Document Manager datasheet

Complete control over your policies, procedures and other critical documentation.

Learn how our document control module makes your business fitter, faster and stronger.

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Qualsys's software and solutions help you plan, manage and improve processes for making your business fitter, faster and stronger.

We're familiar with many standards and regulations, including: .

FDA
21 CFR Part 11

ISO 9001, 14001, 27001, 31000, 13485, 14791 45001

GxP QUALITY SYSTEMS

MHRA Regulating Medicines and Medical Devices

An effective management system takes more than a single software solution or achieving a certificate for the wall. It takes time, energy, commitment and investment.

Qualsys's software and solutions give businesses the tools and knowledge they need to effectively plan, monitor and improve performance.

We've worked with worldwide brands such as Sodexo, BT and Diageo, as well as hundreds of SMEs, to help them make good practice natural and invisible.

Founded in 1995, Qualsys Ltd is now one of the largest privately-owned governance, risk and compliance software providers in the UK.

Our software solutions are used every day in more than 100 countries across the globe, helping all kinds of businesses meet a wide range of standards and regulations.

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Brands we work with

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SOFT DRINKS

UNIVERSITY OF LEEDS

NHS

DIAGEO

Honeywell

INDIVIOR

Keepmoat

LOWRI BECK

RAWSON

sodexo

YAZAKI

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"Being a global tier
1 supplier in the
automotive industry,
you have to comply with
a lot of regulations and
standards. We are now
so big, with so many
sites and our quality
management systems
were all separate.
Our governance,
risk and compliance
management solution
brings this all together. "

Valere Vastmans,
European Lead Auditor at Yazaki
Manager

Watch video

1.
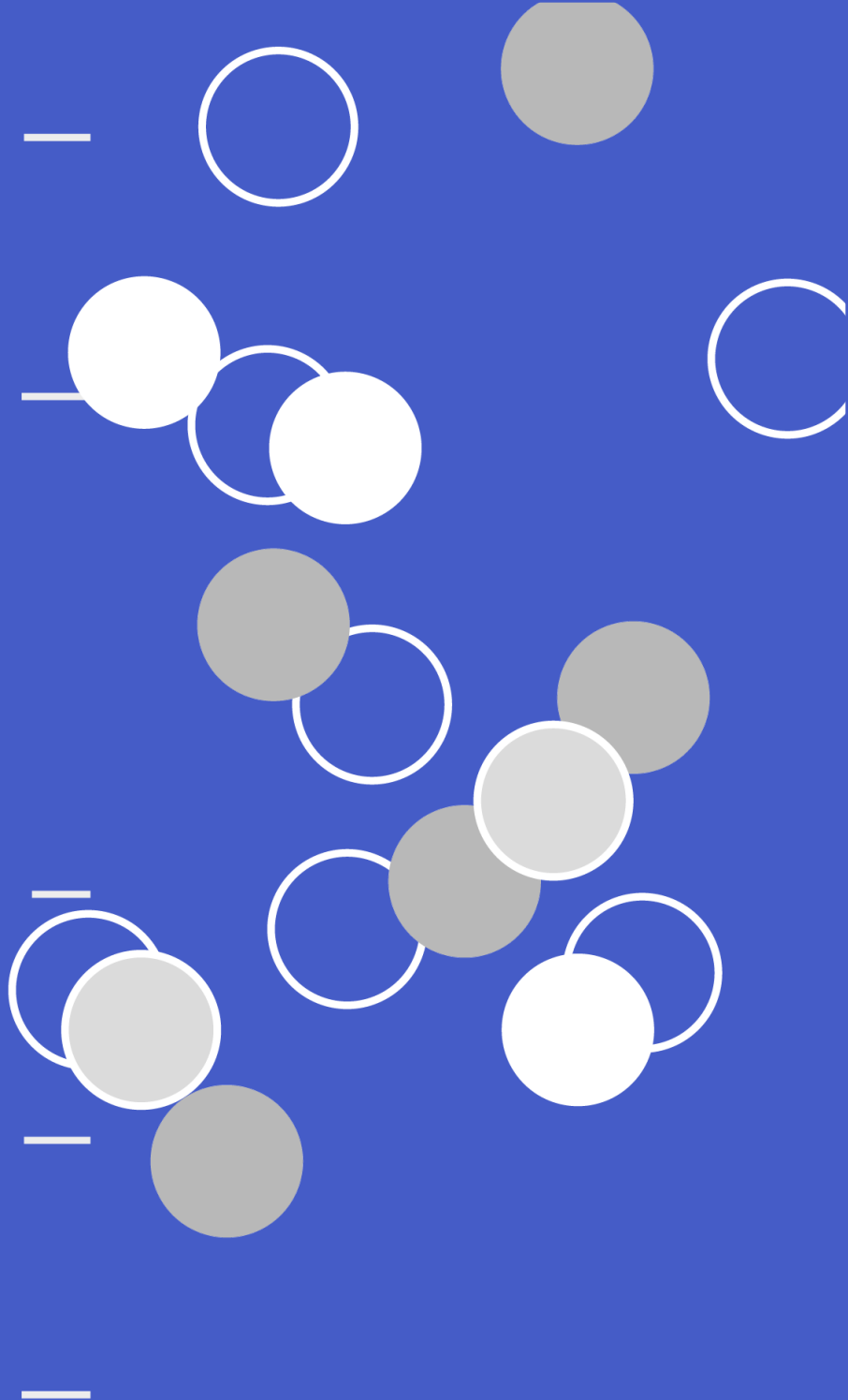
1.

