QUALITY REGISTRAR SYSTEMS

Empowering continual improvement for your business

Certification & Audit Platform

by Quality Registrar Systems

COMPLETE USER MANUAL

Version 2.1 • May 2026

ALTAYABOON INFORMATION TECHNOLOGY NETWORK SERVICES L.L.C
National Cinema - Al Danah - Zone 1 - Abu Dhabi, UAE
contact@altayaboon.com | +971 5632 96231

Table of Contents

1. Introduction

Welcome to the **Quality Registrar Systems Certification & Audit Platform** — a complete ERP solution that streamlines every step of the certification lifecycle: client onboarding, inquiries, auditor assignment, audit scheduling, document generation for Stage 1 and Stage 2, certificate issuance (draft + digital), and ongoing surveillance.

Purpose of This Manual

- Walk every user — from a brand-new sign-up to a Super-admin — through each module **step by step**.
- Show what every screen looks like with real screenshots and explain every field on every form.
- Define roles and permissions so admins can keep the platform secure and accurate.
- Establish a consistent naming convention for every audit document the platform produces.

How to Read This Manual

Start with **Section 3 (Authentication)** to create your account and sign in. Then read **Section 4 (Dashboard)** to see every module on one screen. After that, jump to the module sections (5 – 16) that match your role. Each module section follows the same structure: **Purpose → Access → List View → Forms → Step-by-step instructions → Tips**.

2. System Overview

The Platform is organised around a central Dashboard from which every module is one click away. The platform is role-based — each user only sees the modules and actions appropriate to their job function. The table below lists every module covered in this manual.

Module	What It Does
User Management	Add users, verify new sign-ups, assign roles and granular permissions.
Companies	Master record of every client organisation that is audited or certified.
Inquiries	Captures new business leads / requests for certification.
Audit Compliance	Tracks every audit, its stage, status and linked documents. Used by the Scheme Department to generate Stage 1 / Stage 2 audit pack documents.
Audit Schedule (In Dev)	Coordinator's real-audit scheduling: pick date, lead auditor and mode for each row; notify Marketing, Auditor and Coordinator; reschedule and cancel with audit trail. Currently in development.

Module	What It Does
Standards	Master list of supported certification standards (ISO 9001, 14001, 45001, ...).
Countries	Country directory for client locations and regulatory mapping.
Templates	Library of Stage 1 / Stage 2 audit document templates and their content.
Job Registrar	Each audit becomes a Job here — assigned, tracked and completed.
Certificate	Generates Draft and Digital certificates after Stage 2 closure.
Chat	WhatsApp-style internal messaging between Marketing, Coordinator, Scheme Dept. and Auditors. Send text, files, QR codes and shared record cards from any module.
Previous Certificates	Historical archive of certificates imported from legacy systems.
Settings	Platform-wide configuration, notifications, branding.

3. Getting Started — Authentication

Before any work can be done in the Platform, every user must have a verified account with a role assigned. The platform follows a secure two-step onboarding process: the user self-registers (with OTP email verification), then an administrator verifies the account and grants the appropriate role and permissions.

3.1 User Registration (with OTP)

New employees create their own account from the Create Account page. The platform asks only for the essentials — name, work email and a password — and immediately sends a One-Time Password (OTP) to the work email to confirm the user really controls that mailbox.

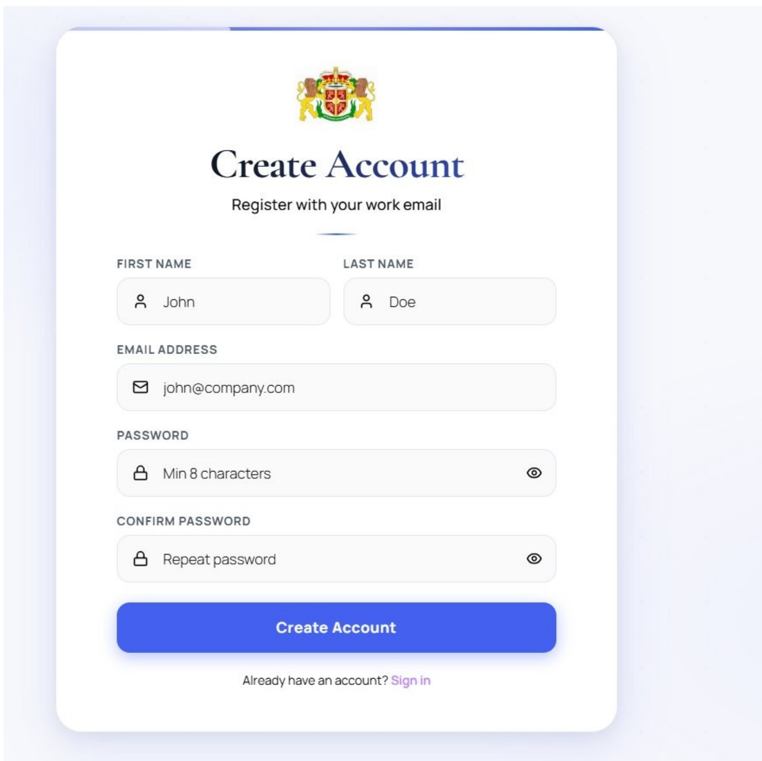

Figure 3.1 — Create Account form.

Step 1 ► Open the Create Account page

From the login page, click the **Create Account** link at the bottom.

Step 2 ► Enter your name

Type your **First Name** and **Last Name** in the two side-by-side fields (e.g. **John** / **Doe**).

Step 3 ► Enter your work email

Type your company email address (e.g. **john@company.com**). Personal addresses are not permitted.

Step 4 ► Set a password

Type a password of at least **8 characters** in the **Password** field, then repeat it in **Confirm Password**. Use the eye icon to toggle visibility.

Step 5 ► Submit

Click the blue **Create Account** button. The system sends a 6-digit OTP to your work email.

Step 6 ► Verify the OTP

Open the email titled **“Confirm your account”**, copy the 6-digit code, paste it on the verification screen, and click **Verify**. Your password is now active.

> ℹ️ The OTP is valid for **10 minutes**. If it expires, click **Resend OTP** on the verification screen.

3.2 Login

Once the email is verified, the user can sign in from the **Welcome Back** screen. Until the admin verifies the account, the user will see a banner indicating their account is **Pending Verification** and most modules will be read-only or hidden.

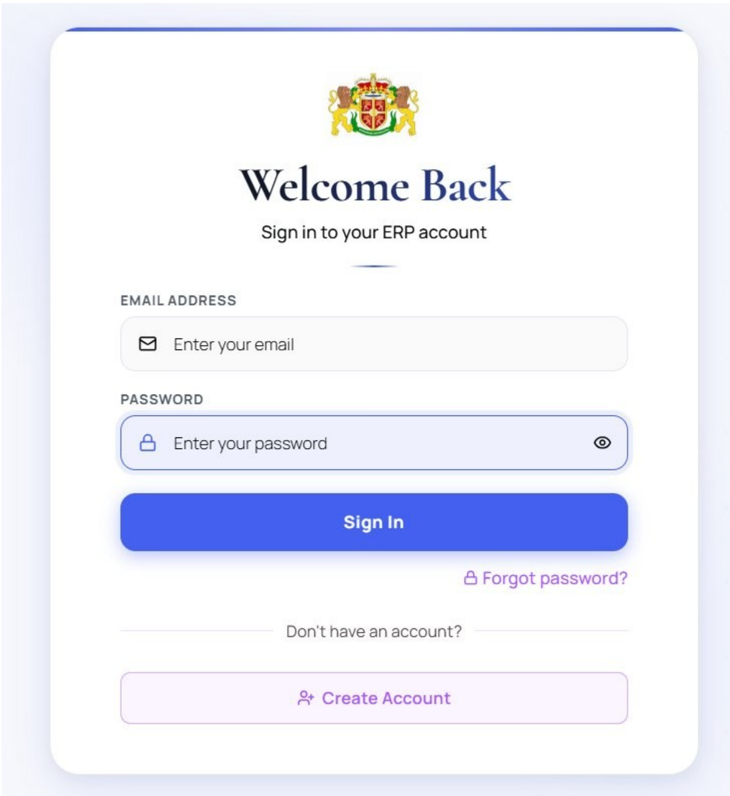

Figure 3.2 — Login screen (Welcome Back).

Step 1 ► Open the Platform URL

Navigate to the platform login page in your browser (e.g. **web.qrsyst.com**).

Step 2 ► Enter credentials

Type your **work email** and **password** in the two fields.

Step 3 ► Sign In

Click the blue **Sign In** button. If credentials are correct, you land on the Dashboard (Section 4).

Step 4 ► Pending account?

If your account is **Unverified** or **Pending Approval**, contact a Super-admin — see Section 3.4.

3.3 Forgot Password / Password Reset

Users can reset their own password without administrator help. The flow uses the same OTP mechanism as registration, so only the owner of the work email can reset the password.

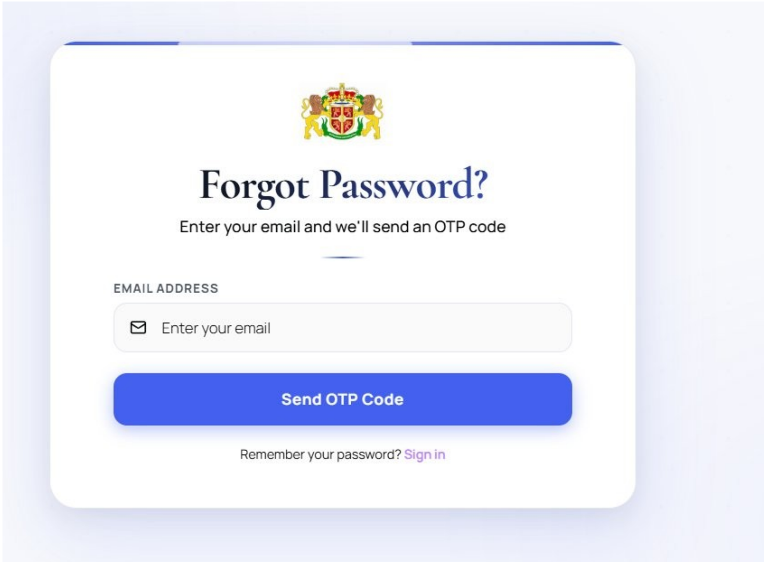

Figure 3.3 — Forgot Password screen.

Step 1 ► Click Forgot Password

On the login page, click the purple **Forgot password?** link.

Step 2 ► Enter your work email

Type your email and click the blue **Send OTP Code** button.

Step 3 ► Check your inbox

Open the OTP email from the platform and copy the 6-digit code.

Step 4 ► Set new password

Return to the platform, enter the OTP, then type your new password twice and click **Reset Password**.

> ⚠️ For security, after **5 failed login attempts** the account is locked for 15 minutes. Wait or use Forgot Password to recover access.

3.4 Admin Verification of New Users

Even after the user has verified their email via OTP, the account remains in **Unverified / Pending Approval** state until an administrator with the **Super-admin** role approves it. This second gate ensures that only authorised personnel can act inside the certification system.

Admin Step-by-Step

1. Sign in as a Super-admin and open **User Management → All Users**.
2. Filter **Status = Unverified** (or **Pending Approval**) to find new sign-ups.
3. Click the **Eye** icon to review the user's profile (name, email, joined date).
4. If legitimate, click the **Verify** action (green tick) to mark the account as **Active**.
5. If suspicious, click **Delete** (red bin) to remove the account entirely.

3.5 Role & Permission Assignment

Once an account is verified, the admin assigns one or more roles. Roles map to job functions — Auditor, Marketing, Scheme Coordinator, Super-admin. Each role carries a default permission set, but the admin can fine-tune permissions per user from **User Permissions** or globally from the **Permission Matrix**.

Standard Roles in the Platform

Role	Typical Access
Super-admin	Full access to every module, user management, settings, and override actions.
Scheme Coordinator	Manage Companies, Inquiries, schedule audits, generate certificates.
Auditor	View assigned jobs, fill audit checklists, upload audit documents, raise NCRs.
Marketing	Manage Inquiries and Companies records; no audit or certificate actions.
Read-only / Viewer	Read access to dashboards and reports only — no edit rights.

Assigning a Role

1. Open **User Management → All Users**.
2. Locate the user and click the **Key** icon under Actions.
3. Tick one or more roles (e.g. `Auditor`, `Marketing`). Multiple roles are permitted.
4. Optionally open **User Permissions** to grant or revoke specific actions for that user only.
5. Click **Save**. The user is notified by email and can now access the granted modules.

4. Dashboard — All Modules at a Glance

After signing in, every user lands on the **Dashboard**. This is the **first page** of the platform and presents every module on a single screen. The Dashboard greets the user by name, shows the current date and active role, and presents twelve summary tiles — one per module — each showing the live record count. Beneath the tiles you'll find Recent Activity and Jobs This Year.

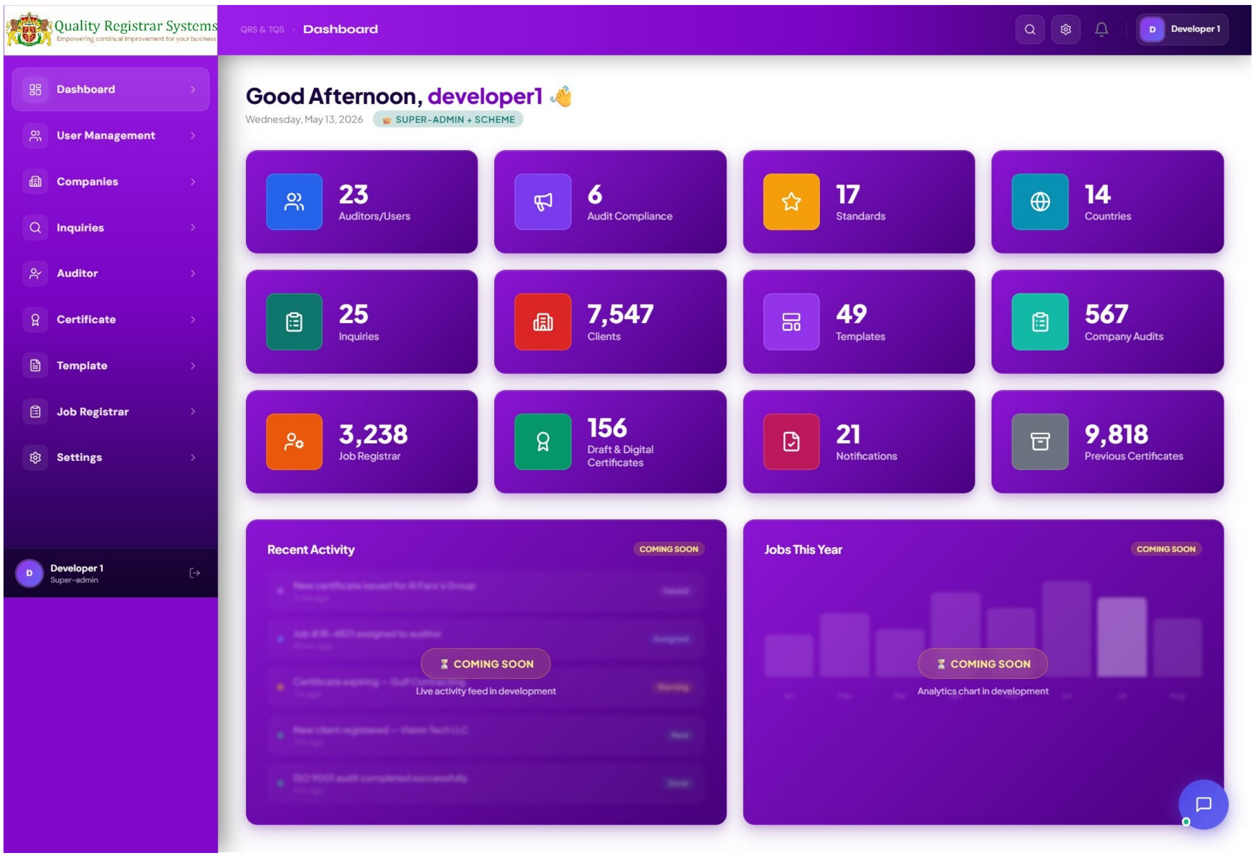

Figure 4.1 — The Dashboard, shown immediately after login. Every module is one click away.

