

The objective of this procedure is to define the best practices for document management, to detail its operation, as well as the roles and responsibilities of each individual.

Electronic Document Management Procedure for the Supply Chain (EDM)

SC-P-WW-00

DIRECTION GLOBAL PURSHASING & SOURCING

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Lexicon :

DRAFT: Draft

EAF: Europe Africa

FP: Practical sheet

G: Guide/Book

EDM: Electronic Document Management

GPS: Global Procurement & Sourcing Department

N: Internal Note

P: Procedure

SC: Supply Chain

WW: Worldwide

I) OBJECTIVES

Electronic Document Management System is used to organize and manage all types of documents within an organization and facilitating their access, creation, tracking, distribution, and storage.

This procedure outlines best practices, roles, and responsibilities for each stage of the document lifecycle, specifically for documents intended for online publication and employee access.

This document applies to all Club Med Supply Chain personnel involved in document creation, updates, tracking, storage, distribution, and online database updates.

II) ROLES AND RESPONSIBILITIES

| Role | Responsibility |
|---|--|
| <ul style="list-style-type: none">Logistics Methods SC | Creates, drafts, revises, and translates documents according to established standards. |
| | Ensures distinction between principles and methods in writing to guarantee widespread applicability. Example: Principle ==> respect delivery times / Method = Deadline must be within 48 business hours |
| | Submits documents for review and approval |
| | Publishes the final document online in the Supply Chain storage space and in the Procedures Library. |
| | Analyzes and incorporates feedback. |
| | Archives documents (both DRAFT and final versions) appropriately and/or forwards them to the relevant departments. |
| | Updates the online database, ensuring consistency between files and the database and tracking revisions. |
| | Ensures documents are created/updated according to the established standards in this procedure |
| | Verifies that links between documents are current |
| | Communicates the publication to all stakeholders. |
| <ul style="list-style-type: none">Consultation committeeBusiness Expert depending on the subject | Assists in document drafting (proofreading, comments) to ensure information reliability. |
| <ul style="list-style-type: none">Internal AuditFinance | Receives draft for proofreading |
| | Ensures information accuracy. |
| | Checks for ambiguity, contradictions, or redundancy in the document. |
| | Submits comments and forwards them to editors for corrections |
| <ul style="list-style-type: none">Purchasing and Logistics DirectorDirect CSP Supply Chain | Receives the document after proofreading |
| | Conducts a final review of the document. |
| | Provides comments and forwards them to editors for corrections. |
| | Approves the document for publication |
| <ul style="list-style-type: none">WW GPS Manager | Proofreading and comments on approved and translated documents (WW scope) |

III) RELATED DOCUMENTS

[Library of Procedures – User Guide](#)

IV) CONTROLS

The Internal Audit and Supply Chain-Logistics Methods departments (or any other department validated by the Supply Chain's Direction) can carry out checks at any time to ensure the correct application and compliance with procedures.

It ensures the detection of possible misunderstandings or anomalies and therefore, taking the action of updating the documents involved if necessary.

