

XYZ Manufacturing Inc.

Document Control Procedure

Document Title	Document Control Procedure
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Revision	0
Effective Date	[Insert effective date]
Process Owner	Quality Manager

Approval

	Name	Signature	Date
Prepared by			
Reviewed by			
Approved by			

Revision History

Rev	Date	Description of Change	Prepared By	Approved By
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1. Purpose

This procedure describes how XYZ Manufacturing Inc. creates, reviews, approves, issues, and controls the documents used to run our business and our Quality Management System (QMS). It applies to the paper documents used on the production floor and to the digital files stored in our Microsoft SharePoint system, used mainly on the admin floor.

Following this procedure makes sure that everyone is working from the correct, most current version of a document, and that outdated or incorrect versions are removed from use. It also satisfies the requirements of ISO 9001:2015, Clause 7.5, Documented Information.

2. Scope

This procedure applies to all documents that form part of XYZ Manufacturing Inc.'s Quality Management System, including but not limited to:

- The Quality Manual and quality policy
- Procedures, work instructions, and forms
- Production drawings, routers, and travelers
- Inspection and test plans and checklists
- Documents from outside sources that we must follow, such as customer specifications, industry standards, and regulatory requirements

This procedure covers both formats used at XYZ Manufacturing Inc.: paper documents used on the production floor, and digital files stored in the company's SharePoint system.

This procedure does not cover completed forms and other quality records (for example, filled-in inspection sheets or test results). Those are controlled under the Control of Records Procedure (QP-7.5-02).

3. Definitions

Controlled document: An official, current document that is issued and tracked through this procedure.

Master Document List: The master index of all controlled documents, showing the current revision and location of each one.

Obsolete document: A document that has been replaced by a newer revision and is no longer valid for use.

Uncontrolled copy: A printed or saved copy kept for reference only. It is not automatically updated and must not be used to perform work.

Document Controller: The person responsible for maintaining the Master Document List and issuing controlled documents, on both the admin and production floors.

4. Responsibilities

Role	Responsibility
Quality Manager	Owns this procedure. Makes sure document control works consistently across the admin floor and the production floor. Approves the Quality

	Manual and top-level procedures. Appoints and supports the Document Controller.
Document Controller	Maintains the Master Document List. Sets up and manages the controlled folders/libraries in SharePoint. Issues, stamps, numbers, and tracks paper controlled copies. Collects and removes obsolete paper copies. Archives obsolete digital files and keeps the Document Distribution Log up to date.
Department Supervisors (Production Floor)	Make sure only current, controlled paper documents are in use at each work station. Return obsolete copies to the Document Controller as soon as a new revision arrives. Tell their team about updates and any new requirements.
Document Owners / Authors	Write and update documents in their own area of responsibility. Submit drafts for review and approval using the Document Change Request form.
All Employees	Use only current, controlled documents to do their work. Never mark up, hand-copy, or unofficially edit a controlled document. Report errors, unclear instructions, or the need for a change to their supervisor or the Document Controller.

5. Procedure

5.1 Creating a New Document or Revising an Existing One

Step 1. Anyone can identify the need for a new document or a change to an existing one — for example, a process change, a new customer requirement, or an error found in a work instruction.

Step 2. Complete a Document Change Request form and give it to the Document Owner or the Quality Manager.

Step 3. The Document Owner writes or updates the document using the standard XYZ Manufacturing template. Every document must show a title, document number, revision number, and effective date.

5.2 Reviewing and Approving

Step 4. The document is reviewed by the people who use it or are affected by it. For example, a work instruction for the CNC department is reviewed by the CNC supervisor before it is approved.

Step 5. The document is approved before it is released. For SharePoint files, approval is recorded by changing the file's Status field to "Approved" and by the approver's electronic sign-off. For paper documents, approval is recorded by a signature on the master copy, which the Document Controller keeps on file.

5.3 Assigning a Document Number and Revision Level

Step 6. The Document Controller assigns a unique document number to a new document, or increases the revision number by one for an update (for example, Rev 0 becomes Rev 1) and updates the Master Document List.