Reading the Tiles

Tile	Meaning
Auditors / Users	Total registered platform users across all roles.
Audit Compliance	Open audit compliance records currently being tracked.
Standards	Certification standards configured in the system.
Countries	Countries available for client / auditor location selection.
Inquiries	Active inquiries / leads in the pipeline.

Tile	Meaning
Clients	Total client companies registered in the platform.
Templates	Stage 1 / Stage 2 templates available in the library.
Company Audits	Total audits executed across all companies.
Job Registrar	Total job records (each audit cycle creates one job).
Draft & Digital Certs	Active certificates issued, both draft and digital.
Notifications	Unread notifications for the current user.
Previous Certificates	Historical certificate archive imported from legacy systems.

Sidebar Navigation

The **left sidebar** provides direct access to every module. Click any module to expand its sub-pages (e.g. **Companies → All Companies / Reports**). The currently selected module is highlighted in white. Each section below corresponds to one sidebar item, in the same order they appear in the platform.

> ✓ Click any tile or sidebar item to jump into that module. Tile counts update in real time as records are added or removed.

5. Module — User Management

User Management is the control centre for everyone who can log into the Platform. From here, administrators search and filter users, verify pending accounts, assign or revoke roles, and inspect the live permission matrix.

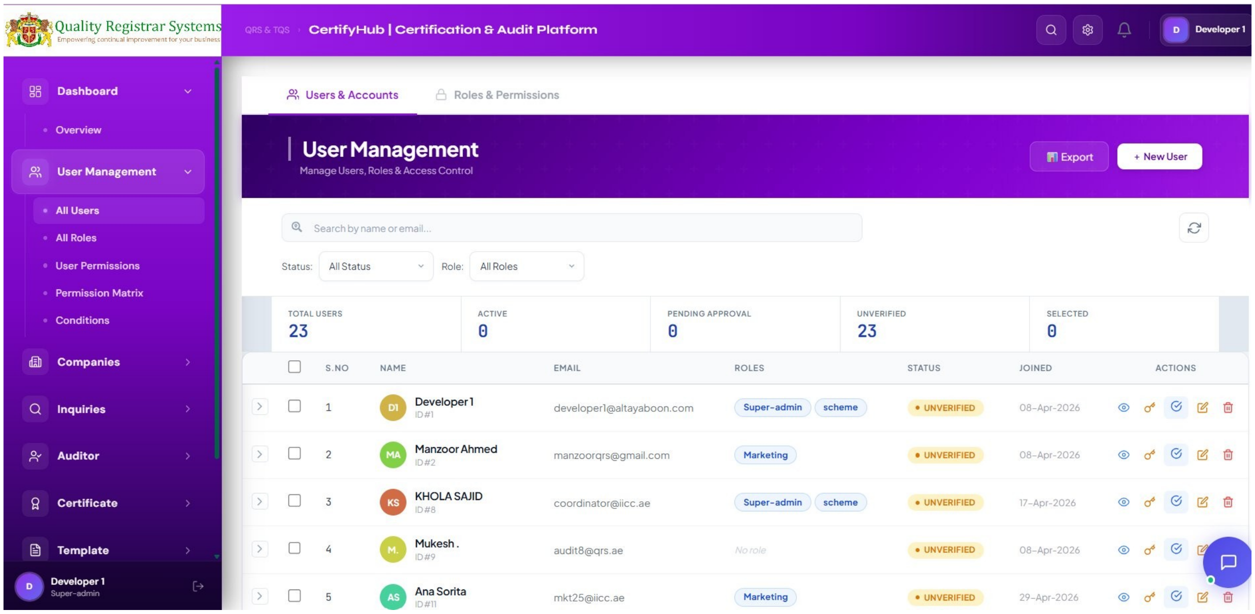

Figure 5.1 — User Management screen with the Users & Accounts and Roles & Permissions tabs.

Sub-pages within User Management

Sub-page	Purpose
All Users	Complete user directory with status, role, joined date and per-user actions.
All Roles	Define and manage roles (Auditor, Marketing, Super-admin, etc.).
User Permissions	Grant or revoke specific actions to individual users, overriding role defaults.
Permission Matrix	Grid view of every role × every action — the fastest security review.
Conditions	Define conditional rules (e.g. an Auditor can edit only audits assigned to them).

Action Icons (Per-User Row)

Icon	Action
👁 Eye	View full profile — name, email, role, audit history.

Icon	Action
🔑 Key	Open Role & Permission editor for this user.
✅ Tick	Verify (approve) a Pending / Unverified account.
✏️ Pencil	Edit basic profile fields (name, phone, role).
🗑️ Bin	Soft-delete the user (account hidden, audit trail preserved).

Status Values

- **Active** — fully verified and operational.
- **Pending Approval** — email confirmed via OTP, awaiting admin verification.
- **Unverified** — registered but email not yet confirmed.
- **Disabled** — administratively disabled (cannot log in, history retained).

✓ Review the **Unverified** queue at least once per business day. Stale unverified accounts older than 14 days should be deleted to keep the directory clean.

6. Module — Companies (Client)

The **Companies (Client) module** is the master directory of every client organisation that the Platform audits or has audited in the past. Every audit, inquiry, job and certificate in the platform is linked back to a Company record.

Primary Users

Role	What They Do Here
Marketing	Add new client companies, update contact details.
Scheme Coordinator	Verify company information before audits are scheduled.
Auditor	Read-only access — view client details before performing an audit.
Super-admin	Full control: add, edit, delete, bulk import and export.

6.1 Companies List View

Click **Companies → All Companies** in the sidebar. The screen shows the running record count (e.g. **Showing 1–10 of 7,547 companies**), the search bar, the filter row, two top-bar action buttons (Reports and Analytics), and the table of companies itself.

> 📊 **Reports Button —** Every Companies module list view has a green Reports button on the top-right. Apply any filters first (date range, month, status, group, standard, etc.) and then click Reports — the platform generates a styled PDF / Excel of exactly the rows currently visible. The same applies on every list view in the platform — Companies, Inquiries, Certificates, Job Registrar, Standards, Countries — so you always get a report that matches what you see on screen.

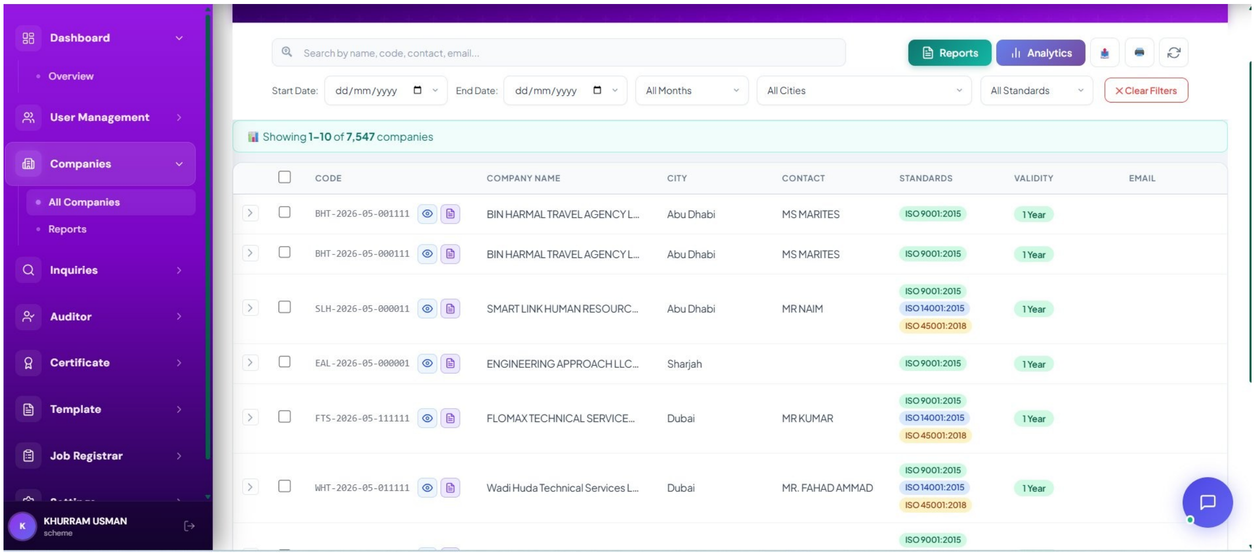

Figure 6.1 — Companies module list view.

Search Bar

The search bar accepts any of: **company name**, **company code**, **contact person**, or **email address**. Searching is live — results filter as you type.

Filter Row

Filter	What It Does
Start Date / End Date	Show companies registered between these dates.
All Months	Quick filter by calendar month.
All Cities	Limit to one city (Dubai, Abu Dhabi, Sharjah ...).
All Standards	Show only companies certified against a specific ISO.
Clear Filters	Red button — resets every filter at once.

List Columns

Column	Description	Example
Code	Auto-generated unique code. Format: `XXX-YYYY-MM-NNNNNN`.	`BHT-2026-05-001111`
Company Name	Registered name of the organisation.	BIN HARMAL TRAVEL AGENCY L...
City	Primary city.	Abu Dhabi
Contact	Primary contact person.	MS MARITES

Column	Description	Example
Standards	ISO standards (colour-tagged).	ISO 9001:2015, ISO 14001:2015
Validity	Certificate validity period.	1 Year
Email	Primary contact email.	contact@bht.ae

6.2 Adding a New Company — Step by Step

Click **+ Add Company**. A green-themed modal titled **New Company — Register a new company for ISO certification** opens. The form has four sections: Company Information, Location, Contact Details and ISO Standards.

Section A • Company Information

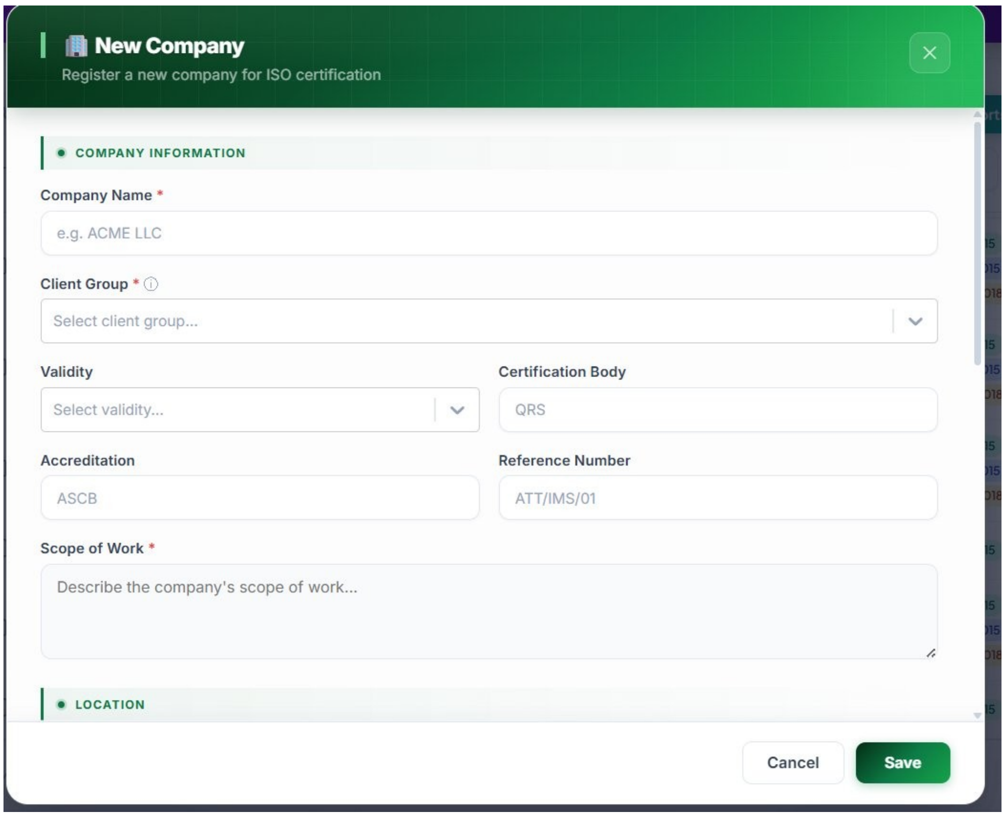

Figure 6.2 — New Company form (top): Company Information section.

Step 1 ► Enter the Company Name

Type the legal name of the organisation. Example: **ACME LLC**. This field is **mandatory** (red asterisk).

Step 2 ► Select the Client Group

Open the **Client Group** dropdown and choose the group this client belongs to. **Mandatory**.

Step 3 ► Choose the Validity

Pick the certificate validity period — typically **1 Year**, **2 Years** or **3 Years**.

Step 4 ► Enter the Certification Body

Default is **QRS** (Quality Registrar Systems). Change only if the client is certified by a different body.

Step 5 ► Enter the Accreditation

Type the accreditation body code, e.g. **ASCB**, **EIAC**, **UKAS**.

Step 6 ► Enter the Reference Number

Internal reference, format `<DEPT>/<TYPE>/<NN>` — e.g. `ATT/IMS/01`.

Step 7 ► Describe the Scope of Work

Type a clear paragraph describing the activities the certificate will cover. This text is **printed verbatim on the certificate** — write it carefully. **Mandatory**.

Section B • Location

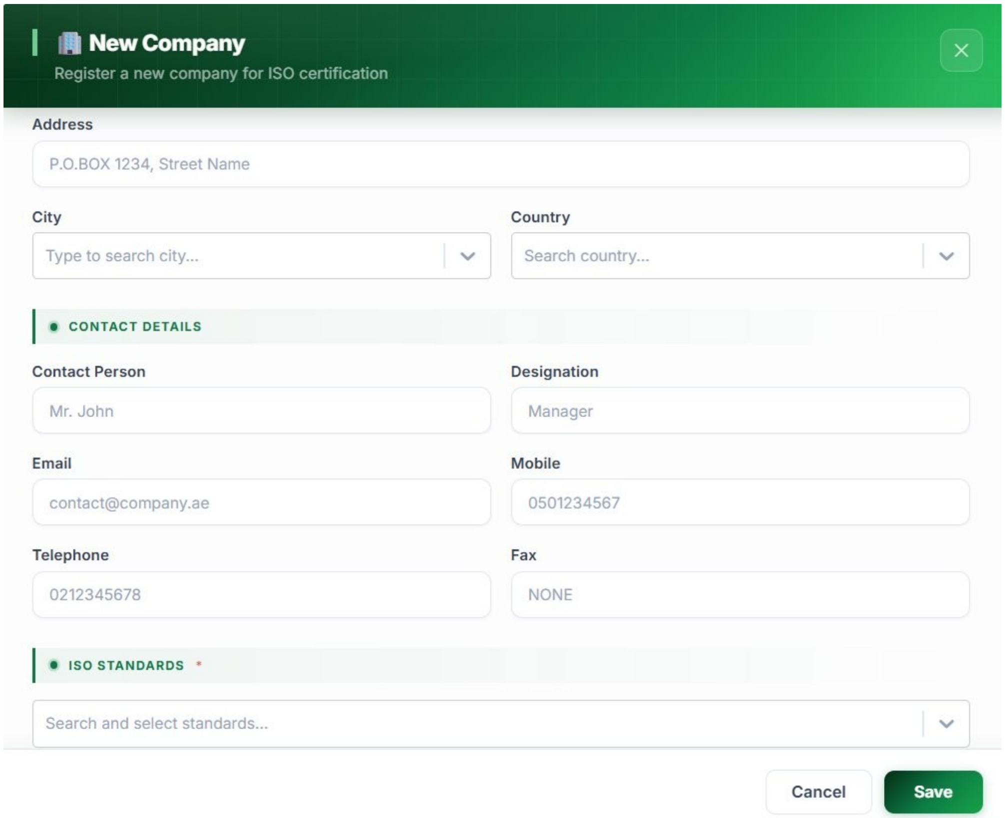

Figure 6.3 — New Company form: Location, Contact Details, ISO Standards.

Step 8 ► Enter the Address

Full street address (e.g. **P.O. BOX 1234, Street Name**). Printed on the certificate.

Step 9 ► Select the City

Type to search — only valid cities from the Cities master appear.

Step 10 ► Select the Country

Type to search the country list. The flag icon appears once selected.

Section C • Contact Details

Step 11 ► Enter the Primary Contact Person

Full name, e.g. **Mr. John**. This person becomes the default recipient of all platform emails.

Step 12 ► Enter the Designation

Job title — e.g. **Manager**, **QHSE Manager**, **General Manager**.