V) FLOW CHART

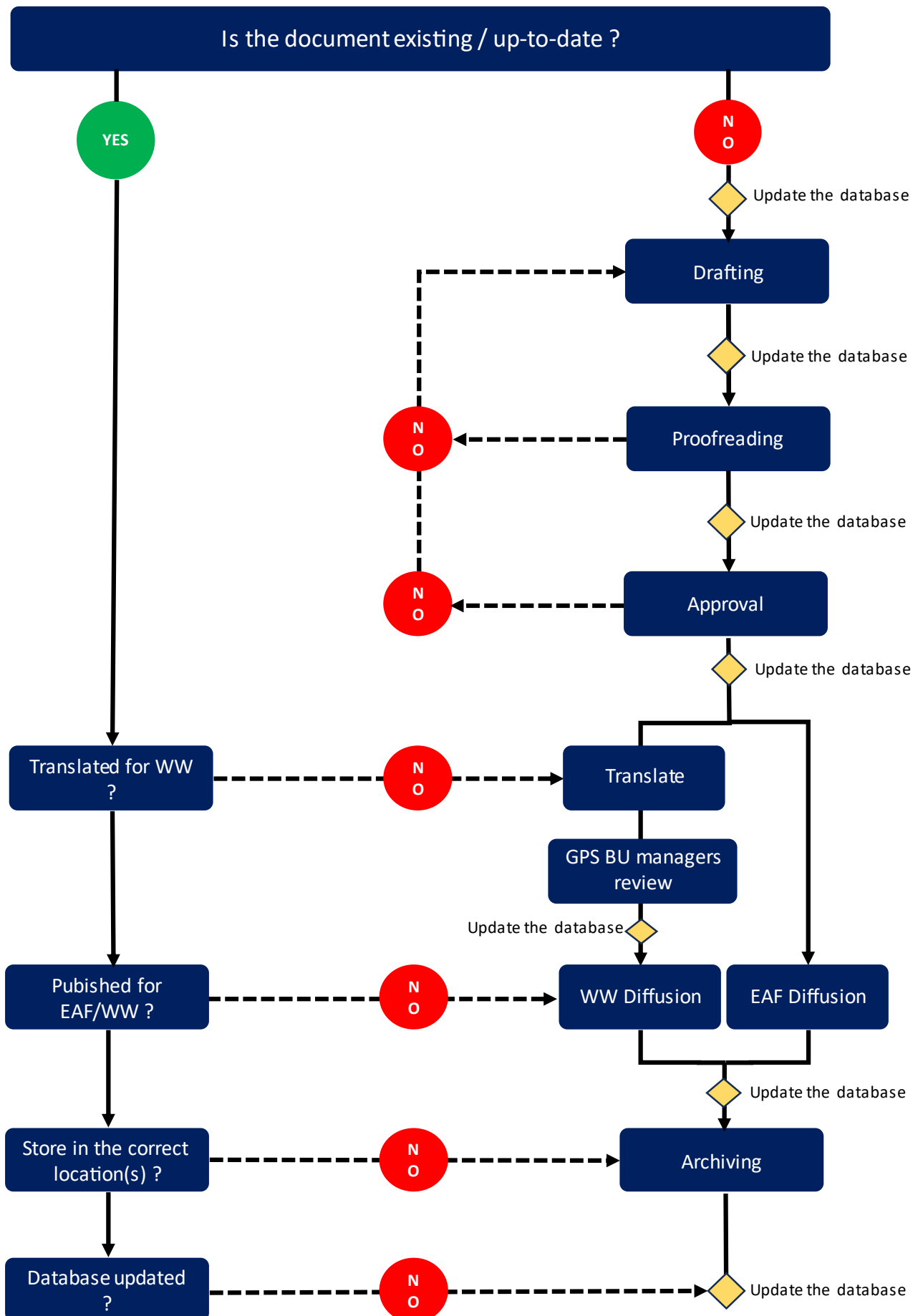


Figure 1- Summary flowchart of the EDM

VI) DESCRIPTION

a. Managing the online document database

i. General

The Electronic Document Management database is an online system that centralizes and lists all documents useful for task and function execution.

It consolidates essential document information in one place, enhancing accessibility and simplifying searches through links between different documents that might be stored elsewhere.

It also improves document tracking with filter systems for quick attention points and alerts when documents are nearing expiration and need revision.

The Logistics Methods department is responsible for maintaining and updating the database to ensure information is always reliable and current.

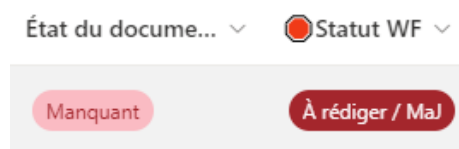
i The database is available here : [GED Supply Chain](#)

The database consists of document records in a list format.

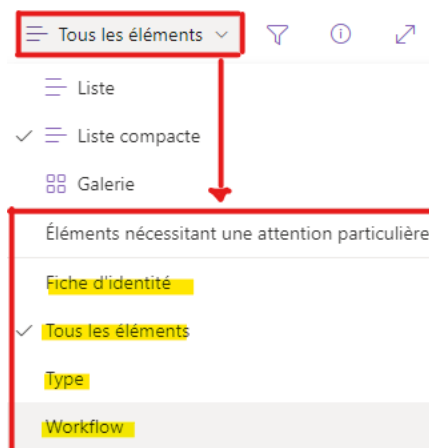
Each document record includes several fields, categorized into:

