

# How the Cloud is Transforming Document Management in Modern Manufacturing

By taking a cloud-based approach, all stakeholders can access a single source of data.

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Manufacturers are grappling with multiple challenges—global competition, evolving quality standards, regulatory compliance, and profitability—not to mention a demanding, informed consumer. With no room for inefficiency in managing operations, companies have to rely on internal business processes to effectively support the enterprise.

Outdated technology, however, cannot keep pace with growing demands, particularly in the area of document management. As organizations wrestle with the “data-driven enterprise,” they must still rely on suppliers, manufacturing partners, and other specialized outside resources to support operations. As a result, the criticality of document control increases exponentially. A survey conducted by IDC among workers and IT professionals reported that document challenges account for 21.3% of productivity loss.<sup>1</sup>

Disparate applications used by internal and external stakeholders for document management create barriers that slow business processes and jeopardize regulatory compliance and quality. Without integration among systems, workers find they must use manual workarounds to update and share information. Multiple software applications also make version control, review, and security extremely challenging, if not impossible.

To address these issues, many companies have taken a patchwork approach by trying to tie together legacy systems or add new applications that aggravate instead of fixing problems. Rather than support a multitude of software programs, forward thinking organizations are taking the opportunity to rethink document control and the opportunities presented by cloud-based solutions. Without needing to install and maintain software or connect to disparate systems, employees can focus on what’s important to the business, working within one platform that unifies and automates document management throughout every aspect of business operations—from R&D and quality to legal and marketing. By taking a cloud-based approach, all stakeholders can access a single source of data fostering greater collaboration, transparency, and efficiency across the product journey. Simultaneously, companies can reduce IT burdens and costs while remaining on the cutting edge.

Working in a multi-tenant cloud application also secures information with authorized access. Highly granular, permission-based document security restricts access to only approved users. In addition, technology is automatically updated. IT never worries about current versions or rescaling the system as work changes or increases and new sites open.

By adopting a cloud-based document management system that streamlines business processes, digitizes information, and unifies stakeholders on one platform, manufacturers can work smarter, faster and address the following challenges that often cause friction in business processes.

## Break Down the Silos

Without a centralized system, business departments and sites use their own applications and operate in silos, which hinder collaboration and transparency. For example, if the R&D team uses their own combination of software to support their operations, information cannot be readily shared with the quality and marketing teams in real-time. Collaboration across departments is simply not possible.

Problem resolutions often result in overcorrections as functional areas create their own new processes instead of interacting with other departments to determine a company resolution. Inconsistent document handling across different departments also poses business risks as no uniformity exists to support information sharing, retrieval, or compliance.

A cloud-based document management solution breaks down the walls and supports true collaboration among different functional areas while providing true transparency throughout business operations. Working on the same platform, every user can directly share the latest document version with each other and outside suppliers and partners such as manufacturing documentation, supplier change notifications, and quality manuals in standardized formats without delays that slow down communications and productivity.

## ONE PLATFORM

A mid-sized American skincare manufacturer primarily using Excel spreadsheets and paper-based methods to create documentation could not properly sustain business operations due to rapid growth. By moving to a cloud-based document management solution, the enterprise moved stakeholders onto one platform that automated processes, opened collaboration, and increased transparency into business activities. Now, management has direct access to content to make better decisions and keep programs on track.

## DOCUMENT CONTROL

A Fortune 500 company of household products experienced quality and compliance issues when using a combination of systems, SharePoint, and paper for managing documentation. Inconsistent document handling across manufacturing sites caused problems with communications and document control. By implementing a unified document control solution, the company created a consistent, compliant, audit-ready environment for its manufacturing documents and activities at key sites. Documentation including SOPs, policies, work instructions and contracts are now accessible in one location.

## A CLOUD-BASED SOLUTION

A wholly-owned subsidiary of a Top 5 CPG company found it increasingly difficult to manage quality processes and documents as existing tools were mostly paper-based or disconnected on-premise software. By moving to a cloud-based document management solution across the entire organization, the company unified processes and documents to become more compliant and efficient.

