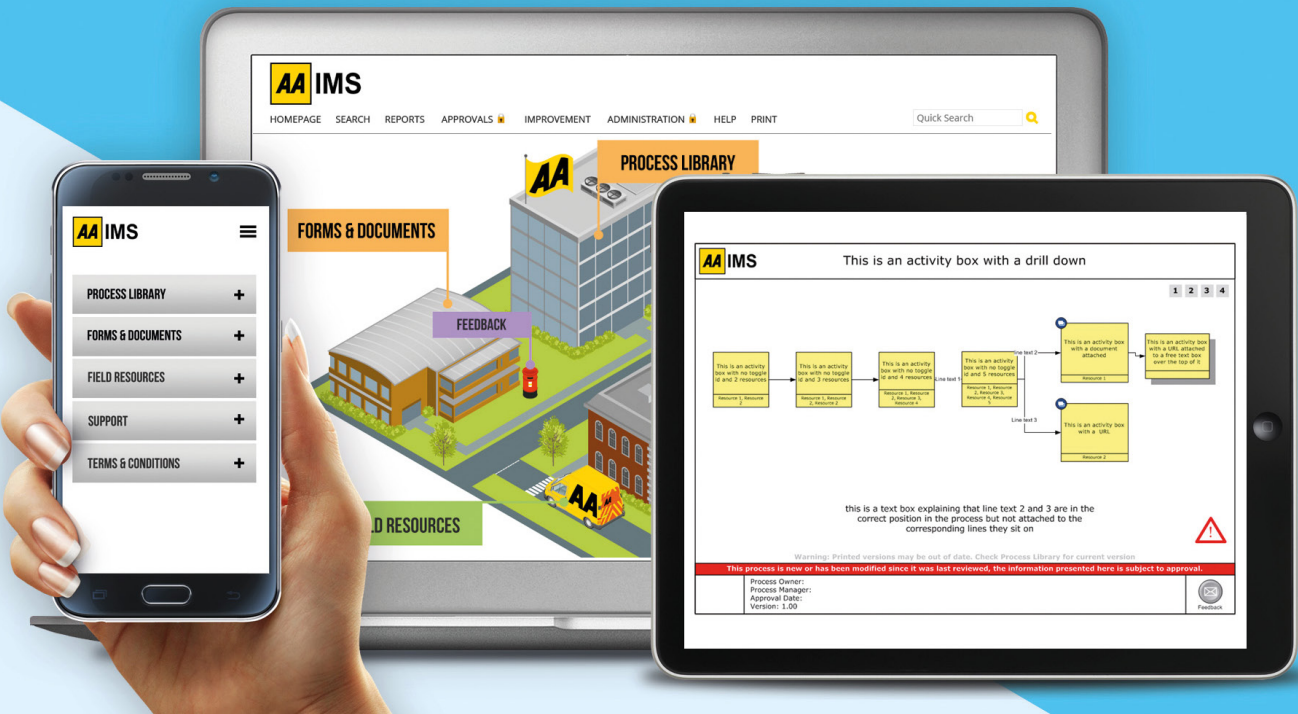
An IMS at the Heart of the Business

In accordance with the AA's initial objectives for their IMS, the Business Assurance team's first task was to meet the requirements of ISO 9001:2015.

Scope of Business

Scope of mananagement system (AAIMS)

Scope of ISO certification
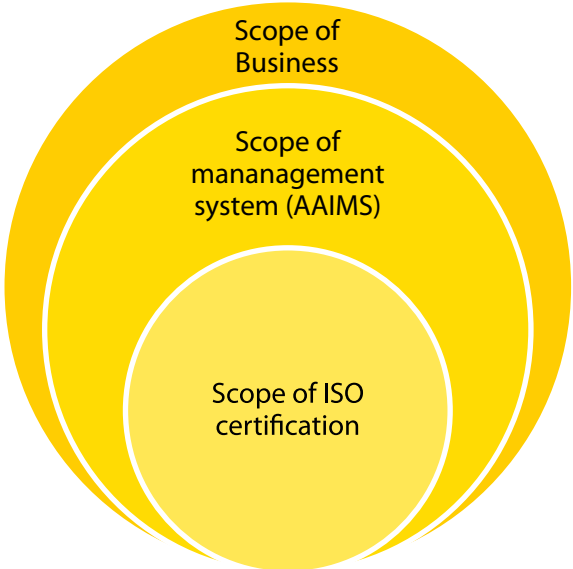
Right from the start however, Mark and the team were very clear that this would only be the start -point. Their IMS would be about delivering continuous improvement to the whole organisation. In fact, Mark's utopia will be when the three circles in the diagram above all cover the same area/scope, and the entire customer journey is mapped using value stream methodology.

Triaster support (both in general and technical support) is really good and very fast

AA IMS

HOMEPAGE   SEARCH   REPORTS   APPROVALS   IMPROVEMENT   ADMINISTRATION   HELP   PRINT   Quick Search

PROCESS LIBRARY

FORMS & DOCUMENTS

FEEDBACK

AA IMS

PROCESS LIBRARY   +
FORMS & DOCUMENTS   +
FIELD RESOURCES   +
SUPPORT   +
TERMS & CONDITIONS   +

FIELD RESOURCES

AA IMS   This is an activity box with a drill down

1 2 3 4

This is an activity box with no toggle id and 2 resources

This is an activity box with no toggle id and 3 resources

This is an activity box with no toggle id and 4 resources

This is an activity box with no toggle id and 5 resources

This is an activity box with a document attached

This is an activity box with a URL attached to a free text box over the top of it

This is an activity box with a URL

this is a text box explaining that line text 2 and 3 are in the correct position in the process but not attached to the corresponding lines they sit on

Warning: Printed versions may be out of date. Check Process Library for current version

This process is new or has been modified since it was last reviewed, the information presented here is subject to approval.