Step 13 ► Enter Email, Mobile, Telephone, Fax

Email is **critical** — all outbound platform communication goes there. If the company has no fax, type **NONE** so the certificate doesn't show a blank field.

Section D • ISO Standards

Step 14 ▸ Search & Select Standards

Click the **Search and select standards...** field, type (e.g. *9001*) and tick each standard. Multiple standards can be selected (integrated management systems). **Mandatory** — at least one required.

Step 15 ▸ Save

Click the green **Save** button at the bottom-right. The system validates every mandatory field, auto-generates the **Company Code** (e.g. `BHT-2026-05-001111`) and adds the company to the directory.

> ⚠️ **Mandatory fields:** Company Name, Client Group, Scope of Work, at least one ISO Standard. Other fields are optional but **strongly recommended** — incomplete records cause certificate-printing errors later.

6.3 Reports — Filtered Report Generation

The Companies module's Reports button (green, top-right) produces a styled PDF or Excel of the company directory, filtered exactly the way you see it on screen. This is the single place to answer questions like "how many new clients did we onboard in May?", "which Abu Dhabi clients hold ISO 45001?", or "give me every company under QRS group registered this quarter". Marketing typically runs it monthly to track onboarding; Super-admins run it at year-end for the management deck.

Step-by-Step — Generating a Companies Report

Step 1 ▸ Apply the filters you need

Pick any combination of Start Date / End Date, All Months (single calendar month), All Cities, All Standards. The list updates live — what you see is what gets exported.

Step 2 ▸ Confirm the count

The header chip — Showing 1–10 of 7,547 companies — updates as you filter. Always glance at it before exporting so you don't ship the whole 7,547 by accident.

Step 3 ▸ Click the green Reports button (top-right)

A small picker appears with two options: PDF (styled report) and Excel (raw .xlsx).

Step 4 ▸ Pick the format

PDF is for sharing with management or the client (carries the QRS letterhead and the filter summary at the top). Excel is for further analysis — sorting, pivoting, charting.

Step 5 ▸ Save / Send

The file downloads with the name format CompaniesReport_<YYYY-MM-DD>_<filters>.pdf — e.g. CompaniesReport_2026-05-14_Abu-Dhabi_ISO9001.pdf. Attach to email or upload to the Job Registrar Documents tab.

What's Inside the Companies Report

Section	Contents
Cover	QRS branding · Report title · Date generated · The filters that produced the report (e.g. "City: Abu Dhabi · Standard: ISO 9001:2015 · From 01-Apr-2026 to 30-Apr-2026").
Summary block	Total count · Count by Standard · Count by City · Count by Client Group (QRS / TQS).
Detail table	Every company in scope with: Code, Name, City, Country, Contact, Designation, Email, Standards (tags), Validity, Registered date.
Footer	Page X of Y · QRS contact line · Confidentiality notice.

Use Cases by Role

Role	Typical Filter Combination	What They Use the Report For
Marketing	Start Date / End Date covering this month.	Monthly onboarding report — count of new clients added, broken down by standard. Sent to the marketing head.
Scheme Dept.	All Standards = ISO 45001:2018 (or whichever standard).	Pool of certified companies under a single scheme — used when planning the surveillance cycle.
Super-admin	Empty filters (or by year).	Year-end management report covering the full client base.
Auditor	City = own region; Standards = own qualifications.	Pre-visit briefing pack — every client in the auditor's region certified for a standard they cover.

✓ Best practice — Always apply Start / End Date filters when running a Companies report. An unfiltered export pulls the entire history (7,000+ rows) and is rarely useful. Two clicks of filtering before export saves the recipient 20 minutes of reading.

7. Module — Inquiries (Proceeding)

The **Inquiries module** — internally called the **Proceeding Module** — is the bridge between sales and operations. Every certification engagement starts as an inquiry. The header reads: **"Manage Certification Inquiries — Marketing submits, Scheme reviews & issues."**

Two-Step Workflow

Step	Department	Action
1. Submit	Marketing	Receives a request → creates an inquiry → submits.
2. Review & Issue	Scheme Dept.	Reviews → verifies scope → schedules audit or issues document.

Inquiry Types

Type	When to Use
Surveillance	Annual check-up of an existing certified client.
Re-Certification	End of the 3-year cycle — full re-audit required.
New Client	A brand-new prospect being onboarded.

7.1 Inquiries List View

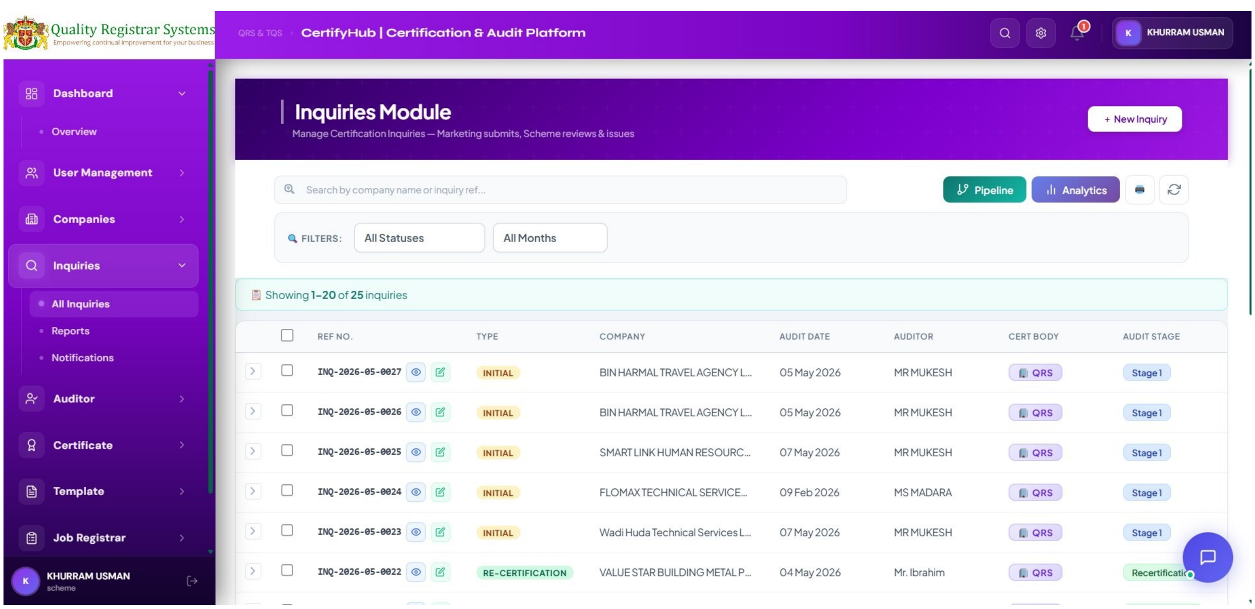

Figure 7.1 — Inquiries module list view with Pipeline and Analytics toggles.

📊 **Reports Button —** Every Inquiries module list view has a green Reports button on the top-right. Apply any filters first (date range, month, status, group, standard, etc.) and then click Reports — the platform generates a styled PDF / Excel of exactly the rows currently visible. The same applies on every list view in the platform — Companies, Inquiries, Certificates, Job Registrar, Standards, Countries — so you always get a report that matches what you see on screen.

List Columns

Column	Description	Example
Ref No.	Format: `INQ-YYYY-MM-NNNN`.	`INQ-2026-05-0027`
Type	Inquiry type — colour-tagged.	INITIAL / RE-CERTIFICATION
Company	Client organisation.	BIN HARMAL TRAVEL AGENCY L...
Audit Date	Planned audit date.	05 May 2026
Auditor	Suggested auditor (final assignment by Scheme).	MR MUKESH
Cert Body	Certification body (QRS or TQS).	QRS
Audit Stage	Stage 1 / Stage 2 / Surveillance / Recertification.	Stage 1

7.2 Submitting a New Inquiry — Step by Step

Click **+ New Inquiry**. A blue-themed modal titled **Submit Certification Inquiry** opens.

Section A • Inquiry Type & Group

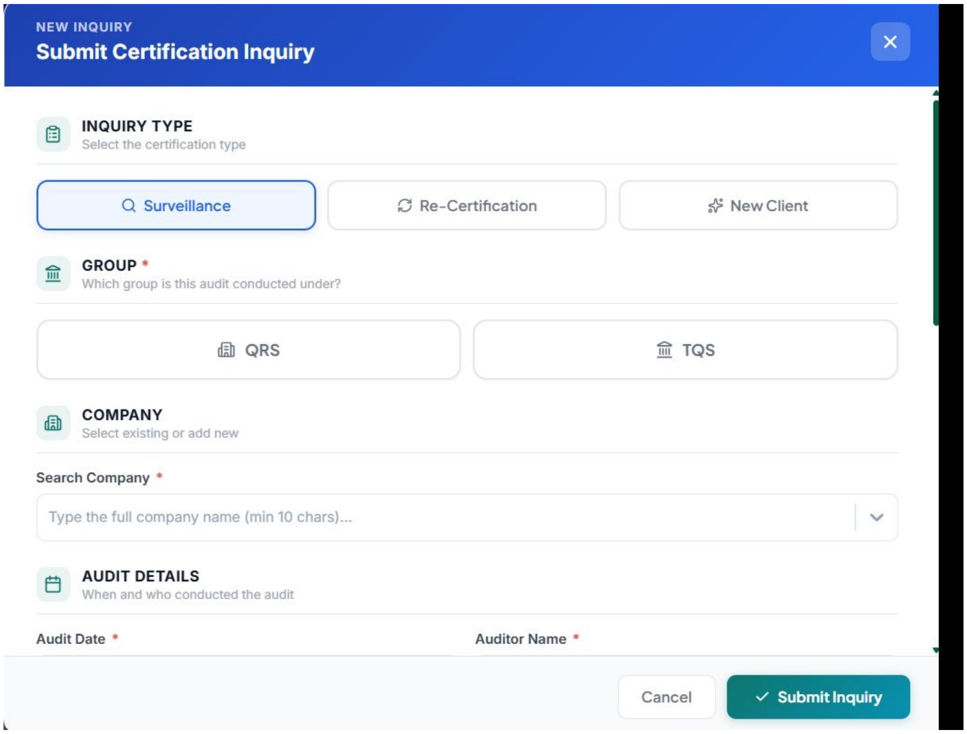

Figure 7.2 — Submit Certification Inquiry form: Inquiry Type, Group, Company, Audit Details.

Step 1 ► Choose the Inquiry Type

Click **Surveillance**, **Re-Certification** or **New Client**. The selected card highlights in blue.

Step 2 ► Choose the Group

Pick **QRS** or **TQS**. **Mandatory**.

Section B • Company & Audit Details

Step 3 ► Search & Select the Company

Type the company name (minimum **10 characters** to trigger the auto-complete). If the company does not exist, save & close, add it in Module 6, then return.

Step 4 ► Set the Audit Date

Click **Audit Date** and pick the planned date (dd/mm/yyyy).

Step 5 ► Enter the Auditor Name

Type the suggested auditor's name (e.g. **MR. HASSAN AL MALIK**).

Section C • Audit Stage & References

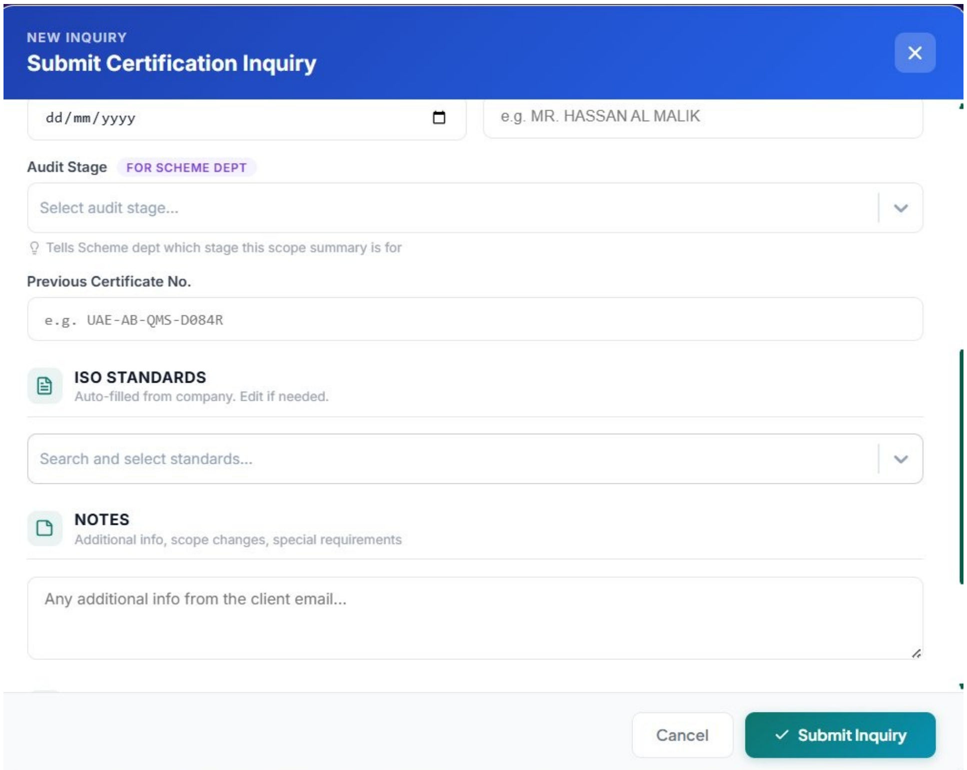

Figure 7.3 — Submit Certification Inquiry form: Audit Stage, Previous Certificate, ISO Standards, Notes.

Step 6 ► Select the Audit Stage

Open the **Audit Stage** dropdown and choose Stage 1 / Stage 2 / Surveillance / Recertification. The purple **FOR SCHEME DEPT** tag confirms this field is critical for downstream processing.

Step 7 ► Enter Previous Certificate No. (if applicable)

For Re-Certification / Surveillance, paste the existing certificate number (e.g. **UAE-AB-QMS-D084R**). Leave blank for New Client.

Section D • ISO Standards & Notes

Step 8 ► Confirm ISO Standards

Auto-filled from the company record. Edit only if scope has genuinely changed.

Step 9 ► Add Notes (optional but recommended)

Use the **Notes** text area for scope changes, special requirements, language preferences, etc.

Step 10 ► Submit

Click the green ✓ **Submit Inquiry** button. The system auto-generates the Ref No., sets status to **Submitted**, and notifies the Scheme department.

7.3 Inquiry Lifecycle

Status	Owner	What Happens
Submitted	Scheme Dept.	Inquiry appears in the Scheme inbox for review.
Under Review	Scheme Dept.	Scheme verifies scope, standards, validity, audit date.
Approved	Scheme Dept.	Approved → Audit Compliance record auto-created.
Scheduled	Audit Compliance	Audit scheduled, Job auto-created in Job Registrar.
Closed	Audit Compliance	Audit completed and certificate issued.
Rejected	Scheme Dept.	Rejected with reason — sent back to Marketing.

7.4 Reports — Filtered Report Generation

The Inquiries (Proceeding) module's Reports button generates a styled report of the proceeding pipeline — the inquiries that came in, who owns them, what stage they're at, and what's stuck. Marketing runs this report every month to show the inquiry volume and conversion rate; the Scheme Department uses it to see how many inquiries are sitting in their queue and how old each one is.

Step-by-Step — Generating an Inquiries Report

Step 1 ► Filter by date range

Set Start Date and End Date for the period you care about — typically the calendar month for Marketing's monthly report, or a quarter for management reviews.

Step 2 ► Filter by type and status

Pick Inquiry Type (Surveillance / Re-Certification / New Client) and Status (Submitted / Under Review / Approved / Scheduled / Closed / Rejected). Combine to answer specific questions — e.g. "all New Client inquiries Under Review in May".

Step 3 ► Click Reports → pick PDF or Excel

PDF for sharing in management meetings; Excel when you need to pivot by salesperson / standard / region.

Step 4 ► Save / Send

File name pattern: InquiriesReport_<YYYY-MM-DD>_<filters>.pdf.

What's Inside the Inquiries Report

Section	Contents
Cover	Report title · Date · Filter summary · Generated by (user name and role).
Pipeline	Count by status (Submitted / Under Review / Approved / Scheduled / Closed /

summary	Rejected) · Conversion rate (% Approved / Total submitted).
By type	Count by Inquiry Type — New Client / Surveillance / Re-Certification.
Detail table	Ref No · Type · Company · Audit Date · Auditor · Cert Body · Audit Stage · Status · Submitted By · Submitted On · Days in Current Status.
Aging block	Inquiries older than 7 / 14 / 30 days still Under Review — surfaces bottlenecks in the Scheme queue.
Footer	Page X of Y · QRS contact · Confidentiality.

