

Technical Airworthiness Authority Advisory (TAA Advisory)	
Title	Technical Publication Management
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OPI / Telephone	DTAES 4-5 / 819-939-4757
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1. Purpose

- 1.1 This TAA Advisory provides guidance for organizations seeking to implement a system for the management and control of paper-based and electronic formatted technical publication libraries. It ensures compliance with the requirements of the Department of National Defence (DND) *Technical Airworthiness Manual* (TAM), by providing measures for managing publication inventories. This includes provisions for maintaining a master index of publication holdings, incorporating approved publication revisions and temporary amendments, providing adequate librarian training and performing periodic verification audits on publication holdings.
- 1.2 This TAA Advisory is not mandatory, nor does it constitute a regulation. It describes a means acceptable to the TAA, but is not the only means to demonstrate compliance with the regulation(s). If you choose to use this TAA Advisory, then all its important aspects must be followed.

2. Applicability

- 2.1 This TAA advisory is applicable to all organizations responsible for the management and control of aircraft technical publications and approved drawings, in both hard copy and Interactive Electronic Technical Publication (IETP) formats, hereafter referred to as publication libraries. The requirement for acceptable organizations to establish a publication management and control system (PMCS) is defined in reference 3.2.a.(1).

3. Related Material

- 3.1 Definitions:
 - a. **Office of Primary Interest (OPI).** The organization responsible for the content of a publication or suite of publications. The OPI normally maintains a master index of publication revisions and temporary amendments on behalf of their customers.
- 3.2 Regulatory References:
 - a. *Technical Airworthiness Manual* (TAM):
 - (1) Part 5, Chapter 5, Section 2, Standard S4 – *Technical Publication Management*;
 - (2) Part 5, Chapter 3 – *Maintenance Program Requirements*; and
 - (3) Part 1, Chapter 4 – *Assignment of Technical Airworthiness Authority*.

4. Discussion

- 4.1 The fundamental principles of the DND/CAF Airworthiness Program require that all airworthiness-related activities be performed in accordance with acceptable standards, by authorized individuals who work in Acceptable Organizations and use approved procedures. In keeping with these principles, any organization responsible for performing

on/off-aircraft maintenance, design, engineering and materiel support activities will require a PMCS. The primary goal of this system is to ensure that all activities are carried out using the latest approved version of the applicable publication(s), and that all relevant publications are available to support the scope and depth of work performed for the organization.

4.2 To support these goals, the PMCS should be described within the quality management system of the organization. Quality procedures and documents should be established to define the following:

- a. **Library physical and organizational structure description** – identification of master tech library/librarians, sub-libraries/librarians and publication holdings, including one or several Points of Contact(s) (POCs) within the organization for publication-related issues and questions, should they arise;
- b. **Publication master index** – a master list of all publications including the latest issue date and all applicable revisions and temporary amendments;
- c. **Upkeep** – procedures for performing routine and urgent amendments and/or revisions;
- d. **Error correction** – procedures for identifying and reporting publication discrepancies to the applicable publication OPI;
- e. **Audit** – procedures for conducting periodic audits of the organization libraries; and
- f. **Training** – procedures for performing training to organization personnel performing librarian functions.

4.3 This TAA advisory has been released to assist organizations in achieving TAA Acceptance of a PMCS. This advisory provides guidance on how the TAA will evaluate the PMCS to ensure compliance with the regulatory requirement stipulated at Regulatory Reference 3.2.a.(1).

4.4 **Acceptable Means of Compliance**

4.4.1. An organization seeking accreditation must ensure their PMCS meets the requirements of Reference 3.2.a.(1), and their Airworthiness Process Manual and enabling quality procedures include provisions for the following:

- a. **Inventory** – A master list of publications (technical and regulatory) available to the organization. This list should include all publications that were identified as required according to the scope or work performed (including partial publications) and in accordance with regulatory reference 3.2.a.(2). It should differentiate between publications delivered electronically vs. paper-based;
- b. **Physical and Organizational structure** – identification of the master tech library and sub-libraries, sub-section, location and holdings, including aircraft on-board libraries, laptops, SharePoint sites and IETPs, where applicable. A Point of Contact (POC) within the organization for publication issues and questions should also be identified;
- c. **Publication Master Index** – All publications must be kept current to ensure that both technical and administrative work performed by the organization is carried out in accordance with the latest standards. Contractually, the master index for publication held by the organization should be delivered by the publication OPI on initial release and revised whenever the content of the publication changes (as a minimum). The publication OPI can be an original equipment manager (OEM), fleet Type Certificate Holder (TCH), regulatory organization or any other source responsible for the content of the document. The publication master index should include:
 - (1) Identification. Nomenclature and unique publication identifier (Alphanumeric);
 - (2) Latest Issue. Date of initial release;
 - (3) Latest Revision. Date and revision number of all revisions issued after the issue date;