Process Owner:
Process Manager:
Approval Date:
Version: 1.00

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Accordingly, the team have now processed mapped 84% of the AA's processes. This covers the work of nine business areas and 6,500 employees. The process maps are captured in two ways, either using Triaster process mapping software or Visio Templates in A3. As Mark says, "We process map every department either with Triaster or Visio Templates, as Visio can just be published in the system without conversion".

Currently the team are focusing on process risks and opportunities - both capturing risk in a Risk Register and putting mitigation plans in place - and capturing 194 business change opportunities (to date). This is proving really popular with the wider business, who now routinely request business reviews (audits) by the Business Assurance team (who are fully booked out six months in advance) - something which is unheard of in most organisations!

Business Improvements Quantified

As well as driving and supporting a culture of continuous improvement, the Business Assurance team can quantify Business Improvements of between £250K and £350K each year (well in excess of the £200K per annum initially promised). Mark shared some examples of how these savings have been achieved.

Call Handling Centre
The average call handling time for each call to the call centre was reduced by 3 - 10 seconds per call. With 6.5 million calls handled each year – this resulted in a massive cost saving.

Tools and Equipment
Audits found that some tools were not being used by the patrol teams. As a result, these tools were no longer issued. With an organisation the size of the AA – this resulted in a huge cost saving.

Packaging
Opportunities were found to reduce the amount of packaging used in parcels sent by post. Again, a small incremental improvement, which saved the company many thousands of pounds.

Continuous Improvement
The IMS is constantly being updated as process improvements are agreed. With quick and easy communication both upstream and downstream, small step changes are made every single day, approved and immediately communicated to the front line - benefiting everyone immediately.

IMS usage
Historically the old management system had a few hundred visits per day, or about 70,000 visits per year. Now with Triaster implemented and buy-in from operational teams, the annual visits to the IMS have increased to over 700,000 a year. Employees are accessing the latest policies, processes and procedures, enhancing the customer experience and getting things right first time.

"There are small step improvements made every single day."

What's not quantified?

Only improvements captured during projects are reported on and verified, whereas small changes - a tweak here and there to processes, suggestions from operational staff - go through a simpler process and while they save time and effort, as well as increasing engagement and employee satisfaction, this is not quantified. It is very probable therefore that the actual savings per annum are significantly higher that the Business Assurance team reports.

"The Business Assurance team have been more than paying our own salaries for seven years now – even though we are also growing."

So what's next?

With so much achieved, the AA's Business Assurance team might be forgiven for resting on their laurels a little, but For Mark Braham it is all about matching the scope of the AA's ISO certification, with the scope of the Triaster IMS and the scope of the business. So, what's next is to achieve just that.

With Mark's vision and the hard work of the whole Business Assurance team - supported by the Triaster IMS - we know it is just a matter of time.

ASK THE CROWD

Introducing the new Suggestion Tool from Triaster

I am delighted to introduce Ask the Crowd to the Triaster community.

Triaster have long understood the power and the value of the suggestions and feedback given by our customers and users. This is one of the reasons why the Triaster User Group has been running for almost as long as Triaster. The feedback given hasn't always been the easiest to hear or implement, but it has always been crucial in our drive for continual improvement.

Michael Cousins // Managing Director

Over the years Triaster have used a number of methods to capture user feedback and suggestions. We have set up a feature suggestion e-mail address, we have attended User Group meetings, we have held Customer Focus Days, virtual feature prioritisation workshops, feature voting...

We have also shared our Product Roadmap and internally we have used several methods to manage the feature requests that we have captured in this way.

None of it has been ideal. None of it has had the transparency and clarity that we wanted, particularly in feeding back to our customers and users, what we were planning/doing in response to their suggestions.
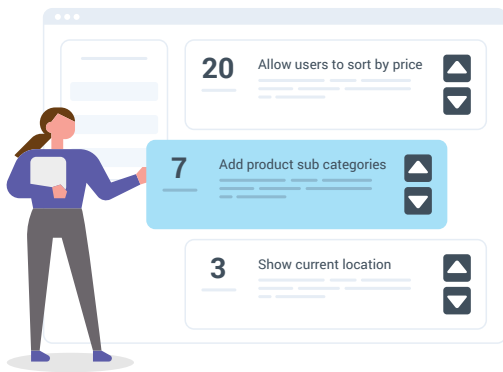
So...we have developed Ask the Crowd

Ask the Crowd is not just for Triaster however. It is for anyone wanting to improve their products or services.

Ask the Crowd is a simple and intuitive way to ask users to suggest and vote on feature requests and then keep them updated regarding what you are doing in response.

SOFTWARE

APPROVED

IN DEVELOPMENT

RELEASED

user to sort by price

oduct sub categories

ocation

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How it works

|	
20	Allow users to sort by price
7	Add product sub categories
3	Show current location

Ask customers to suggest features to improve your products and services

The users of your products and services will be brimming with ideas on how they should best be developed. Ask the Crowd gives them an easy and fun way to tell you about them.

Ask for votes and comments on the suggestions made

There is no such thing as a bad idea, but some ideas are more generally useful than others. Ask the Crowd will prioritise the suggestions made, based on the votes that they get. Comments will also help flesh-out some suggestions.