- **Document identity card** : Includes fields such as name, type, publication status, scope of application/drafting/proofreading, etc.
💡 For more details, refer to the [Document](#)
- **Approval workflow** : Includes fields initiating the document approval process, such as the allocation of people/groups to tasks, dates for validation (proofreading/approval), task due dates, etc.
💡 For more details, refer to the [Approval workflow](#)

! Any missing document must also be identified by creating a new record with the document status: “Missing” and the approval workflow set to the status “To be drafted / Updated” until an editor is assigned.




i To facilitate visualization, you can switch between different display types based on your needs by clicking to the left of the filter button and selecting the desired view:



ii. Registration in the database

1. Create / Update a file

All documents, even missing ones, must be recorded in the database with their main identifying information.

- To **create a new file**, go to the [GED Supply Chain](#) and click on the button  (See [Figure 2](#)). The input form opens.
- To **update an existing file**, there are several options (Cf. [Figure 2](#))
 - Select the form (small check mark on the left) and click on “Edit” in the top menu : it opens the input form.
You can edit multiple records in bulk by checking several at once.
 - Edit in grid mode: fields in the records are transformed into editable boxes, without needing the input form (not always available, depending on the displayed views)
 - Double-click on the document form: opens the input form
 - Click on the document's title: opens the input form

01 – Create a record by clicking « New » to open entry form

02 – Edit one or more records by selecting it/them and clicking 'Edit' to open the entry form

03 – Edit one or more records without opening the form by clicking 'Edit in grid mode'. (dependson the view)

04 – Edit a record by double-clicking it to open the entry form.

05 – Edit a record by clicking its title to open the entry form.

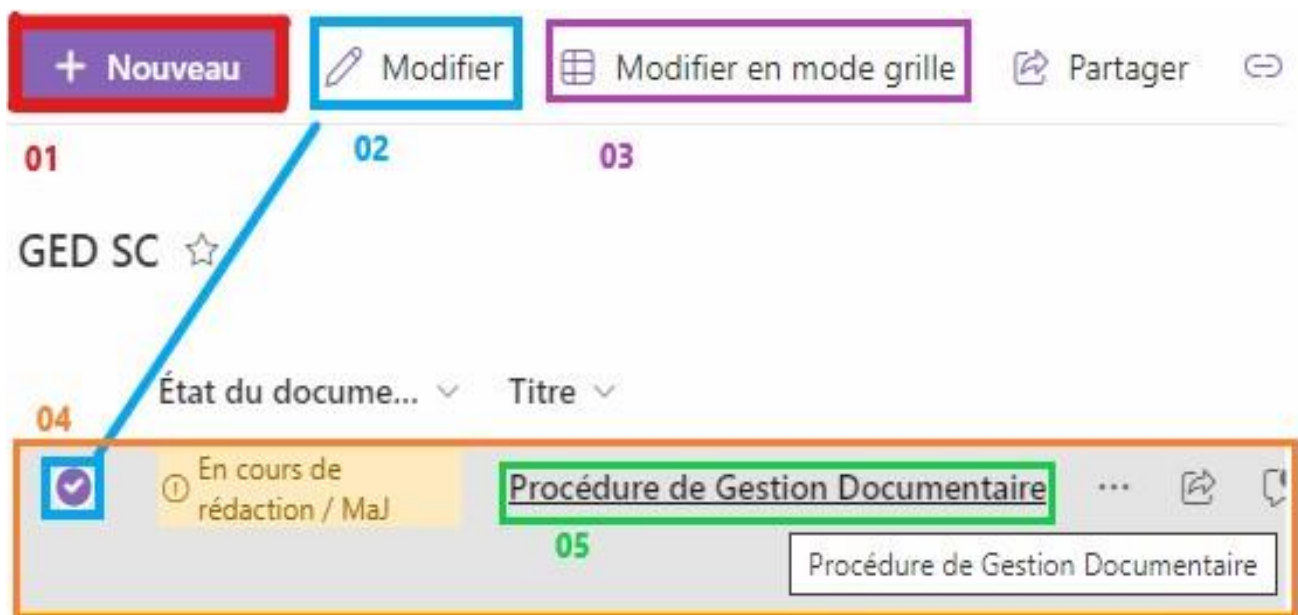


Figure 2- Update a record on the online database

2. Document identity record

Below are the fields that make up the document's identity record and the type of input required in the form (excluding the approval process)

