



The Definitive Guide to Document Control and Document Management

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Optimising the world's most complex projects & operations

At Assai, we believe that history is not just a record of the past but a foundation for the future. Since 1996, we've been dedicated to helping our clients—ranging from primary energy companies to construction giants—safeguard and manage their critical data. Our name, inspired by the Italian adjective 'assai' reflects our mission to amplify the impact of every detail, ensuring that no information is forgotten or overlooked.

Our software, trusted by leading industries worldwide, offers unparalleled flexibility and precision, providing over 300 functionalities designed to optimize data control and management. Whether you're in the oil and gas sector, renewable energy, transportation or mining, we ensure that everybody is on the same page, so that your projects are executed safely and efficiently. In a world where energy demands are rising and sustainability is paramount, Assai helps you navigate these challenges with confidence.

From building oil rigs to setting up wind farms, we understand that success lies in the details. Our software ensures that every decision is backed by accessible, secure data, making it possible to respond to any situation with certainty. With Assai, companies gain control over their complex project, their past and future, making sure their efforts are not just remembered, but assai memorable, achieving more than they thought possible.

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Introduction

In the realm of document control and management, professionals face the ongoing challenge of handling extensive technical documentation, ensuring compliance, and maintaining accuracy across all project phases. The complexities of these tasks can lead to inefficiencies, errors, and delays, all of which can jeopardize the success of critical operations.

This whitepaper provides a comprehensive look at how you can overcome these challenges by implementing effective document control and management strategies. By leveraging the right systems, you can streamline your workflows, ensure compliance, and minimize errors. This guide offers expert insights and practical advice on how to optimize your document processes, ultimately leading to more efficient project execution and stronger control over your operations.

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What is document control and what is document management?

Document control and document management are important processes that are used to ensure the reliability and accessibility of an organization's documents.

Document Control

Document control is the process of creating, reviewing, approving, distributing, and storing documents, and tracking and reporting changes to those documents. The purpose of document control is to maintain the accuracy and integrity of an organization's documents and ensure they are up-to-date. This process is often used to ensure compliance with regulatory or industry standards, and to provide a clear audit trail of changes to a document over time. Examples of documents that are typically subject to document control processes include policies and procedures, work instructions, and technical drawings.

Document Management

Document management, on the other hand, is focused on the organization, storage, and retrieval of documents. This process includes developing systems and processes for organizing, categorizing, and indexing documents, as well as using technology such as document management software to facilitate these tasks. The goal of document management is to make it easy to locate and access documents when they are needed. This can be especially important in organizations with large numbers of documents or where documents are used across multiple departments or locations.

Combining Document Control and Document Management

Document control and document management are closely related processes, and they are often included in the same software package. Many document management software systems also include features for document control, such as version control, change tracking, and electronic approvals.

This type of software, often known as Enterprise Content Management (ECM) or Document Management System (DMS), typically provide a centralized location for storing and managing documents. This can include features for organizing and categorizing documents, as well as tools for searching and retrieving documents. Some of the common functionalities include document version control, access control, version history, workflow and approval process, audit trail, and many more.

Having both document control and document management functionalities in the same software can provide many benefits. It can help to streamline processes and reduce the need to switch between different software applications. It can also help to ensure that all stakeholders have access to the most up-to-date versions of documents, which is particularly important when working on complex projects with multiple teams and stakeholders.

Document Control processes and critical steps

The process of controlling documents involves several critical steps to ensure the accuracy and consistency of an organization's documents. These steps include:

- 1 Identifying the need for a new document or updating an existing one.
- 2 Creating or updating the document using relevant templates and guidelines.
- 3 Reviewing the document for accuracy and completeness.
- 4 Obtaining the required approvals for the document.
- 5 Distributing the document to relevant parties.
- 6 Storing the document in a secure location like a document management system.
- 7 Tracking and reporting any changes to the document.

Each step in the document control process is essential. Identifying the need for a new document helps to create relevant and necessary documents, saving time and resources. Using templates and guidelines to create or update the document ensures consistency and accuracy. Reviewing and approving the document ensures it meets necessary standards before distribution. Distributing the document to relevant parties allows everyone to access the most up-to-date information. Storing the document securely and tracking any changes maintains its accuracy and accessibility over time.