The documentation challenge

Meeting 21st-century business requirements

Kate Armitage

Product Quality Assurance Manager at Qualsys

Modern technology means we're bombarded with information in all aspects of our lives, at home and at work.

In business, the challenge is making sure the right information is viewed by the right person at the right time.

Effective document control is central to quality management and compliance. Managing policies and procedures on paper is inefficient, costly and unsustainable.

As your documentation multiplies, bottlenecks and delays can hold your business back. Reviewing documents feels like a burden. Retrieving information becomes a challenge and the risk of using out-of-date content puts your compliance in jeopardy.

Structuring, controlling and distributing policies, procedures and process documents is essential to supporting governance, automating compliance and minimising risk.

Electronic systems help prevent mistakes, speed up processing, and lower costs. A document management solution is ideal for storing your information and allowing your people to make full use of it.

And with modern job roles becoming increasingly mobile, the argument for capturing 'knowhow' is even more compelling.

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"I wanted to implement a system for continuous quality improvement. I wanted to automate our documentation, training management and have automatic workflows when there is an issue."

Lee Clack, Quality Systems Manager, W. E. Rawson Ltd.

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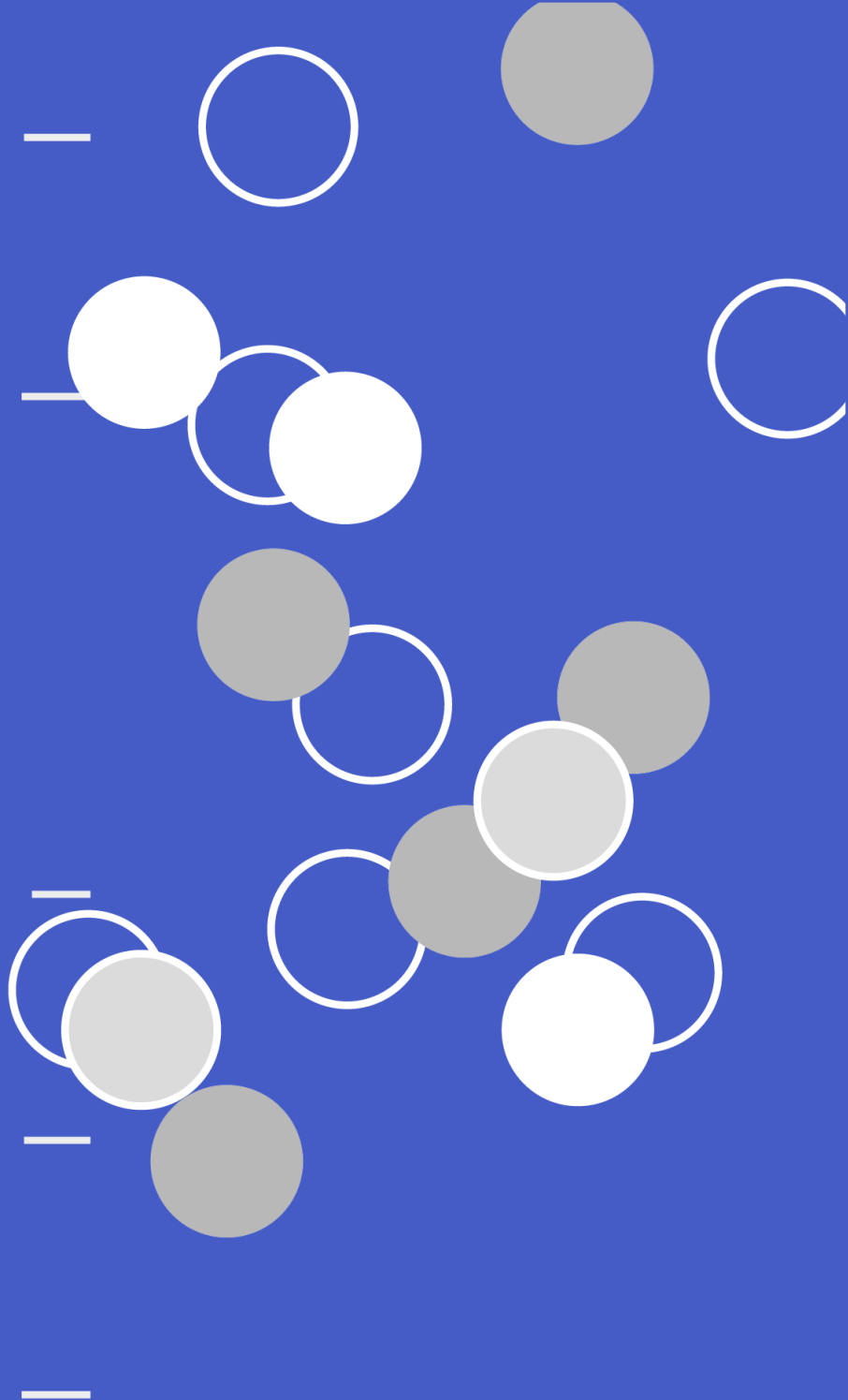
2.

