

Q&A from MCHW publishing approach, WSRs & Specifier Tool session on 29th Nov

Acronyms

* Changed or introduced since previous training

AR	Additional Requirement
CARS	Collaborative Authoring and Review System
CR	Cancelled Requirement
DAS	Departure Approval System
IfS	Instructions for Specifiers
NDR	Nationally Determined Requirement
NDS	Nationally Determined Sections
ODF*	Open Document Format (a non-proprietary format which is not limited to applications such as Word or Excel)
SHW	Specification for Highways Works
SI	Specifier Instruction
SR	Substitute Requirement
TSC	Technical Standards Committee (formerly TPB)
TSES	Technical Standards Enterprise System
TSG	Technical Standards Group, formerly TAGG
WSR*	Works Specific Requirements, previously referred to as Works Specific Inputs in original training

Question (21 in total)	Answer
1. What will the contractors be provided with for a construction project? Is it a rendered version of the IfS?	<p>No, the contractors will be provided with the Works Specification. This comprises:</p> <ul style="list-style-type: none"> the SHW, which is brought in by reference the Works Specific Requirements (WSRs); formed from the relevant WSR documents as required by the scheme. The WSR documents can either be created using the WSR templates as published with the IfS documents on the Standards for Highways website, or by using the Specifier Tool (for NH schemes only)

Question (21 in total)	Answer
2. When will these 'Templated' and 'Rendered' versions be available? It would be useful if these could be reviewed at TSC rather than the TSC having to work out the difference within CARS	<p>The document as currently being authored in CARS is the 'templated' IfS document – this is the version that should be used as the basis for consultation and capturing comments.</p> <p>The 'rendered' SHW and IfS outputs will be available within CARS by the end of January 2023. These will assist the visualisation of the final outputs but must not be used for capturing comments.</p>
3. Will the IFS be issued as an editable PDF?	No, the IfS will not be shared as editable PDFs. The open format WSR document templates will contain all SIs that need to be completed by the specifier.
4. Are "designers" the same as "specifiers"?	They may be the same person; however, we are keen to distinguish between these two <u>roles</u> as the specifier may be a completely different person who purely converts the outcome of the design into contract specific information using the IfS documents. These roles attract differing levels of professional liability. While the designer may assume the specifier role, the specifier cannot assume the designer role.
5. When do we access to the pdf document so we can distributed externally?	<p>The ability to export the PDF SHW and IfS documents from CARS will be enabled for Lead Authors by the end of January 2023. These documents will be clearly watermarked as not for use and should not be distributed beyond the consultees.</p> <p>Please note that all consultee comments shall be made within CARS.</p>
6. The non-schedule based rendered SFR example that was shown earlier refers to a numbered WSR e.g. WSR 120/00#. Assumed the requirements would be in line, rather than referencing to elsewhere, given the WSI was [enter free text], where is this numbered WSR going to be located? In another document?	<p>The core SHW requirements are brought into the Works Specification by reference. The works specific requirements that the specifier needs to supply are defined in the IfS documents, but they will be provided in the form of WSR documents – created by the specifier either using the WSR templates or the Specifier Tool. The WSR references in the SHW point the contractor to the WSR documents within the Works Specification where the required information is provided.</p> <p>Please note that multiple instances of completed specifier instructions may appear in the WSR documents to represent different 'elements' within a scheme.</p>