TOPIC
Software

Development

Testing

Go-live
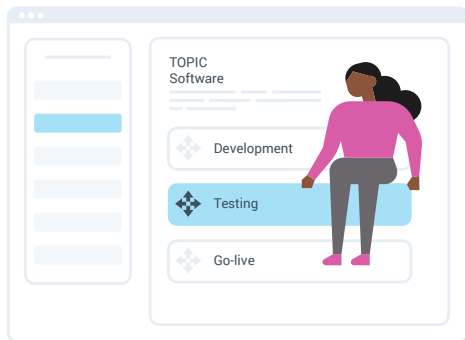
Prioritisation, communication and management of suggestions is fully baked-in

Capturing useful improvement ideas and feature requests is only half the battle. To make them happen, they need to be prioritised, taken through a development lifecycle and released. This all takes co-ordination, management and communication, which is hard via e-mails and spreadsheets, but just so easy in Ask the Crowd.

As part of the testing and launch process, we are now asking Triaster customers to register with Ask the Crowd and use it to feedback on Triaster's products: **Process Navigator, Triaster Server and Ask the Crowd**

Please join the Triaster Crowd here:

🔗 **Please join the Triaster Crowd here:**
tinyurl.com/atc-tri ≫
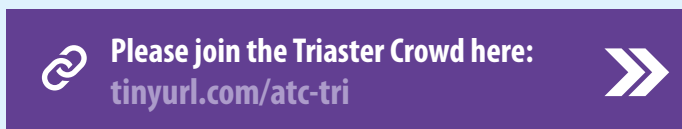
...and through Ask the Crowd let us know what works for you and what you would like to see improved.

Shortly we will also be offering all Triaster customers the opportunity to trial Ask the Crowd with your own users (or Crowd) – and feedback how you would like that element of the tool to be developed further.

A next step before too long will be to enable Triaster System customers to capture their users' feedback on the process maps in their Business Management Systems, using Ask the Crowd rather than an e-mail link. (A Triaster User Group request.) We are still ironing out the details on the integration for that, but it's not too far off.

As a thank you, all Triaster System customers will always be able to use Ask the Crowd absolutely free of charge, for up to a 1,000 users. Please visit the Ask the Crowd website for more information.

🔗 **www.askthecrowd.cloud** ≫

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T.U.G. News

Linda Spinks presents the latest news from the User Group

Linda Spinks // User Group Chairperson

User Group Meeting in October

The October 2018 User Group meeting took place at the beautiful University of Winchester campus, hosted by Claire Lorrain who is Head of the Continuous Improvement Unit there.

WE TELL YOU

I was very happy to be back in the position of Chair, but missed Julie Savage our Secretary. Therefore, Matt Burrowes from Triaster stepped in to take the minutes on the day. Another slight variation to the usual structure of the day, appeared in the form of Triaster's Managing Director and Founder Michael Cousins, who also attended. Mike took the opportunity to speak with the room about the path that Triaster is following and to give an insight into what the future holds.

We had some new faces in attendance on the day and some fantastic conversations, that resulted in new ideas and points to take away.

Presentation by Claire from University of Winchester

Claire gave an inspiring presentation reflecting on the University's own journey through their Excellence Model and how this has linked to their Triaster Process Library. Claire also gave an insight into what it takes to achieve recognition of excellence at a national level having been awarded the British Quality Foundation (BQF) UK

Excellence Award in 2016 and how embedding the Triaster Process Library has helped to drive process and improvement.

Claire also discussed the benefits of involving the student body of the University in the mapping process. The initiative enables the students to gain further qualifications, whilst making a positive contribution to the current and future life of the University of Winchester.

Towards the end of Claire's presentation, she focused on how the Continuous Improvement Unit are taking a LEAN approach to waste reduction in process. Claire emphasised that ensuring the right data - behind processes - is captured and the right reports run against this, is extremely important.

Workshop One

The group agreed to discuss Document Management, with particular focus on how this relates to attendees own Process Libraries. To begin everyone scoped out the requirements of a Document Management System to fit to their particular industry. This created a lot of constructive conversation and ultimately illustrated that no one system can possibly fit all.

John Stokes from Interserve raised a valid point about ISO compliance, with particular focus on ISO Clause 7.5.3. This helped the group to reach common agreement, that there needs to be both a business definition for a document management system and a technical definition.

The group reflected on how the small Triaster Document Approvals tool might be developed to become a full document management system and provided feedback to Matt and Mike on how this could be achieved.

This discussion so inspired Terry Giles, that he has written the article 'What is Document Management?', which can be found on page 21.

Thank you Terry!

Update from Libreea

Libreea now deliver all the consultancy and training included with each Triaster system, in addition to a whole raft of other services around process mapping and improvement.

Victoria Hormigo, Libreea's Managing Director explained how customers could make use of Libreea, who of course deliver the high-quality services which everyone has come to expect from the familiar face of Paul Elson-Vining and Libreea's new Junior Consultant Jessica Homan, who also attended the User Group.

LIBREEA

Find out more about Libreea's services:

Phone: +44 (0)1183 800856
E-mail: info@libreea.co.uk
Web: www.libreea.co.uk

Workshop Two

Following on from the host presentation, LEAN became the topic of conversation in Workshop two.

Claire provided some more information on how the University of Winchester is using LEAN to streamline processes and reduce waste on a daily basis. One example was how paper registers for lectures and seminars have been completely replaced by key cards, which are swiped by each attendee. This change has significantly reduced the amount of resource required to monitor attendance, which in turn has reduced costs.

Some of the longer standing Triaster users mentioned that they have noticed that the Reports Exchange can no longer be found in the new Help and Support structure. However, it is really useful to have the ability to share reports, particularly ones focusing on waste reduction and identifying areas for improvement. Triaster also agreed that the Reports Exchange is an important tool in enabling such tasks and will reinstate it.

The conversation then shifted on to the culture and reception of a LEAN approach in the wide range of industries that the User Group attendees come from. It was agreed that the best practice in LEAN is to keep it simple where possible and ensure that the entire workforce is kept engaged. This can mean using alternative terminology. Clive from Landmarc no longer uses the term 'Value Added', instead talking about 'Benefits', a word which is far better understood by the rest of the organisation. Claire uses the term 'Continuous Improvement' instead of 'LEAN'.

