



DOCUMENT CONTROL SPECIALIST

JC: 000161
PG: SEIU-09
FLSA: Non-Exempt

BU: 04 (SEIU)
Created: February 2017
Revised: March 2021

*Class specifications are intended to present a descriptive list of the range of duties performed by employees in the class. Specifications are **not** intended to reflect all duties performed within the job.*

DEFINITION

Under general supervision, provides a variety of professional level duties related to reviewing and processing documents to ensure compliance with District policy as well as federal and state regulatory record keeping requirements, procurement, and accounting procedures; assists in the administration of departmental procurement and purchasing functions; follows maintains, controls, and archives records and documentation in a variety of electronic databases and systems used in the Maintenance and Engineering (M&E) Department.

CLASS CHARACTERISTICS

This is a single incumbent, journey level classification within the Financial Analysis and Administration Division of M&E. Positions at this level receive only occasional instruction or assistance as new or unusual situations arise and are fully aware of the operating procedures and policies of the work unit. This classification is distinguished from the Contract Administrator in the latter develops and administers services, lease and license agreements, maintenance agreements, minor public works and procurement purchase orders/contracts of a moderate to difficult nature.

REPORTS TO

Manager of Acquisition Support

EXAMPLES OF DUTIES – *Duties may include, but are not limited to, the following:*

1. Enters financial and vendor information into PeopleSoft; review and edit documents from project teams, obtain quotes for goods and services, and set up purchase requisitions in PeopleSoft.
2. Provides administrative support to receiving and logging goods and material, spare parts and small tools.
3. Coordinates and participates in the conversion of all computerized files to new computer applications if required; assists with the digitization of documents.

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4. Performs data entry into Maximo procurement system and PeopleSoft Financials for purchases, work orders, asset tracking; ensures contracts meet budget limitations and comply with legal and procurement requirements; monitors contract spending, expiration, and option years on a portfolio of contracts.
5. Serves as first level approver for several M&E cost centers, which entails monitoring the budget, and reviewing and approving purchase requisitions and invoices for budget compliance and consistency with district requirements.
6. Initiates, tracks, and processes service agreement contracts, including developing service contracts with input from program staff and ensuring the contracts meet budget limitations and comply with legal and procurement requirements.
7. Ensures M&E is in compliance with procurement and accounts payable policies and procedures; resolve vendor payment issues through communication with vendors, research in PeopleSoft, and working with project or program staff.
8. Generates reports on purchase order balances, analyzes trends, and provides recommendations to management on improving customer service and streamlining processes.
9. Provides administrative support on material and equipment inventory tracking and monitoring.
10. Ensures all M&E records are followed District and regulatory records retention policies.
11. Follows document control procedure, may create and maintain document index for M&E document control system.
12. Assists in the development and implementation of procurement strategies for needs identified by M&E staff, with support of manager or senior team member and Procurement staff.
13. Assists on training new team members.

QUALIFICATIONS

Knowledge of:

- Basic knowledge of document archiving, distribution, retention
- Basic methods and techniques of document controls
- Basic skills of office administration
- Principles and procedures of record keeping
- Principles and practices of public agency purchasing
- Principles of basic report preparation
- Familiar with Microsoft office suites application including SharePoint

Skill/Ability in:

- Prepare clear and concise reports
- Maintain accurate documentations and records

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- Operate office equipment including computers and supporting word processing and spreadsheet applications
- Understand and follow oral and written instructions
- Communicate clearly and concisely, both orally and in writing
- Establish and maintain effective working relationships with all personnel and staff
- Work independently in the absence of supervision

Other Requirements:

Must possess a valid California driver's license.

Must be willing to work off-hour shifts, holidays and weekends beyond your regular scheduled hours.

MINIMUM QUALIFICATIONS

Education:

Possession of a Bachelor's degree in public administration, business administration, or a closely related field from an accredited college or university.

Experience:

Five (5) years of (full-time equivalent) experience in document controls or related experience.

Substitution:

Additional experience as outlined above may be substituted for the education on a year-for year basis. A college degree is preferred.

WORKING CONDITIONS

Environmental Conditions:

Office environment; exposures to computer screens.

Physical Conditions:

May require maintaining physical condition necessary for walking, standing or sitting for prolonged periods of time.

BART EEO-1 Code: 3500 – Professionals
Census Code: 0710 – Management Analysts
Safety Sensitive: No