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7. Will MCHW authors need further training on how to fill in CARS so that instructions for specifiers and work specific requirements are compiled correctly?	<p>Further training is <u>not</u> needed as the rules and approach to filling in specifier instructions (SIs) has not changed.</p> <p>Adding WSR references will also not require any specific training. Full guidance on how to use this functionality will be provided within help pages upon its release in the very near future.</p>
8. Constructor Templates – are those for Contractor designed elements or is it expected that contractors use the existing DMRB/MCHW?	<p>The current MCHW contains a limited number of proformas that are to be completed by constructors on site as part of the documentation requirements. If to be retained, these proformas can be provided in a format that is ready for the constructor to use and published with the core SHW document. Any proposed constructor templates need to be included with the consultation and approval/authorisation processes.</p> <p>Please note that such proformas shall be referenced within the SHW as part of a documentation requirement.</p>
9. Shouldn't it be "nation" rather than "country"?	<p>Whilst we normally talk about 'national' variations, it's be more appropriate to say 'Overseeing Organisations' variations as within a nation we've got local authorities too who can specify things differently. Thus, the wording 'country-specific documents' was chosen.</p>
10. Who will be populating the clause change summary? Is it automatic? Will it be populated versus the 'old' MCHW or just between versions of the 'new' MCHW?	<p>The clause change summary will be automatically generated as part of the publication process. It will summarise the clauses that have changed in comparison to the previously published version of the document. The clause change summary can only be generated for changes to CARS authored documents; it cannot be generated for the initial publication of the new format MCHW documents.</p>
11. Will these WSR reference numbers automatically update if section numbers &/or clause numbers change? (as they probably will) - or will they need to be updated manually?	<p>As with current section reference functionality in CARS, a refresh button is provided on the Document Information page. On clicking this button, all WSR references within the document will be checked to ensure they still point to valid content, and the WSR document numbers and associated section indexes and document codes will be updated to current values. Running the document health check will also check for and highlight WSR references in need of updating.</p>
12. Will there be changes to DAS? (Ref Departures just mentioned in the SI slide)	<p>There are no changes to DAS. The need for departures in association with CR, SR and ARs remains the same as it is today.</p>

Question (21 in total)	Answer
<p>13. If you have been working on WSR since March 2021, why are we only getting this now when I have less than a week to action before we were looking to get the TSC to sign off the draft.</p>	<p>The contents of the published MCHW outputs (SHW, IfS and WSR templates) contain no additional information to that which is already been authored in CARS. The WSR documents are essentially consolidated listings of SIs.</p> <p>The SI templates were updated in January 2022 to ensure they were in a template format that can be readily published. This change was communicated to all authoring teams at that time and resource was provided by TSG to help migrate from the old SI formats to the new.</p> <p>The WSR document templates are not required to undertake a review of the CARS authored MCHW documents. Work to enable the export of PDF versions of the SHW and IfS outputs from a CARS MCHW document has been brought forward in the programme to help authors visualise the final outputs. This has also been done to clarify that there is <u>no dependence</u> on the Specifier Tool for authoring or review processes.</p> <p>The format of the WSR documents templates has been in development as part of MCHW publication planning since August 2022; the proposed approach had to be reviewed and approved within National Highways and the Devolved Administrations before being shared with the authoring teams.</p> <p>Planned TSC consultations should continue as programmed.</p>
<p>14. We have a TSC coming up very soon. How does this stuff impact our meeting?</p>	<p>No impact – see answer to question 13.</p>
<p>15. If you need the content to validate the Specifier tool, then the risk is that this will flag up that changes are needed to the content (after TSG) so there may be multiple iterations.</p>	<p>The Specifier Tool is a new tool being developed to assist specifiers create the WSR documents quickly and efficiently. It will assist in the population of the Specifier Instructions that are currently being authored. The dependency mentioned in the call was the need to have sufficiently mature, new format MCHW documents that can be ingested into the Specifier Tool to demonstrate that it is meeting the agreed requirements; not that the content of the MCHW documents is correct. The validation of the content of MCHW documents is covered by the consultation phase by TSC within the Standards Governance Process.</p>

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16. We have not any budget for doing the specifier tool, are we expected to fund this in FY23/24?	<p>The Specifier Tool is being developed as a TSG led programme.. Validation activities in FY23/24 will focus on application of the new SHW/IfS documents within the system and the functionality of the tool; as such that activity will be with Specifiers and Constructors, not Technical Authors</p> <p>The only responsibility of technical authors in relation to the Specifier Tool is to follow MDD rules on drafting SI (specifier instructions), which will then be automatically extracted by the Specifier Tool to populate the Work Specific Requirements document.</p>
17. It would be really useful to see what the specifiers will be required to complete before the specifier tool is implemented. Who will be responsible for creating and testing worksheets/documents for the specifiers?	<p>As highlighted within the call, the Specifier Tool will simply assist the specifier in creating the WSR documents.</p> <p>The WSR document templates are essentially consolidated listings of SIs and contain <u>no additional information</u> to that which is already being authored in CARS. They will be automatically created as part of the export process from CARS. Extensive system testing will be undertaken to ensure that the WSR documents 100% replicate the content as authored.</p> <p>Non-schedule based SIs will appear in the WSR documents as they are currently being authored. Schedule based SIs will be presented in a 'rendered' tabular format, rather than the 'templated' textual format that is used for authoring. To help visualise that format; the preview functionality is being introduced into CARS as presented.</p>
18. What happens when the lead technical author is out of contract?	All DMRB and MCHW documents need a defined, current lead author who is an Overseeing Organisation member of staff.