💡 For more details on entering workflow fields, refer to the [Approval workflow](#)

Table 1- Document identity card fields in the online database

| FIELDS | DESCRIPTION | FORM ENTRY TYPE |
|---------------------------------------|---|--|
| Document Status | <p>Indicates the document's general status:</p> <ul style="list-style-type: none"> • Missing : the document does not exist and must be created, no editor is assigned • To review : the document is expiring/ expired, or needs updating <p>⚠️ These 2 states necessarily imply the opening of an Approval workflow</p> <ul style="list-style-type: none"> • Currently being written / Updated : A new version is in progress in the workflow • Up to date : the document is online in its latest version | <ul style="list-style-type: none"> • Mandatory • Choice list (single choice) <div> <div>⊗ Manquant</div> <div>⚠️ À réviser</div> <div>⌚ En cours de rédaction / MaJ</div> <div>✓ À jour</div> </div> |
| Title | File name according to Naming convention | <ul style="list-style-type: none"> • Mandatory • Free text (max 255 characters) |
| Public Link | <p>Link to the document published online (Procedures library / GPS Tool Box)</p> <p>⚠️ Check access to ensure that the document is accessible to everyone</p> | <ul style="list-style-type: none"> • Hyperlink • Enter a clear name in the “alternative text”. The link will display the entered text <p>🔗 Lien Public</p> <div> <div>https://tinyurl.com/FP-Traiter-litige-logistique</div> <div>Traiter un litige logistique</div> </div> <p>ℹ️ If the link exceeds 255 characters, reduce it using a third-party tool</p> |
| Department application | <p>Department to which the document applies</p> <p>💡 Autocomplete: <i>Supply Chain</i></p> | <ul style="list-style-type: none"> • Does not appear in the input form (Autofill column) |
| Content Type | Nature of the document (Procedure, Practical Sheet, Guide, Internal Note, etc.) | <ul style="list-style-type: none"> • Mandatory • Choice list (single choice) |
| Geographic scope | Is the document intended for Worldwide (WW) or Europe Africa (EAF) | <ul style="list-style-type: none"> • Mandatory • Choice list (single choice) |
| Document code | Internal ID according to Naming convention | <ul style="list-style-type: none"> • Free text (max 255 characters) |
| Objective | Document function | <ul style="list-style-type: none"> • Free text without limits |
| Revised on | Last update date of the published version | <ul style="list-style-type: none"> • Date |
| Expires on | <p>Maximum date by which the document must be reviewed</p> <p>💡 Autocomplete according to the “Revised on” date entered (default + 2 years)</p> | <ul style="list-style-type: none"> • Does not appear in the input form (Autofill column) |
| References | Mentioned annexed documents | <ul style="list-style-type: none"> • Rich text (links, layout, etc.) |
| Languages | Availability of the document in different languages | <ul style="list-style-type: none"> • Choice list (multiple choices) |
| Writing scope | <p>Sector(s) authorized to create, review and submit documents for review/approval</p> <p>💡 Autocomplete: <i>SC Logistics Methods</i></p> | <ul style="list-style-type: none"> • Does not appear in the form (Autofill column) |
| Proofreading scope | <p>Sector(s) authorized to reread and comment on the document to validate sending for approval</p> <p>💡 Autocomplete: <i>Internal Audit / Finance</i></p> | <ul style="list-style-type: none"> • Does not appear in the form (Autofill column) |
| Approval scope | <p>Sector(s) authorized to approve the document in its final version and send it for distribution</p> <p>💡 Autocompleted: <i>CSP Supply Chain Director / Purchasing and Logistics Director</i></p> | <ul style="list-style-type: none"> • Does not appear in the form (Autofill column) |
| Distribution and Storage scope | <p>Sector(s) responsible for storing and making the document available</p> <p>💡 Autocompleted: <i>SC Logistics Methods</i></p> | <ul style="list-style-type: none"> • Does not appear in the form (Autofill column) |

3. Approval workflow

When a document needs to be created or updated, it enters a multi-step process before it can be published and made available to collaborators in its final version. This is known as the approval workflow.

