QUALITY REGISTRAR SYSTEMS — CRM

Dynamic Audit Report — Standards Coverage Guideline

Which audit-report forms are built, which are pending, and how to add the next one. Status as of 3 November 2026.

4	11	1
FORMS COMPLETED	STANDARDS PENDING	DECISION NEEDED
ISO 9001 · ISO 14001:2026 · ISO 45001 · IMS	with audits booked in the CRM	ISO 14001:2015 — 479 audits booked

1. COMPLETED — REPORT FORMS READY TO USE

Each completed standard has its own clause list (Stage 1 readiness checklist, Stage 2 clause table, sections 10–13 rows with pre-written "C" evidence), its own wording (objective, criteria, categories, conclusion, section titles) and its own design (colours and cover picture) copied from the sample Word files.

Standard	DB id	Form No.	Design	Stages	Clause library	Status
ISO 9001:2015	4	Form 04-2a	Blue (original)	Stage 1 · Stage 2 · Surveillance · Recert	64 rows (18 readiness, 30 clause, 16 sections 10–13)	**Done — unchanged**
ISO 14001:2026	33	Form 04-2b	Green (sample)	Stage 1 · Stage 2 · Surveillance · Recert	74 rows (25 / 31 / 18)	**Done 03-11-2026**
ISO 45001:2018	6	Form 04-2a (OH&S)	Orange (sample)	Stage 1 · Stage 2 · Surveillance · Recert	74 rows (28 / 30 / 16)	**Done 03-11-2026**
IMS — ISO 9001 + 14001 + 45001	1 / combined	Form 04-2a (integrated)	Light blue, 3-column cover (sample)	Stage 1 · Stage 2 · Surveillance · Recert	91 rows (31 / 39 / 21)	**Done 03-11-2026**

Sample files used: ISO14001_2026_Stage1_Audit_Report.docx, ISO14001_2026_Stage2_Surveillance_Recert_Report.docx, ISO 45001_Stage1_Audit_Report.docx, ISO_45001_2018_Stage2_Surveillance_Recert_Report.docx, IMS_Stage1 _Audit Report.docx, IMS_Stage2_Surveillance_Recert_Report final.docx (all in backend/src/audit-report-builder/samples).

IMS: used automatically by the "Combined audit report" option of an audit booked for two or more of ISO 9001 / 14001 / 45001, and by the umbrella standard "ISO 9001, 14001 & 45001" (id 1).

2. PENDING — STANDARDS THAT STILL PRINT THE GENERIC FORM

Ordered by the number of audits booked in the CRM (all years). A pending standard still produces a report today, but with the generic wording, the blue design and a clause list borrowed from another standard of the same audit (or from ISO 9001).

Standard	DB id	Audits	What prints today	What is needed
ISO 14001:2015	5	479	Prints the GREEN 14001 form and wording, but has no clause list of its own, so it borrows the ISO 9001 clauses of the same audit and shows "Form 04-2a".	Decide: (a) copy the 2026 list to id 5 (one clone call) and accept the 2026 wording, or (b) send the 2015 Stage 1 + Stage 2 Word files.
HACCP	13	21	Generic form, blue design, borrowed clause list.	Stage 1 + Stage 2 Word sample files.
ISO 22000:2018	7	17	Generic form, blue design, borrowed clause list.	Stage 1 + Stage 2 Word sample files.

Standard	DB id	Audits	What prints today	What is needed
ISO 27001:2022	16	15	Generic wording, blue design. Holds an old COPY of the 9001 clause list (64 rows) that must be replaced.	Stage 1 + Stage 2 Word sample files (Annex A controls list).
ISO 27001:2013	3	14	Generic form, blue design, borrowed clause list.	Stage 1 + Stage 2 Word sample files, or retire in favour of 2022.
ISO 22301:2019	10	8	Generic form, blue design, borrowed clause list.	Stage 1 + Stage 2 Word sample files.
HALAL	20	7	Generic form, blue design, borrowed clause list.	Stage 1 + Stage 2 Word sample files.
ISO 50001:2018	11	4	Generic form, blue design, borrowed clause list.	Stage 1 + Stage 2 Word sample files.
ISO 27017 / ISO 27018	32 / 31	3 / 3	Generic form, blue design, borrowed clause list.	Sample files (usually audited with 27001).
GMP / ISO 22716:2007	14 / 25	2 / 2	Generic form, blue design, borrowed clause list.	Sample files.
ISO 41001, 29001, 55001, 21001, 42001	8, 12, 15, 17, 28	1 each	Generic form, blue design, borrowed clause list.	Sample files when an audit is due.

