



ETQ Reliance Application Overview: Document Control

All controlled documents are managed through the Reliance Document Control application. ETQ Reliance Document Control is a workflow-based application that is designed to manage the creation, review, approval, and release of controlled documents. This module enables you to run a completely paperless document control system, or a system that combines hardcopy and electronic distribution of documents. Document Control is designed to control different types of documents including Policies, Procedures, Work Instructions, Forms, Specifications, and more.

Controlled documents can either be created using Reliance Microsoft Office integration templates or be attached using the file attachment interface. Attachments can be any file the customer chooses. Forms and workflows provided out-of-the-box and ready to deploy but can also be configured to meet your exact requirements without the need for programming.

To create a new Document, click the [New Document] action button located on the application toolbar, the selected Document Control form will open in a new tab.

The look and feel of each system Forms is very similar and contains information, tabs, etc. as depicted in the following figure:

The screenshot displays the ETQ Reliance Document Control application interface. At the top, there is a navigation bar with the 'etq' logo and a 'Document Control' tab. Below the navigation bar, a breadcrumb trail shows 'Policy # QM-00001-DOC'. The main content area features a workflow progress bar with stages: Draft (31 Dec), Document Control Review, Initial Approval, Review, Final Approval, Awaiting Release, Approved, and Voided. A toolbar includes buttons for 'Close', 'Save', 'Save & Close', and 'Send'. The left sidebar contains a 'Document Information' menu with options like 'Document Identification', 'Document Body', 'Related Documents', 'Revision History', 'Training', and 'Access Control'. The main form area is titled 'Document Identification' and contains several fields: Number (QM-00001-DOC), Title (Corporate Quality Manual), Revision (2), Department (Quality), Author (Eric Dano), Location(s) (ETQ : Corporate : New York), Approver(s) (Eric Dano), Electronic Distribution List (Document Control Readers), Categories (ISO Document:Policy), Project (Energy), Reviewers List (Eric Dano), Hardcopy Distribution List (Document Control Center), and System Elements (ISO 9001-2015: 4. Context of the organization).

Document Identification Section

This section contains general information about the document

Document Identification

Number <input type="text" value="QM-00001-DOC"/>	* Title <input type="text" value="Corporate Quality Manual"/>	Revision <input type="text" value="2"/>	Department <input type="text" value="Quality"/>
Author <input type="text" value="Eric Dano"/>	Origination Date <input type="text"/>	Effective Date <input type="text"/>	Review Date <input type="text"/>
Location(s) <input type="text" value="ETQ : Corporate : New York"/>	Project <input type="text" value="Energy"/>		
Approver(s) <input type="text" value="Eric Dano"/>	Reviewers List <input type="text" value="Eric Dano"/>		
Electronic Distribution List <input type="text" value="Document Control Readers"/>	Hardcopy Distribution List <input type="text" value="Document Control Center"/>		
Categories <input type="text" value="ISO DocumentPolicy"/>	System Elements <input type="text" value="ISO 9001-2015 : 4. Context of the organization"/>		

Document Body Section

You often need to include external related files with your documents; for example, you may need to attach a scanned drawing, table, etc or such documents as Word Documents, Excel Sheets, images, Visio drawings, MS Project Plans, etc. You can create documents using Microsoft Word templates through the MS Office Integration feature. This feature in Reliance allows for the creation of MS Office template forms or reports that can be dynamically linked to Reliance data. These forms/reports can be custom configured to meet the exact needs of the end-user. Different templates can be created for customers, vendors, suppliers, or regulatory/reporting agencies.

Document Body

Attachment
1 File(s)

i *↓* *↻* *🗑*

Download All
Select Template
Add File(s)

Record Linking

There are many ways to provide hyperlinks within a Document Control form.

Other Links

In a Doc Control form, the Document Info tab is used for the main information of the document. One of the fields is called "Other Links". When you use the Dual Linking feature to create a target document (from another application) from within the Doc Control document, a link referencing the target document will be pasted in the 'Other Links' field.

The following is an example of what 'Other Links' look like in a Doc Control main form:

The screenshot shows a Document Control form with several sections:

- ETQ : Corporate : New York
- Energy
- Approver(s): Eric Dano
- Reviewers List: Eric Dano
- Electronic Distribution List: Document Control Readers
- Hardcopy Distribution List: Document Control Center
- Categories: ISO Document\Policy
- System Elements: ISO 9001-2015 : 4. Context of the organization
- Links to Other Documents: No Links (0 link(s))
- Links to Other Documents: No Links (0 link(s)) with a "Paste Link" button.

Two pink arrows point to the "Links to Other Documents" fields.

Related Documents

Depending on the document scope and contents and business rules, you can add links to pending or approved Document Control documents related to the current document. You may select as many documents as you want to be linked.

Once documents have been selected, the system will add link(s) for the selected document(s) in the Related Documents section. This link description will include the Document Title, Document Number, Revision Number, Type, Effective, Review and Location. In addition to documents, you can use this field to paste links to other related documents whether from Document Control or any other application.

The screenshot shows the "Related Documents" section of a Document Control form. On the left is a navigation menu with options: Document Information, Related Documents (selected), Revision History, Training, Access Control, and Show All. The main area shows a list of three linked documents:

Document Title	Document Number	Revision Number	Type	Effective	Review	Location
Work From Home, Policy # QM-00003-DOC	QM-00003-DOC	[rev. 0]	(Approved)			
Industrial Safety Policy, Policy # QM-00004-DOC	QM-00004-DOC	[rev. 0]	(Approved)			
Procurement Plan, Policy # QM-00005-DOC	QM-00005-DOC	[rev. 0]	(Approved)			

At the bottom right of the list is a "Pick from View" button.