The steps and parameters of the Workflow should be defined in advance to assign tasks efficiently and ensure a swift release of the new document:

- Scope of action (who is authorized to write/read/approve, etc.)
- Completion time
- Mode and channels of diffusion/communication
- Storage location for drafts/final versions/obsolete versions
- Tracking/approval method (email, automation, etc.)
- ...

For the agreed parameters for the Supply Chain, refer to *Figure 3*:

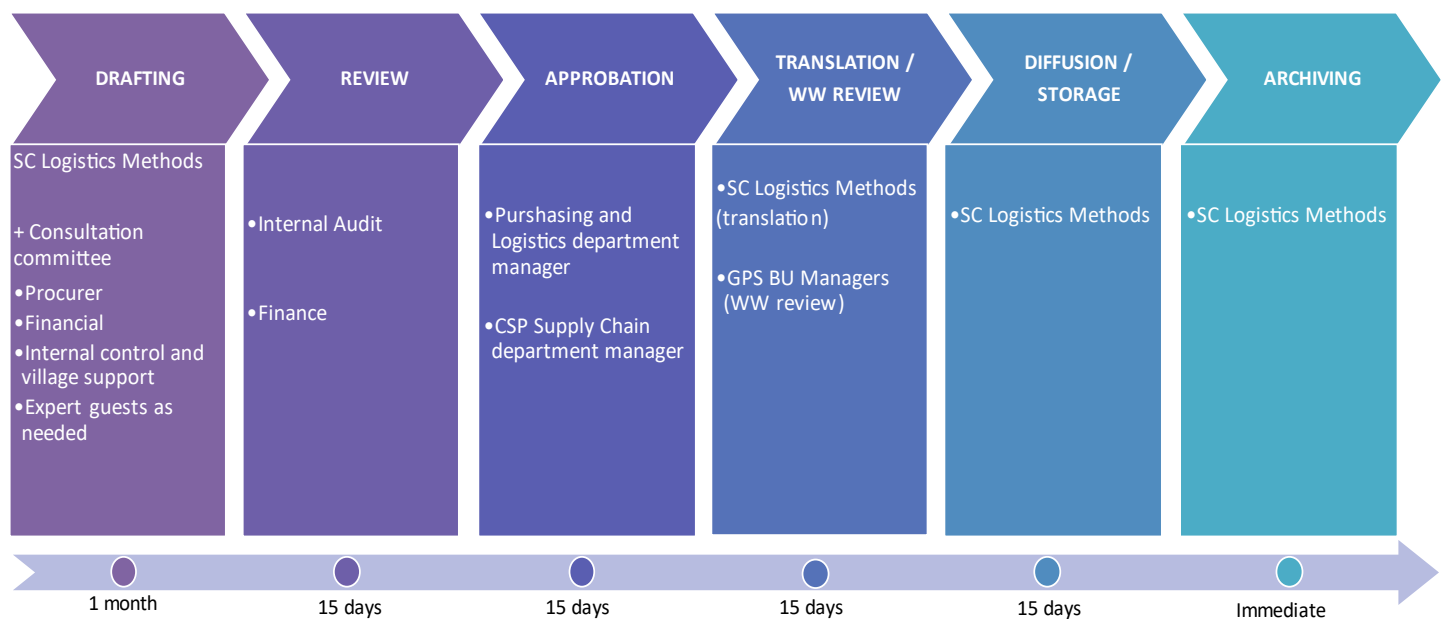







Figure 3 Supply Chain approval workflow - Scope and deadline



Any new or updated document must undergo a two-step validation (proofreading/approval) before publication and archiving.