Standards with no audits booked (ISO 9001 "id 2", ISO 2801, ISO/IEC 20000-1, ISO 14064-1, 20000-1:2018, 10002:2018, ISO 7591, ISO 13485, ISO 44001, ISO 7816-8) need nothing until an audit is scheduled.

3. DECISION NEEDED — ISO 14001:2015 (ID 5)

479 audits are booked for ISO 14001:2015, but the green 14001 form was built from the ISO 14001:2026 sample files and seeded under id 33 (2 audits booked). Because the name contains "14001", a 14001:2015 report already gets the green design and EMS wording, but not the clause list and not the Form 04-2b document box. Two options:

- **Option A (5 minutes):** copy the 2026 clause list and template rows to id 5. Reports then read "ISO 14001:2026" in a few requirement texts (clause 4.4, section 10 intro, mandatory documents heading) even for a 2015 audit.
- **Option B (recommended if the 2015 wording matters):** provide ISO 14001:2015 Stage 1 and Stage 2 Word files; they are added the same way as the others, keeping 2026 separate.

4. HOW A NEW STANDARD IS ADDED

- **1. Sample files.** Two Word files per standard: the Stage 1 (document review & readiness) report and the Stage 2 / Surveillance / Recertification report, in the final design. Put them in backend/src/audit-report-builder/samples.
- **2. Clause library.** A seed file (seed/<standard>.seed.ts) with the readiness list, the clause table and the sections 10–13 rows, each with its pre-written "C" wording. Applied to the database by a migration (migrations/00x_<standard>...sql) or by POST /api/audit-reports/clause-library/seed/<key>.
- **3. Template rows.** Four report_templates rows (Stage 1, Stage 2, Surveillance, Recertification) carrying the Form No., Issue, Rev and date of the document box.
- **4. Profile and theme.** One entry in report.standards.ts: wording (categories, objective, criteria, conclusion, section titles, interview roles, Category-of-Findings table) and the theme (fill colour, text colour, cover picture, cover layout).
- **5. Check.** Render Stage 1 and Stage 2 offline (Word → PDF and HTML preview), compare with the sample page by page, then create a real report in the CRM.

Nothing of an existing standard is touched when another one is added: each report keeps the wording and design of the standard it was created for, and approved reports print from their frozen snapshot.

5. HOW TO GENERATE A REPORT IN THE CRM

- **1.** Open the audit (My Audits → audit row) and click the Report tab.
- **2.** Under "1. Audit report" choose the standard (separate report) or "Combined audit report" (IMS), confirm the stage, click Create & open details.
- **3.** Clauses tab: click C on a row to get the pre-written evidence (editable); NC / OFI clear it for your own finding. Save.
- **4.** Narrative and Conclusion tabs: the objective, criteria, audit brief and conclusion are pre-filled; tick declarations and attachments. Surveillance reports have a "Surveillance 1 / 2" selector.
- **5.** Preview tab: Open PDF (draft watermark) or Word. Submit; an admin or scheme user approves and the final PDF is attached to the audit.

6. HOUSEKEEPING NOTES

- Standard id 16 (ISO 27001:2022) holds an old copy of the ISO 9001 clause list. Replace it when the 27001 sample files arrive.
- Report 34 (surveillance, ISO 45001) was created before the 45001 list existed and keeps borrowed 9001 clause rows; recreate it to get the 45001 list.
- Standards "ISO 9001" (id 2) and "ISO 2801" (id 9) duplicate ISO 9001:2015 with no bookings; consider retiring them.
- Audits booked for the new standards today: row 735 (Falcon Middle East, Stage 1: 9001 + 45001 + 14001:2026) and row 712 (Recertification: same three).