Common challenges in the document control process include incomplete or inaccurate documents, delays in obtaining approvals, and difficulties tracking and reporting changes. To overcome these challenges, organizations can implement robust review and approval processes, use document management software, and provide training and support to relevant parties.

Document Management processes and critical steps

The document management process involves several steps that are designed to ensure the organization, storage, and retrieval of an organization's documents. These steps include:

- 1 Identify the types of documents that need to be managed.
- 2 Develop systems and processes for organizing, categorizing, and indexing documents.
- 3 Use technology, such as document management software, to facilitate the organization and storage of documents.
- 4 Establish procedures for the retrieval and dissemination of documents.
- 5 Ensure the security and accessibility of documents.

The importance of each step in the document management process cannot be overstated. Identifying the types of documents that need to be managed ensures that the organization's document management systems are tailored to its specific needs. Developing systems and processes for organizing, categorizing, and indexing documents ensures that documents can be easily located and accessed when needed. Using technology, such as document management software, facilitates the organization and storage of documents, making them more easily accessible. Establishing procedures for the retrieval and dissemination of documents ensures that the right people have access to the right documents at the right time. Ensuring the security and accessibility of documents protects the organization's sensitive information and ensures that it remains available when needed.

Common challenges in the document management process include the overwhelming volume of documents that need to be managed, difficulty organizing and categorizing documents, and inadequate security and accessibility of documents. To overcome these challenges, organizations can implement robust systems and processes for organizing and categorizing documents, use document management software to facilitate the storage and retrieval of documents, and prioritize the security and accessibility of documents through training and support.

Best practices for document control and document management

Identifying the specific needs and goals of the organization when developing document control and document management processes. This helps to ensure that the processes are tailored to the organization's specific needs and are effective in achieving its goals.

Using document management software to facilitate the organization, storage, and retrieval of documents. It is important to ensure that the software is regularly updated and maintained to ensure its effectiveness.

Prioritizing the security and accessibility of documents. This may involve establishing procedures for protecting sensitive information and ensuring that it remains available when needed.

Regularly reviewing and updating document control and document management processes to ensure that they continue to meet the changing needs of the organization. This helps to ensure that the processes remain effective and efficient over time.

Summary

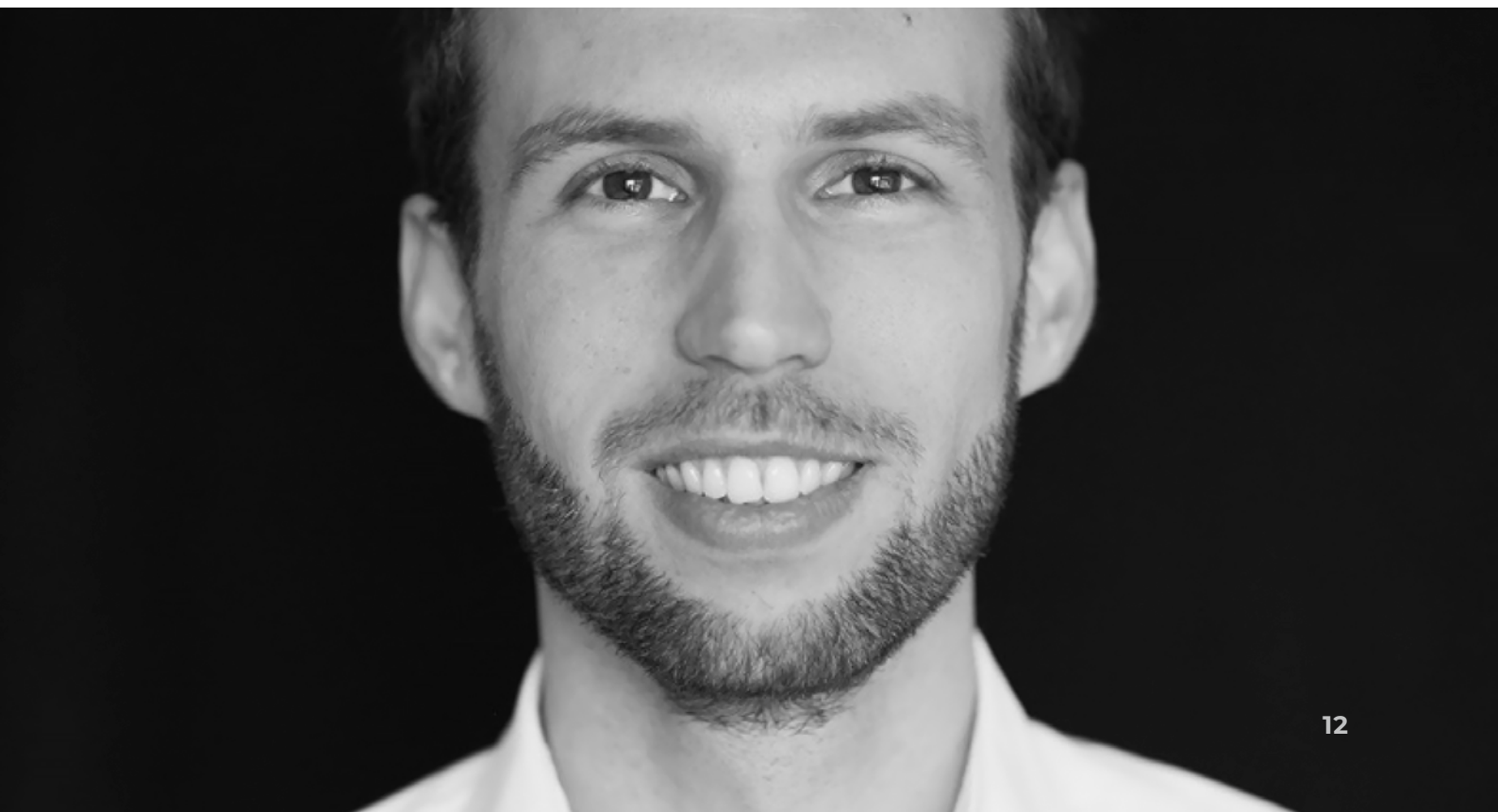
In conclusion, document control and document management are essential processes for ensuring the accuracy, consistency, and accessibility of an organization's documents. By implementing effective document control and document management processes, organizations can achieve their goals more efficiently and effectively.