Question (21 in total)	Answer
<p>19. If the fully electronic generation of WSRs works in practice when rolled out, it will be great for the future. However, we may receive many queries from designers, specifiers contractors after roll out because what they wish to specify is not possible with the default settings. Who would be responsible for dealing with the queries, and will WSP be available to adjust the coding to improve?</p>	<p>Re the Specifier Tool: We have allocated over a year prior to the publication of the new format MCHW to do testing and validation of the tool, and are planning 1.5 years of post-launch implementation and adoption support. The tool will be supported by extensive self-help guidance and help page. A 'Contact support' option will be provided to field any system related issues.</p> <p>All queries relating to the content of constructor requirements and specifier instructions will be submitted via the feedback process. General enquiries will be addressed by TSG. Questions related to the content of the SHW or IfS documents will be managed by technical authors as any other technical feedback item received.</p> <p>As with the current MCHW documents, if the Specifier is unable to comply with the requirements defined within the documents, they will need to raise CR, SR and/or ARs and create respective departures in DAS – there is no change to the current way of working here.</p>
<p>20. It would have been helpful having this before we started to draft documents and definitely before sending it to TSC. It looks like we may have to cancel the forthcoming TSC.</p>	<p>There is no need to cancel the TSC consultation. None of the items presented at the session are introducing changes to the authored content; therefore documents can proceed to TSC as scheduled. Please also see the answer to question 13.</p>

Question (21 in total)	Answer
<p>21. Does feel like there's lots of new things, we are under a lot of pressure with other work.</p>	<p>The MCHW dedicated sessions are being provided to show: how the final core MCHW documents will be published; what other useful templates and files will be made available to suppliers; how Specifiers will complete SIs within WSR documents; and to clarify that there is no dependency on the Specifier Tool.</p> <p>Whilst we appreciate that there is new content presented, it is mostly informative only for awareness purpose. <u>There is no change to the current authoring approach to constructor requirements or specifier instructions.</u></p> <p>The only aspects presented that require Technical Author input are:</p> <ul style="list-style-type: none"> • A call with TSG to agree WSR subject and topic mapping to IfS sections, and the associated WSR document numbering. • Define <WSR reference> input sections in authored clauses that point to WSR. Full guidance on how to use this functionality was provided within help pages upon its release on 02 Dec '22.
<p>22. Will users be able to copy and paste data into the rendered, tabular schedules, e.g. from a spreadsheet?</p>	<p>The WSR document templates will be provided in an open spreadsheet format; users will be able to paste data into this format.</p>
<p>23. Is there a reason why clauses can't have unique reference numbers like the WSR's - instead of having to X-reference only to headings?</p>	<p>Authoring of the new format MCHW documents has been guided to use sections to cover discreet objects, materials, or processes. As such referencing should direct to entire sections so that all related requirements can be holistically rather than in isolation.</p>
<p>24. What happens when our support contract ends? If the support contract doesn't align to the programme just displayed.....?</p>	<p>There is no need to change existing programmes; the new outputs will assist with consultations but are not required for them to proceed.</p>
<p>25. Does this WSR mapping task must be done before document submission to TSC? The WSR template (country specific) is only available in March 23.</p>	<p>WSR mapping and insertion of WSR references is not mandatory prior to consultation if your document is due to enter consultation on or before 20 January 2023; however, mapping and reference insertion must be completed by the authoring team by the end of the comment resolution stage. If you document is due to enter consultation after 20 January 2023, the mapping and reference insertion must be completed before.</p>