Use Cases by Role

Role	Typical Filter Combination	What They Use the Report For
Marketing	This month's Start–End dates.	Monthly proceeding report — number of inquiries submitted, conversion %. Sent to the marketing head and management.
Scheme Dept.	Status = Submitted OR Under Review.	Daily / weekly worklist — what's pending in my queue, sorted by age.
Coordinator	Status = Approved · Inquiry Type = New Client.	Pipeline of audits coming up that need scheduling.
Super-admin	Whole year.	Annual sales / proceeding KPI — total inquiries, conversion %, lead-to-cert time.

ℹ️ Bottleneck spotting — The aging block in the report highlights inquiries that have been Under Review for more than 14 days. Use it in the weekly Scheme stand-up to clear stale items. A healthy queue keeps every inquiry under 7 days; anything over 14 days is a quality signal worth investigating.

9. Module — Audit Compliance

Audit Compliance is the **heart of the Platform**. Every company that needs to be audited has one or more compliance records here, each tracking a single audit cycle. The module is shaped around the **Audit Management** workflow: pick a company → schedule the audit → run the stages → close out.

This module is owned by the **Scheme Department** and is primarily used to **generate the audit pack documents for Stage 1 and Stage 2** — audit plans, checklists, reports, recommendations and certificates — produced from the Templates library in one click. The real-world scheduling of audits (picking dates, assigning lead auditors per visit, sending notifications, handling reschedules and cancellations) is handled by the Coordinator in the **Audit Schedule** module (see Section 9A).

> ℹ️ **Two-module split —** Module 9 (Audit Management / Compliance) is the Scheme Department's document-generation engine for the Stage 1 and Stage 2 audit packs. Module 9A (Audit Schedule, currently in development) is the Coordinator's real-time scheduling tool. The two modules hand off cleanly: the Coordinator schedules the visit, the Scheme Dept. produces the paperwork.

9.1 Audit Management — List View

The list view shows every audit currently tracked in the platform with rich filters and the option to export the entire filtered set to PDF or Excel.

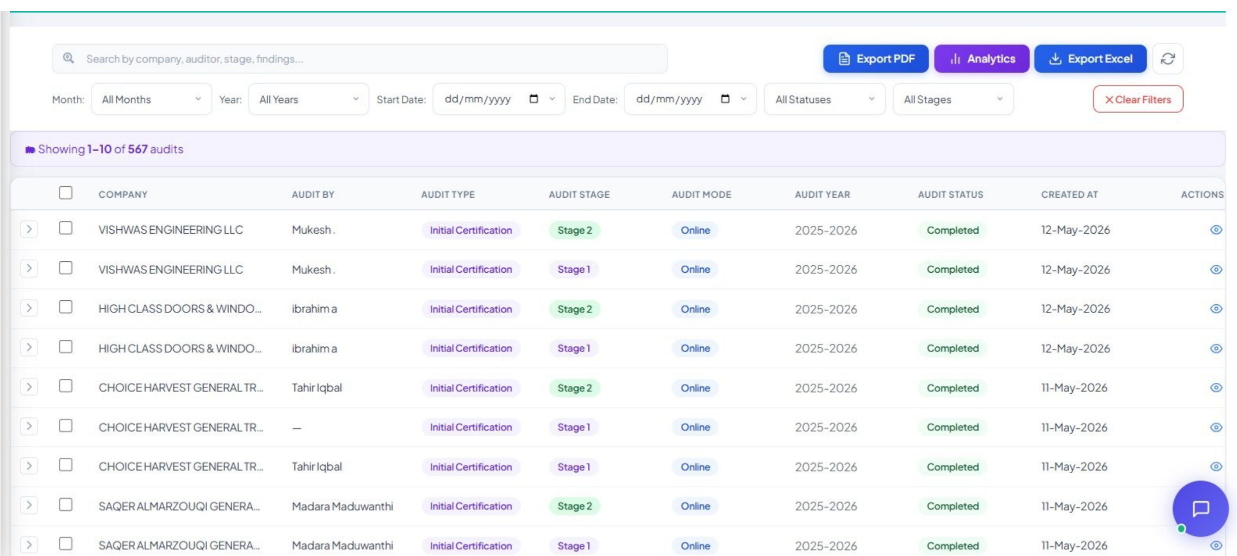

Figure 9.1 — Audit Management list view, showing 567 audits with filters and export buttons.

Search & Filters

Filter	What It Does
Search	Search by company name, auditor name, audit stage or findings.
Month	Quick filter by calendar month.
Year	Filter by audit year (e.g. 2025–2026).
Start / End Date	Date range filter.
All Statuses	Scheduled / In Progress / Completed / Non-Compliant.
All Stages	Stage 1 / Stage 2 / Surveillance / Recertification.
Clear Filters	Red button — resets every filter.

Top-Bar Action Buttons

Button	Purpose
Export PDF (blue)	Downloads the currently filtered audit list as a styled PDF report.
Analytics (purple)	Opens dashboards: audits by stage, by auditor, by status, monthly trend.
Export Excel (blue)	Downloads the filtered list as an .xlsx file for offline analysis.
Refresh icon	Reloads audits from the server.

List Columns

Column	Description
Company	Client organisation being audited.
Audit By	Lead auditor assigned to this audit.
Audit Type	Initial Certification / Surveillance / Re-Certification.
Audit Stage	Stage 1 or Stage 2 (colour tag).
Audit Mode	Online / On-site / Hybrid.
Audit Year	Year covered by this audit (e.g. 2025–2026).
Audit Status	Scheduled / In Progress / Completed / Non-Compliant.
Created At	Date the audit record was created.
Actions	Eye icon — open the Audit Management modal.

9.2 Audit Management Modal — Three Tabs

Clicking the eye icon (or scheduling a new audit from a Company record) opens the **Audit Management** modal. The modal has three tabs that you complete in order: **Company Info → Schedule Audit → Audit Stages**.

Tab 1 • Company Info

Confirms which client the audit is for and shows their key information. If you arrived from the Company record, the company is pre-selected; if not, choose it from the dropdown.

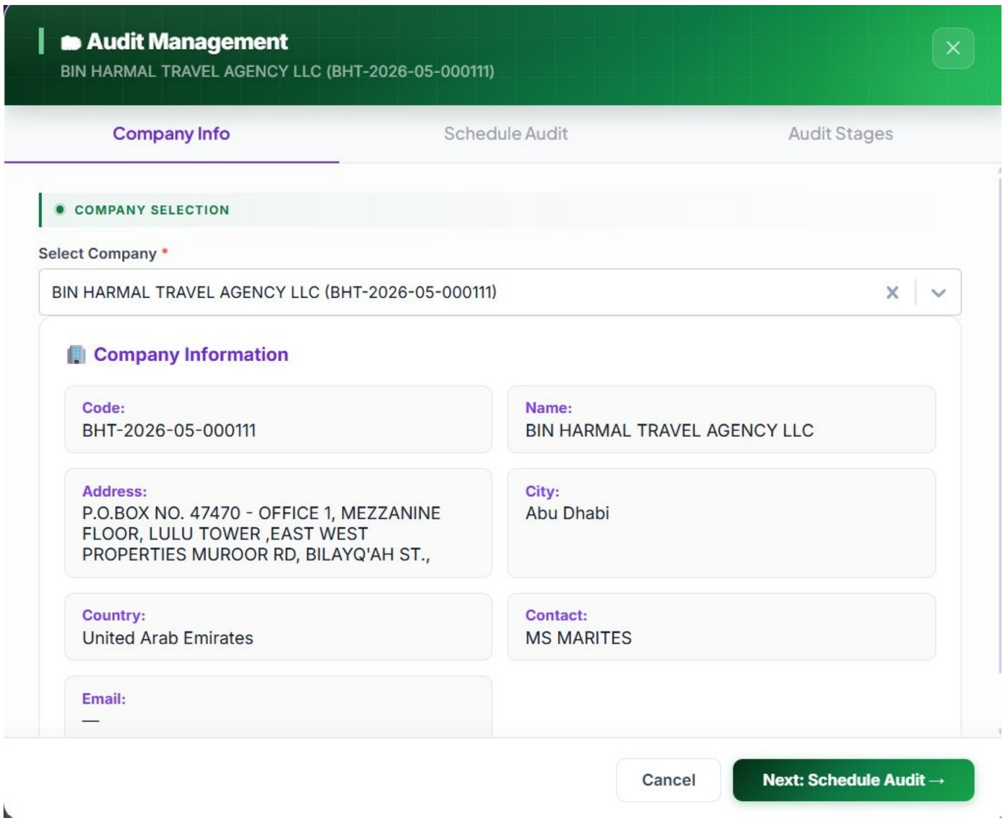

Figure 9.2 — Audit Management modal, Tab 1: Company Info.

Step 1 ▸ Select the Company

Open **Select Company** dropdown — type to search. The list is limited to active company records. **Mandatory** field.

Step 2 ▸ Verify Company Information

Read the read-only **Company Information** block: **Code**, **Name**, **Address**, **City**, **Country**, **Contact** and **Email**. If anything looks wrong, cancel the modal, fix the company in Module 6, then come back.

Step 3 ▸ Move to next tab

Click the green **Next: Schedule Audit →** button at the bottom-right.

> ℹ️ If the company has an **incomplete record** (e.g. missing email or no ISO Standards), the system

warns you here and blocks progress until the record is fixed.

Tab 2 • Schedule Audit

The Schedule Audit tab is where the audit's identity is defined — type, standards, validity, mode, current stage and status. Every field here drives downstream document generation and certificate issuance.

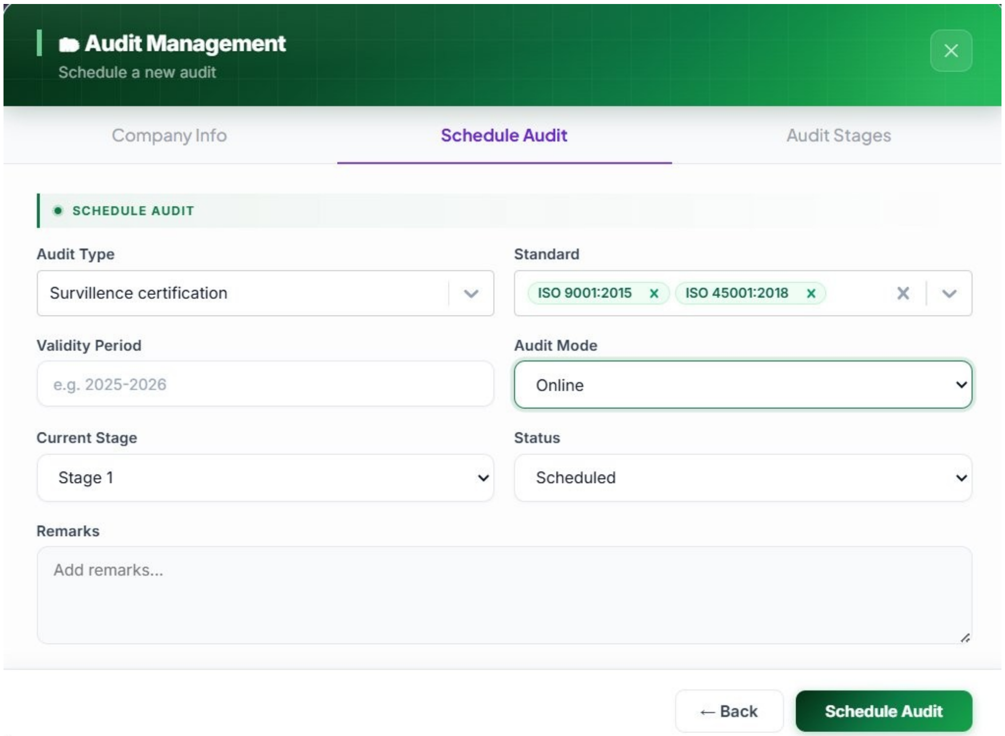

Figure 9.3 — Audit Management modal, Tab 2: Schedule Audit.

Step 4 ► Select the Audit Type

Open the **Audit Type** dropdown. Options: **Initial Certification**, **Surveillance Certification**, **Re-Certification**, **Transfer Audit**. This drives which template set is loaded for Stage 1 and Stage 2.

Step 5 ► Pick the Standard(s)

Open the **Standard** multi-select. The list is pre-filtered to standards the company is registered for. Selected standards appear as removable green tags (e.g. **ISO 9001:2015 ✕**, **ISO 45001:2018 ✕**). Multiple standards = integrated management system audit.

Step 6 ► Enter the Validity Period

Type the certificate validity window in the format **YYYY–YYYY** (e.g. **2025–2026**). Used to compute the certificate's issue and expiry dates.

Step 7 ► Select the Audit Mode

Open **Audit Mode**. Options: **Online**, **On-site**, **Hybrid**. Online audits skip the on-site travel logistics and use video conferencing only.

Step 8 ► Set the Current Stage

Open **Current Stage**. Pick **Stage 1** for a brand-new audit. After Stage 1 is closed you'll come back here and change it to **Stage 2**.

Step 9 ► Set the Status

Open **Status**. Typical lifecycle: **Scheduled → In Progress → Completed**. If findings make the audit non-compliant, pick **Non-Compliant** — this blocks certificate issuance until resolved.

Step 10 ► Add Remarks

Use the **Remarks** text area for any extra context (e.g. client requested specific dates, scope clarifications, auditor notes). Visible to anyone with access to this audit.

Step 11 ► Save & continue

Click the green **Schedule Audit** button. Use **← Back** if you need to fix the Company Info tab.

Tab 3 • Audit Stages

The Audit Stages tab is where you record the operational detail for each stage — date, lead auditor, technical expert, ANZIC code, and remarks. You add one Stage entry per audit visit; a normal certification cycle has two Stage entries (Stage 1 and Stage 2), surveillance has one.

Fields on Each Stage Entry

Field	Description
Select Audit	Links the stage to the audit just created in Tab 2.
Stage Name	**Stage 1**, **Stage 2**, **Surveillance**, **Recertification**.
Audit Date	Actual date of this stage's audit visit.
Audit By	Lead auditor (must be Active and qualified for the selected standards).
Technical Expert	Optional secondary auditor or technical expert.
ANZIC Code	Industry classification code for this audit.
Remarks	Free-text notes specific to this stage.

Workflow Summary

1. Open the **Audit Stages** tab → click **Add Audit Stage**.
2. Fill all fields → click **Save Stage**.
3. Repeat for Stage 2 when you return after Stage 1 closure.
4. Job Registrar (Module 13) auto-creates a Job linked to this audit.
5. Audit documents (Stage 1 / Stage 2 templates) are produced from Module 12.
6. When Stage 2 is closed and all NCRs are resolved, the **Generate Certificate** action becomes available (Module 14).

⚠️ **Stage 2 cannot start until Stage 1 = Completed** and all Stage 1 NCRs are closed. Certificate issuance is blocked if any open NCR is attached to the company.

9.3 Single-Click Document Generation by the Scheme Department

Audit Management is the engine that **prepares all audit documents for the Job Registrar**. Documents are produced based on each audit when it is completed — and they are generated by the **Scheme Department** in a single click, without any manual copy-paste from Word.

How it Works

1. After the auditor marks the stage as **Completed** in the **Audit Stages** tab, the audit appears in the Scheme Department's queue.
2. The Scheme user opens the audit record and clicks **Generate Document** (or **Generate Stage 1 Pack** / **Generate Stage 2 Pack**).
3. The platform reads the audit metadata (company, standards, auditor, dates, scope, NCRs) and merges it into the **selected template** from the Templates module (Module 12).
4. Within **a minute or two**, the complete document set (audit plan, checklist, report, recommendation, etc.) is generated, watermarked, and attached to the Job Registrar entry — see Module 13.
5. All files appear under the company's **Audit Documents** tab, ready for review, e-signing and delivery to the client.

> ℹ️ Audit Management documents are **prepared by the Scheme Department, primarily for the initial audit cycle** (Stage 1 → Stage 2). Surveillance and Re-certification cycles reuse the same engine but with their dedicated template sets.