This whitepaper has provided a comprehensive overview of these important topics, including the definitions and differences between document control and document management, the steps in each process, and best practices for achieving success. By following the guidelines outlined in this whitepaper, organizations can improve their document control and document management processes and realize the many benefits of effective document management.

Everybody on the same page

About the author

Arno van Vulpen, with a background in information science and a specialization in user experience, draws inspiration from his scientific roots. Since joining Assai in 2013, Arno has advanced from consultant to product manager, leading innovations in document management software. He has been instrumental in the development of Assai Connect represents an iconic breakthrough, setting new standards in the industry. Passionate about the role of software in engineering projects, Arno advocates for its early integration to enhance project outcomes. His philosophy emphasizes alignment between project teams and document controllers, ensuring everyone has quick access to crucial information. Arno's journey began on the client side, where he firsthand experienced the challenges Assai could solve, leading him to join the company. He is driven by a desire to improve lives and contribute to a better, safer, and more sustainable world.



About Assai

Some people say you shouldn't let history dictate the future. At Assai, we see it differently. History is our business. We store activities because they have shaped things as they are now and will be. Take our name: 'Assai' is an adjective in Italian. 'Allegro assai' makes lively music even livelier. Much becomes more. Beautiful becomes magnificent. That's what our document management system brings to your projects and operations: more certainty, reassurance, impact, and control.

Our goal has always been to help clients keep their critical information safe and accessible. Not the slightest piece of information must be forgotten. Since 1996, we have been the trusted partner for those who shape the future. Primary energy companies and construction giants rely on our software, which constantly evolves and adds more value. We offer unmatched flexibility without sacrificing precision.

Whether you're in the oil and gas sector, renewable energy, chemicals, or mining, we ensure that everybody is on the same page so that your projects are executed safely and efficiently and will be remembered for the right reasons. In a world where energy demands are rising, and sustainability is paramount, Assai helps you confidently navigate these challenges.

From building oil rigs to setting up wind farms, we understand that success lies in the details. Our software ensures that every decision is backed by accessible, secure data, making it possible to respond to any situation with certainty. With Assai, companies gain control over their complex projects, their past, and the future, making sure their efforts are not just remembered but 'assai memorable,' achieving more than they thought possible.

Check it out on our site, and feel free to [book a demo!](#)

Get in Touch





Assai Software Services

Parallelweg Oost 13a
4103 NC, Culemborg
The Netherlands

 +31 345 516 663

 sales@assai.nl

assai-software.com

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