DID YOU KNOW?

We have a working version of the APQC Classification Framework, which can be found here:

There is a Properties Editor, which can be found here:

And a tool to help cloud customers connect to Azure, which can be found here:

🔗 **frameworks.triaster.cloud**

🔗 **properties.triaster.cloud**

🔗 **azureconnect.triaster.cloud**

Keeping it simple, easy and achieving quick wins ensures continuous engagement. "It does not have to be complicated", summarises the Workshop discussion well.

Next Main UK User Group Meeting

YOU TELL US

The next User Group meeting is going to be hosted by Mick Tetley from Galliford Try. The date has not yet been finalised, but if you are interested in attending the next User Group meeting, please e-mail customer.services@triaster.co.uk.

Once the date is agreed you will be able to register via the Triaster website here info.triaster.co.uk/events-customer-user-group

We also have yet to agree a date for the next US User Group meeting. If you would like to register your interest in attending the next virtual meeting, please email customer.services@triaster.co.uk

Please remember to raise any community questions on the User Group forum on LinkedIn. The forum can be both clicked to from the User Group's Secure page and accessed via this link:

🔗 **Visit the User Group Forum**
tinyurl.com/tri-user-group »

If you aren't already a member of this group, please simply request to join and the group owners will approve your request.

If you would like to host a meeting, or have any questions about the User Group please drop us an e-mail to user.group@triaster.co.uk

L de Spiels

user.group@triaster.co.uk

PROCESS MAPPING WORKSHOPS

Libreea have been running a series of half-day Process Mapping workshops, which have been really well received.

"

A great workshop, developing process understanding. The key to effective, consistent services.
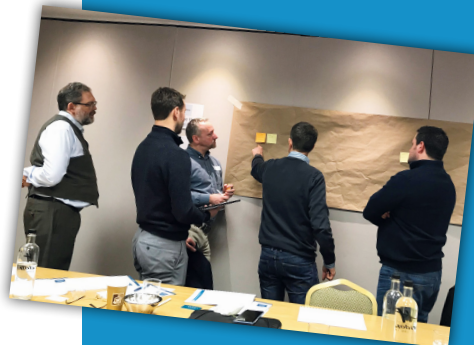

"

Arms you with the basics of where to start and how to think about the questions to ask and from whom.

"

Very well explained, easy to follow and understand.

"

Fantastic intro session into the importance of process...and where to start documenting.

LOOK OUT FOR THE NEXT ONE!

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Triaster Software Development
Triaster Platform Version 18.2 will bring major benefits to all

The Triaster Platform version 18.2 is being released shortly and it will bring several major benefits to all:

- ✔ **Process Navigator free of charge**
- ✔ **Triaster E-learning courses free of charge**
- ✔ **Triaster Online Systems enhanced**
- ✔ **Triaster On-premises System customers automatically upgraded**
- ✔ **Language Translation**
- ✔ **Caching issue resolved**
- ✔ **Disconnected Server more easily deployed**

Michael Cousins // Managing Director

Process Navigator free of charge

Following the release of 18.2 Process Navigator will be available free of charge!

That's right, Triaster System customers will be able to have as many users of Process Navigator as they need - at absolutely no extra cost.

This is a highly ambitious move by Triaster to make our software more affordable and to remove a potential barrier to widespread adoption of our solution by our customers' organisations.

So, following the release of 18.2 all Triaster System customers, will have access to both **unlimited author licences** as well as **unlimited viewer licences**. We don't know of any other solution in this space that is offering such flexible licensing.

The entitlement to unlimited Process Navigators requires no action on our customers' part, we will be updating our activation database in the month following the 18.2 release and to start with will add 1,000 user months - but if you need any more just let us know.

There will also be a free Start-up version of Process Navigator available for all - not just Triaster System customers. Following the release of version 18.2 this will be downloadable from the Triaster website.

Triaster's E-learning courses free of charge

As well as making Process Navigator free, for existing Professional System customers we are now also making our library of on-line learning courses completely free. So, as well as there being no licence cost to growing the number of process authors, for Professional System customers that are able to use on-line training, there will also be no learning costs.

Triaster Online Systems enhanced

No Microsoft Azure charges

For our cloud customers, I am also delighted to announce that following the release of 18.2, Triaster will be absorbing all Microsoft Azure charges in our (unchanged) fee. That means that in future, customers won't have to worry about consumption costs or virtual machine costs, it will now all be part of the package.

Start-up System reduced in cost

Actually the fee for the Triaster Start-up system is changing – it is being reduced by over 50%!

We have been able to do this – and freeze the cost of the Standard and Professional Systems for another year - because of the investments we have made in improved automation and efficiency over the last year.

The Start-up system is perfect for smaller organisations or end-of-life libraries that are required for ongoing reference, but are rarely updated.

Improved base machine specification

We have also increased the standard specification of our online base machines, so they now sport 2CPUs and 8GB RAM - more than enough power for everything apart from the most demanding Triaster workloads.

Triaster On-premise customers automatically upgraded

For all organisations that have on-premises implementations of a Triaster Server, the release of 18.2 will automatically entitled them to our Gold Managed Service package and all the other entitlements of the Triaster Professional System, at no cost increase.