Why This Matters

Before (manual)	After (single-click)
Open Word, copy company details from Companies module.	Platform reads company data automatically.
Manually paste auditor, dates, scope into each document.	Audit Stage fields merge into placeholders.
Save 8–10 files per audit, name them, email them.	All files generated, named and stored in one click.
Risk of typos, mismatched standards, wrong dates.	Single source of truth — zero data-entry errors.
~2 hours of preparation per audit.	**~2 minutes** per audit pack.

Where the Generated Documents Land — Audit Documents Tab

Once the Scheme Department clicks Generate Document and the platform finishes producing the pack (audit plan, checklist, report, recommendation, etc.), every file is automatically attached to the company's record and visible from the Audit Documents tab inside the company / audit detail view.

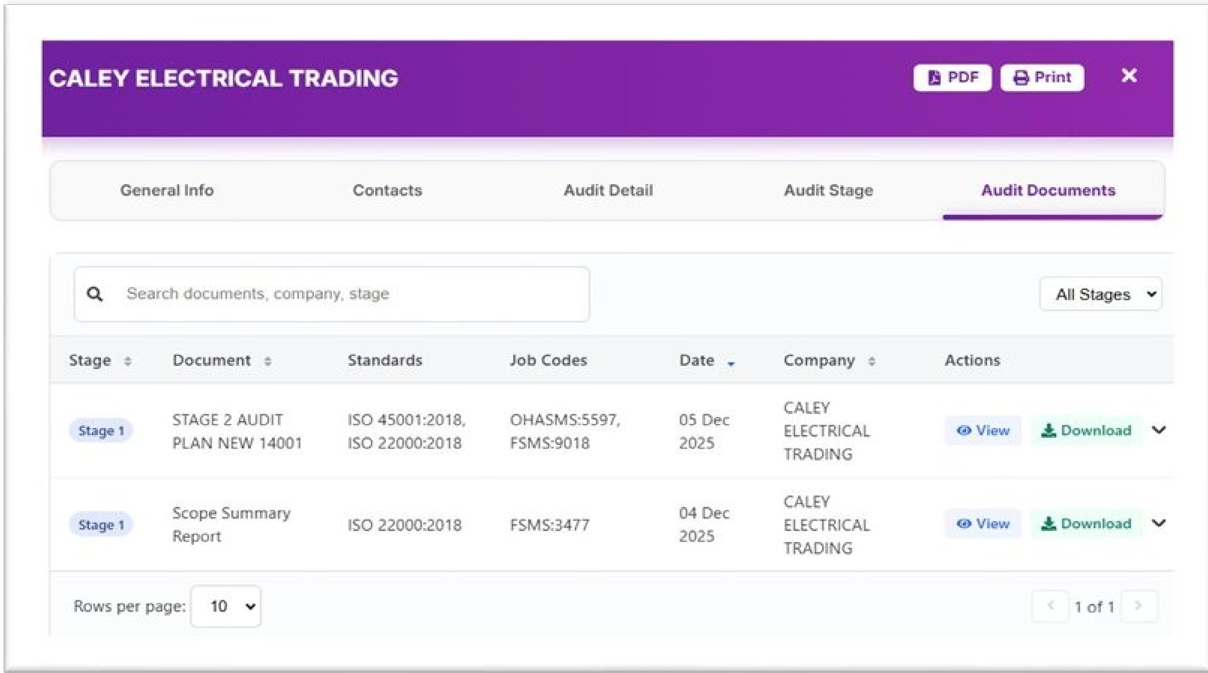

Figure 9.4 — Company audit detail modal with the Audit Documents tab selected (CALEY ELECTRICAL TRADING). The tab strip across the top (General Info · Contacts · Audit Detail · Audit Stage · Audit Documents) gives the Scheme user every angle on the audit; the documents table lists every file the platform has generated for this company — Stage, Document name, Standards covered, Job Codes, Date, Company, and per-row View / Download actions.

Reading the Audit Documents Tab

Column	Description	Example
Stage	Colour tag — Stage 1 / Stage 2 / Surveillance / Recertification.	Stage 1
Document	Internal name of the generated file.	STAGE 2 AUDIT PLAN NEW 14001
Standards	ISO standards the file covers (comma-separated).	ISO 45001:2018, ISO 22000:2018
Job Codes	Job-Registrar codes attached to each standard.	OHASMS:5597, FSMS:9018
Date	Date the document was generated.	05 Dec 2025
Company	Client organisation — repeats across every row.	CALEY ELECTRICAL TRADING
Actions	View opens the file in-browser; Download saves a copy locally; chevron expands to versions.	View · Download · ▼

Filters & Top-Bar

Use the Search bar ("Search documents, company, stage") to find a specific file inside a large set, and the All Stages dropdown on the right to narrow to Stage 1 / Stage 2 / Surveillance / Recertification. The purple top-bar carries two export actions — PDF (the entire documents list) and Print — plus an X to close the modal. The Rows per page selector at the bottom-left controls list density (10 / 25 / 50).

> ℹ️ Why this tab matters — Anyone with access to the company record (Scheme, Coordinator, Auditor) can pull up the audit pack from here without going back to the Job Registrar. View opens in-browser for a quick check; Download saves a local copy when the auditor needs the file offline for the visit.

9A. Module — Audit Schedule (Coordinator — In Development)

The Audit Schedule module is the Coordinator's workspace for scheduling the real audit visits — picking dates, assigning the lead auditor for each row, choosing on-site / online mode, and sending notifications to Marketing, the Auditor and the Coordinator. It complements Module 9 (Audit Management) which the Scheme Department uses to generate the audit pack documents.

> ⚠️ Development Status — This module is in active development. The screens below are functional today, but a few refinements are still being polished. When the development phase is completed, the Coordinator will schedule real audits for each auditor directly from this module — full handoff from Audit Management (Scheme Dept., document generation) to Audit Schedule (Coordinator, real-time scheduling).

How Module 9 and Module 9A Differ

Aspect	Module 9 — Audit Management	Module 9A — Audit Schedule
Owner	Scheme Department	Coordinator
Primary purpose	Generate audit pack documents (Stage 1 & 2)	Schedule real audits, notify stakeholders
Output	Audit Plan / Checklist / Report / Recommendation PDFs	Calendar entries, notifications, schedule status
Hand-off	Hands documents to the Coordinator	Coordinator picks up and schedules the real visit
Status	Live	In Development

9A.1 Audit Schedule — List View

The Audit Schedule list view shows every schedule the Coordinator has created — past, present and upcoming — with its title, client group, audit-rows count, coordinator name and current status (Published / Cancelled / Draft). Use the Stats button on the top-right for a quick summary.

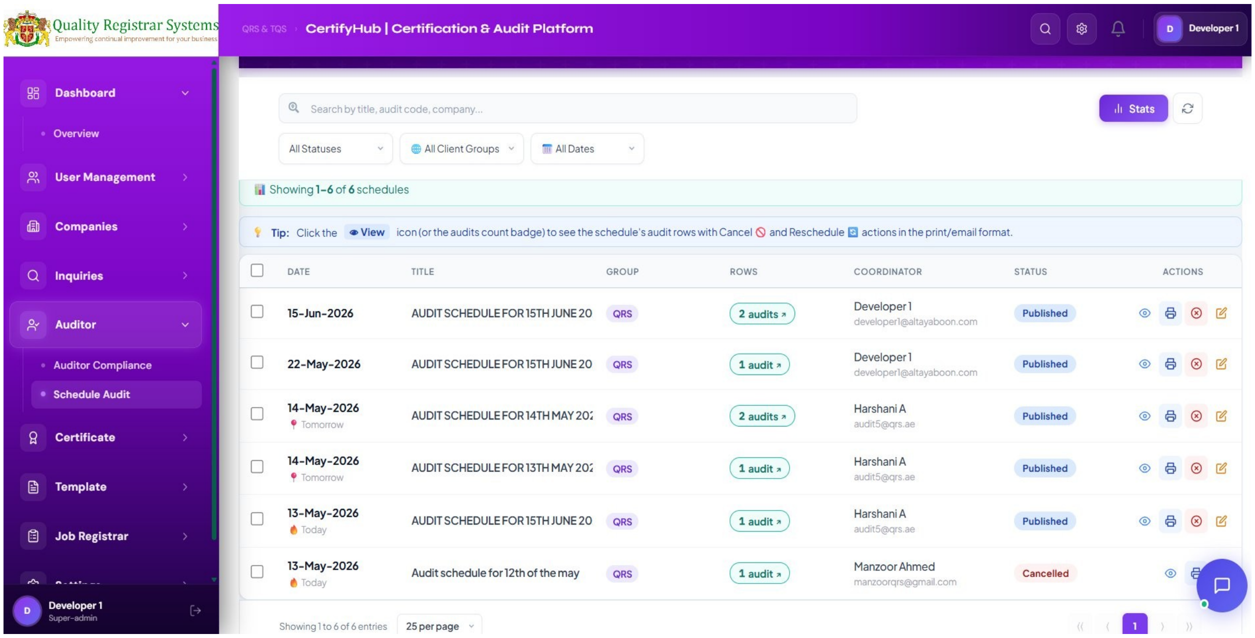

Figure 9A.1 — Audit Schedule list view with Published, Cancelled and Draft entries. Each row carries the View, Print, Cancel and Edit actions.

List Columns

Column	Description	Example
Date	The schedule date.	15-Jun-2026
Title	Free-text title of the schedule.	AUDIT SCHEDULE FOR 15TH JUNE 2026
Group	Client group — QRS or TQS.	QRS
Rows	Number of audits inside this schedule.	2 audits
Coordinator	Owner of the schedule.	Developer 1
Status	Schedule lifecycle status.	Published / Cancelled / Draft
Actions	View · Print · Cancel · Edit.	(icons)

Filters & Search

Filter the list by All Statuses, All Client Groups, and All Dates. The Search bar matches against schedule title, audit code and company name in any row inside a schedule.

ℹ️ Tip — Click the eye (View) icon or the audits-count badge to open the schedule's audit rows in the print/email-ready detail view, where each row's Cancel and Reschedule actions are also available.

9A.2 Creating a New Audit Schedule

Click the + New Audit Schedule button at the top of the list. The modal has two sections — Schedule Details and Audit Rows — and saves as a Draft by default so you can return to it before publishing.

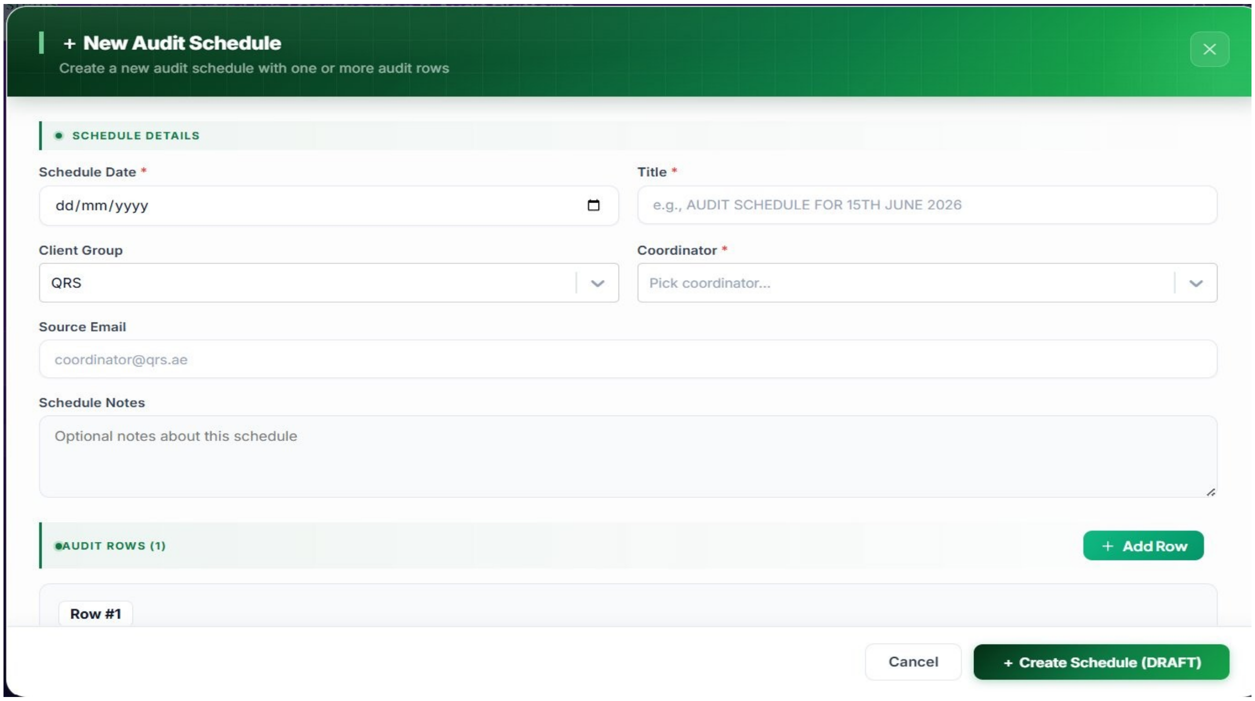

Figure 9A.2 — New Audit Schedule, top half: Schedule Details (date, title, client group, coordinator, source email, notes).

Section A • Schedule Details

Step 1 ► Enter the Schedule Date

Click the Schedule Date field and pick the date the schedule is for (dd/mm/yyyy). Mandatory.

Step 2 ► Enter the Title

Short, descriptive title — e.g. AUDIT SCHEDULE FOR 15TH JUNE 2026. This is what appears on the printed schedule and in notifications. Mandatory.

Step 3 ► Pick the Client Group

Choose QRS or TQS from the dropdown. The list of companies and coordinators is filtered to the chosen group.

Step 4 ► Pick the Coordinator

Open the Coordinator dropdown and pick the user who owns this schedule. Mandatory.

Step 5 ► Confirm Source Email

Defaults to the coordinator's email (e.g. coordinator@qrs.ae). This is the From: address on outbound schedule notifications.

Step 6 ► Add Schedule Notes (optional)

Use the notes area for any context that applies to the whole schedule — public holidays, road closures, special arrangements.

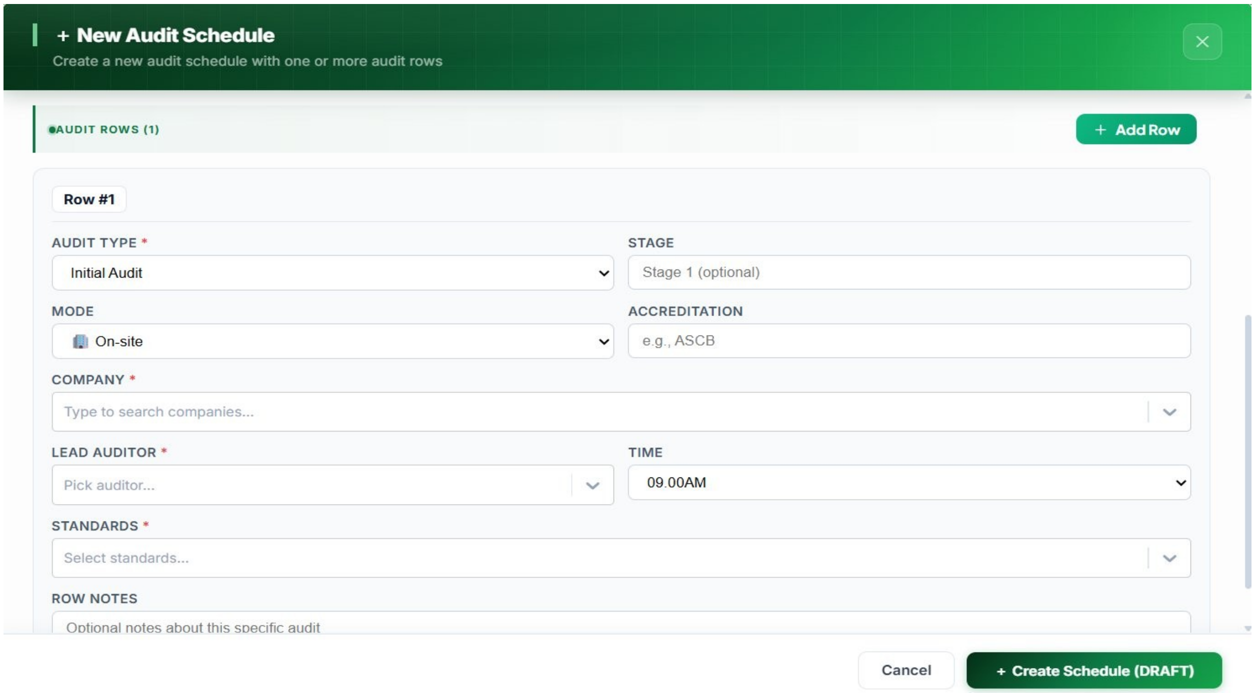

Figure 9A.3 — New Audit Schedule, bottom half: Audit Rows — each row is a separate audit visit with its own type, stage, mode, accreditation, company, lead auditor, time and standards.

