Document Types — Controlled Vocabulary

Every entry in the Register must be tagged with one of these types

Type	What it is	Default review
Manual	The QMS Manual (single instance, M0100-01)	Annually
Procedure	Controlled procedure (P-coded). 27 in this toolkit	24 months
Work Instruction	Detailed step-by-step instructions referenced from a procedure	12 months
Policy	Statement of intent (e.g. F0520-01 Quality Policy)	Annually
Form	Blank template used to capture records	24 months
Tool / Register	Excel-based register, tracker, dashboard, matrix	24 months
Guide	User guide (G-coded)	On tool revision
Training	Training deck (T-coded)	24 months
Record	Filled-in form or generated evidence	Per retention

SAMPLE

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Adding a New Document — Six Steps

From decision to MDL entry to first formal review

SAMPLE

1 — Confirm not duplicate

Search MDL on document name and file name first.

2 — Allocate Doc Ref

Use prefix readme; clause-based four-digit + sequence.

3 — Apply QMS template

Header, footer, version-control block at the storage location.

4 — Add row, Status Draft

Complete columns A–L; Status = Draft; Created on = today; Last Reviewed = today.

5 — Submit for approval

Approver signs off; Status → Active; Dashboard updates.

6 — Verify Dashboard

Confirm counters increment as expected for the Type and Clause.

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