4. Status Lifecycle

The Status column (E) tracks where each document sits in its lifecycle:

Column/Field	Description
Draft	Document is in preparation. Not yet released for use. Visible to author and reviewers only.
Under Review	Submitted for approval; not yet released.
Active	Approved, released, in current use. The default state for most rows.
Superseded	Replaced by a newer revision. The newer revision is Active. Superseded versions are retained for the retention period.
Obsolete	No longer used. Removed from active circulation; retained per retention schedule. Marked with a watermark if any physical copies remain.
Withdrawn	Removed from the QMS scope (e.g., process discontinued). Different from Obsolete because no replacement exists.

5. Register Column Reference

Column	Header	Purpose
A	**Doc Ref**	Document identifier (e.g. P0820-01, F0850-12, M0100-01). Must match the file name and the on-document footer.
B	**Document Name**	Plain-language title.
C	**Version**	Format Rev X.Y. Major version increments (X) for substantive changes that need re-approval; minor (Y) for editorial corrections.
D	**Type**	Controlled vocabulary from §3 (Procedure/Form/Register/etc.).
E	**Status**	Lifecycle state from §4 (Active/Superseded/etc.).
F	**Linked ISO Clause**	Primary ISO 9001:2026 clause that the document supports (e.g., 4.1, 8.4.2).
G	**Owner**	Role responsible for keeping the document current.
H	**Approver**	Role authorized to approve the document for release.
I	**Storage Location**	Where the controlled master is stored (DMS path, SharePoint URL, network folder).
J	**Created on**	Date the document was first released as Active.
K	**Last Reviewed**	Date of the most recent formal review.
L	**Review Freq (mo)**	Review frequency in months. Defaults vary by type (see §3).
M	**Next Review Due**	Auto-formula: =EDATE(K, L). Recalculates on each Last Reviewed update.
N	**Review Status**	Auto-formula: returns Overdue, Due Soon (≤ 30 days), or On Track based on column M against today.
O	**Retention Period**	How long the document is retained (e.g., 10 years, Current + 1 revision, Indefinite).
P	**Retention Basis**	The basis for the retention period (e.g., ISO 9001:2026 Clause 7.5.3 — current version + 3 superseded revisions).
Q	**Confidentiality**	Access classification, selected from the drop-down: Public, Internal, Restricted or Confidential.

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Column	Header	Purpose
R	Notes	Free-text notes — e.g., cross-references, dependencies, special handling.

6. The Review-Status Formula

Column N uses an IF formula to flag review status against today's date: *If Next Review Due is in the past, return Overdue. Else if it is within 30 days, return Due Soon. Else, On Track.*

The colour-coded conditional formatting on column N drives the Dashboard's "Review Status" panel. A document marked Overdue should not be Active in the Status column — if it is, the matrix is internally inconsistent and should be reviewed.

7. Adding a New Document — Step by Step

1. Confirm the document does not already exist. Search the Register by document name and by file name.
2. Allocate the next available reference number from the prefix series. The prefix readme (in 4.0 Procedures) explains the four-digit clause-based numbering.
3. Create the document file at the storage location and apply the QMS template (header, footer, version control block).
4. In the Register, add a new row at the bottom (do not insert into the middle — it disturbs sort order).
5. Complete columns A–L. Set Status to Draft initially. Set Created on to today. Set Last Reviewed to today.
6. Set Review Freq based on type defaults (§3), unless there is a specific reason to deviate.
7. Confirm Storage Location is a valid path that the Owner role can access.
8. Submit for approval. Once approved, change Status from Draft to Active.
9. Verify Dashboard counters increment as expected. If the Type or Clause does not appear in the dashboard breakdown, the dashboard formulas may need extending.

8. Updating Status

There are three transitions worth describing in detail.

Active → Superseded

Triggered when a new revision is released. The old revision's Status changes to Superseded; a new row is added for the new revision (or the existing row is updated and Last Reviewed is set to today, depending on the level of change). Most organizations keep one row per Doc Ref and increment the Version; substantive changes (e.g., clause-coverage changes) sometimes warrant a new Doc Ref and a parallel old/new period.

Active → Obsolete

Triggered when a document is removed from active use without a direct replacement (e.g., a procedure for a discontinued process). Status changes to Obsolete; physical copies are watermarked or destroyed; the row is retained until the retention period expires.

Superseded → [removed]

Triggered when the retention period expires. The Document Controller archives or destroys per Retention Basis (column P) and removes the row from the Register. A separate retention log records the disposal action and date.

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