ASK THE CROWD?
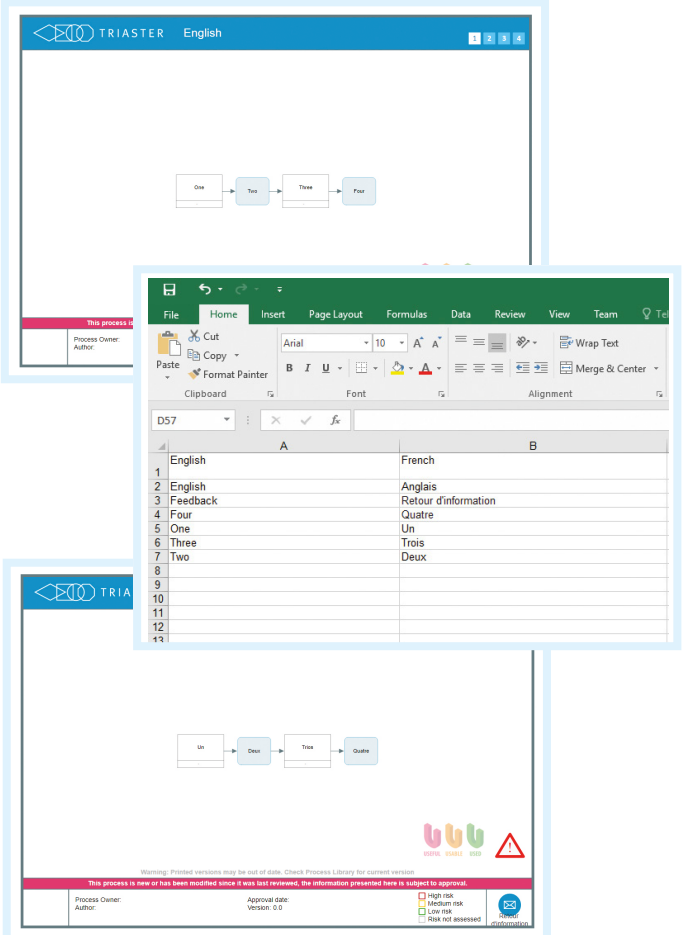### Introducing the new Suggestion Tool from Triaster.

Find out more about our exciting new product. See article on page 8.

Join Ask the Crowd and feedback your suggestions, votes and comments.

🔗 **Please join the Triaster Crowd here:**
tinyurl.com/atc-tri

Language Translation

18.2 also includes the general release of a new language translation database.

The language translation database was originally developed in response to the needs of a customer who needed to expand their BMS across Europe, and to deliver content in the local language. The previous Data Manager approach would have worked fine here, but it was a more complex approach than necessary. So, we had a re-think, and came up with a much simpler approach that was much easier to deploy and contained increased levels of automation.

Following 18.2, it will be easier than ever for all Triaster System customers to have libraries that deliver centrally developed content in a variety of different cultures and languages. All you need to worry about is managing the translation work!

If this is a requirement that you have, let us know and we'll talk you through the possibilities.

Caching issue resolved

Thanks to customer feedback we have been able to identify an issue in the caching engine on the server, which for some customers, in certain circumstances, was leading to response times of over 20 seconds on simple things like logging in.

18.1 and later of the server software has an improved caching engine, and with 18.2 we have seen some pretty solid performance gains as a consequence.

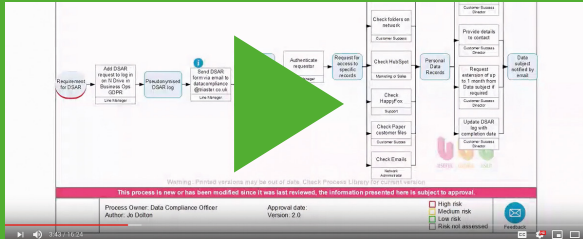## Disconnected Server more easily deployed

This is another area that has received a lot of attention during the year, in response to the needs of a customer that needed to deploy Disconnected Servers, without the need for Triaster to install and configure them.

It is a highly technical task to set-up a Disconnected Server, so it was a real challenge to find a way to enable that to be done by non-technical staff.

To some extent, this remains a work in progress, but in version 18.2 big strides forward have been made in simplifying the whole process including:

1. Automated server replication (rather than script driven as previously) to a zip file

2. A specific Disconnected Server option on install to automatically configure the server in Disconnected Server mode

3. An import routine to enable easier synchronisation of content directly from the replication zip file

GDPR WEBINAR ON-DEMAND

Triaster partner, Libreea have recorded this really helpful webinar on how to utilise the Triaster BMS Process Library to support the data mapping requirements of GDPR. Even though the GDPR deadline has now passed, it is definitely worth a watch:

🔗 **tinyurl.com/libreea-gdpr**

Sign up for Product Releases

An e-mail will be sent out to anyone signed up for Product Release e-mail on the release of version 18.2. If you haven't already please sign up now:

🔗 **www.triaster.co.uk/software-releases.php**

Triaster Professional Services: an update

Triaster have now fully devolved all our professional services delivery (not technical services) to Libreea.

In future, professional services days should be booked directly with Libreea. Apart from simplifying processes for all concerned, this will also reduce the day rate cost and increase the choice of consultants and services available.

Libreea can be contacted as per the details below.

Partly as a result of this change and partly because a surprising number of customers do not use their full allowance of bundled services, Triaster are discontinuing the inclusion of bundled Professional Services in our licence agreements.

For customers that have undelivered services days, we will of course honour these days, and for customers who like the convenience of being able to call off services without the need to raise requisitions, both Libreea (for professional services) and Triaster (for technical services) can still offer packages of time to use as and when you need them.

By phone: +44 (0)1183 800856

By e-mail: info@libreea.co.uk

Via their website: https://libreea.co.uk/contact.php

LIBREEA

Meet…
Sam Light
Technical Apprentice

Sam joined the Triaster Team in July and has become a member of the Support, Documentation and Testing Team whilst completing his college course. Sam is the youngest member of the team, bringing a completely fresh view on all aspects of the company.