Section B • Audit Rows

Each schedule can contain one or more rows — each row is a separate audit visit. Click + Add Row at the top-right of the Audit Rows section to add another. For each row, complete the following:

Step 7 ► Pick the Audit Type

Initial Audit / Surveillance Audit / Re-Certification / Transfer Audit. Mandatory.

Step 8 ► Set the Stage

Optional. Type Stage 1 / Stage 2 if the row is stage-specific; leave blank for surveillance or transfer visits.

Step 9 ► Pick the Mode

On-site / Online / Hybrid. Default On-site.

Step 10 ► Enter the Accreditation

Free-text accreditation tag — e.g. ASCB, EIAC, UKAS.

Step 11 ► Search & pick the Company

Type to search the master Companies list. Only active companies appear. Mandatory.

Step 12 ► Pick the Lead Auditor

Only active auditors qualified for the selected standards appear. Mandatory.

Step 13 ► Set the Time

Default 09.00 AM. Adjust per row if multiple audits are in the same schedule on different time slots.

Step 14 ► Pick the Standards

Multi-select — ISO 9001, 14001, 22000, 45001, 27001 ... Mandatory.

Step 15 ► Add Row Notes (optional)

Use the row notes area for special instructions about this specific audit (entry pass, client contact, scope clarifications).

Step 16 ► Save as Draft or Publish

Click + Create Schedule (DRAFT) to save without notifying. To publish (and notify Marketing, Auditor, Coordinator), open the saved schedule and click Publish.

9A.3 Reschedule an Audit

If a planned audit can't go ahead on the original date, click the Reschedule icon on the row in the schedule detail view. The Reschedule Audit modal shows the audit metadata read-only at the top and a new schedule section below.

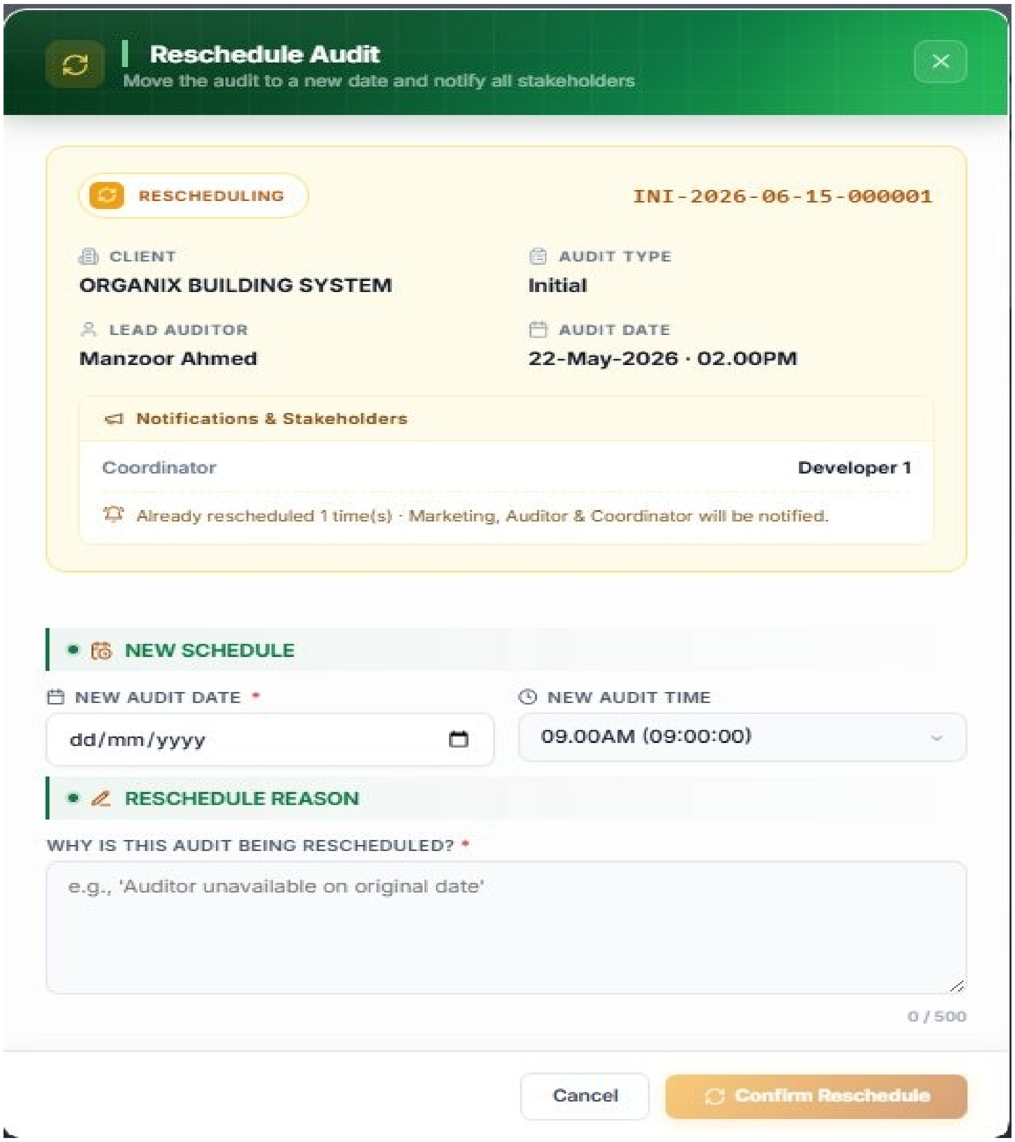

Figure 9A.4 — Reschedule Audit modal: pick the new date, the new time, and explain why the audit is being rescheduled.

Fields

Field	Description
New Audit Date	Pick the new date (dd/mm/yyyy). Mandatory.
New Audit Time	Pick a slot from the time dropdown (default 09.00 AM).
Reschedule Reason	Free-text — explain why (e.g. auditor unavailable, client request, weather, lockdown). Mandatory.

Click Confirm Reschedule to apply. Marketing, Auditor and Coordinator are automatically notified by email. The audit moves to the new date and the previous date is logged in the audit trail. The amber banner "Already rescheduled N time(s)" shows at the top of the modal so the Coordinator can see how many times the audit has been moved — repeated rescheduling is a quality signal worth investigating.

9A.4 Cancel an Audit

Click the red Cancel icon on the row in the schedule detail view to open the Cancel Audit modal. The modal shows the audit metadata at top, four reason cards in the middle, and an explanation box at the bottom.

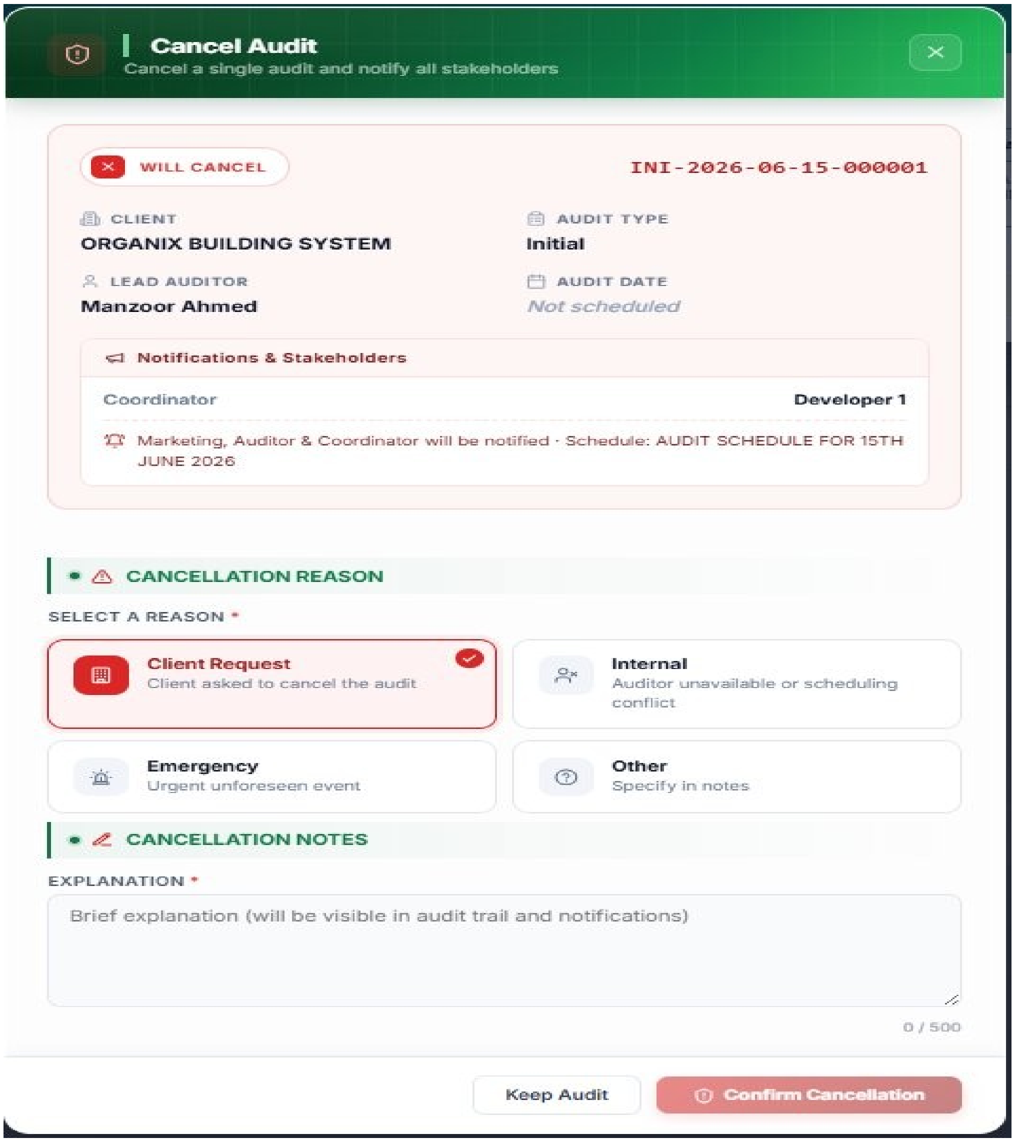

Figure 9A.5 — Cancel Audit modal: pick one of the four cancellation reasons and add a brief explanation. Marketing, Auditor and Coordinator are notified.

Cancellation Reasons

Reason	When to Use

Client Request	Client asked to cancel the audit (re-scoping, budget, withdrawal).
Internal	Auditor unavailable or scheduling conflict on our side.
Emergency	Urgent unforeseen event — illness, natural disaster, force majeure.
Other	None of the above — explain in the notes field.

Step-by-Step

Step 1 ► Pick a reason card

Tap one of the four cards (Client Request, Internal, Emergency, Other). The selected card highlights in red.

Step 2 ► Type the Explanation

Brief explanation (max 500 chars) — visible in the audit trail and in the notification sent to Marketing, Auditor and Coordinator. Mandatory.

Step 3 ► Confirm or Keep

Click Confirm Cancellation to cancel, or Keep Audit to abort. Cancelled audits remain visible in the schedule list with a Cancelled status tag — never deleted. The trail preserves who cancelled, when and why.

9A.5 Audit Schedule Details — Print / Email View

Clicking the eye icon on any schedule row opens the Audit Schedule Details print view. It shows the title (e.g. AUDIT SCHEDULE FOR 14TH MAY 2026) and a tabular breakdown of every audit row inside the schedule — perfect for emailing to the client or printing for the auditor's day-pack.

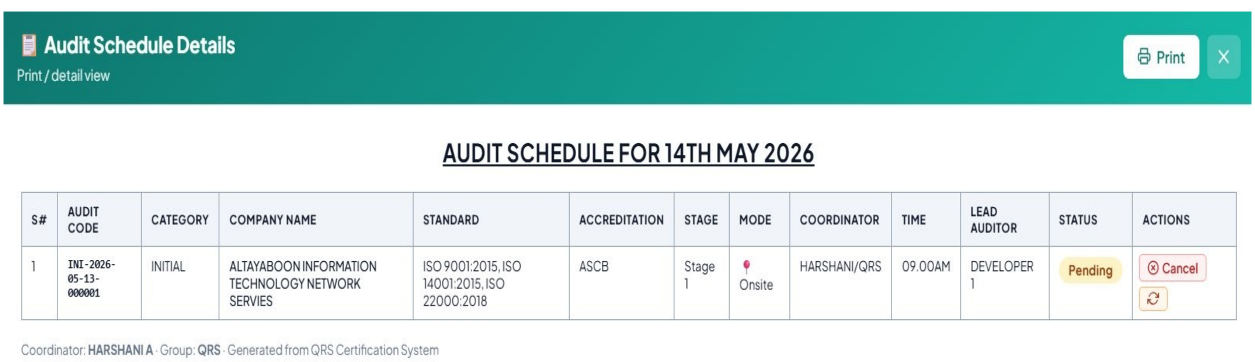

Figure 9A.6 — Audit Schedule Details, print/detail view. The Actions column on this view shows the Cancel and Reschedule icons so the Coordinator can act on a row directly from the detail.

Columns on the Detail View

Column	Description

S#	Sequence number inside the schedule.
Audit Code	Auto-generated audit code (e.g. INI-2026-05-13-000001).
Category	Audit category — Initial / Surveillance / Re-Cert / Transfer.
Company Name	Client organisation being audited.
Standard	Comma-separated list of ISO standards covered.
Accreditation	Accreditation body — ASCB / EIAC / UKAS / ...
Stage	Stage 1, Stage 2 (or blank).
Mode	On-site / Online / Hybrid.
Coordinator	Owner of the schedule.
Time	Time slot for the visit (e.g. 09.00 AM).
Lead Auditor	Auditor assigned to this row.
Status	Pending / Completed / Cancelled.
Actions	Cancel · Reschedule (icons).

Click Print to send to the printer, or X to close the view. The detail view is also the entry point for the Cancel and Reschedule actions described in §9A.3 and §9A.4.

9A.6 Status Flow & Notifications

Status	Meaning
Draft	Schedule created but not yet published. Fully editable. No notifications sent.
Published	Schedule is locked and visible to stakeholders. Marketing, Auditor and Coordinator are notified by email.
Cancelled	Schedule cancelled — all rows are marked Cancelled. Reason and explanation are logged in the audit trail.
Pending	Row-level status — the individual audit row hasn't yet been completed by the auditor.
Completed	Row-level status — the audit visit has been completed and the documents are ready in Audit Management.

9A.7 Roadmap — What's Coming Next

Items currently on the development backlog for this module:

- Direct calendar view (week / month) of all schedules, with drag-to-reschedule.
- Auto-suggested lead auditor based on standards, availability and proximity.
- ICS calendar invite attached to every Published notification (so auditors and clients get the event in their own calendar).
- Bi-directional sync with Module 9 (Audit Management) — when a schedule is Published, the Audit Compliance record is auto-created so the Scheme Dept. can start preparing the document pack in parallel.
- Mobile-friendly day-view for auditors arriving on-site (offline-capable).

> ✓ When the Audit Schedule module is fully released, the end-to-end workflow becomes: Inquiry → Companies → Audit Schedule (Coordinator picks date & auditor) → Audit Management (Scheme generates the pack) → Job Registrar (the day-pack) → Certificate. The Coordinator owns the calendar; the Scheme Dept. owns the paperwork; the Auditor owns the visit.

10. Module — Standards

The **Standards module** is the master list of every certification standard the Platform supports. Every company, audit, template and certificate references one or more standards from this list — never free-text — which keeps reporting consistent.

