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

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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   SCOPE

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

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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.
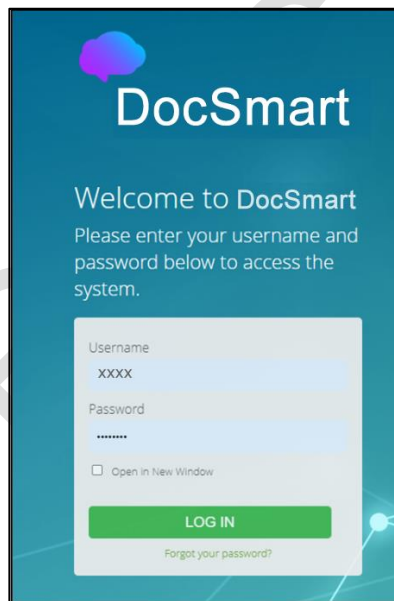
6.1.1.3 Initial Password: **CM1234!**

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.)
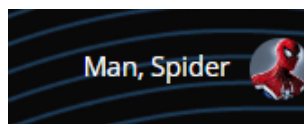

Figure 2

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6.1.3 **Select** "Profile" (See Figure 3.)
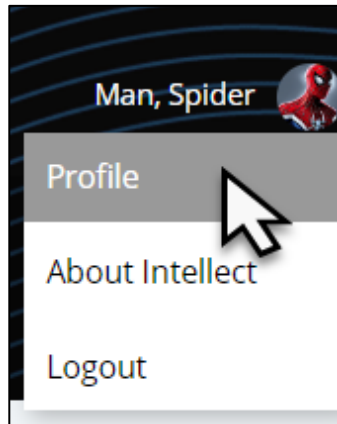
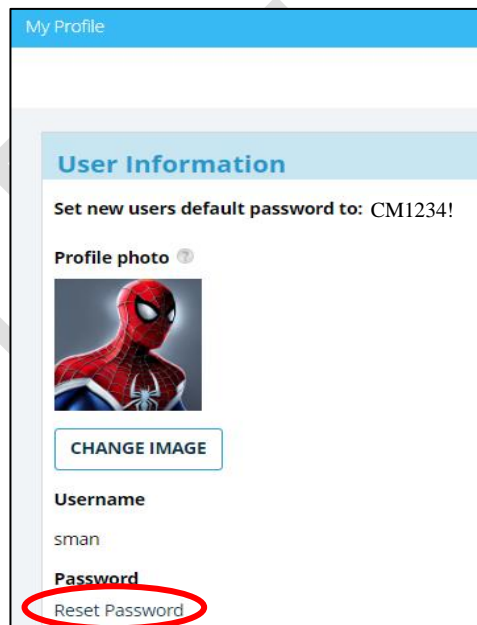Figure 3

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

Figure 4

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6.1.5 **Enter** your new password**, retype (verify)** your new password, and **Click** "OK." (See Figure 5.)
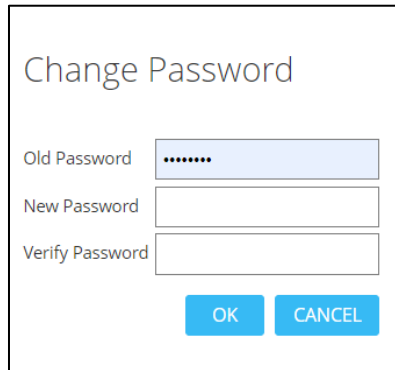
Note: Be sure to remember your new password.

Figure 5

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.
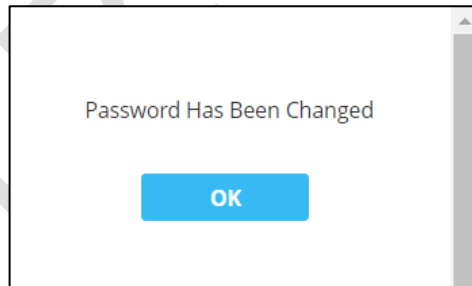
6.1.6 **Click** "OK" when ready. (See Figure 6.)

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.

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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-DOC-001, has been assigned to you.

N NoReply@CM_docs.com
To ● Dean Reed

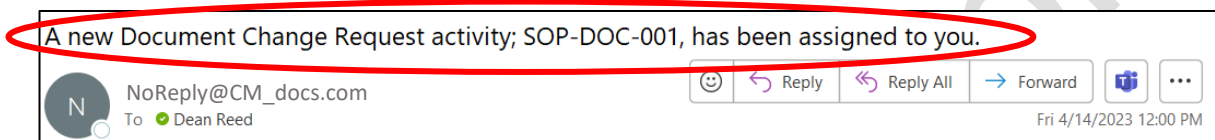😊 ↩ Reply ↩ Reply All → Forward ⊞ ⋯

Fri 4/14/2023 12:00 PM

Figure 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."
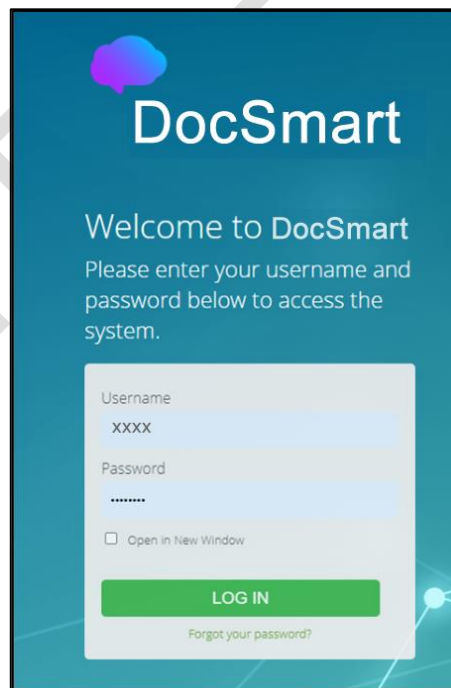
DocSmart

