WORK INSTRUCTION (WI)	DOCUMENT #	WI-DOC-037
HOW TO APPROVE OR REJECT A CONTROLLED DOCUMENT	VERSION #	1

TABLE OF CONTENTS

1.0	PURPOSE)
2.0	SCOPE	 2
3.0	DEFINITIONS	 2
4.0	PREREQUISITES	 2
5.0	EHS AND EQUIPMENT	 2
6.0	PROCESS	 3
7.0	REFERENCES and ATTACHMENTS)

WORK INSTRUCTION (WI)	DOCUMENT #	WI-DOC-037
HOW TO APPROVE OR REJECT A CONTROLLED DOCUMENT	VERSION #	1

1.0 PURPOSE

The purpose of this work instruction is to outline the steps required to approve or reject a document in the Document Control and Management System (DCMS).

2.0 <u>SCOPE</u>

This process applies to all employees who need to access the document control system to approve or reject a new or revised document.

3.0 **DEFINITIONS**

Term	Definition
Approved	The status of an item (e.g., controlled document, controlled record) that has been reviewed, found acceptable and documented as acceptable by all approvers.
Document Change Request (DCR)	A formal request to Documentation for either the creation of new document or changes to an existing document. Once received, Documentation will either prepare the system for a new document or release an existing document for changes.

4.0 PREREQUISITES

You must have access to the DCMS and have the rights to approve or reject a controlled document.

5.0 EHS AND EQUIPMENT

N/A

WORK INSTRUCTION (WI)	DOCUMENT #	WI-DOC-037
HOW TO APPROVE OR REJECT A CONTROLLED DOCUMENT	VERSION #	1

6.0 PROCESS

6.1 Log into the DocSmart Document Control System

Note: If this is your first-time logging into the system, please follow the steps below to change your password. (If you have already changed your password, you may skip to section 6.2.)

6.1.1 Log into the DocSmart Document Control System: (See Figure 1.)

- 6.1.1.1 URL: www.castlemfg.docsmart.com/docsmart
- 6.1.1.2 Username: Your first initial and last name.
- 6.1.1.3 Initial Password: CM1234!

A / 1	
/Velco	me to DocSmar
	nter your username an
assword system.	d below to access the
,	
Username	
Username XXXX	
XXXX	
XXXX Password	New Window
XXXX Password	New Window
XXXX Password	New Window

Figure 1

6.1.2 **Click** on your name or profile icon in the upper right corner of the screen to access a drop-down menu. (See Figure 2.)

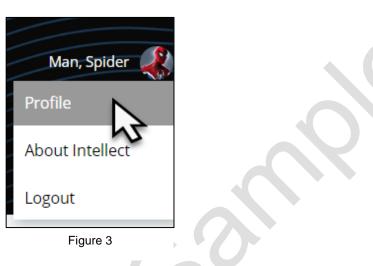


Figure 2

Castle Manufacturing	
Cloverton, PA	

WORK INSTRUCTION (WI)	DOCUMENT #	WI-DOC-037
HOW TO APPROVE OR REJECT A CONTROLLED DOCUMENT	VERSION #	1

6.1.3 Select "Profile" (See Figure 3.)



6.1.4 **Click** on "Reset Password" (See Figure 4.)

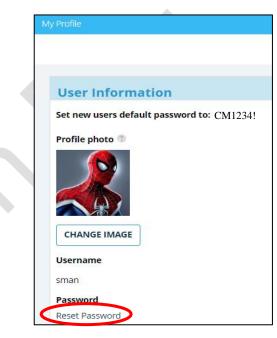
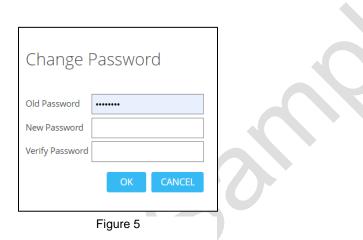


Figure 4

WORK INSTRUCTION (WI)	DOCUMENT #	WI-DOC-037
HOW TO APPROVE OR REJECT A CONTROLLED DOCUMENT	VERSION #	1

6.1.5 Enter your new password, retype (verify) your new password, and Click "OK." (See Figure 5.)



Note: Be sure to remember your new password.

- 6.1.5.1 When complete, you should receive this message along with a Google popup (if using Google) to save/update your login password.
- 6.1.6 Click "OK" when ready. (See Figure 6.)



6.2 Document Approve/Reject Process

- 6.2.1 Submit your final draft document to Documentation.
- 6.2.2 Documentation will enter your document into the Document Control and Management System (DCMS) for routing.

Cloverton, PA Confidential Page 5 of the second sec	Castle Manufacturing Cloverton, PA	Confidential	Page 5 of 9
--	---------------------------------------	--------------	-------------

WORK INSTRUCTION (WI)	DOCUMENT #	WI-DOC-037
HOW TO APPROVE OR REJECT A CONTROLLED DOCUMENT	VERSION #	1

- 6.2.3 Documentation will function as the document owner and author in order to manage/monitor the routing process.
- 6.2.4 Your document will be ready for approval when you receive an email notification from "NoReply@CM_docs.com" with the header that reads, "A new Document Change Request activity; [Doc #], has been assigned to you." (See Figure 7.)

