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Procedure
for
document control

PURPOSE

The purpose of this document is to describe the Secretariat's internal process for the control of EA documents.

Authorship
This document has been prepared by the Secretariat.

Official language
The text may be translated into other languages as required. The English language version remains the definitive version.

Further information
For further information about this publication, please contact the Secretariat.

Please check our website for up-to-date information http://www.european-accreditation.org

Category:	Secretariat Management System and Operational Documents
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CONTENTS

1   INTRODUCTION

This document sets out the procedure for document control. It is to be used in conjunction with EA-INF/01: *List of EA Publications and International Documents*, EA-0/06: *Format and Layout of EA Documents, EA-1/14: Procedure for Development and Approval of EA Documents and the Adoption of ILAC/IAF Documents* and procedures for internal Secretariat documents.

2   RESPONSIBILITY

The Secretariat is responsible for ensuring that the procedure detailed hereafter is applied properly in the process for document control.

3   EA-CONTROLLED DOCUMENTS

An EA-controlled document is a document that:
- is identified as an EA document;
- has been given a specific reference number;
- is owned by an EA body or person, responsible for its management (preparation, review, revision, , withdrawal) according to the applicable rules.

The EA-controlled documents consist of:

- the **EA documents** classified in EA-1/14: *Procedure for Development and Approval of EA Documents and the Adoption of ILAC/IAF Documents*, and published on the public part of the EA website. A separate list of EA documents, EA-INF/01, is published for use by the EA member bodies and Conformity Assessment Bodies (CABs);

- the **EA committee-owned documents**, including constitutive documents, operational lists and documents, as well as the so-called "meeting papers" that are working or discussion documents distributed to EA committee members before the EA meetings through the EA intranet;

- the **EA Secretariat-related documents**, such as procedures, templates, lists or forms that are owned, managed and centralized by the EA Secretariat.

EA documents shall have the EA logo, according to the rules detailed in EA-1/19 *Rules for use of EA logo and Graphic Specification.*

4   COPYRIGHT POLICY

Only EA documents, published on EA's website, are subject to the EA copyright policy.

EA publications' copyright is held by EA unless otherwise stated in the copyright note in each EA document. An EA document may be used as a reference document in another document

by member bodies, or other organisations, upon permission by EA, provided that an explicit mention of EA as the source of the document is formally made.

5   DOCUMENT FORMAT

5.1   Publication format

EA documents' format is set out in EA-0/06: *Format and Layout of EA Documents*. All EA documents, published on EA's website, shall comply with the rules defined in EA-0/06.

In particular at the final stage of voting on an EA document according to EA-1/14, the document shall be presented according to these rules.

6   DOCUMENT IDENTIFICATION

6.1   Categorization and referencing of EA publications

Documents published by EA are divided into the six categories set out in EA-1/14: *Procedure for Development and Approval of EA Documents and the Adoption of ILAC/IAF Documents*.

-   Governance and Policy documents;
-   Peer Evaluation Process documents;
-   Members' Procedural documents;
-   Application documents for conformity assessment bodies (CABs);
-   Secretariat Management System and operational documents;
-   Information documents.

EA documents, published on EA's website, are given a reference number based on the category they belong to.

The table below gives a summary of the rules applicable for categorisation, identification and referencing of EA documents.

Note: These rules are only applicable to documents defined in EA-1/14 and published on EA's website.

Category	Status	Reference Number
Secretariat Management System and operational documents	Not Applicable	EA-**0**/dn
Information documents	Not Applicable	EA-**INF**/dn
Governance and Policy documents	Not Applicable	**A**: documents relevant for EA as an Association :EA-1/dn **A** **AB:** documents relevant for Members: EA-1/dn **AB**
Peer Evaluation Process documents, including policies and procedures	• **M**andatory or • **G**uidance or /**INF**ormative documents	EA-2/dn M EA-2/dn G EA-2/dn INF
Members' Procedural documents	• **M**andatory or • **G**uidance or • /**INF**ormative documents	EA-**2**/dn **M** and EA-**3**/dn **M** or EA-**2**/dn **G** and EA-**3**/dn **G** EA-**2**/dn **INF** and EA-**3**/dn **INF**
Application documents and Technical/Advisory for Conformity Assessment Bodies	• **M**andatory or • **G**uidance or • **INF**ormative	EA-**4**/dn **M** and EA-**5**/dn **M** EA-**6**/dn **M** and EA-**7**/dn **M** EA-**4**/dn **G** and EA-**5**/dn **G** EA-**6**/dn **G** and EA-**7**/dn **G** EA-**4**/dn **INF** and EA-**5**/dn **INF** EA-**6**/dn **INF** and EA-**7**/dn **INF**

In the table, **dn** refers to the document number which is the order number.

Supplements to existing documents may be published.
They are identified with an "S" added to the reference of their "father" document. For instance, the document "Criteria for membership" is a supplement to the EA Rules of procedure. It is identified as EA-1/17 S1.

6.2   Initial referencing of documents

Documents in preparation shall be given a unique identification (e.g. as footnote), which shall include at least the title (short form, if appropriate), the actual date and the owner (if not defined elsewhere).

7   DOCUMENT TRACEABILITY

7.1   EA Documentation Master List

The Secretariat maintains a Documentation Master List. This is a working list used for document control purposes and which is not published.

The Master List is updated on a continuous basis in the Secretariat according to the information arising from the EA committees and the Secretariat itself.

For each document, the Master List identifies the following information:
- the reference number of the document;
- the title of the document;
- the category of the document according to EA-1/14, if applicable;
- the EA body owner of and responsible for the document;
- the number and date of last revision;
- the correspondence information with an equivalent ILAC, IAF or ILAC/IAF publication, where relevant;
- the status of the publication: new, (to be) revised, withdrawn;
- the planned date for next review.

7.2   Periodical review of documents

Each EA committee is responsible for the periodical review of the documents it owns. This review shall be carried out at least every 5 years.

Before each committee meeting, the Secretariat checks the Documentation Master List in order to ensure that all documents due to review will be considered at the meeting.

This review aims to confirm the document status. It may result in:

➢ a new work item proposal (if applicable):
- for revision of an existing document; or
- for drafting of a new document;

➢ confirmation of the document without any change,

➢ the withdrawal of the existing document.

8   DOCUMENT AVAILABILITY AND ARCHIVING

8.1   Internet availability of EA documents

EA documents, approved according EA-1/14, shall be made available in the public part of the EA website, unless EA decided differently.

The documents will remain available until they are replaced by a revised version or withdrawn according to the applicable rules.

When an EA document is withdrawn, it is identified as such in the list of EA publications, EA-INF/01, and on the website. On the website, the link to the document is de-activated but reference to the document remains visible for one year. Then, the document disappears from both the EA list and the website and is archived according to the applicable rules.

8.2   Retention of documents

The Secretariat keeps (electronic) archives of all EA documents.

The following withdrawn documents shall be archived for a period of 5 years:
- Governance and policy documents,
- Guidelines and informative documents,
- Procedures and Instructions.

The following withdrawn documents shall be archived for a period of 2 years:
- Templates and form sheets,
- Lists,
- Terms of References,
- Any other documents, unless there are applicable legal requirements.