

SUBJECT: Document Management System	Effective Date: 12/3/18	Policy Number: FSP 2018 FS0020	
	Supersedes:	Page 1	Of 3
	Responsible Authority: Associate Vice President for Administration and Finance (Facilities & Safety)		

APPLICABILITY/ACCOUNTABILITY:

This policy applies to all Facilities & Safety (F&S) employees responsible for process-related document management. Documents needed for the execution of F&S operations are included in this policy. Contracts with outside entities and UCF policies or regulations, or processes outside of F&S are not included in this policy.

POLICY STATEMENT:

F&S shall use a document management system to ensure that all policies, procedures, and other process-related documents are readily accessible and used to execute work.

DEFINITIONS:

Document change table: A table at the end of the document that memorializes changes made to the document.

Form: A logical, structured document designed for capturing data elements and communicating information as required by a process, procedure, or other work instruction.

Guide or Guideline: An informal document that provide rule sets for activities; does not necessarily follow a required format or template.

Handbook: A document that describes the philosophy, history or other background information that aids in understanding the full scope of the department. May include a manual.

Instruction: A document that describes the specific steps to complete an action. Instructions have a narrow scope and usually a narrow use.

Manual: A step-by-step guide to a particular topic that can also serve as a reference book.

Policy: A guiding principle used to set direction under a given set of circumstances, which guides decision-making within the framework of objectives, goals, and management philosophies.

Procedure or Standard Operating Procedure (SOP): A document that outlines how to carry out a specific work process or activity.

Program: A document that describes a planned series of actions with responsibility to achieve a result.

Template: A standardized format used to create documents such as policies and procedures. Other document types may use any format suitable for the topic and audience.

POLICY:

F&S shall use a centralized digital document management system to manage the activities required to develop, release, track, store, update, archive, and manage F&S process-related documents of any type or format, such as:

- Forms
- Guides
- Handbooks
- Instructions
- Manuals
- Policies
- Procedures
- Programs
- Standard Operating Procedures (SOPs)
- Templates

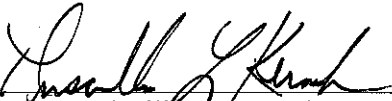
The below chart shows what must be included on each type of document:

Document Type	Title (Subject)	Owner	Effective Date	Number	Version/Revision Number	Responsible Authority	Signature	Document Change Table
Forms	X	X	X	X				
Guides	X	X	X	X				
Handbooks	X	X	X	X				
Instructions	X	X	X	X				
Manuals	X	X	X	X				
Policies	X	X	X	X	X	X	X	X
Procedures	X	X	X	X	X	X	X	X
Programs	X	X	X	X	X	X		
SOPs	X	X	X	X	X	X	X	
Templates	X	X	X	X				

F&S policies and procedures shall follow a standardized format. F&S departments may develop document formats that are suitable for their departmental needs.

Revision Log

Version	Description of Changes	Date
0	Original approved	12/2018
1		

Approved By:	Date Approved:
 Priscilla L. Kernek Associate Vice President Administration and Finance Facilities and Safety	12/8/18