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# Using Document Management Software to Support the Implementation of a QMS



## Why Document Management Software?

KnowledgeTree provides a flexible and affordable platform to support the implementation of quality and environmental management systems in small and medium sized organizations.

The key features within KnowledgeTree that make it a compelling platform to run a management system include the following high level features:

- Personalized dashboard that presents summary of user interactions with system.
- Security features that enforce control at point of use.
- Audit trails of user interactions support traceability.
- Workflow that provides for a document change approval process as well as the ability to run other processes such as control of Incident reporting & Corrective & Preventative Action Procedures.
- The ability to create a document taxonomy based on the specific requirements of the management system(s).
- Multiple ways to search for relevant documents or filter by Document types or folders.
- Web interface supports ease of access for multi-site environments.
- Scheduler supports time based actions on documents and records.

Amongst others, KnowledgeTree may be used to support the following standards:

- ISO 9001 2000
- ISO 14000
- ISO 17025

## Document & Records Control

Document and records control are core systems procedures for all quality or environmental management systems. In the absence of supporting technology, access to paper-based documents and records is managed by the systems administrator. This is further complicated in a multi-site environment.

KnowledgeTree will automate the document and records control processes and make policies and procedures available for users with appropriate permissions. Documents may be downloaded for users wanting to review work instructions and procedures, or checked out by users wanting to amend the document content.

KnowledgeTree's web interface allows easy access to the document repository for those users with appropriate access rights. A document audit trail ensures traceability of system documentation and older document versions can be viewed and downloaded.

## Document Types and Metadata

The first stage in implementing a quality management system requires the policies, processes and procedures that describe the activities of the business to be documented. Once the system is running, records are kept and audits are performed from time to time. Below is a list of the document types that would be required:

- Policies are statements which describe what is done and why
- A process is a series of interrelated steps involved in an activity usually represented as a flowchart
- Procedures are the written work instruction which specifies how to perform the steps in the process. They provide a written guide for those involved in the process.
- Records are the outputs of processes

- Audits are performed to ensure that the system is being complied with.

These document types are defined during implementation and each associated with specific metadata fields. KnowledgeTree accomplishes this with the use of metadata field sets and fields which are created and associated with each document types.

Metadata is structured data which describes the characteristics of the document. KnowledgeTree requires each document to have a generic Meta data set which is common to all documents and includes fields like file name, created by, document type, workflow status, Document ID etc.

## Document Taxonomy

KnowledgeTree supports the creation of a taxonomy that provides a folder view into the document repository. The document taxonomy will be determined by the system to be implemented. For example, the ISO 9001 2000 taxonomy should follow the following headings and numbering:

- Quality Management System
- Management responsibility
- Resources
- Product realization
- Measurement, analysis and improvement.

In this way a single KnowledgeTree implementation may be used to run multiple management systems.

## Workflow support for system processes

KnowledgeTree supports the implementation of workflows for processes such as:

- Document approval
- incident reporting
- Corrective & Preventative Action Procedures

This is achieved by setting up workflows and associating them to folders in KnowledgeTree. Workflows are constructed by defining *transitions* and *states* and assembling them. Emails notifications can be defined at each state so that users are notified when a document reaches a certain state. For example in a simple document approval workflow, once the approved state is reached, the document author is notified.

Example:

- Corrective & Preventative Action template is created and associated with an incident reporting workflow.
- When an incident occurs, the person responsible clicks a copy link on the document details page.
- The template is copied into a preset folder and the workflow is triggered.
- Users are notified and interact with the document, check it out and complete the system reporting requirements.
- Once the workflow is complete the Corrective & Preventative Action report is made available to a broader group of stakeholders and the is available as a system report.

In summary, KnowledgeTree can be rapidly deployed to support your Quality or Environmental management system implementation. Please contact our sales team to arrange a demonstration.

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