Documents intended for WW must also be translated and sent to GPS BU WW Managers for proofreading before publication

The steps in the approval process when creating/updating documents are defined as follows:

1. **Drafting** : An editor has been assigned. The document is currently being drafted (created or updated). The author(s) may rely on a consultation committee comprised of experts to conduct an initial review and refine the draft to ensure it is as complete as possible.
 For more details, refer to the sections [Creating a new document/ Writing / Revisions](#)
2. **Review** : Once the draft is completed, it is sent to designated reviewers for the first validation step. The draft may be revised based on reviewers' comments before being forwarded for approval.
 For more details on proofreading a document, refer to the [Proofreading](#)
3. **Approval** : Approvers receive the reviewed document for the second and final validation step. They may provide feedback to amend the draft before giving final approval.
 For more details on how to approve a document, refer to the [Approval](#)
4. **WW Translation and Proofreading**: Once a document intended for global distribution is approved in its final version, it is translated into English and sent for review to WW BU Managers.
 For more details, refer to the [WW Controls](#)
5. **Distribution / Archiving** : Once the document is approved in its final version, designated staff make it available to employees. The document is then stored and published in the predetermined distribution channels and storage locations
Obsolete and draft versions are also archived.
 For more details, refer to the [Distribution and Archiving](#)

To ensure effective monitoring of the process, the Logistics Methods team updates the online database as the various stages progress ([GED Supply Chain](#))

Below, in [Table 2](#) are the fields that make up the document's approval workflow record and the type of input required in the form in the online database:

Table 2- Workflow fields of the document record

| FIELDS | DESCRIPTION | FORM ENTRY TYPE |
|---|---|---|
| Workflow status | Indicates the general state of the document: <ul style="list-style-type: none"> To create / Update : No author is assigned, writing has not started Currently being written / Updated : An editor has been assigned, a draft has started In review : the draft is sent for review (first validation) In approval : the review has been validated and the document sent for final approval In WW control : the document is being translated by the Methods Logistics team or reviewed by the WW Bus To be published : the document has been approved in its final version but is not yet published / archived Done – no WF in progress : the document has been published and archived in its final version. The workflow is complete. | <ul style="list-style-type: none"> Mandatory Choice list (single choice) To be updated according to progress until closing |
| Author(s) | Authorized assigned persons assist the editor bringing their professional expertise | <ul style="list-style-type: none"> Person or group Multiple selection |
| Support – Consultation committee | Assignment of people authorized to assist the author through their expertise. | <ul style="list-style-type: none"> Person or group Multiple selection |
| Start DRAFT | Date when drafting began | <ul style="list-style-type: none"> Date |
| DRAFT Deadline | Maximum date by which the draft must be sent for review 🕒 Autocomplete according to “DRAFT Start” date entered (default + 1 month) | <ul style="list-style-type: none"> Does not appear in the input form (autofill column) |
| Draft link | Direct link to draft file | <ul style="list-style-type: none"> Hyperlink |
| Replay status | Indicates whether the document has been sent for review and validated | <ul style="list-style-type: none"> Choice list (single choice) |
| Reviewer(s) | Assigning a person or group of people to proofread the document | <ul style="list-style-type: none"> Person(s) or group(s) Multiple selection |
| Date sent for review | Date the draft was sent for review | <ul style="list-style-type: none"> Date |
| Review deadline | Maximum date by which the review must have been done 🕒 Autocomplete according to “Date sent for review” entered (default + 15 days) | <ul style="list-style-type: none"> Does not appear in the input form (autofill column) |
| Approval status | Indicates if the document has been sent for approval and validated | <ul style="list-style-type: none"> Choice list (single choice) |
| Approver(s) | Assignment of one or more persons or groups to approve the document | <ul style="list-style-type: none"> Person(s) or group Multiple selection |
| Date sent for approval | Date the document was sent for approval | <ul style="list-style-type: none"> Date |
| Approval due date | Maximum date by which the document must have been approved 🕒 Autocomplete according to “Send for approval date” entered (default +15 days) | <ul style="list-style-type: none"> Does not appear in the input form (autofill column) |
| Approval | Indicates the approval date (received by email) and the approver | <ul style="list-style-type: none"> Free text |
| WW control | Indicates the status of WW translation and proofreading | <ul style="list-style-type: none"> Choice list (single choice) |
| WW start date | Date the WW process (translation/proofreading) started | <ul style="list-style-type: none"> Date |
| WW deadline | Maximum date by which the document must be finalized WW 🕒 Autocomplete according to “Send for approval date” entered (default +15 days) | <ul style="list-style-type: none"> Does not appear in the input form (autofill column) |
| GPS diffusion | Has the document been stored in the GPS ToolBox folders for the SC library to update | <ul style="list-style-type: none"> Choice list (single choice) |
| Procedures Library diffusion | Has the document been sent to the procedures’ library for publication | <ul style="list-style-type: none"> Choice list (single choice) |
| Comments | Log the dates and updates made to the document | <ul style="list-style-type: none"> Free text |

b. Creating a new document



i. Naming convention

The naming convention establishes the standards to be used for the file name and the creation of the document code. This allows efficient categorization and quick identification of documents.