2.

Our document control module

An introduction

Make sure the right information reaches the right person at the right time.

Our document control module is a web-based solution that allows you to automate document management across your business.

It provides an easy-to-use, central repository for storing and organising documents that can be accessed from a computer, smartphone or tablet.

Pre-defined workflows control how documents are read, created, amended, reviewed and approved throughout your organisation.

> "I look after 13 sites with nearly 12,000 documents. Governance, risk and compliance is central to this. I find Qualsys's system very user-friendly and I like using it a lot."

Janice McMillan, Document Control Manager at Diageo

Partnering with us

We know good document control doesn't happen overnight – it takes time, energy and investment. At Qualsys, we're fully committed to helping you implement an efficient and effective document management system, and we offer a best-practice configuration to ensure your success.

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"Our GRC software reduces the cost of compliance with our international regulations. We have improved processes, more control and better visibility."

Rob Gibson, Quality Systems

Manager at Sodexo

Watch video
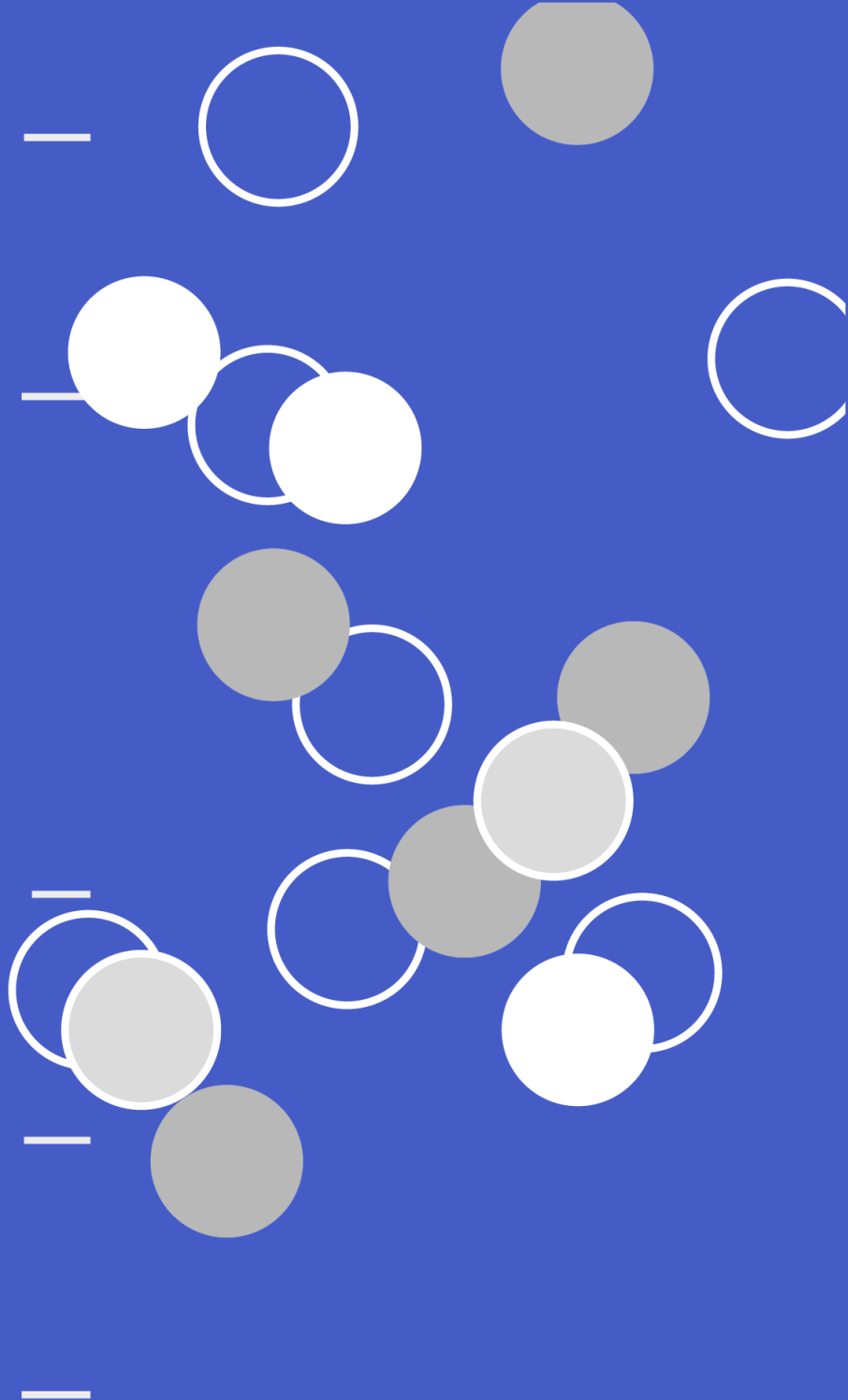
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3.

