

ISO 9001:2008 Template Pack Instructions

Planning to Move to ISO 9001:2008

Waypoint Global wants to help you insure success for moving your ISO documentation to the 2008 revision of the ISO 9001 standard. While our Template Packs help our customer author their QMS documents quickly and accurately, moving this documentation to a new revision of a standard is more challenging.

We have prepared a number of resources to help you through this process. These resources can all be found on our corporate web site ([click here for ISO 9001 Resources](#)). These resources are show below (along with links to more information):

- ***Presentation – “Moving to ISO 9001:2008”*** – Provides an overview of the steps necessary to plan and execute your move to ISO 9001:2008.
- ***ISO 9001:2008 Gap Analysis Pack*** – This package helps you with the Compare, Assess, and Revise phases of the audit preparation process. It includes instructions on how to revise your documents to meet the new revision of the standard, an audit checklist to help you perform a desk audit of your documentation, and analysis and planning worksheets. This is delivered to you as a Powerway POSI file, which will install these documents into your Powerway Desktop System (see below for instructions)
- ***ISO 9001:2008 Provisionary Pack*** – If you have an audit coming up quickly, and do not have time for a thorough assessment, you may be able to modify your existing documents without installing the ISO 9001:2008 template pack and adjust the references in your documents such that they meet the criteria of the audit. The Provisionary Pack provides instructions on how to modify your documents and some worksheets to help you determine which documents are affected the most by the new revision. This is delivered to you as a Powerway POSI file, which will install these documents into your Powerway Desktop System (see below for instructions).

Using the ISO 9001:2008 Gap Analysis and Provisionary Packs

Installation

The Gap Analysis Pack and Provisionary Pack are delivered as Suite 2000 POSI files, and are packaged in a self installing executable file.

- 1) Pick the desired pack from the Powerway web site ([click here](#)) and select the “Save” option to save it to your workstation.
- 2) Run the .exe file and select “Next” to continue through the Installation Wizard.

Using the Documents

Once installed, the documents in the ISO 9001 Gap Analysis and Provisionary Packs are categorized by their Pack name, and can be easily found with Binders by selecting the

pre-packaged Filters that we are providing (see Filters section below). The following documents are included in these packs:

ISO 9001:2008 Gap Analysis Pack

Document Title	Description
Updating management system documents to an evolving standard - A process overview	Procedure for updating ISO documentation in order to conform to new revisions of the standard (Suite 2000 Procedure Document).
Updating Authoring Tool documents for evolving standards	Work instructions for revising documents to bring them into conformance with a new revision of the standard (Suite 2000 Work Instruction Document)
Desk Audit for Document Conformance to ISO 9001:2008	Audit Checklist that leads you through a desk audit of your current ISO documentation and identifies the most likely areas of change (Suite 2000 Audit Checklist)
ISO Documentation Revision Planning Worksheet - 2008 Revision	Provides you with a quick estimate of the work that will be required to bring your documentation up to the new revision of the standard, by taking the results of your Desk Audit and the summarizing document level tasks that we have identified
ISO 9001 2000 - 2008 - Comparative Matrix	Provides element by element analysis of the difference between the 2008 and 2000 revisions of the standard.
ISO 9001 2008 Shall Statement Coverage Matrix	Identifies the Policy, Procedures and Audit Checklist content in the Template Pack that provide support for support each clause in the standard.

ISO 9001:2008 Provisionary Pack

Document Title	Description
Instructions for updating document references to the ISO 9001:2008 revision	Work instructions for revising documents to bring them into conformance with a new revision of the standard without installing the ISO 9001:2008 Template Pack (Suite 2000 Work Instruction Document)
ISO Documentation Revision Planning Worksheet - 2008 Revision	Provides you with a quick estimate of the work that will be required to bring your documentation up to the new revision of the standard, by taking the results of your Desk Audit and the summarizing document level tasks that we have identified
ISO 9001 2000 - 2008 - Comparative Matrix	Provides element by element analysis of the difference between the 2008 and 2000 revisions of the standard.
ISO 9001 2008 Shall Statement Coverage Matrix	Identifies the Policy, Procedures and Audit Checklist content in the Template Pack that provide support for support each clause in the standard.

Filters

The following Filters will be available:

Filter Name	Binder Contents
ISO 9001:2008 Gap Analysis Pack	All documents included in the ISO 9001:2008 Gap Analysis Pack

Installing the ISO 9001:2008 Template Pack

The ISO 9001:2008 Template Pack is included in version 3.00 of Suite 2000. A new license is required for this Template Pack, but it is included in maintenance if you are currently on maintenance for the ISO 9001:2000 Template Pack.

Installation

- 1) Upgrade your installation of Suite 2000 to version 3.00. You can request the latest version of Suite 2000 by contacting Customer Service.
- 2) License the ISO 9001:2008 Template Pack by using the license file emailed to you by Customer Service. The license must be added by a user with Master privilege via the Licenses area in the Administration section
- 3) Once the license has been added, the CD has to be reinserted and a system update must be run in order to install the Template Pack documents.