Document version control



We set up a naming, approval and retention workflow for one shared document library.

Who it helps

Operations directors and team managers

The problem to solve

People can send outdated documents when filenames fail to show which version has been approved.

Working through the brief

1. **Review the document library**

   Gather the agreed inputs. Existing procedures, approved policies or a recorded walkthrough.

2. **Agree naming and approval steps**

   Track “Revision identifier” and “Approval state” together so the reviewer can connect the source information to the result.

3. **Set out retention ownership**

   Use the workflow to make version status visible and assign responsibility for approval and retention.

4. **Check the scope at handover**

   External audit, certification, software and additional teams are separate.

Worked example

Two documents share a title. Use the revision record and approved location to identify which version is current.

Read the service scope / OPS-012

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