1% EVO · ISO 9001:2015

ISO 9001 document-control checklist

Clause 7.5 — documented information

A working checklist for clause 7.5: identify what you need, create and update it correctly, then keep it under control. Check off each line against your own system.

7.5.1 General

- [ ] Every procedure, form and record your quality management system actually needs is listed — no more, no less.
- [ ] The list still matches your business. Size, process complexity and staff competence all change what "necessary" means.

7.5.2 Creating and updating

- [ ] Every document carries a title, a date, an author, and a reference or revision number.
  Revision number and effective date are written the moment the final signature lands.
- [ ] Format and media are fixed and stated: which language, which software version, paper or electronic.
- [ ] Nothing goes live before a reviewer checks it and an approver signs off on the content.
  Two of the four human gates. The system never approves anything itself.

7.5.3 Control

- [ ] The current version is available where the work happens, the moment it's needed.
  A document's stage is the folder it sits in — no separate status field to drift out of sync.
- [ ] Documents are protected: no unintended edits, no unauthorised access, no accidental loss.
  Built and tested on working copies; the original source documents were never touched.
- [ ] Distribution, access, retrieval and use are all defined — who can see what, and how they get it.
  The master list carries a ten-department distribution matrix, updated at the same moment.
- [ ] Storage keeps every document legible for as long as it has to survive.
- [ ] Every change carries a version number, so two people are never working from two different truths.
  The amendment record and master list update together, every time, with no duplicate rows.
- [ ] Retention periods and disposal dates are set in advance, not decided the day a document goes obsolete.
  The retention clock starts and the disposal date is calculated the moment a document is approved.
- [ ] Documents from outside your business — supplier drawings, customer specs, external standards — are identified and controlled the same way.
  One of the four human gates is dedicated to external and support documents.
- [ ] Records kept as proof of conformity are locked against edits once they're final.
  Every write is logged: when it changed, and why. The same approval run twice produces no duplicate.

Built from the vocabulary of the ISO 9001 document-control automation we run in production. This is a checklist, not certification — certification is a separate audit by a certification body.