



# DOCUMENT MASTER LIST

## **MetalForge Inc.**

*Quality Management System per ISO 9001:2015*

Version 1.0 — April 2026

**QSE Academy**

## Document Master List — 57 QMS Documents

Complete list of documents required to deploy MetalForge Inc.'s Quality Management System per ISO 9001:2015. Each document is referenced by a unique code, assigned to a process owner, and scheduled in one of the three deployment phases.

**Color legend:** Phase 1 (Blue) Phase 2 (Orange) Phase 3 (Green)

#	Code	Title	Type	Category	Clause	Process	Owner	Status	Phase	Format	Frequency
1	QM-001	Quality Manual	Manual	Recommended	4.3, 4.4	QM-01	Quality Mgr	To create	1	Word	Annual
2	POL-001	Quality Policy	Policy	Mandatory	5.2	QM-01	President	To create	1	Word	Annual
3	OBJ-001	Quality Objectives and Annual Action Plan	Plan	Mandatory	6.2	QM-01	President	To create	1	Excel	Annual
4	CTX-001	Context Analysis and Interested Parties	Analysis	Mandatory	4.1, 4.2	QM-01	Quality Mgr	To create	1	Excel	Annual
5	SCO-001	QMS Scope Statement	Document	Mandatory	4.3	QM-01	Quality Mgr	To create	1	Word	On demand
6	MAP-001	Process Map	Document	Recommended	4.4	QM-01	Quality Mgr	To create	1	Word	Annual
7	MAT-INT-001	Process Interaction Matrix	Matrix	Recommended	4.4	QM-01	Quality Mgr	To create	1	Excel	Annual
8	PS-QM01	Process Sheet QM-01 Strategic Steering	Sheet	Recommended	4.4, 5	QM-01	President	To create	1	Word	Annual
9	PS-QM02	Process Sheet QM-02 Continuous Improvement	Sheet	Recommended	4.4, 10	QM-02	Quality Mgr	To create	1	Word	Annual
10	PS-QM03	Process Sheet QM-03 Customer Focus	Sheet	Recommended	4.4, 9.1.2	QM-03	Sales Mgr	To create	2	Word	Annual
11	PS-OP01	Process Sheet OP-01 Sales	Sheet	Recommended	4.4, 8.2	OP-01	Sales Mgr	To create	2	Word	Annual
12	PS-OP02	Process Sheet OP-02 Production	Sheet	Recommended	4.4, 8.5	OP-02	Prod. Mgr	To create	1	Word	Annual
13	PS-OP03	Process Sheet OP-03 Logistics	Sheet	Recommended	4.4, 8.5.4	OP-03	Prod. Mgr	To create	2	Word	Annual
14	PS-SP01	Process Sheet SP-01 Purchasing	Sheet	Recommended	4.4, 8.4	SP-01	Purchasing Mgr	To create	2	Word	Annual
15	PS-SP02	Process Sheet SP-02 Human Resources	Sheet	Recommended	4.4, 7.1.2	SP-02	HR Mgr	To create	3	Word	Annual
16	PS-SP03	Process Sheet SP-03 Equipment	Sheet	Recommended	4.4, 7.1.3	SP-03	Shop Foreman	To create	3	Word	Annual
17	PROC-001	Documented Information Control Procedure	Procedure	Mandatory	7.5	QM-02	Quality Mgr	To create	1	Word	Biennial
18	PROC-002	Internal Audit Procedure	Procedure	Mandatory	9.2	QM-02	Quality Mgr	To create	2	Word	Biennial
19	PROC-003	Management Review Procedure	Procedure	Mandatory	9.3	QM-01	President	To create	2	Word	Biennial
20	PROC-004	Nonconformity and Corrective Action Procedure	Procedure	Mandatory	8.7, 10.2	QM-02	Quality Mgr	To create	2	Word	Biennial
21	PROC-005	Risk and Opportunity Management Procedure	Procedure	Recommended	6.1	QM-02	Quality Mgr	To create	2	Word	Biennial
22	PROC-006	Internal and External Communication Procedure	Procedure	Recommended	7.4	QM-01	President	To create	2	Word	Biennial
23	PROC-007	Sales and Contract Review Procedure	Procedure	Recommended	8.2	OP-01	Sales Mgr	To adapt	2	Word	Biennial