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

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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.)
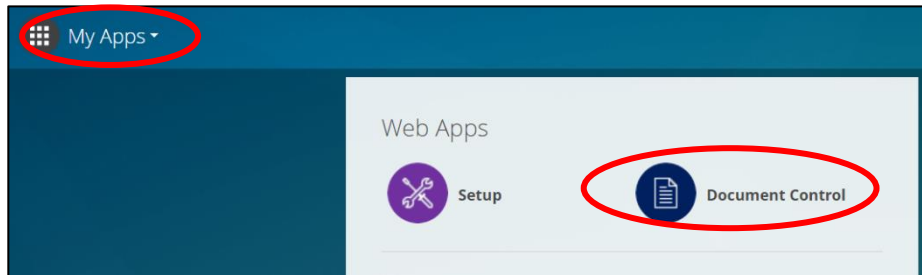

Figure 9

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.)
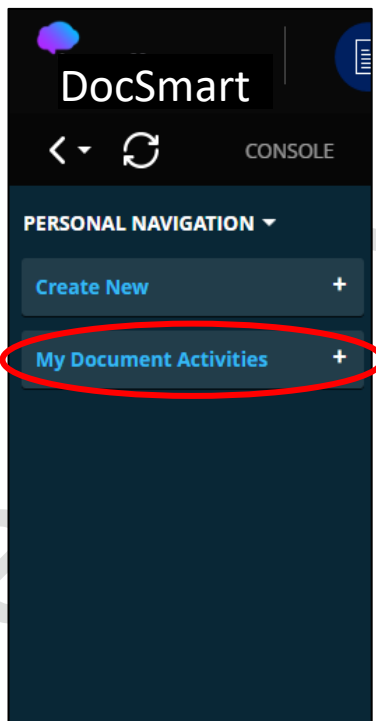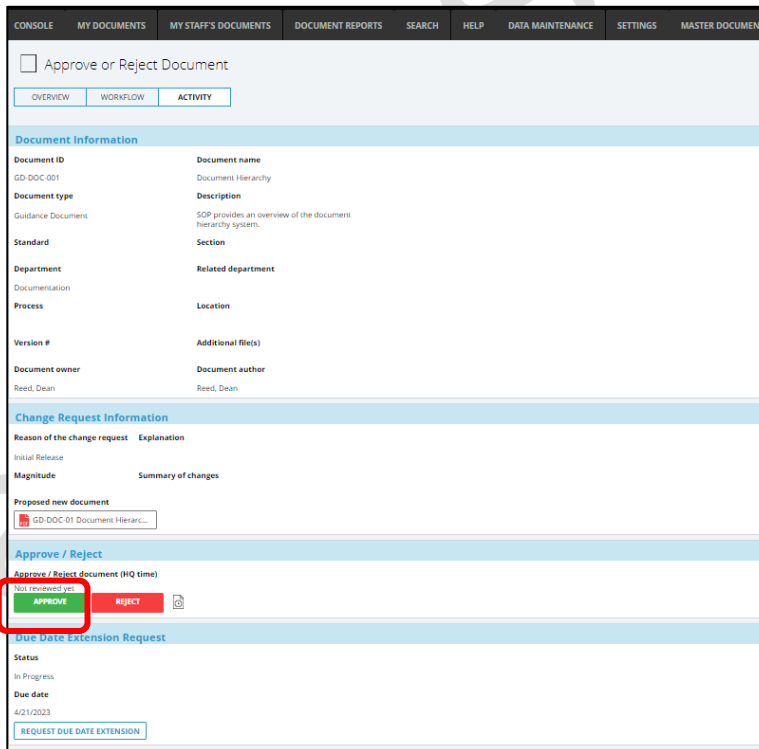

Figure 10
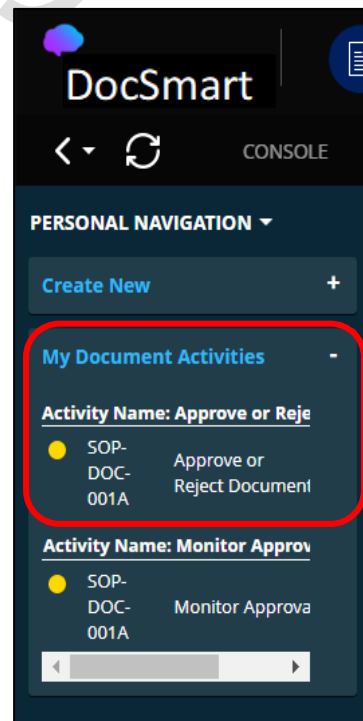
Figure 11

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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.)

Figure 12

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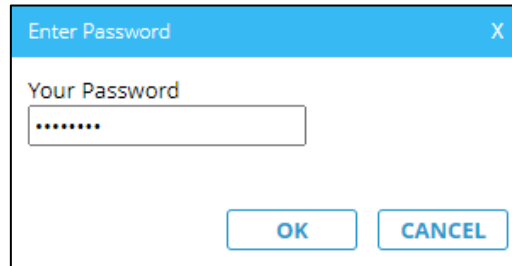

Figure 13

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