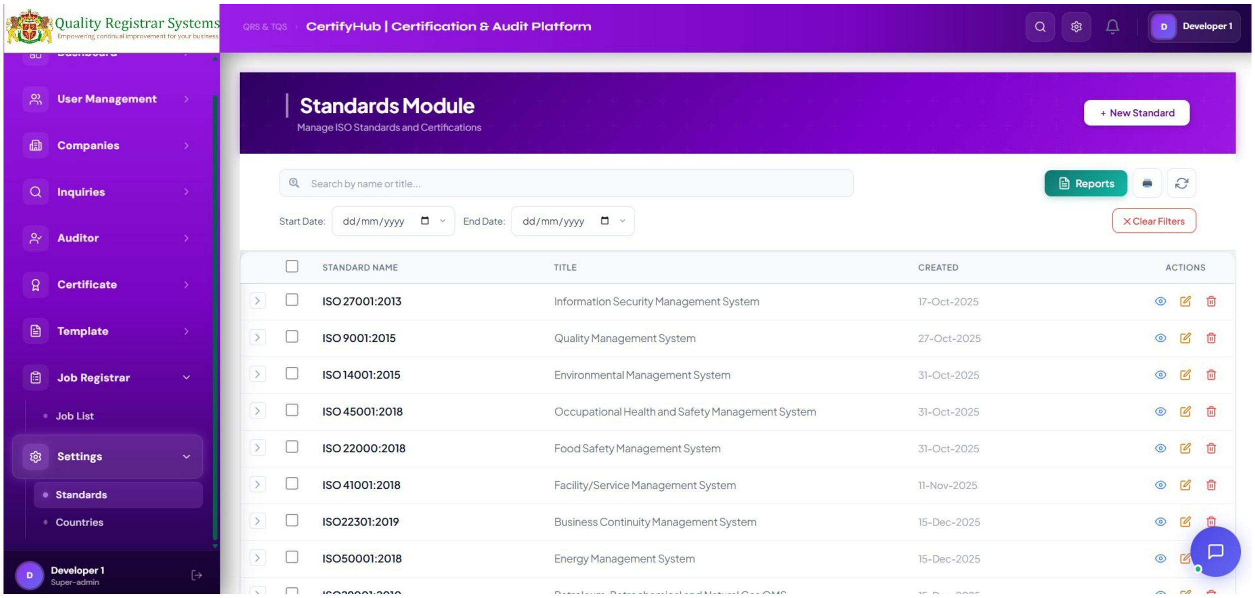

Figure 10.1 — Standards module list view with the +New Standard button.

10.1 List View

Top-Bar

- **+ New Standard** (white button, top-right) — opens the Add Standard modal.
- **Search by name or title** — live search across both fields.
- **Start Date / End Date** — filter by the **Created** date.
- **Reports** (green) — generate a styled PDF / Excel of the currently filtered list.
- **Print** / **Refresh** icons — print the visible page or reload from server.
- **Clear Filters** (red) — reset all filters.

List Columns

Column	Description	Example
Standard Name	Short code of the standard.	ISO 9001:2015
Title	Full descriptive title.	Quality Management System

Column	Description	Example
Created	Date the standard was added.	27-Oct-2025
Actions	👁️ View • ✏️ Edit • 🗑️ Delete.	(icons)

Common Standards Pre-configured

Code	Title
ISO 9001:2015	Quality Management System
ISO 14001:2015	Environmental Management System
ISO 45001:2018	Occupational Health & Safety Management System
ISO 27001:2013	Information Security Management System
ISO 22000:2018	Food Safety Management System
ISO 41001:2018	Facility / Service Management System
ISO 22301:2019	Business Continuity Management System
ISO 50001:2018	Energy Management System

10.2 Adding a New Standard — Step by Step

Step 1 ► Open the modal

Click the white **+ New Standard** button in the purple banner.

Step 2 ► Enter the Standard Name

Short code, e.g. **ISO 9001:2015**. This is what appears on certificates and dropdowns. **Mandatory**.

Step 3 ► Enter the Title

Full descriptive title, e.g. **Quality Management System**. Appears on the certificate body.

Step 4 ► Add Description (optional)

A short paragraph explaining what the standard covers — useful for auditors and clients.

Step 5 ► Set Effective Date

Date the standard became effective (auto-defaults to today).

Step 6 ► Save

Click **Save**. The standard becomes immediately available in every dropdown across the platform (Companies, Inquiries, Audit Compliance, Templates, Certificates).

10.3 Editing or Retiring a Standard

1. Locate the standard → click the **Edit** (pencil) icon.
2. Update fields → **Save**.
3. To retire (delete): click the red 🗑️ **Bin** icon → confirm.

> ⚠️ **A standard cannot be deleted if it is referenced by any active company, audit or certificate.** The platform will block the deletion and show the dependencies.

11. Module — Countries

The **Countries module** holds the directory of countries where the Platform operates or where its clients are based. Each country is shown with its flag icon, a 2-letter ISO code and the date it was added.

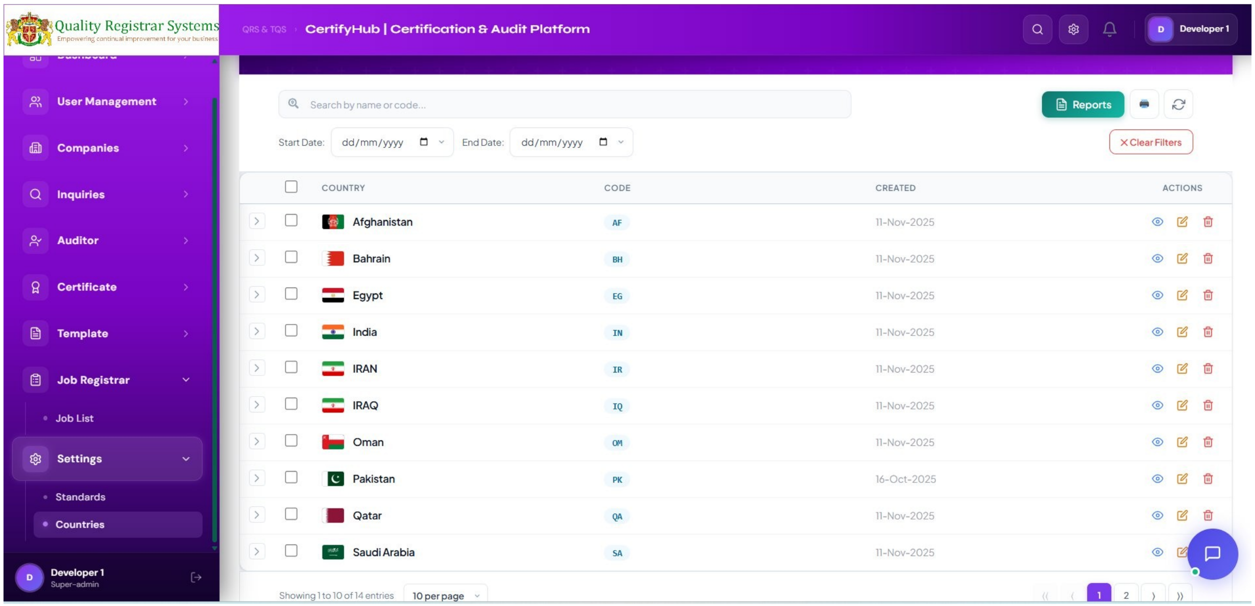

Figure 11.1 — Countries list view. Found under Settings → Countries.

11.1 Where to Find This Module

Countries lives under **Settings → Countries** in the left sidebar (visible to Super-admins by default). The sibling page **Settings → Standards** is the Standards module (Section 10).

11.2 List View

Top-Bar

- **Search by name or code** — type to find a country (e.g. *Pak...* → **Pakistan**, code **PK**).
- **Start Date / End Date** — filter by the **Created** date.
- **Reports** (green) — export the filtered list.
- **Print** / **Refresh** icons.
- **Clear Filters** (red).

List Columns

Column	Description	Example
Country	Flag icon + full country name.	United Arab

Column	Description	Example
		Emirates
Code	ISO 2-letter code (blue tag).	AE, PK, IN, OM, BH, SA, QA
Created	Date the country was added to the system.	11-Nov-2025
Actions	👁️ View • ✏️ Edit • 🗑️ Delete.	(icons)

Pagination: The footer shows *Showing 1 to 10 of 14 entries* and a page-size selector (10 per page) with arrow controls for moving between pages.

11.3 Adding a New Country — Step by Step

Step 1 ► Open the Add Country modal

Click the **+ Add Country** button (top-right of the list).

Step 2 ► Enter the Name

Full country name (e.g. **United Arab Emirates**). **Mandatory**.

Step 3 ► Enter the Code

ISO 3166 alpha-2 code (e.g. **AE**, **PK**, **IN**). The code appears on the company list, in certificates and in reports. **Mandatory**.

Step 4 ► Upload the Flag Icon

Upload a flag PNG or SVG, **≤ 50 KB**. The icon shows next to the country name in every dropdown across the platform.

Step 5 ► Set Region / Continent (optional)

Useful for regional reporting (e.g. **GCC**, **MENA**, **Asia**, **Europe**).

Step 6 ► Save

Click **Save**. The country becomes selectable on every form (Companies, Auditor, Certificates).

11.4 Editing or Deleting a Country

1. Locate the country → click the orange ✏️ **Edit** icon.
2. Update fields → **Save**.
3. To delete: click the red 🗑️ **Bin** → confirm.

⚠️ A country cannot be deleted if any active company, auditor or certificate references it. Resolve the dependencies first or mark the country **Inactive** instead.

12. Module — Templates (Stage 1 & 2)

The **Templates module** is the library of every audit document the platform can produce — audit plans, checklists, client sheets, scope summaries, recommendations, meeting minutes, certificates. Templates are organised by **Stage** (Stage 1 or Stage 2) and by **Type** (DOCUMENT or CERTIFICATE).

12.1 List View (Stage 1)

Open **Templates → Templates**. By default the list shows **all** templates; use the **Stage** filter to narrow down. The screenshot below shows the list filtered to **Stage 1** — 35 templates out of 49 total.

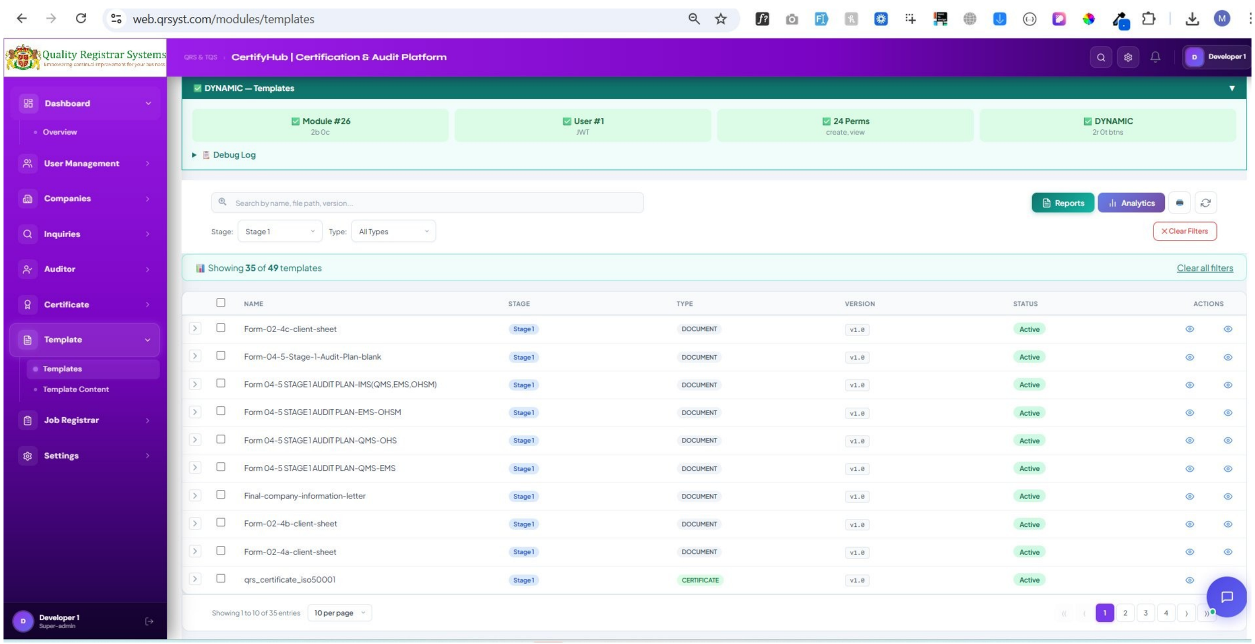

Figure 12.1 — Templates list filtered by Stage 1, showing 35 of 49 templates.

Stage 1 Templates You'll See

- **Form 02-4a / 4b / 4c-client-sheet** — client information sheets.
- **Form 04-5-Stage-1-Audit-Plan-blank** — generic Stage 1 audit plan.
- **Form 04-5 STAGE 1 AUDIT PLAN-IMS(QMS,EMS,OHSM)** — integrated management system Stage 1 plan.
- **Form 04-5 STAGE 1 AUDIT PLAN-EMS-OHSM** — combined EMS + OHSM Stage 1 plan.
- **Form 04-5 STAGE 1 AUDIT PLAN-QMS-OHS** — QMS + OHS Stage 1 plan.
- **Final-company-information-letter** — letter sent to the client after Stage 1.
- **qrs_certificate_iso50001** — certificate template (Type = **CERTIFICATE**).

12.2 List View (Stage 2)

Switching the **Stage** filter to **Stage 2** shows the 14 templates used for the on-site implementation audit and certification recommendation.

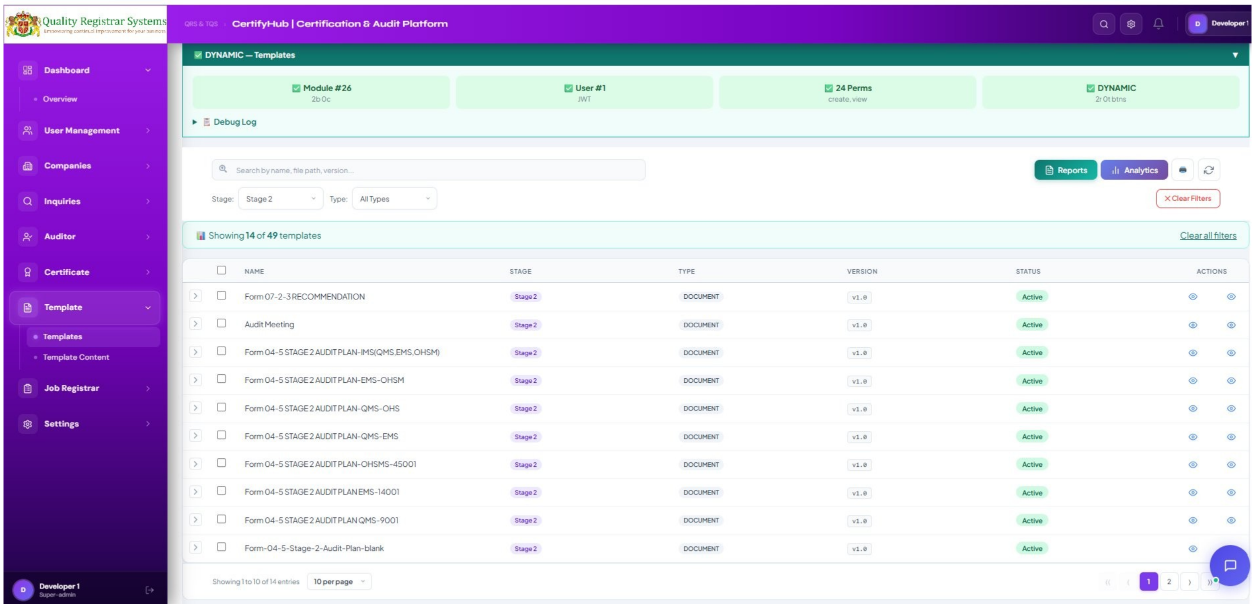

Figure 12.2 — Templates list filtered by Stage 2, showing 14 of 49 templates.

Stage 2 Templates You'll See

- **Form 07-2-3 RECOMMENDATION** — certification recommendation written after Stage 2.
- **Audit Meeting** — agenda and minutes for opening / closing meetings.
- **Form 04-5 STAGE 2 AUDIT PLAN-IMS(QMS,EMS,OHSM)** — integrated Stage 2 plan.
- **Form 04-5 STAGE 2 AUDIT PLAN-EMS-OHSM**, **-QMS-OHS**, **-QMS-EMS**, **-OHSMS-45001**, **EMS-14001**, **QMS-9001** — one plan per standard / combination.
- **Form-04-5-Stage-2-Audit-Plan-blank** — generic Stage 2 audit plan.