How good document control helps your business

Best practice implementation

Our document control module is a powerful, flexible and highly configurable solution that's trusted by global organisations across a range of regulated industries.

The module provides the following benefits:

- A secure, central repository lets you store documents, policies, processes and procedures easily and efficiently.

- Documents can quickly be located, updated or removed from circulation to support your compliance.

- Workflows allow for better communication and teamwork across departments and functional areas.

- The status of documents can be made visible across the entire business, providing full transparency.

- Accelerated cycles for reviewing and approving documents lead to better-quality content.

- Users see content in a consistent framework and have full confidence that the documents are accurate and correct.

- Faster access to authorised content and a comprehensive audit trail of all changes lowers the cost of complying with standards and regulation.

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"With our supplier audit management system, I now receive an audit report instantly. The data is clear, correct and concise. Our auditing software copes with the whole audit and I was really suprised about that."

Nigel Mangnall, Head of Quality at Compliance

Carillion Direct Sourcing

Read more

4.
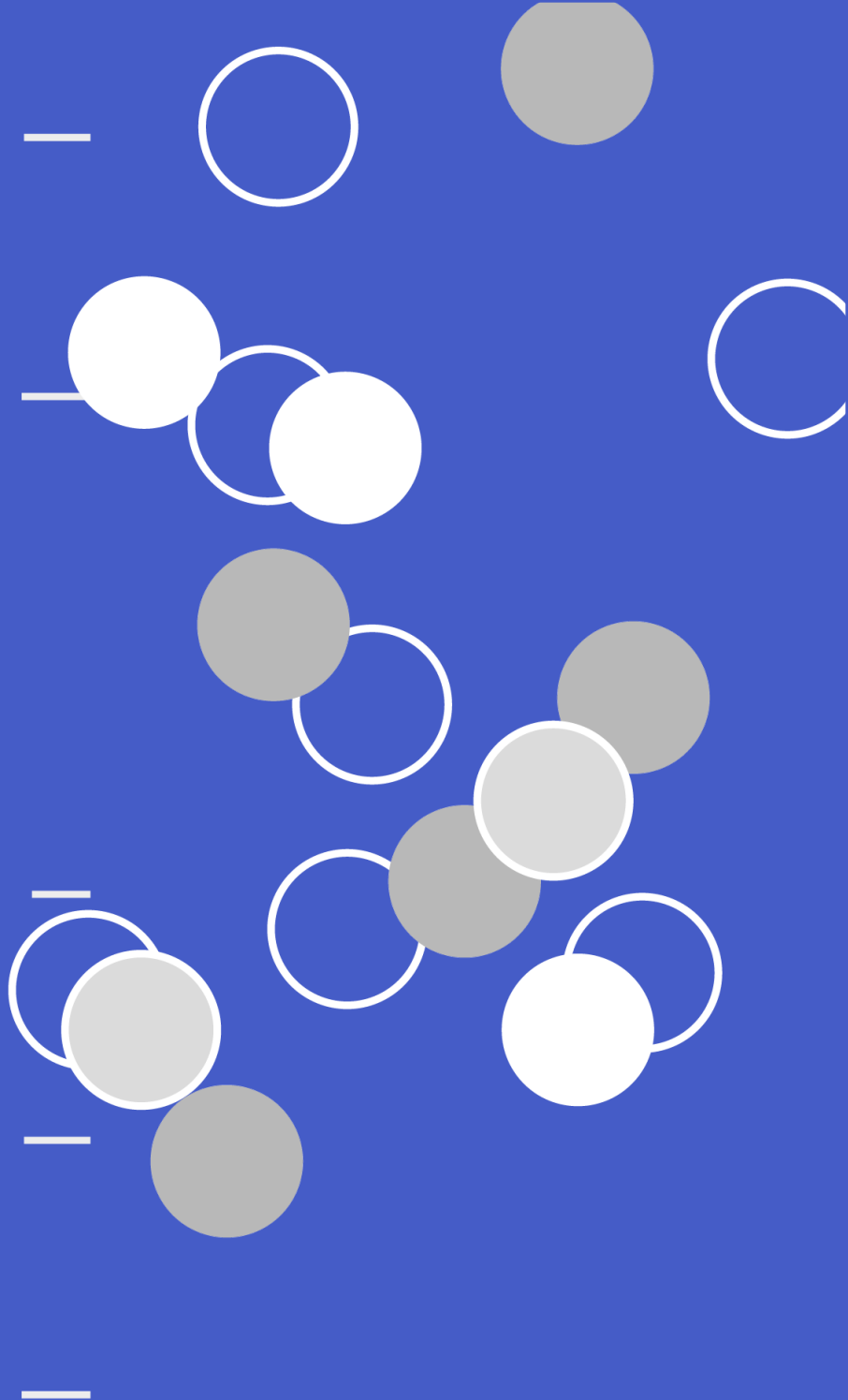
4.1

Module features for general users

Demonstrating your compliance at every stage

Access

Every document is given a unique ID number. Users can also define their own numbering for documents they create.

Users navigate through live, current versions of read-only documents. The system will make a log every time a document is checked out. When checked out, a document cannot be overwritten, only copied.

Rights to view, amend and share documents are granted based on system-defined roles or user-defined groups.

The system can store and manage documents of any file format, including MS Office, PDF, Scanned images, graphics, photos, audio and video.