Despite his age Sam has an exceptionally deep voice, which we know is going to provide a much-needed soothing tone on support calls in the future - so keep your ears open…

We asked Sam what he likes most about his role with Triaster, and this is what he said:

"

When I first joined Triaster, I had no idea about how complex working with computers could be. This friendly but professional environment has really opened my eyes to the endless possibilities that all start with a keyboard and a mouse.

Fact File

Joined Triaster
July 2018

Before that
Studying GCSE's at school

Professionally most proud of …
Learning as much about HTML as I have since joining Triaster and in such a short timeframe

Hobbies
Football, climbing, mountain hiking (especially in Spain)

Likes
A good old-fashioned cup of tea in front of a warm fire. Football, been a passionate Liverpool supporter since before I can remember! Big music fan, anything from hip-hop to old school rock. Family Guy is also a big favourite…

Dislikes
A lot of things, but mainly olives. Everyone seems to love them, and I always get roped into trying one for the 2,816th time!

Everyone at Triaster will always remember…
Sam's constant bed hair and that he is secretly a professional bowler

connector
Linking the Triaster community

Meet…
Nathan Stevenson
Technical Apprentice

Nathan joined Triaster in August forming part of the Support, Documentation and Testing Team alongside completing a college course. Nathan's calm, methodical and proactive approach to his work has quickly made him a reliable test user and support analyst. Despite his short time here in the office we think he has really settled in well and hit the ground running.

We asked Nathan what he likes most about his role with Triaster, and this is what he said:

"

Triaster has been a good introduction into how a software company works, as this is my first experience in the IT/software industry, and I enjoy having to use my problem-solving skills to try help improve the product or help customers resolve issues.

Fact File

Joined Triaster
August 2018

Before that
**Worked in a warehouse for a luxury spa**

Professionally most proud of …
Getting multiple promotions at my last job

Hobbies
Weight training/strength sports, reading and watching documentaries

Likes
Travelling, food, yoga, strength training, music and doing new things

Dislikes
Running, drivers who don't indicate and excessive notifications

Everyone at Triaster will always remember…
The video of him squat lifting 200kg and his sense of humour which is more than quick enough to match the huge amount of sarcasm in the office
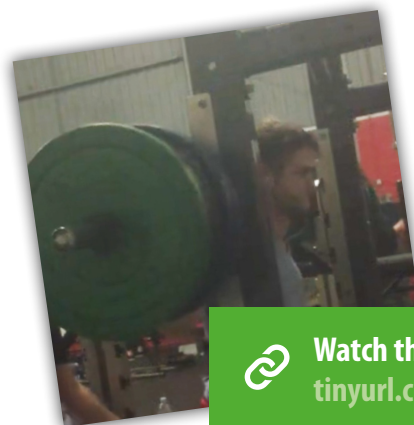
Watch the video here:
tinyurl.com/tri-nathan

Meet…
Jane Duncan

Administration Assistant – Customer Success

After joining Triaster in July 2018 as our new Administration Assistant, Jane very quickly settled into the Triaster family. Jane's role has already changed in the few months she's been with us, as she has taken on more responsibilities from the Customer Success team. We enjoy her friendly personality, sense of humour and cake choices.

We asked Jane what she likes most about her role with Triaster, and this is what she said:

"

Having taken 8 years out of employment to care for my young family, joining Triaster has made me realise how much I have missed being in a work environment. My role at Triaster has already grown in the time that I have been here, and I am loving every minute of it. I particularly like that is so varied.

The supportive and friendly culture within Triaster has allowed me to regain confidence in myself on a personal and professional level. I am very much looking forward to my future with Triaster.

Fact File

Joined Triaster
July 2018

Before that
Stay at home mum for 8 years and prior to that I was Customer Services Helpdesk Team Leader for a business services company

Professionally most proud of …
Finding the confidence to return to employment after such a long time as a stay at home mum. It hasn't been easy and it has taken time for family life to adjust, but it has been worth it and I am very lucky to have found such a great new "work family" at Triaster

Hobbies
Baking, shopping, clearing up after the kids!

Likes
Spending time with family, socialising with friends, cake, shopping, drinking cocktails, Movies24 (especially when it becomes Christmas24!), TV shows such as Suits and Hawaii Five-0, popcorn, hot chocolate and shiny things!

Dislikes
Lemons, peanut butter (unless it has chocolate with it!), rudeness

Everyone at Triaster will always remember…
Jane answers the phone ridiculously quickly, and whilst always having fruit and salad on her desk, she is a very good supplier of cake

connector
Linking the Triaster community

From the blog
Terry Giles considers document management and version control

Terry Giles // TerryAG Consultancy

What is Document Management?

At the October Triaster User Group meeting one of the subjects that came up was document management. The question arose as to what is meant by document management. I thought that this was a great question - one that I have set out to answer in this article.

What is a document?

When considering what document management is, we need to start with a question, what is a document?

ISO 9000:2015 defines a document as: information and the medium on which it is contained. This moves us far away from the more traditional thinking of documents being bits of paper with writing on them, what we are really looking at is information management.

ISO 9001:2015, sections 7.5.2 and 7.5.3 then talk about the controls that are needed to be in place for managing documented information. This is where things start to get really interesting and the whole concept of managing documents starts to get a bit confusing.

Documents and their uses

One of the areas where confusion occurs, is around the use to which the document is put. Given the ISO 9000:2015 definition, documents can range from Twitter posts, through e-mails and letters to process or procedure descriptions.

Thankfully ISO 9001:2015 does limit the controls required, to those associated with the quality management system (QMS), (ISO 14001 and ISO 45001 also require the same controls). However, that does mean we need to define the boundaries of our QMS or, if we are dealing with ISO 14001 or 45001, the relevant management system.

I tend to separate documents in business management systems into two categories; records and instructional.

