

# Your guide to document control



Across all industries, document control is one of the most important processes to get right. It ensures documents are updated and revision-controlled, allowing you to effectively route them for review, approval and distribution.

Processes, jobs, specifications — all of your most important documents should be in one place, with consistent procedures for handling them. In this guide, we discuss the most important capabilities of a robust document control system, highlighting how it should integrate with other quality applications to promote process excellence.

## Document creation

Your document control system should standardize the process of document creation. An important point to consider is that not all documents will go through the same set of steps, making flexible workflows essential from a best practices perspective.

For instance, you wouldn't necessarily have the same team reviewing a policy document as you would a specification, so each one needs its own routing procedure. An effective document control system will automatically assign each document to the appropriate workflow configured by your team.

Most companies also use Microsoft Office to manage documents, whether in Word, Excel or PowerPoint. You want a document control system integrated with Office so that any changes you make are reflected in the Office file for consistency and accuracy.

## Document routing, review and approval

An effective document control system hinges upon its ability to automate workflows for document routing. This ensures the necessary parties have reviewed and approved each document prior to distribution and use.

**It's not just about sending documents to the next phase in the workflow — the system should also use intelligent business rules such as:**

- Conditional routing to send documents to different parties or workflows depending on the business process or document attribute
- Delegation rules to route documents to an assigned substitute when the primary contact isn't available
- Escalation rules to notify responsible parties when documents pending review aren't reviewed on time, keeping the process moving forward

Ultimately, what you want is a document control process that isn't just automated, but also intuitive.

# Integration with employee training

When you distribute new documents such as policies, procedures or work instructions, it's critical that employees receive training on the updated documents. Integrating document control with employee training creates a seamless transition, making it easy to track who's received training on key changes.

## Capabilities to look for here include:

- Automatic updates to training requirements after a document revision
- Training tests built into the document control and training records
- Employee training records showing complete vs. incomplete training

# Document change requests

Document control is a cyclical process. Even after document approval, you will inevitably need to change the document at some point.

## A robust document control system allows you to incorporate a dedicated change request process into your workflow to ensure:

- All changes go through a consistent set of steps configured according to your unique needs
- You can request changes to multiple related documents within a single workflow for added efficiency, so other documents affected by the change don't fall through the cracks
- The system automatically archives previous versions so you can restore or review them if needed





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