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Some documents may need to be visible to everyone, others only to those users with authorisation. You can assign permission to individual users or groups, and define whether to grant read-only access or permission to amend and record information too.

> "The system is really user-friendly, meaning there's very little need for training."

Harry Singh, Quality Systems Administrator at AG Barr

Security

Access to the repository irequires a unique username and password to gain access. Once they gain access they are identified and the system will only show them documents or functionality that they are authorised to use.

Audit trails

The system automatically generates complete histories of all changes to a document.

Authorised managers have access to this audit trail, which provides a clear view of changes made over the entire life of a document or a set period. You can also see how a given document looked at a particular point in time.

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This Month

Jenny McGhee updated **Document** record with ID 1913 - 01. Sandwell Example SOP, changing the **Last Retrieved Date** field from **05 Jan 2018 10:31** to **05 Jan 2018 13:18** and changing the **Read Count** field from **412** to **413**

5 January 2018 13:18:02

Jenny McGhee created a new **Content Change Log** record with ID 1913 and set the following 3 fields:

- **Change Detail** field to **Demonstration purposes.**
- **New Version** field to **11.5**
- **Old Version** field to **11.4**

5 January 2018 13:16:48

Version history

The system will archive each superseded version of a document, and its full history. These versions are locked down to prevent them from being tampered with or destroyed.

Search this archive for specific content. Restrict access to the history of any document, and set rules for how changes to archived documents should be reviewed and approved, and by whom.

The system will automatically prompt key users to periodically review document, where appropriate, and record review decisions.

Compliance anywhere

Access the repository via computer, smartphone or tablet. For documents that require formal approval prior to publishing, the system will enforce this and only allow these documents to be published once all required approvals and electronic signatures have been recorded.