- Records being those documents that are created and once issued never change, such as e-mails, letters, reports and even Twitter feeds.

- Instructional documents on the other hand are issued and then subject to modification over time.

Storing records vs storing instructions

The management of records should be relatively simple in that a record is created, reviewed, issued and then stored in such a way as to be both accessible (to those with the required authorization) and to be proof against being changed.

As many people have found out to their cost, even e-mails and Twitter feeds need to be reviewed (i.e. read and considered) before hitting the send button.

The management of instructional documentation on the other hand has the added complication that once an instruction has been issued, it may be the subject of change as time goes by.

So, the common bit to the document management of both records and instruction is the creation, review and storage.

Documentation controls

From a practical perspective, what controls should we be considering when looking at document management?

Going back to ISO 9001:2015, section 7.5.3.2 requires the following to be addressed:

- Distribution, access, retrieval and use
- Storage and preservation, including preservation of legibility
- Control of changes
- Retention and disposition

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blog.triaster.co.uk/blog

How these are achieved are down to the individual organization. There are however some interesting potential issues that can arise when using electronic media as the mechanism for storing the information.

Storage and preservation

One of them concerns the requirement for storage, preservation and preservation of legibility. Many users rely on applications such as Word, Adobe Acrobat, Visio, Excel etc. as document editors, which is great - so long as those applications are supported.

I am old enough to remember applications such as WordPerfect and Lotus 123 and the fun that could be had (not) translating WordPerfect documents into Word documents, whilst trying to retain some semblance of formatting - particularly when it came to tables or porting across formulae in Lotus 123.

What happens when the application becomes obsolete, or the latest version is not backwards compatible with an old version you are still working on?

Similarly, with retention requirements, working within a regulated industry where records may need to be kept for the life of a product - and that life could be 20 years or more - then retaining the ability to read the documents created by an obsolete application, could be fun.

Storing documents in the Cloud

Then we come on to a recent set of developments with information being stored in the 'Cloud'. What controls are going to be in place, so that when you 'delete' the records from your system in line with legislation, they are not backed up on the 'Cloud' somewhere and still theoretically available?

The answer here is to have something in the contract with the 'Cloud' provider, to ensure all records and backups are deleted. I wonder how many IT managers think of such things?

The takeaway

Managing documentation in today's environments where paper is the exception and the information you need is just a click away, does need to be thought about carefully.

Yes, it does mean that people can get to the right information quickly and efficiently and search engines make it so easy to get to the information you require, but will it always be the right information? That however, is a subject for another day.

Version Control in Document Management

Some time ago I became involved in a discussion about what constitutes version control and what the best method is for indicating the latest version. As part of the discussion we got into the realms of how we should represent the version.

Version control – what do we call it?

Our discussion got as far as considering if we should call the versioning, the 'version number', 'revision number', 'issue number', 'release', or what?

But, does it matter, as long as we are consistent in what we use? The answer to this is, probably not - with a caveat or two.

Why use version control?

The real question to ask is, how does knowing the version, issue etc. number, actually benefit us?

A stock answer to that question is, that it enables the user to tell if they have the correct document. However, this only works if the user knows what version, etc. they should be using. In most organisations users tend not to worry about such things, as they obtain documents from whatever document library they use and trust that at the time they obtain it, it is at the latest in issue.

To most users the version number at the top, bottom or side of the document is just a number. They would know however, if the number on the document they have is lower than the one stored in the library, that their copy is an old version.

Using a version identifier has other uses. One variant on versioning uses integers for issued documents and decimal points for draft versions. This gives a further bit of information about whether the document has been formally issued, or if it is still a draft and subject to change.

From a user perspective however, having a version number on a document provides only a limited amount of useful information and probably does not help them too much in deciding if they are using the correct version of the document.

Is there a better way?

Using the issue date for version control

My take on this is that if you utilise the issue date for version control, rather than a number (or letter), this will provide users with much better information.

They can tell if the document was issued recently, in which case the probability is that it is the current one to use, or it was issued some time ago and it might be worth checking that there is not a more up-to-date version available.

Using the date to identify the version number has another advantage too, it avoids the situation arising when a document has been updated and re-issued many times and the version number gets rather high. Thus also avoiding any potential questions from auditors about the effectiveness of your review system.

Does effective BPM alter the picture?

Going for an even more radical approach; in these days of electronic publication, do we even need to publish the version on the electronic document, if it can only be accessed from a single source? As long as the published version is always the current version and the history of the changes are maintained in the library, why is it required?

These article were first published to Triaster's blog, which Terry contributes to regularly.
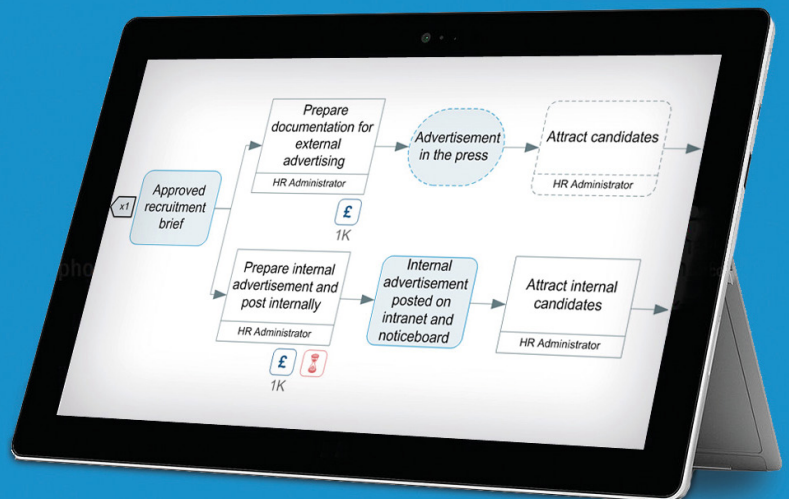
🔗 Visit the Triaster blog today:
blog.triaster.co.uk/blog

Creating Maps for Your Process Library

Triaster's next 2-day public training course, Creating Maps for Your Process Library, is on 22nd – 23rd January at Triaster HQ in Wallingford.