- (4) Temporary Revisions (TRs). Date and identifier of all TRs issued to the publication. This list should distinguish between TRs that are still active vice those that have been incorporated by revision and removed. Note that temporary revisions can come in the form of ink amendments (DND) and TR leaflets; and
 - (5) A list of permanent amendments that are issued locally and not necessarily authorized by the OPI. This may occur occasionally for DND-owned and operated equipment, which have been modified with unique military mission equipment.
- d. **Publication amendment** – The organization’s PMCS must include a means for incorporating temporary amendments to the publication holdings pending formal update. The publication amendment process should include:
- (1) **Monitoring.** The organization shall have a system for monitoring all manufacturers’ service information and initiating the publication temporary amendment process, where required. For publications delivered in electronic format (content controlled by the OPI), arrangements shall be made to ensure that a notification of change is provided to the customer, so that laptops and hard copy publications (if applicable) can be updated/reproduced in conjunction with the formal change; and

NOTE

While some organizations may receive publications directly from their OPIs (such as the TCH, the OEM, etc.), it is acceptable for an organization to use their internal support arrangement processes to contract subscription services, where applicable.

- (2) **Temporary Amendment.** The organization shall have a standard, common temporary amendment process to ensure that all libraries are amended in conjunction with the master tech library. If applicable, the amendment process should also include details on temporary amendments to the IETP (i.e., development, issue and configuration of annotation notes). The airworthiness policy should be included in the organization’s Approved Policy Manual (APM), with reference to the associated governing quality system procedures. A means of assigning and tracking unique TR numbers against the identified source changes (i.e., database, Technical Problem Management System (TPMS)) should also be described.
- e. **Audit** – While there is no defined regulatory requirement mandating a specific audit frequency, it is necessary to conduct periodic audits of the organization’s library to ensure that all publications are in a usable state (condition) and that the latest revision and amendments match the master index of revisions (paragraph 4.4.1.c). The periodicity, scope and depth of auditing to be performed by the organization will depend on a number of factors:
- (1) **Sampling Audit.** These audits are normally required when the master tech librarians employ sub-librarians to perform amendments/revisions on their behalf. The sampling audit is intended to verify that the sub-librarians understand their responsibilities and are carrying out revisions/amendments in accordance with the approved procedure for the organization. The frequency and depth of the sampling audit should be defined in the quality system and will vary, depending on the size and/or quantity of the sub libraries in the organization; and
 - (2) **Comprehensive Audit.** The goal of this audit is to verify that the master tech library and all sub-libraries are current when compared to the master list of revisions (paragraph 4.4.1.c). The quality management team or individuals external to the publication management staff normally perform this audit. The

audit schedule should be based on the criticality of the publications and the amount of publication change activity that occurs. Auditors conducting the audit should carry it out to the scope and depth required to gain full confidence that the librarians understand their responsibilities and that the library is well maintained and current.

NOTE

For organizations that use a publication management service provider to maintain an IETP, the service provider's embedded verification, validation and acceptance processes for publication additions and amendments will normally meet the intent of sampling and comprehensive audits, as described in paragraphs 4.4.1.e.(1) and (2) above.

- f. **Training** – It is the responsibility of the organization to identify the minimum training requirements for the master tech librarian, which should be documented in the Training, Qualifications and Authorizations (TQ&A) records for the individual. Normally, the Master tech librarian will provide training to the sub-librarians on an 'as required' basis.
- g. **Error Correction** – A system should be in place for reporting publication discrepancies to the Master Tech Librarian for action. This should include:
 - (1) Publication Discrepancy Report. A standard quality form (either paper-based or electronic) used across the organization for reporting publication discrepancies;
 - (2) Assignment of a unique identifier number used for tracking the status of each publication, including links to engineering service requests and associated temporary amendment records; and
 - (3) Closed loop. The system should provide traceability to the resolution and feedback to the originator (i.e., TPMS).
- h. **Accessibility** – Care should be taken to ensure that sections within the organization have adequate accessibility to the publications required for the activities performed within the section. This normally includes a combination of paper-based publications and terminals/laptops for access to electronic versions of the publication within an organization, and while working away from the organization.