The document code is a unique identifier assigned to Supply Chain documents (procedures, guides, notes, practical sheets).

The standards for Supply Chain documents are defined in [Table 3](#) below:

Table 3 Supply Chain document naming convention

| | |
|---------------|--|
| File name | <p>The file name must be structured as follows: Document code – Language – Document subject – Revision date <u>Example :</u></p> <ul style="list-style-type: none">Document in English ref SC-P-WW-00 about electronic Document Management procedure (EDM) revised on April 2024 = SC-P-WW-00 – EN – Document management procedure – Apr 24 <p> Do not mix the name of the file (name on which it is saved) and the title of the document (typed in the document) <u>Example :</u> file name “SC-P-WW-00 – FR – Document management procedure – Apr 24” / title in the document “Electronic Document Management Procedure (EDM)”</p> |
| Document code | <p>The document code is a fixed value to be generated at the document creation and structured as follows: Department applying the procedure - Type – Geographic scope (WW/ EAF) - Document number <u>Example :</u></p> <ul style="list-style-type: none">Procedural Supply Chain document , WorldWide distribution , 1st document = SC - P - WW - 01Guide Supply Chain document, EAF diffusion, 16th document = SC - G - EAF - 16 <p> Before assigning a code, verify the existing codes in the database to avoid duplicates and ensure logical continuity of document numbering.</p> |

ii. Template and document identity

To maintain consistency among documents and facilitate their management, check if a Template exists for the type of file being created.

The available Templates for the Supply Chain are accessible here: [Template](#)

Each document must include an identity section completed with at least the following information:

- Document revision date
- Editor
- Document code

Example of an identity section on procedure-type documents:

| Words keys : Procédure – Supply Chain – Gestion – Documents | | | | |
|---|---|--|--|---|
| Title : Procédure de Gestion Électronique des Documents | | | Document code : SC-P-WW-00 | |
| Revision date | Drafting | Proofreading : | Approval | Date application : |
| April 2024 | SC Logistics Methods : Amandine Asset | Internal Audit Department : Julie BOURGOIN Camille BAUBY EAF Finance Department : Pierre-Olivier HOT | GPS direction: Franck PICABEA (06/13/24) EAF Supply Chain Department : Christophe GALY (05/30/24) | Date au format XX/ XX/20XX Cliquez ici pour entrer du texte. |
| Perimeter application | | | | |
| Worldwide Supply Chain | | | | |

c. Writing


The document that enters the drafting phase (new document or update) is in DRAFT state.

When writing the document, it is essential to clearly **distinguish the principle from the way of doing** ensuring that the document adheres to standard norms with the broadest possible scope of application.

The editor can rely on a consultation committee composed of experts authorized to perform an initial review and provide assistance and feedback to the editors to ensure the draft is as comprehensive and polished as possible.

Once the draft is completed, the editor sends the document for proofreading to the authorized staff within the agreed review scope.

The editor is responsible for following up and ensuring that the review deadline is met to maintain an efficient approval workflow.

 For more details on the people authorized to write, support or even write/ update deadlines, please refer to Figure 3 - *Figure 3 Supply Chain approval workflow - Scope and deadline*

Before sending, it is crucial to verify that everything is up to date in the document and in the database to ensure an effective monitoring.

