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How To Get Documents Under Control When You're Managing a Large Volume

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1.

Categorise all the documents at a high level. Use two categories...

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- Type

e.g. Policy, Procedure, Work Instruction, Form Template, Planning, Non-conformance Management, etc.
(no more than 5 - 6 and a document can only belong to ONE type).

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- **Operational area**

This would be the intended document recipients, e.g. production floor, warehouse, purchasing, sales, or all staff. Try keep it under 8. A document can belong to more than one Operational area (*as well as "All"*).

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Avoid getting too detailed; keep it broad and simple with just a few core types and operational areas.

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2.

Create a Document Matrix as follows:

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- **Vertical axis**:

Type.

- **Horizontal axis**:

Operational area.

- **It should be no larger than 6x8.**

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3.

Assign each grid block to a 'gatekeeper' or 'handler'; someone best positioned to manage that document group.

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Then, count how many documents fall into each block. This will quickly show whether:

- The review and management expectations for each block are realistic.

- Documents are accessible to the people who need them.

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If it looks good—well done, you're in control!

But If it looks messy...

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Then step #4 is critical...fixing it is like eating an elephant; handle small pieces consistently over a set timeplan.

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4.

Invest in smart document management software and use the software to manage the process one document group at a time.

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This may take you months, but remember:

Trying to fix things before automation and rules-based control are in place means simply continuing the manual system that created the problem in the first place.

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