## Eliminate Manual and Redundant Work

Legacy and disconnected systems make document sharing difficult, leading to manual workarounds and redundant work. Different stakeholders may even use a combination of applications, spreadsheets, and paper reports that expose the company to operational errors and compliance breaches. Employees rely on email to manage and share digital assets. As documentation is received in different formats, recipients must reconfigure data and upload it into their own systems. The end result is multiple versions of the same data in different systems throughout the corporation.

A modern document management system unifies content on one platform so that users can automatically access and share information without toggling between applications or sending an email. Stakeholders can create, send, store and manage documentation in the same platform using the same formats to eliminate redundant work and capture the right information.

Authorized workers can automatically access needed documents without requesting or waiting for them. With documentation activities completely automated and information digitized, collaboration becomes easy and productivity rises.

## Create a Single Source of Truth

Lack of transparency in document creation presents challenges with version control. Having been emailed a document, a team member may not know if the information is the latest version, jeopardizing quality and compliance. Without an audit trail to show users, records, workflow, and signoffs, companies cannot trace and control document creation or even ensure authenticity.

A cloud-based document management system controls file edits and versions while offering visibility into the entire document's creation to establish a reliable audit trail. Teams can see who made changes and access previous versions. Users can log into the cloud-based system to review, change or electronically sign off on the latest approved version of any document. Once a user enters information, the system automatically updates documents so everyone is working with the latest version. Processes that took weeks can be accomplished in just days or hours.

## Gain Real-Time Visibility

Without a common platform, employees and partners cannot automatically access documents from one source. Worse, information is not available in real-time. As some document management applications update only once or twice a day, high probability exists that users are not working with the latest data at any given time.

According to a McKinsey report, employees spend 19% of the workweek searching or gathering information.<sup>2</sup> Using a cloud-based system, documents are available in one location so workers can quickly find the most current version with the click of a button. Built-in search capabilities also help team members locate documents faster.

Authorized stakeholders gain visibility into real-time data across end-to-end processes. Management can access information across the broad spectrum of business activities to get a succinct view of operations. Information is always current as the system automatically updates with each data entry. Interactive dashboards let teams know program status and when to take next steps. With a current view of activities at different sites, project managers can identify potential problems to keep programs on track. An added plus is the secure availability of

documentation anytime, anywhere. Employees can pull information at a client or supplier site to expedite business activities.

## Connecting It All Together

Not all manufacturers produce the same documentation. Some products go through clinical trials while others require testing to prove claims. Some manufacturers also require regulatory documentation to prove product efficacy, safety, and composition. Rather than using separate applications to address different requirements, a unified document management system can offer a comprehensive solution on one platform.

Documents are related and referenced to each other and create a single thread of information from R&D to regulatory and quality and on to legal and marketing. Using the same information, quality can develop products based on the right regulations and specifications outlined from R&D and regulatory. At the same time, marketing and legal can collaborate on creating materials working with the same documentation.

By replacing outdated document management systems with modern solutions, companies can connect people and processes to operate at the highest levels of efficiency and productivity to maintain a competitive edge.

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<sup>1</sup> Webster, M. (2012, September) Bridging the Information Worker Productivity Gap: New Challenges and Opportunities for IT. Retrieved from: [http://en.community.dell.com/cfs-file\\_keycommunityservercomponents-postattachments/00-20-32-01-31/Adobe-IDC-Whitepaper-Bridging-the-Productivity-Gap-GlobalWP.pdf](http://en.community.dell.com/cfs-file_keycommunityservercomponents-postattachments/00-20-32-01-31/Adobe-IDC-Whitepaper-Bridging-the-Productivity-Gap-GlobalWP.pdf)

<sup>2</sup> The McKinsey Global Institute (2012, July) The social economy: unlocking value and productivity through social technologies. Retrieved from: <https://www.mckinsey.com/industries/high-tech/ourinsights/the-social-economy>