See *Figure 4* for a (non-exhaustive) list of checkpoints before sending

| Database update | File settings | Layout | Rédaction |
|--|--|--|---|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/> Updated status | <input type="checkbox"/> Correctly named | <input type="checkbox"/> Suitable template | <input type="checkbox"/> Addressed comments |
| <input type="checkbox"/> Identified person/group | <input type="checkbox"/> Store in the right location | <input type="checkbox"/> Identity box filled out | <input type="checkbox"/> No inconsistencies/ redundancies |
| <input type="checkbox"/> Date(s) recorded | <input type="checkbox"/> Sharing access configured | <input type="checkbox"/> Functional links | <input type="checkbox"/> Accuracy of information |

Figure 4- Writing Check List



SC Logistics Methods : Update the workflow status in the online database and enter the drafting fields.


d. Proofreading

Once the document is written, it undergoes proofreading before approval. The people authorized to proofread must check and ensure the following points:

- Accuracy of the information
- Absence of ambiguity/contradiction/redundancy
- No open questions
- Completeness of the document (ensuring the document is comprehensive and finalized)

The proofreader sends back their validation to the editor, indicating:

- **Comments for modifications:** the editor analyzes the relevance of the comments and modifies the document if necessary, before sending it for approval. (It is not required to resend the document for proofreading after applying any corrections)
- **Validation to send for approval:** if no changes are needed, the document can be directly sent for approval.

 For more details on authorized proofreaders, database update and deadlines refer to Figure 3 - *Figure 3 Supply Chain approval workflow - Scope and deadline*




SC Logistics Methods : Update the workflow status in the database to “Replaying” and enter the review fields

e. Approval

When the document is validated after the proofreading, it is sent for final approval to the authorized staff who will perform a final proofreading to ensure the document is up to date and as complete as possible.

The approver can enter their comments and send a return email to the editor with:

- **Comments for changes:** the document must be corrected before being sent again for approval (no need for Audit/Finance rereading)
- **Approval** : the document can be translated / published and archived in the appropriate locations

 For more details on authorized personnel for document approval, refer to Figure 3 - *Figure 3 Supply Chain approval workflow - Scope and deadline*



Approval emails must be archived in the SharePoint [SC Logistics Methods EAF documents](#).




SC Logistics Methods : Update the workflow status in the database to “In Approval” and enter the approval fields. When the document is approved and ready to be published, the status can be changed to “To be published”.

f. WW Controls

Before their publication, the documents intended for a worldwide application must:

- Be translated and corrected by the Logistics Methods team and then sent to GPS BU WW managers
- Be reviewed and commented on by GPS BU WW managers and then returned to the editors

If necessary, the document is corrected depending on the feedback received before it can be published and stored according to the agreed methods (see the *Distribution and*)

 For more details on the authorized personnel, refer to Figure 3 - *Figure 3 Supply Chain approval workflow - Scope and deadline*





SC Logistics Methods : Update the workflow status in the database to “In WW control” and enter the control fields.


g. Distribution and Archiving

When the document is approved, it can be published and made available to employees.

Authorized staff for distributing and storing the document:


- Submit documents for publication on the SharePoint [Procedures Library](#) (For updating an existing document, the obsolete version should be archived, and its deletion from the procedures library should be requested.)
 For more details on using the Procedures Library, refer to the document [Library of Procedures - User Guide](#)
- Store the final and editable versions in the appropriate locations (SC Logistics Methods & GPS ToolBox)
- Ensure that published links are accessible to all employees
- Archive obsolete versions

 For more details on the people authorized for distribution and archiving, refer to Figure 3 - *Figure 3 Supply Chain approval workflow - Scope and deadline*


 **SC Logistics Methods** : Updates the workflow status in the database to “Published – Updated” once the document is published as well as the date, storage and link fields.
Records the updates made: who wrote, who proofread, who approved and on what date, in the comments then resets the writing/proofreading/approval fields


h. Revisions

To ensure that the information communicated in the documents is still compliant, regular reviews are essential.
Supply Chain documents are subject to review at least every 2 years.

 Do not wait for the deadline if there is a need for a specific update during the document’s life cycle (legislation changes, methods, etc.)

When a document needs to be revised, create a copy of the existing version and update the file name and identity insert in the document before starting the review.

The added new elements must be identified clearly in the new version. For example, using a pictogram: 
The former version of the document must be archived when the new version is published.

 If there is no substantive change (E.g: just a link update, layout change, correction of mistakes), the document does not need to go through the workflow again.
Any other modification implies that the document goes through the approval workflow

In the database:

- A document requiring updating/revision will have the status “To be revised”
- An alert is automatically generated 3 months before expiry for Logistics Methods to take action
- A workflow should be opened and updated as the review progresses

 **All changes made to the document must be recorded in the workflow comments. Comments should be considered for future revisions.**