#	Code	Title	Type	Category	Clause	Process	Owner	Status	Phase	Format	Frequency
24	PROC-008	Purchasing and Supplier Evaluation Procedure	Procedure	Recommended	8.4	SP-01	Purchasing Mgr	To create	2	Word	Biennial
25	PROC-009	Production and Process Control Procedure	Procedure	Recommended	8.5	OP-02	Prod. Mgr	To adapt	2	Word	Biennial
26	PROC-010	Inspection and Product Release Procedure	Procedure	Recommended	8.6	OP-02	Prod. Mgr	To adapt	2	Word	Biennial
27	PROC-011	Product Traceability Procedure (auto/aero)	Procedure	Sector-specific	8.5.2	OP-02	Prod. Mgr	To create	2	Word	Biennial
28	PROC-012	Competence and Training Management Procedure	Procedure	Recommended	7.1.6, 7.2	SP-02	HR Mgr	To create	3	Word	Biennial
29	PROC-013	Calibration and Metrology Procedure	Procedure	Sector-specific	7.1.5	SP-03	Shop Foreman	To create	2	Word	Biennial
30	PROC-014	Equipment Maintenance Procedure	Procedure	Recommended	7.1.3, 8.5.1	SP-03	Shop Foreman	To create	3	Word	Biennial
31	WI-OP02-01	Machining Work Instructions by Part Family	Instruction	Sector-specific	8.5.1	OP-02	Shop Foreman	To adapt	2	Word	On demand
32	WI-OP02-02	Dimensional Inspection Work Instructions	Instruction	Sector-specific	8.6	OP-02	Prod. Mgr	To adapt	2	Word	On demand
33	WI-OP02-03	Nonconforming Parts Handling Instructions	Instruction	Mandatory	8.7	OP-02	Prod. Mgr	To create	2	Word	On demand
34	WI-SP03-01	CNC Machine Preventive Maintenance Instructions	Instruction	Recommended	7.1.3	SP-03	Shop Foreman	To create	3	Word	On demand
35	WI-SP03-02	Inspection Equipment Calibration Instructions	Instruction	Sector-specific	7.1.5	SP-03	Shop Foreman	To create	3	Word	On demand
36	REC-MR-001	Management Review Minutes Template	Record	Mandatory	9.3.3	QM-01	Quality Mgr	To create	2	Word	Annual
37	REC-AUD-001	Internal Audit Program and Report	Record	Mandatory	9.2.2	QM-02	Quality Mgr	To create	2	Word	Quarterly
38	REC-NC-001	Nonconformity Sheet	Record	Mandatory	8.7, 10.2	QM-02	Quality Mgr	To create	2	Excel	On demand
39	REC-CA-001	Corrective and Preventive Action Plan	Record	Mandatory	10.2	QM-02	Quality Mgr	To create	2	Excel	On demand
40	REC-RO-001	Risk and Opportunity Register	Record	Recommended	6.1	QM-02	Quality Mgr	To create	2	Excel	Semi-annual
41	REC-COMP-001	Customer Complaint Register	Record	Recommended	9.1.2	QM-03	Sales Mgr	To create	2	Excel	Monthly
42	REC-SAL-001	Customer Contract Review Sheet	Record	Mandatory	8.2.3	OP-01	Sales Mgr	To adapt	2	Word	On demand
43	REC-WO-001	Work Order Template	Record	Recommended	8.5.1	OP-02	Prod. Mgr	Existing	1	Word	On demand
44	REC-TR-001	Production Traveler	Record	Mandatory	8.5.2	OP-02	Prod. Mgr	To adapt	1	Word	On demand
45	REC-IR-001	Dimensional Inspection Report	Record	Sector-specific	8.6, 9.1.1	OP-02	Prod. Mgr	To adapt	2	Excel	On demand
46	REC-PO-001	Packing Slip with Traceability	Record	Mandatory	8.5.2	OP-03	Prod. Mgr	To adapt	2	Word	On demand
47	REC-SUP-001	Supplier Evaluation Sheet	Record	Recommended	8.4.1	SP-01	Purchasing Mgr	To create	2	Excel	Annual
48	REC-HR-001	Job Descriptions by Function	Record	Recommended	7.1.2, 7.2	SP-02	HR Mgr	To create	3	Word	Annual
49	REC-HR-002	Skills and Competence Matrix	Record	Recommended	7.2	SP-02	HR Mgr	To create	3	Excel	Semi-annual
50	REC-HR-003	Annual Training Plan	Record	Mandatory	7.2	SP-02	HR Mgr	To create	3	Excel	Annual
51	REC-HR-004	Individual Training File	Record	Mandatory	7.2.d	SP-02	HR Mgr	Existing	3	Word	On demand

#	Code	Title	Type	Category	Clause	Process	Owner	Status	Phase	Format	Frequency
52	REC-HR-005	Annual Performance Review Grid	Record	Recommended	7.2	SP-02	HR Mgr	To create	3	Word	Annual
53	REC-EQ-001	Production Equipment List	Record	Recommended	7.1.3	SP-03	Shop Foreman	To create	3	Excel	Annual
54	REC-EQ-002	Inspection and Measurement Equipment List	Record	Mandatory	7.1.5.1	SP-03	Shop Foreman	To create	2	Excel	Annual
55	REC-EQ-003	Preventive Maintenance Plan	Record	Recommended	7.1.3	SP-03	Shop Foreman	To create	3	Excel	Annual
56	REC-EQ-004	Calibration Certificates (Archive)	Record	Mandatory	7.1.5.2	SP-03	Shop Foreman	To create	2	PDF	On demand
57	REC-EQ-005	Maintenance Intervention Sheets	Record	Recommended	7.1.3	SP-03	Shop Foreman	To create	3	Word	On demand

**TOTAL: 57 documents**

## Document Master List Synthesis

This section provides aggregate views of the 57 QMS documents required for ISO 9001:2015 certification of MetalForge Inc.