A new Document Change Request activity; SOP-DO	C-001, has been ass	igned to you	J.	
NoReply@CM_docs.com	🙂 🔶 Reply	🖔 Reply All	→ Forward	1
To O Dean Reed			Fri 4/14/2	2023 12:00 PM
Fig	Jure 7			

6.2.5 To access and approve your document, log into the DocSmart Document Control System at: www.castlemfg.docsmart.com/docsmart (See Figure 8.)

Note: If this is your first-time logging into the system, see "6.1 Log into the DocSmart Document Control System."

_	
	DocSmart
	Welcome to DocSmart Please enter your username and password below to access the system.
	Username XXXX
	Password Open in New Window
	LOG IN Forgot your password?

Figure 8

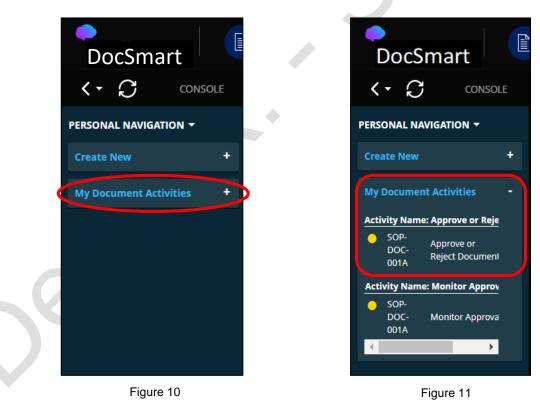


WORK INSTRUCTION (WI)	DOCUMENT #	WI-DOC-037
HOW TO APPROVE OR REJECT A CONTROLLED DOCUMENT	VERSION #	1

6.2.5 **CLICK** on the "Document Control" web app button. If you do not see the "Document Control" button, **Click** on "My Apps." (See Figure 9.)



6.2.6 **Navigate** to the left side of the screen and **CLICK** the "+" next to "My Document Activities." This will open and list any document activities that have been assigned to you. (See Figure 10.)



Castle Manufacturing Cloverton, PA	Confidential	Page 7 of 9
---------------------------------------	--------------	-------------

WORK INSTRUCTION (WI)	DOCUMENT #	WI-DOC-037
HOW TO APPROVE OR REJECT A CONTROLLED DOCUMENT	VERSION #	1

- 6.2.7 Locate the activity titled, "Activity Name: Approve or Reject." The activity will list the document number of the document being routed along with "Approve or Reject Document." (See Figure 11.)
 - 6.2.7.1 **CLICK** on the document activity you wish to approve or reject. This will bring up the activity's information page. From this page, you will be able to view the following:
 - Overview of the document's Information.
 - Change request information and a PDF copy of the document.
 - Approve or Reject buttons.
 - Due date extension request.

6.2.9 **CLICK** on the green "Approve" button. (See Figure 12.)

CONSOLE MY DOCUMENTS MY	STAFF'S DOCUMENTS	DOCUMENT REPORTS	SEARCH	HELP	DATA MAINTENANCE	SETTINGS	MASTER DOCUMENT O
Approve or Reject Doc	ument						
OVERVIEW WORKFLOW A	CTIVITY						
Document Information							
Document ID	Document name						
GD-DOC-001	Document Hierarchy						
Document type	Description						
Guidance Document	SOP provides an overview hierarchy system.	w of the document					
Standard	Section						
Department	Related department						
Documentation							
Process	Location						
Version #	Additional file(s)						
Document owner	Document author						
Reed, Dean	Reed, Dean						
Change Request Information							
Reason of the change request Explanation							
Initial Release							
Magnitude Summary of	changes						
Proposed new document							
GD-DDC-01 Document Hierarc							
Approve / Reject							
Approve / Reject document (HQ time) Not reviewed yet							
APPROVE REJECT							
Due Date Extension Request							
Status							
In Progress							
Due date 4/21/2023							
REQUEST DUE DATE EXTENSION							
		_					

Figure 12

Castle Manufacturing Cloverton, PA	Confidential	Page 8 of 9
---------------------------------------	--------------	-------------

WORK INSTRUCTION (WI)	DOCUMENT #	WI-DOC-037
HOW TO APPROVE OR REJECT A CONTROLLED DOCUMENT	VERSION #	1

6.2.10 **ENTER** your login password when prompted and **CLICK** OK. Your password serves as your electronic signature. (See Figure 13.)

Enter Password		Х
Your Password		
	ОК	CANCEL
	Figure 13	

- 6.2.11 After a few seconds, the activity should be removed from your screen, and you will see a message stating that the activity assigned to you has been completed.
- 6.2.12 The document will then go to Documentation who will add the document review period (annual) and release the document.
- 6.2.13 Once released, Documentation will create a secure PDF version of the document and upload it to its respective folder on the Q: drive. This will make it viewable/printable for all employees outside of the DCMS.
- **Note:** Rejecting a document stops the approval process and releases the document for editing.

7.0 REFERENCES and ATTACHMENTS

N/A