This ever-popular training course covers the basic software skills needed to create process maps with Process Navigator and publish them to your Library.

🔗 To book, please go here:
tinyurl.com/tri-creating-maps »

Answers to the quiz on page 28

Community Round-Up

HAPPY NEWS

The Patter of Tiny Feet
Atiyeh Sharifi (Triaster Marketing) gave birth to Ava in October. Many congratulations to both her and Arrash on the arrival of their beautiful baby girl.

Brad Fagan and Lynn Dudenhoefer (who are married) have relocated to Germany, to live closer to Lynn's family. Brad's first task on arrival was a crash course in German. He found this rather tough going!
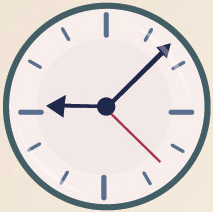
SOME GOODBYES

Wedding Bells
Victoria Glancy (Libreea MD) married James Hormigo on a lovely summer's day in July. It was a wonderful day and Victoria looked absolutely fabulous.

QUITE A FEW WELCOMES

Jo Dolton left Triaster in September and is now enjoying her much reduced commute of 10 minutes – on foot. She worked for Triaster for 15 years – so the office feels rather strange without her.

Welcome to Jane, Sam and Nathan
Welcome to Jane Duncan, Sam Light and Nathan Stevenson who have all joined us within the last six months. They are each featured in the Meet... section – so you can find more about them there.

HARRIS TPS
Inbound and Content Marketing

A NEW COMPANY

Welcome back to Sue
Sue Turner has returned to Triaster as a Technical Consultant, after a gap of many years. In the meantime, Sue has been working on a number of our customers' projects, so we have been in close contact all along, but it is lovely to have her in the office again.

A Bit of a Change (but not too much of one)
Last July Emma Harris started delivering inbound marketing services via her company Harris TPS (harristps.co.uk).
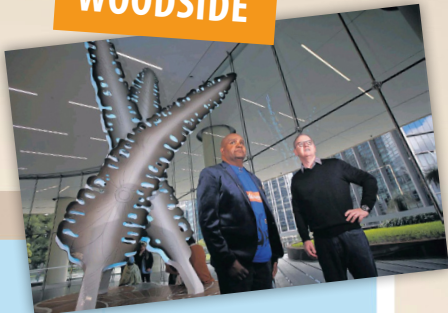
She remains the editor of the Connector and delighted to be delivering Triaster's marketing still but is now also delivering inbound marketing for other companies too – which she is very much enjoying.

WOODSIDE

Great New Premises
Woodside Petroleum have recently moved into their fabulous new headquarters in Perth.

Read more here:
tinyurl.com/tri-woodside

NEW WHITE PAPERS

Triaster have released three new white papers over the last few months, if you have missed any one of them, make sure that you catch up now.

The A-Z Guide of Business Process Management

An exhaustive explanation of BPM; from what BPM is to how to achieve a successful implementation delivering improvement.

Download here:
tinyurl.com/tri-a-z-guide

A NEW PRODUCT

Ask the Crowd
Introducing the new Suggestion Tool from Triaster. See page 8 for more details

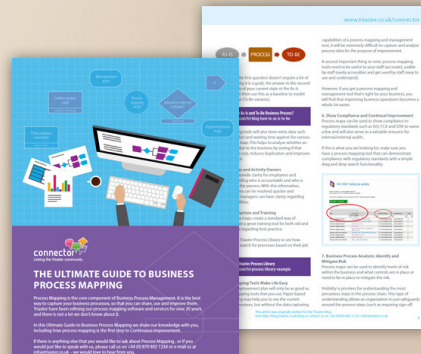**Download here:**
tinyurl.com/tri-complete

The Complete Guide to Continuous Improvement in Business

Every organisation needs to improve - to stand still is to go backwards. But change is hard, people don't like it. This guide explains how to overcome the problems, so that Continuous Improvement becomes business as usual.

The Ultimate Guide to Business Process Mapping

Triaster have been practising process mapping and refining our process mapping software and services for well over 20 years. In this Ultimate Guide to Business Process Mapping we share our extensive expertise with you.

Download here:
tinyurl.com/tri-ult

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Have You Been Paying Attention?

Match the person to their 'Like'

Over the years we have 'met' all of the Triaster team in the Connector. We always ask them their 'Likes' and 'Dislikes'. Can you match those shown below with one of their 'Likes'?

Carma Evans

John Blight

Alex Marchant

Jo Dolton

Matt Burrows

Giles Green

Victoria Hormigo (née Glancy)

Paul Elson-Vining

Jane Duncan

Nathan Stevenson

Sam Light

Emma Harris

Michael Cousins

Chris Mawdsley

Dan Macleod

Linda Spinks
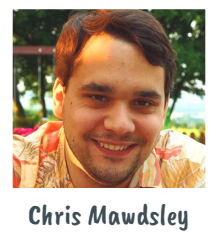
Name	Like
	Reading
	Modern Family
	Good food
	The sea
	Very dark chocolate
	France
	Danish/Swedish crime dramas
	Hawaiian shirts
	Positive people
	The Polotsvian Dances from Prince Igor
	Overusing particular words
	Smiling at people whilst in traffic
	Scrambled eggs on toast
	Shiny things
	A good old-fashioned cup of tea in front of a warm fire
	Doing new things

connector