Favourites

The system automatically logs your recently-viewed documents and allows you to register 'favourites' that you can access quickly later.

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4.2

Module features for administrators

Document management in a central system

Access privileges

Quickly and easily set administrator privileges for managing content. Assign responsibility to individuals or groups by giving them access rights. Those employees can then assign responsibility for elements of their own documents to other individuals or groups.

Navigation structure

Tailor the document navigation structure to reflect your business processes or projects. The in-built functionality allows you to quickly set up links to documents within the navigation structure that reflects the 'real use' of documents.

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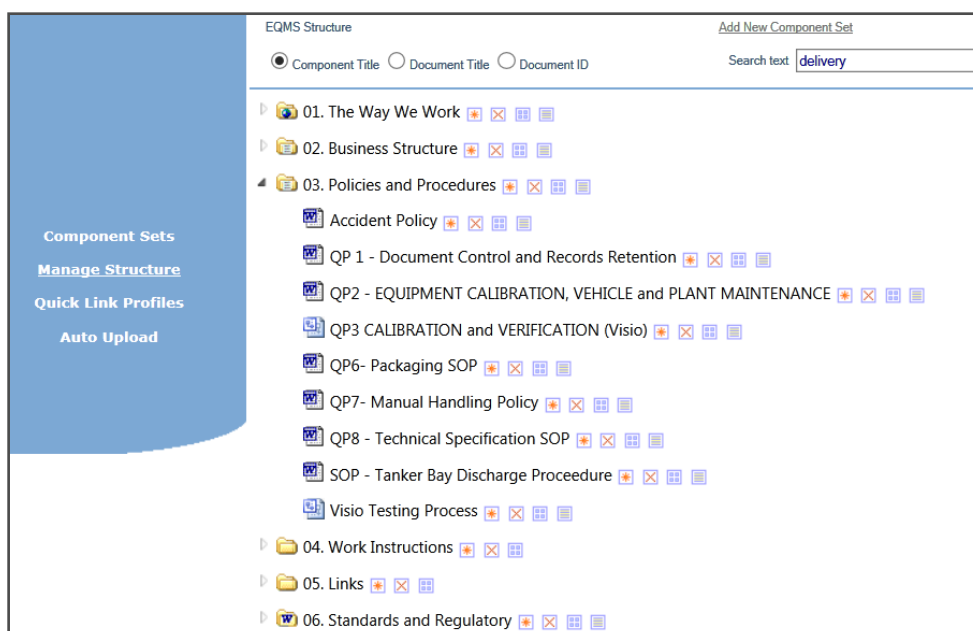
Visibility through reports

Powerful reporting and visual dashboard functions track documents from when they're created to when they're superseded, giving you better visibility and insight.

Manage in a centralised system

The document control module integrates with all our other GRC modules, allowing you to see any associated audits, suppliers, risks, equipment, issues and training records.

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Notification settings

Avoid wasting hours chasing people for approval by configuring the number of reminder notifications you want the system to generate, and how often.

Users may be asked to acknowledge new or changed content by electronic signature depending on the type of document. Email notifications and reminders keep the process on track, with escalations triggered when due dates are missed.

The system keeps a full record of all reviewing and approving, storing responses, names, dates and other compliance-related information against target deadlines.

Configure fields, groups and workflows

You can configure all fields, groups and workflows in the module to your specific needs.

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4.3

Improved decision-making through collaboration

Support and challenge information

Manage processes across your business

Configure different management processes for different types of document. Your processes can be as simple or as sophisticated as you need.

Pre-defined workflows

Set up workflows that help you control how documents are accessed, created, amended, reviewed and approved throughout your organisation.

Electronic signatures

Add electronic signatures to as many steps in workflows as you need. Integrate with third-party applications such as Adobe Echo Sign to deliver physical signatures on your documents.

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4.4

Faster access to controlled information

For a global, mobile and remote workforce

All actions in a To-Do List

The system automatically generates targeted To-Do List messages or actions, plus email prompts for reviewing, approving and archiving documents held in the system.

Actions are triggered by dates and deadlines held in the database and compliance with requests is analysed and reported.

	06 Oct 2017	Document Review Expiry For 1305 - WI-03 Environmental Policy - V3.0
	06 Oct 2017	Document Review Expiry For 1331 - WI-02 Risk FMEA Process - V1.4
	06 Oct 2017	Document Review Expiry For 1358 - WI-04 Sustainability Opportunity Policy
	30 Oct 2017	Document Review Expiry For 1331 - WI-02 Risk FMEA Process - V1.4
	30 Oct 2017	Document Review Expiry For 1358 - WI-04 Sustainability Opportunity Policy

Rapid access to your recently-viewed documents

The system automatically logs your recently-viewed documents and allows you to register 'favourites' that you can access quickly later.