### Distribution by Category

Category	Count	Percentage
ISO 9001 Mandatory	20	35.1%
Best Practice Recommended	31	54.4%
Sector-Specific (auto/aerospace)	6	10.5%
<b>TOTAL</b>	<b>57</b>	<b>100.0%</b>

### Distribution by Initial Status

Initial Status	Count	Percentage
To create	46	80.7%
To adapt	9	15.8%
Existing	2	3.5%
<b>TOTAL</b>	<b>57</b>	<b>100.0%</b>

## Distribution by Process

Process	Description	Doc Count	Primary Owner
QM-01	Strategic Steering	11	President
QM-02	Continuous Improvement	9	Quality Manager
QM-03	Customer Focus	2	Sales Manager
OP-01	Sales	3	Sales Manager
OP-02	Production	10	Production Manager
OP-03	Logistics	2	Production Manager
SP-01	Purchasing	3	Purchasing Manager
SP-02	Human Resources	7	HR Manager
SP-03	Equipment	10	Shop Foreman

## Distribution by Deployment Phase

Deployment Phase	Document Count	Period
Phase 1: Foundational Core	13	Months 1-3
Phase 2: Operational Rollout	30	Months 4-8
Phase 3: Consolidation	14	Months 9-12

## Key Project Tracking Indicators

Project Tracking Indicator	Value
Total documents to produce	57
ISO 9001 mandatory documents	20
Phase 1 priority documents (months 1-3)	13
Estimated consultant workload (hours)	120
Estimated internal cost (USD, \$100/hr basis)	\$12,000

## Deployment Plan — 12 Months to Certification

This section details the sequenced rollout of the 57 documents across three phases. Each phase builds on the previous one and is bound by a clear validation milestone.

### Phase 1 — Foundational Core

*Months 1 to 3 — Laying the strategic foundations and mapping the QMS*

Lay the strategic foundations and process mapping of the QMS. Priority structuring documents.

#	Code	Title	Process	Owner	Type	Status
1	QM-001	Quality Manual	QM-01	Quality Mgr	Manual	To create
2	POL-001	Quality Policy	QM-01	President	Policy	To create
3	OBJ-001	Quality Objectives and Annual Action Plan	QM-01	President	Plan	To create
4	CTX-001	Context Analysis and Interested Parties	QM-01	Quality Mgr	Analysis	To create
5	SCO-001	QMS Scope Statement	QM-01	Quality Mgr	Document	To create
6	MAP-001	Process Map	QM-01	Quality Mgr	Document	To create
7	MAT-INT-001	Process Interaction Matrix	QM-01	Quality Mgr	Matrix	To create
8	PS-QM01	Process Sheet QM-01 Strategic Steering	QM-01	President	Sheet	To create
9	PS-QM02	Process Sheet QM-02 Continuous Improvement	QM-02	Quality Mgr	Sheet	To create
10	PS-OP02	Process Sheet OP-02 Production	OP-02	Prod. Mgr	Sheet	To create
11	PROC-001	Documented Information Control Procedure	QM-02	Quality Mgr	Procedure	To create
12	REC-WO-001	Work Order Template	OP-02	Prod. Mgr	Record	Existing
13	REC-TR-001	Production Traveler	OP-02	Prod. Mgr	Record	To adapt

**Phase 1 total: 13 documents**

### Phase 2 — Operational Rollout

*Months 4 to 8 — Formalize procedures, instructions, and core records. First mock audit.*

Formalize the procedures, instructions, and records of core processes. First internal mock audit.

