

Working Material 2.5

Documented Information: What to Keep, What to Discard

ISO 14001:2026 · Material date: 25 October 2026

This sheet puts the working parts of subchapter 2.5 into editable form: the Verification Pact, the review questions, the common mistakes as a self-check and the Operative Synthesis as an action plan. The empty columns are for your property. The reasoning behind each row is in the book.

GUIDING QUESTION

A laminated card on a wall looks more official than a file on a computer. What happens when the laminated card is nine months out of date and no one ever built a way to know that by looking at it?

Verification Pact: Market Claims Against the Standard

The first three columns are copied from the book. In the last one, note whether this claim circulates in your property — in a proposal, a brochure, a supplier's pitch or your own documents — and what you now hold instead.

What is claimed	Binding?	What actually holds	In our property
Physical documents such as laminated cards fall outside the formal document control system if the organisation's primary system is digital	No	Clause 7.5 applies to documented information regardless of format; a laminated card created for operational use is subject to the same control requirements as its digital source	
Updating a master digital document satisfies clause 7.5.3's control-of-changes requirement regardless of other active instances of the same document	No	The requirement concerns the document's effective control across its actual use, not only the accuracy of a single master copy the update reached	
A document's physical, permanent presence at the point of use is inherently more reliable than a digital equivalent	Not necessarily	Physical presence solves accessibility; it does nothing, on its own, to solve currency, and can actively work against it if no mechanism updates the physical copy alongside the digital one	
A laminated or printed document without a version number or date is still adequately identified under clause 7.5.2 if its content is otherwise clear	No	The clause requires appropriate identification and description, which for a controlled procedure in practice means being able to tell it apart from superseded versions, which an undated, unversioned laminated card cannot provide	
Once a procedure is updated and staff are retrained on the new version, physical copies of the old version pose no further risk	No	Training staff on a new procedure does not remove a physically present, unmarked prior version from the environment where staff, especially under time pressure or in an unfamiliar setting, may still reach for it out of habit or convenience	

What is claimed	Binding?	What actually holds	In our property
Document control requirements are primarily an audit compliance concern rather than an operational safety and environmental concern	No	The Zanzibar case demonstrates a direct operational consequence — an environmental incident — arising specifically from a document control gap, not merely a paperwork discrepancy an auditor might note	

A Checklist for the Next Document Control Review

Answer each question with Yes, Partly, No or N.A., and name the evidence: a record, a date, a person, a place someone can go and look. An answer without evidence is an opinion.

Question	Why it matters	Answer	Evidence
Have we ever conducted a physical walk-through specifically to inventory printed or laminated procedures against their digital sources?	Zanzibar's gap existed for nine months precisely because no one had ever looked		
Does every physical copy carry a visible version number and date?	Without this, currency cannot be verified by anyone looking at the document itself		
Does updating a master document automatically trigger replacement of known physical copies, or does propagation depend on someone remembering?	The single mechanism that would have closed the gap in days rather than months		
Have we asked staff directly whether they have created any personal or informal reference copies outside the formal system?	The inventory at Zanzibar found two further undocumented copies no one had thought to mention unprompted		
When a document is superseded, is the prior physical version disposed of immediately, or does it coexist with the new one for any period?	Any coexistence window is exactly when confusion becomes most likely		

Common Mistakes — Self-Check

Tick every mistake you recognise in your own property today, and write next to it where you saw it. A ticked box is not a nonconformity; it is a place to look before an auditor or an incident does.

☐	Mistake (from the book)	Where we see it
☐	Controlling digital documentation thoroughly while leaving physical copies entirely outside the formal control system.	
☐	Assuming a laminated or printed document's permanent physical presence makes it inherently more reliable than a digital equivalent.	
☐	Failing to identify physical copies with version numbers or dates, making currency impossible to verify at a glance.	
☐	Updating a master document without any mechanism to trigger replacement of known physical counterparts.	
☐	Assuming staff training on a new procedure removes the risk posed by a physically present, unmarked prior version.	
☐	Eliminating physical copies entirely without addressing the genuine operational need that created them, risking uncontrolled informal recreation instead.	

☐	Mistake (from the book)	Where we see it
☐	Failing to maintain any inventory of where physical copies of controlled documents actually exist across the property.	
☐	Treating document control as primarily a digital system concern, overlooking that documented information includes any format the organisation actually uses operationally.	
☐	Assuming an auditor's review of the digital system alone provides adequate assurance of document control, without physically checking posted or printed materials.	
☐	Failing to address informal, personally created reference copies that exist entirely outside organisational awareness.	

Operative Synthesis — Action Plan

The three horizons and their actions are copied from the book. Owner and due date are yours to fill: an action without both is a wish.

Horizon	Action from the book	Owner	Due date
Act on immediately	Walk every operational area of the property and identify every physical printed or laminated procedure currently posted or in use, and check each directly against its corresponding digital master document for currency.		
Plan for	Build a physical-copy inventory linked to every controlled digital master document, with an automatic replacement trigger whenever the master updates; and redesign physical copies to display clear version and date information, with an instruction to verify currency when in doubt.		
Monitor going forward	Include a physical-copy currency check as a standing element of the property's internal audit programme, verifying not only that digital masters are correctly controlled but that every known physical instance actually matches them.		

WHAT THIS SHEET IS NOT

ISO 14001 does not prescribe this form. No clause asks for this worksheet, its columns or a register of market claims; the standard sets requirements and leaves the means to the organisation. This sheet is a working aid drawn from the book: use it, change it or set it aside. Where it touches a requirement, the text of ISO 14001:2026 is the authority, not this page — and nothing on it replaces your own reading of that text.

Source: Francesco Dore, The Helm and the Lens, Volume 1a — ISO 14001:2026, subchapter 2.5. Edizioni Effedore 2026. © 2026 Francesco Dore. Free to adapt for use in your own property. enbooks.effedore.com