Link to any document

Place links to your internal documents alongside links to pages drawn in from the internet. (For example, you can place a supplier's online ordering pages beside your purchasing policies and procedures.)

The navigation tree presents documents either in their native

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format, or in locked and templated PDF format. By preserving the integrity of hyperlinks between documents, the system automatically preserves links between versions.

Only view the right information

Users navigate through live, current versions of read-only documents. Only authorised people can edit and amend.

Store any type of information

The module's repository can store all types of documents in their native format, including word-processed documents, flowcharts, spreadsheets, CAD files, graphics, audio and video. Basically, any type of file your own system supports.

Rich media such as video is increasingly useful to describe processes and procedures. Our software works with viewing applications to reduce licensing costs of other business software.

Powerful search functionality

Depending on what users are authorised to access, a full text search of the document library can be performed. The system employs a range of other search criteria based on the content of document fields such as Title, ID, Date of Issue and Status.

Add your own fields to customise searches for your users. The module stores your criteria for faster access later.

Context-sensitive information

Users have access to context-sensitive help screens and a range of tools, including the ability to view their own details and broadcast messages to their colleagues.

With one mouse-click, users can see the status of the document they're in, including when the document was issued, last reviewed or approved, its owner, and a brief synopsis.

Tailored, relevant content

Users view documentation tailored to their specific needs, which is easy to navigate and search. They see read-only, approved content in the form of current, authorised versions of documents and files.
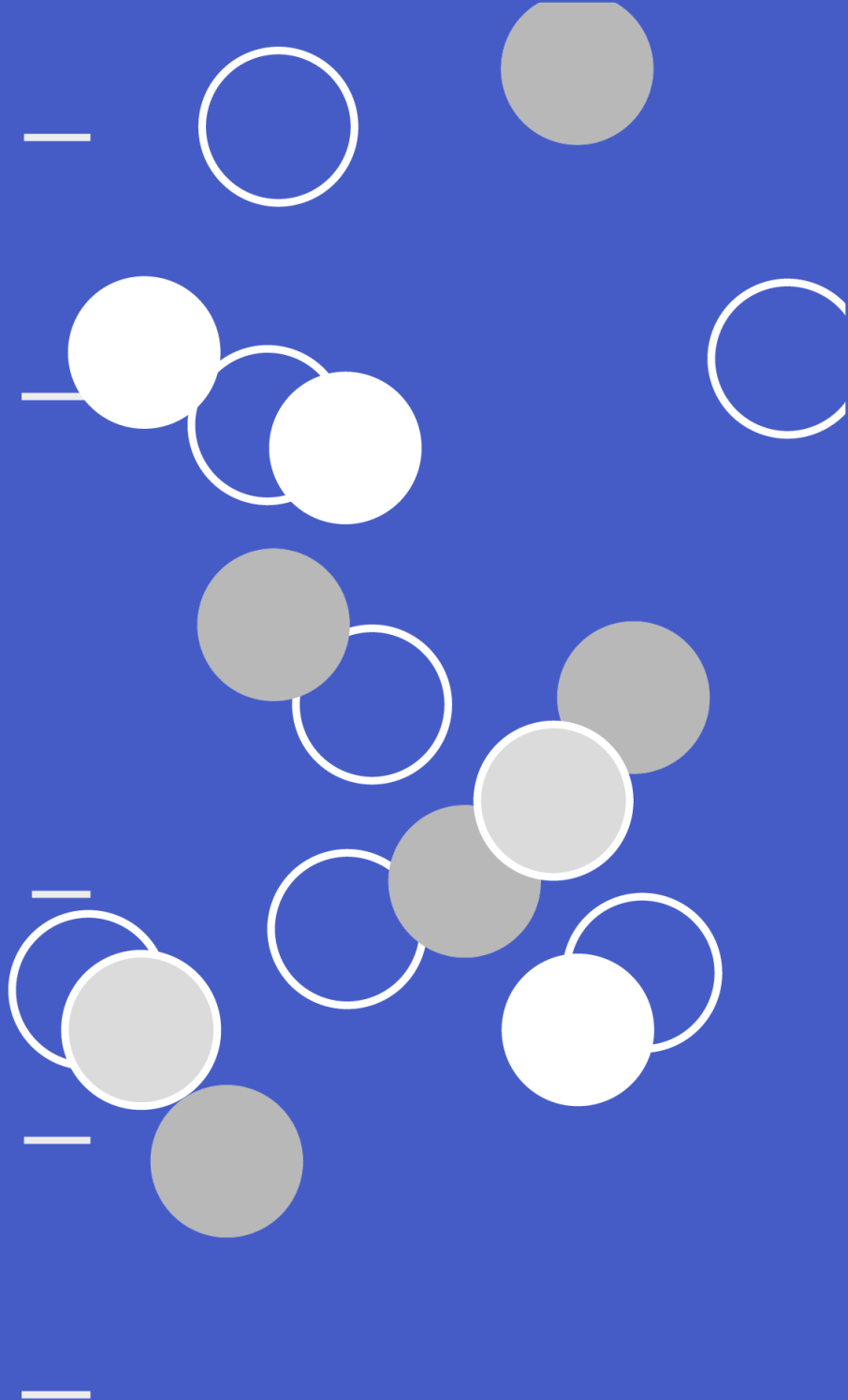
Content is relevant to their personal position and access rights.