#	Code	Title	Process	Owner	Type	Status
1	PS-QM03	Process Sheet QM-03 Customer Focus	QM-03	Sales Mgr	Sheet	To create
2	PS-OP01	Process Sheet OP-01 Sales	OP-01	Sales Mgr	Sheet	To create
3	PS-OP03	Process Sheet OP-03 Logistics	OP-03	Prod. Mgr	Sheet	To create
4	PS-SP01	Process Sheet SP-01 Purchasing	SP-01	Purchasing Mgr	Sheet	To create
5	PROC-002	Internal Audit Procedure	QM-02	Quality Mgr	Procedure	To create
6	PROC-003	Management Review Procedure	QM-01	President	Procedure	To create
7	PROC-004	Nonconformity and Corrective Action Procedure	QM-02	Quality Mgr	Procedure	To create
8	PROC-005	Risk and Opportunity Management Procedure	QM-02	Quality Mgr	Procedure	To create
9	PROC-006	Internal and External Communication Procedure	QM-01	President	Procedure	To create
10	PROC-007	Sales and Contract Review Procedure	OP-01	Sales Mgr	Procedure	To adapt
11	PROC-008	Purchasing and Supplier Evaluation Procedure	SP-01	Purchasing Mgr	Procedure	To create
12	PROC-009	Production and Process Control Procedure	OP-02	Prod. Mgr	Procedure	To adapt
13	PROC-010	Inspection and Product Release Procedure	OP-02	Prod. Mgr	Procedure	To adapt
14	PROC-011	Product Traceability Procedure (auto/aero)	OP-02	Prod. Mgr	Procedure	To create
15	PROC-013	Calibration and Metrology Procedure	SP-03	Shop Foreman	Procedure	To create
16	WI-OP02-01	Machining Work Instructions by Part Family	OP-02	Shop Foreman	Instruction	To adapt
17	WI-OP02-02	Dimensional Inspection Work Instructions	OP-02	Prod. Mgr	Instruction	To adapt
18	WI-OP02-03	Nonconforming Parts Handling Instructions	OP-02	Prod. Mgr	Instruction	To create
19	REC-MR-001	Management Review Minutes Template	QM-01	Quality Mgr	Record	To create
20	REC-AUD-001	Internal Audit Program and Report	QM-02	Quality Mgr	Record	To create
21	REC-NC-001	Nonconformity Sheet	QM-02	Quality Mgr	Record	To create
22	REC-CA-001	Corrective and Preventive Action Plan	QM-02	Quality Mgr	Record	To create
23	REC-RO-001	Risk and Opportunity Register	QM-02	Quality Mgr	Record	To create
24	REC-COMP-001	Customer Complaint Register	QM-03	Sales Mgr	Record	To create
25	REC-SAL-001	Customer Contract Review Sheet	OP-01	Sales Mgr	Record	To adapt
26	REC-IR-001	Dimensional Inspection Report	OP-02	Prod. Mgr	Record	To adapt
27	REC-PO-001	Packing Slip with Traceability	OP-03	Prod. Mgr	Record	To adapt
28	REC-SUP-001	Supplier Evaluation Sheet	SP-01	Purchasing Mgr	Record	To create
29	REC-EQ-002	Inspection and Measurement Equipment List	SP-03	Shop Foreman	Record	To create

#	Code	Title	Process	Owner	Type	Status
30	REC-EQ-004	Calibration Certificates (Archive)	SP-03	Shop Foreman	Record	To create

**Phase 2 total: 30 documents**

## Phase 3 — Consolidation and Certification

*Months 9 to 12 — Finalize support docs, conduct internal audits, first management review, certification audit*

Finalize support documents, conduct the internal audit cycle, hold the first management review, and pass the certification audit.

#	Code	Title	Process	Owner	Type	Status
1	PS-SP02	Process Sheet SP-02 Human Resources	SP-02	HR Mgr	Sheet	To create
2	PS-SP03	Process Sheet SP-03 Equipment	SP-03	Shop Foreman	Sheet	To create
3	PROC-012	Competence and Training Management Procedure	SP-02	HR Mgr	Procedure	To create
4	PROC-014	Equipment Maintenance Procedure	SP-03	Shop Foreman	Procedure	To create
5	WI-SP03-01	CNC Machine Preventive Maintenance Instructions	SP-03	Shop Foreman	Instruction	To create
6	WI-SP03-02	Inspection Equipment Calibration Instructions	SP-03	Shop Foreman	Instruction	To create
7	REC-HR-001	Job Descriptions by Function	SP-02	HR Mgr	Record	To create
8	REC-HR-002	Skills and Competence Matrix	SP-02	HR Mgr	Record	To create
9	REC-HR-003	Annual Training Plan	SP-02	HR Mgr	Record	To create
10	REC-HR-004	Individual Training File	SP-02	HR Mgr	Record	Existing
11	REC-HR-005	Annual Performance Review Grid	SP-02	HR Mgr	Record	To create
12	REC-EQ-001	Production Equipment List	SP-03	Shop Foreman	Record	To create
13	REC-EQ-003	Preventive Maintenance Plan	SP-03	Shop Foreman	Record	To create
14	REC-EQ-005	Maintenance Intervention Sheets	SP-03	Shop Foreman	Record	To create

**Phase 3 total: 14 documents**