5.4 Publishing and Distributing

5.4.1 Digital documents (Admin floor — SharePoint)

Step 7. Upload the approved document to the correct SharePoint library and folder.

Step 8. Update the file's metadata columns: Document Number, Title, Revision, Status (Approved), and Effective Date.

Step 9. Version history is switched on for every controlled document library, so each change is automatically tracked and earlier versions are kept but hidden from everyday view.

Step 10. Folder and library permissions are set so that most employees have Read Only access to controlled documents. Only the Document Controller and the relevant Document Owner have Edit rights, to prevent uncontrolled changes.

5.4.2 Paper documents (Production floor)

Step 11. The Document Controller prints the required number of copies and stamps each one "CONTROLLED COPY." The copy number and its work station location are recorded in the Document Distribution Log.

Step 12. New copies are delivered to the correct work station or board, and the old copies are collected at the same time (see section 5.6).

Step 13. Employees must not photocopy, scan, or hand-copy a controlled paper document for use elsewhere. If a copy is needed at another location, it must be requested from the Document Controller so it can be logged and stamped.

Step 14. Any paper copy printed for reference only — for example, for a meeting — must be marked "UNCONTROLLED COPY — FOR REFERENCE ONLY" and must not be used to perform work.

5.5 Identifying Documents and Their Status

Step 15. Every controlled document, paper or digital, must show its title, document number, current revision number and date, and — for paper documents — the page number and total page count.

Step 16. For SharePoint files, the revision and approval status are also shown in the library's metadata columns, so anyone can check at a glance whether they are looking at the current version.

5.6 Removing Obsolete Documents

Step 17. As soon as a new revision is approved and issued, the Document Controller collects every paper copy of the old revision from its point of use and either destroys it or marks it clearly "OBSOLETE" if a copy needs to be kept for reference.

Step 18. One marked "OBSOLETE" master copy of each superseded paper document may be kept in the Document Controller's obsolete file, following the retention rules in section 5.8.

Step 19. In SharePoint, the previous revision is moved out of the active folder into an Archive folder, and its Status is changed to "Obsolete." Access to the Archive folder is restricted so obsolete files cannot be mistaken for current ones.

5.7 Controlling Documents That Come From Outside XYZ Manufacturing

Step 20. Documents from outside sources — customer drawings and specifications, industry or regulatory standards, supplier certificates, and similar — are entered into the Master Document List, given an XYZ-assigned reference number, and stored in the same controlled areas: the SharePoint "External Documents" library, or a marked binder on the production floor.

Step 21. The Document Controller checks at least once a year, or whenever notified by a customer or standards body, whether a newer version of an external document has been issued, and updates it using the same steps described above.

5.8 Retaining and Disposing of Obsolete Documents

Step 22. Obsolete paper masters and SharePoint archive files are kept for the period set out in the Records Retention Schedule (typically the length of the related contract plus a set number of years, or as required by the customer) and are then destroyed or deleted by the Document Controller.

6. Master Document List

The Document Controller maintains a Master Document List, either as a SharePoint list or a spreadsheet, showing every controlled document's number, title, current revision, approval date, and location — whether that is a SharePoint folder or a physical location on the production floor. This list is the single source of truth for checking whether a document, paper or digital, is current. An example of the layout is shown below.

Document No.	Title	Revision	Location
QP-7.5-01	Document Control Procedure	0	SharePoint > QMS > Procedures
WI-14-03	CNC Set-Up Work Instruction	2	Paper – CNC work station board

7. Records Generated by This Procedure

- Document Change Request forms
- Document Distribution Log (paper copies)
- Master Document List
- Obsolete Document Log
- Approval records and sign-offs

These records are themselves controlled under the Control of Records Procedure (QP-7.5-02).

8. Related and Referenced Documents

- Quality Manual (QM-01)
- Control of Records Procedure (QP-7.5-02)
- Document Change Request Form (FRM-7.5-01)
- Master Document List (SharePoint, QMS > Master Document List)
- Document Distribution Log (FRM-7.5-02)
- Records Retention Schedule (FRM-7.5-03)
- ISO 9001:2015, Clause 7.5 — Documented Information