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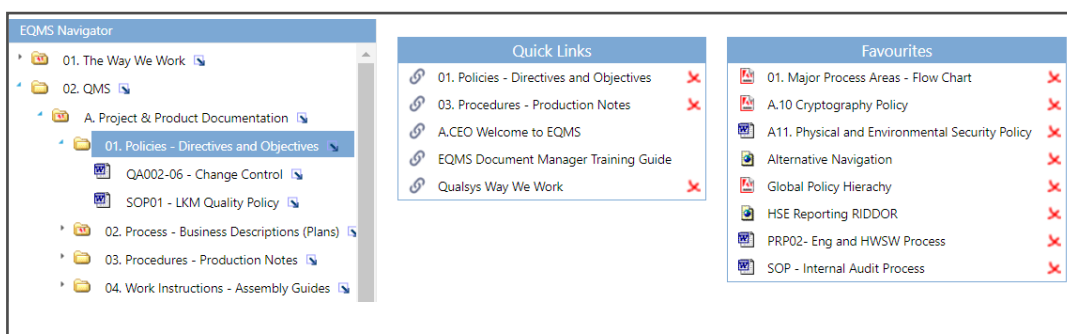
"We have a central system for all our ISO policies, procedures, records and training materials. It is accessible by all staff within the firm."

Greig Robertson, Project Manager
Aberdein Considine

Watch video

5.

5.

Technical information about our GRC software

Details on integrations, development and hosting

Seamless integration with other modules and mobile applications

Qulasys offers an integrated, modular solution. Each module works well on its own or with any other combination of modules and mobile applications.

Microsoft Outlook add-ins

Easy to integrate with your employees' daily routines, the Microsoft Outlook add-ins are the fastest and easiest way to ensure your employees are only accessing controlled documentation.

Microsoft Word, PowerPoint and Excel add-ins

The Microsoft Office software suite is ubiquitous in most businesses. Your staff, customers, and suppliers use it every day, know how it works and understand its benefits. Qualsys have taken advantage of this familiarity by creating a set of add-ins for Microsoft Word, Excel and Powerpoint.

The add-ins enable your employees to open documents from Document Manager, upload to Document Manager, check out and check in documents, and much more.

ERP & other software integrations

Flexible application programming interface (API) and web services enable full integration with your existing software

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tools. This makes it easy for your users to get the data they need and eliminates any duplication of effort. Our API is also used to automatically raise reports reports

and a synchronise training and competency data, or even trigger audits when new suppliers are added to your ERP.

Branding and customised phrasing

Add logos, colours and style sheets to ensure your management system emulates the look and feel of your website, extranet or intranet. Tailor phrases and labels to match your organisation's taxonomy.

Multilingual

The solution is multi-language enabled, supporting global businesses to get the right information to the right people.

Hosting

We offer our software on a SaaS basis with your users accessing your system via a secure https website. Or, we can install the software on your network and integrate with your intranet, extranet or company portal as needed.

You choose the option that best suits your business's IT strategy.

Accessibility

Access the software via your laptop or PC using any commonly-used web browser, or via smartphone or tablet.

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Ready to speak to an expert?

Schedule a discovery call

During the call, we listen to your questions, find out what you're looking for and tell you whether our solution can meet your needs. We can also give you an overview of our pricing.

The call usually lasts 15 minutes. If we're a good fit for you, we'll arrange the next steps.

Click here to arrange a discovery call