List Columns (both Stage 1 and Stage 2)

Column	Description
Name	Internal template name (e.g. `Form 04-5 STAGE 1 AUDIT PLAN-QMS-OHS`).
Stage	Stage 1 or Stage 2 (colour tag).
Type	DOCUMENT or CERTIFICATE.
Version	Semantic version (v1.0, v1.1, v2.0 …).
Status	Active (green) — usable for generation; Inactive (grey) — hidden.
Actions	👁 Open PDF • 👁 View metadata.

Search & Filters

- **Search by name, file path, version** — live search.
- **Stage** — Stage 1 / Stage 2.
- **Type** — All Types / DOCUMENT / CERTIFICATE.
- **Reports** / **Analytics** — top-right buttons.
- **Clear Filters** — red button.

12.3 Adding a New Template — Step by Step

Click the **+ Add Template** button (or the equivalent action in the template module's top-bar). A green-themed modal titled **New Template — Register a new PDF document or certificate template** opens.

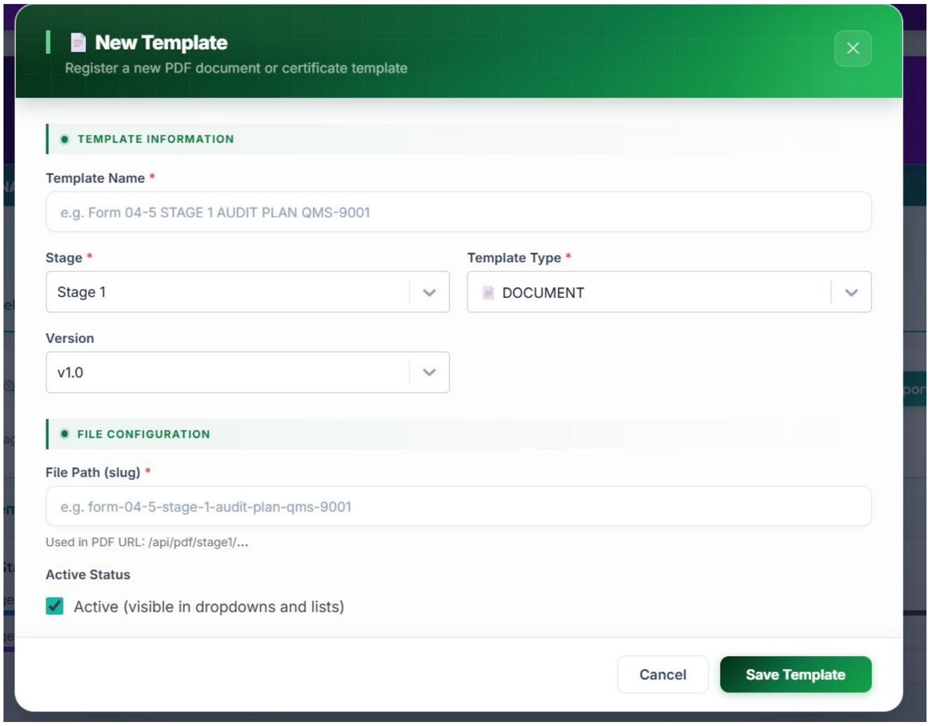

Figure 12.3 — New Template form.

Section A • Template Information

Step 1 ► Enter the Template Name

Type the internal name following the existing convention, e.g. **Form 04-5 STAGE 1 AUDIT PLAN QMS-9001**. **Mandatory**.

Step 2 ► Select the Stage

Open **Stage** dropdown and choose **Stage 1** or **Stage 2**. **Mandatory**.

Step 3 ► Select the Template Type

Open **Template Type** dropdown — pick **DOCUMENT** for forms/reports/checklists, or **CERTIFICATE** for certificate templates. **Mandatory**.

Step 4 ► Set the Version

Open **Version** dropdown — start at **v1.0** for a new template, or pick the next semantic version when uploading a revision (v1.1 for a minor change, v2.0 for a major rewrite).

Section B • File Configuration

Step 5 ► Enter the File Path (slug)

Type the slug used in the file URL, lowercase with hyphens, e.g. **form-04-5-stage-1-audit-plan-qms-9001**. The helper text shows the resulting PDF URL: `/api/pdf/stage1/`…. **Mandatory**.

Step 6 ► Tick Active Status

Check **Active (visible in dropdowns and lists)** to make the template immediately usable. Untick to keep it hidden while you upload supporting files or refine the content.

Step 7 ► Save

Click the green **Save Template** button at the bottom-right. The template appears in the list and is available everywhere it can be applied — audit scheduling, document generation, certificate issuance.

✓ Template names are used in file names of the generated documents. Follow the existing prefix convention (**Form NN-N STAGE X …**) — it makes the audit folder for each company self-sorting.

12.4 Template Content (sub-page)

Templates → Template Content is where you define the actual items inside each template — checklist questions, scoring rules, time slots, section headers. This is the difference between an empty form and a fully usable audit checklist.

- Open a template → **Manage Items** → add / edit / reorder checklist items.
- Set the **Time Slot** for each section so the auditor can plan the day.
- Mark items as **Mandatory** or **Optional**.
- Save — the new items show up in every future audit using this template.

13. Module — Job Registrar

Every audit becomes a **Job**. The Job Registrar is the operational logbook that links the Company, the Auditor, the Standards, the Templates and the generated documents into one record per audit cycle.

Relationship with Audit Management

Audit Management (Module 9) is the **source** of every Job Registrar entry. The flow is:

1. Audit is scheduled in Audit Management → a Job is auto-created here.
2. Auditor completes Stage 1 → marks the stage **Completed** in Audit Management.
3. Scheme Department clicks **Generate Document** in Audit Management — the platform produces the full Stage 1 document pack from the selected template within ~2 minutes (see Module 9.3).
4. All generated files are **attached automatically to this Job's record**, visible under the Job's documents tab.
5. The same flow runs for Stage 2 → on closure, the **Generate Certificate** action becomes available in Module 14.

Job Record Fields

Field	Example
Company Name	MGL Geotechnical Laboratory
Doc Review Date	06 Dec 2025
On-Site Audit Date	08 Dec 2025
No. of Employees	50
Stage	Stage 1 / Stage 2
Auditor	Mr Muhammad Hanzala
Template	Form 04-5 STAGE 1 AUDIT PLAN QMS
Standards	ISO 27001:2013, ISO 45001:2018
NACE / EAC Codes	34.5
Risk Level	Low / Medium / **High**
Job Codes	ISMS:5381, OHASMS:1479
Documents	All Stage 1 / 2 files generated by Audit Management.
Status	Open / Closed (auto-closes when certificate is issued).

List View Workflow

6. Open **Job Registrar → Job List** from the sidebar.
7. Filter by **Stage**, **Standard**, **Auditor**, **Risk** or **Date Range**.
8. Click **View** on any row to see the company, audit, all generated documents and timeline events.
9. Closed jobs remain searchable forever — they are the operational audit trail.

📊 **Reports Button —** Every Job Registrar module list view has a green Reports button on the top-right. Apply any filters first (date range, month, status, group, standard, etc.) and then click Reports — the platform generates a styled PDF / Excel of exactly the rows currently visible. The same applies on every list view in the platform — Companies, Inquiries, Certificates, Job Registrar, Standards, Countries — so you always get a report that matches what you see on screen.

✓ You don't create Job entries by hand. They appear automatically the moment an audit is scheduled in Audit Management. The Job is the place where Scheme & Audit teams collaborate on the actual paperwork.

13.1 Reports — Filtered Report Generation

The Job Registrar Reports button produces a definitive view of how much certification work the platform has executed — every Job is one audit cycle, so this is the report the Scheme Department lives by. Filter by Stage, Standard, Auditor, Risk level or date range, then export to PDF (sharable summary) or Excel (operational sheet).

Step-by-Step — Generating a Job Registrar Report

Step 1 ► Apply filters

Stage (1 / 2 / Surveillance / Recertification), Standard (ISO 9001 / 14001 / 45001 / ...), Auditor (specific lead auditor), Risk (High / Medium / Low), Date Range.

Step 2 ► Pick the slice you need

By auditor — "all of Mr Hanzala's audits this quarter"; by standard — "every ISO 27001 cycle this year"; by status — "open jobs only".

Step 3 ► Click Reports → PDF / Excel

PDF is preferred for executive summaries (workload by auditor, completion rates). Excel when you need to pivot or chart.

Step 4 ► Save / Distribute

File pattern: JobRegistrarReport_<YYYY-MM-DD>_<filters>.pdf — e.g. JobRegistrarReport_2026-05-14_Stage2_OHSMS.pdf.

What's Inside the Job Registrar Report

Section	Contents
Cover	Title · Date · Filter summary · Generator (user).
Workload block	Total jobs · Open / Closed split · By Stage · By Standard.
By auditor	Count of jobs per lead auditor with average completion time. Highlights workload imbalance — useful at quarter-end.
Risk block	Count by Risk level (High / Medium / Low) — drives where Scheme Dept. focuses surveillance attention.
Detail table	Job code · Company · Stage · Standards · Lead Auditor · Doc Review Date · On-Site Date · No. of Employees · NACE/EAC · Status · Generated docs count.
Documents column	Mini summary of how many files the Scheme generated for each Job (8 docs · 12 docs · …). Quick visual of which jobs are document-complete.
Footer	Page X of Y · QRS contact · Confidentiality.

Use Cases by Role

Role	Typical Filter Combination	What They Use the Report For
Scheme Dept. Head	All Open · This month.	"How much has my team produced?" — number of jobs closed, average doc generation time, jobs per auditor.
Coordinator	Date Range = This week.	Operational worklist — audits coming up, NCRs to chase, jobs ready to close.
Auditor	Auditor = me · This year.	Personal audit log — every cycle I led, in one PDF, useful for renewing IRCA / ISO accreditation.
Super-admin	Whole year.	Annual operations KPI — total audits delivered, average lead time, workload balance.
Risk / QA Officer	Risk Level = High.	Surveillance plan — which clients require closer follow-up.

✓ This is the Scheme Department's productivity dashboard — it shows exactly how much audit pack work the team has produced. Run it monthly and the management deck writes itself.

14. Module — Certificate (Draft + Digital)

Once Stage 2 is completed and all NCRs are closed, the platform issues the certificate. **Every certificate is fully digital**: the system assigns a **unique certificate number** based on the standard, attaches a **QR code**, a **verification URL**, a **token** and a digital **fingerprint** that together make the certificate impossible to forge. Clients can verify in seconds by scanning the QR code or entering the certificate number on the public verification page.

14.1 Certificates Module — List View

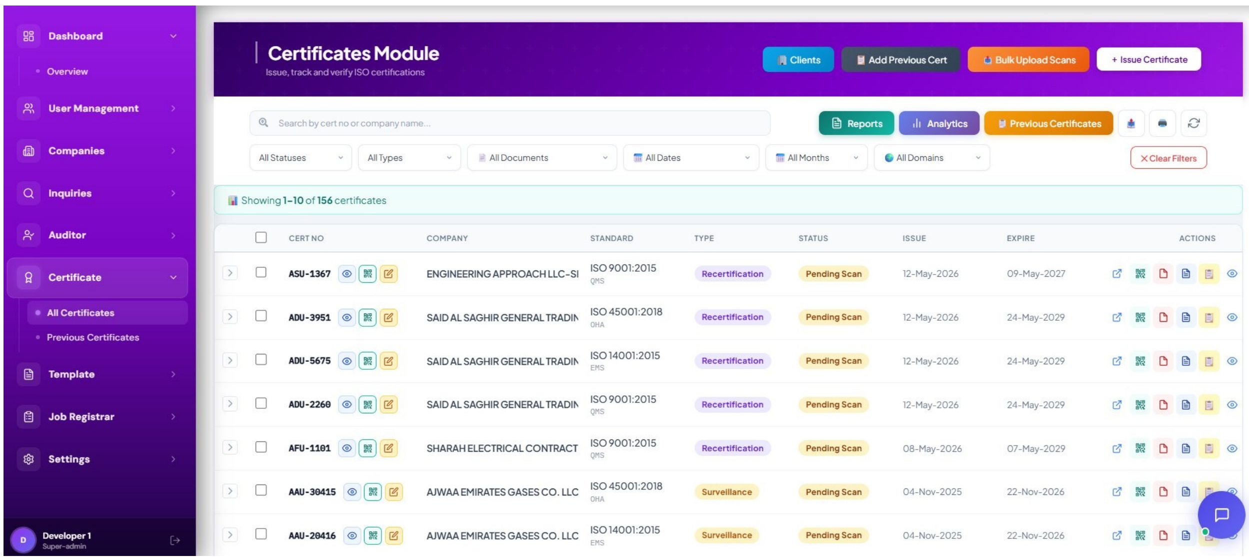

Figure 14.1 — Certificates Module list view, showing 156 certificates with status, type and validity dates.

Top-Bar Actions

Button	Purpose
Clients (blue)	Opens the client picker — choose a company before issuing a certificate.
Add Previous Cert (dark)	Adds a legacy certificate record (links to Module 15).
Bulk Upload Scans (orange)	Drag-and-drop multiple signed PDF scans; the platform auto-matches each file to its certificate number.
+ Issue Certificate (white)	Opens the **Issue Certificate** form — the main daily action.
Reports (green)	Export the filtered list to PDF / Excel.
Analytics (purple)	Dashboards: certs issued per month, by standard, by domain, expiring soon.

Button	Purpose
Previous Certificates (orange)	Jump to Module 15 (the historical archive).
Clear Filters (red)	Reset every filter at once.

List Columns

Column	Description	Example
Cert No	Unique certificate number generated based on the standard.	`UAE-DU-OHA-8K57Q`
Company	Certified organisation.	ENGINEERING APPROACH LLC
Standard	ISO standard + short code.	ISO 9001:2015 • QMS
Type	Initial / Surveillance / Recertification (colour-tagged).	Recertification
Status	Pending Scan / Active / Suspended / Withdrawn / Expired.	Pending Scan
Issue	Issue date.	12-May-2026
Expire	Expiry date (typically 3 years after issue).	09-May-2027
Actions	Open external page • QR code • Edit • PDF • View • Verify.	(icons)

Filters

- **All Statuses** — Pending Scan / Active / Expired / Withdrawn
- **All Types** — Initial / Surveillance / Recertification / Transfer
- **All Documents** — Has scan / Missing scan
- **All Dates** and **All Months** — Issue date range filters
- **All Domains** — Local (`qrsyst.com`) / International

14.2 Issuing a Certificate — Step by Step

Click **+ Issue Certificate**. The platform pre-fills almost everything from the audit data — the user only confirms dates and click Save. The result is a draft certificate; promoting it to **Digital** locks the certificate number, generates the QR code and exposes the public verification URL.

Step 1 ► Open the Issue Certificate form

Click the white **+ Issue Certificate** button in the top-right of the Certificates Module.

Step 2 ► Pick the Company

Search and select the certified company. The form auto-fills Company name, Standards, City, Country, EA Codes and Scope of Work from the company record.

Step 3 ► Confirm the Standard & Standard Short Code

Standard short codes determine the certificate-number prefix: **QMS** (ISO 9001), **EMS** (ISO 14001), **OHA** (ISO 45001), **ISMS** (ISO 27001), **FSMS** (ISO 22000), and so on.

Step 4 ► Set Validity Dates

Enter the **Issue Date** (today by default) and **Expire Date** (3 years after issue is standard). If this is a renewal, the **Originally Registered Date** is carried from the previous certificate.

Step 5 ► Set Verification Domain

Choose **Local (qrsyst.com)** for UAE / GCC clients, or **International** for clients verifying from outside the local accreditation scope.

Step 6 ► Save the Draft

Click **Save**. The certificate appears with status **Pending Scan**. Use the draft PDF for internal review.

Step 7 ► Promote to Digital

Once approved, click **Generate Digital Certificate**. The platform:

- Assigns the **certificate number** (e.g. `UAE-DU-OHA-8K57Q`).
- Generates the **QR code** image.
- Creates the public **Verification URL** with token & fingerprint.
- Locks the record — no further edits without admin override.

14.3 Certificate Details Modal

Clicking the eye icon on any certificate row opens the **Certificate Details** modal. It is split into four logical sections that you can scroll through: Certificate Information, Company & Standard, Validity Dates, and QR Code & Public Verification.

Top — Certificate Information & Company

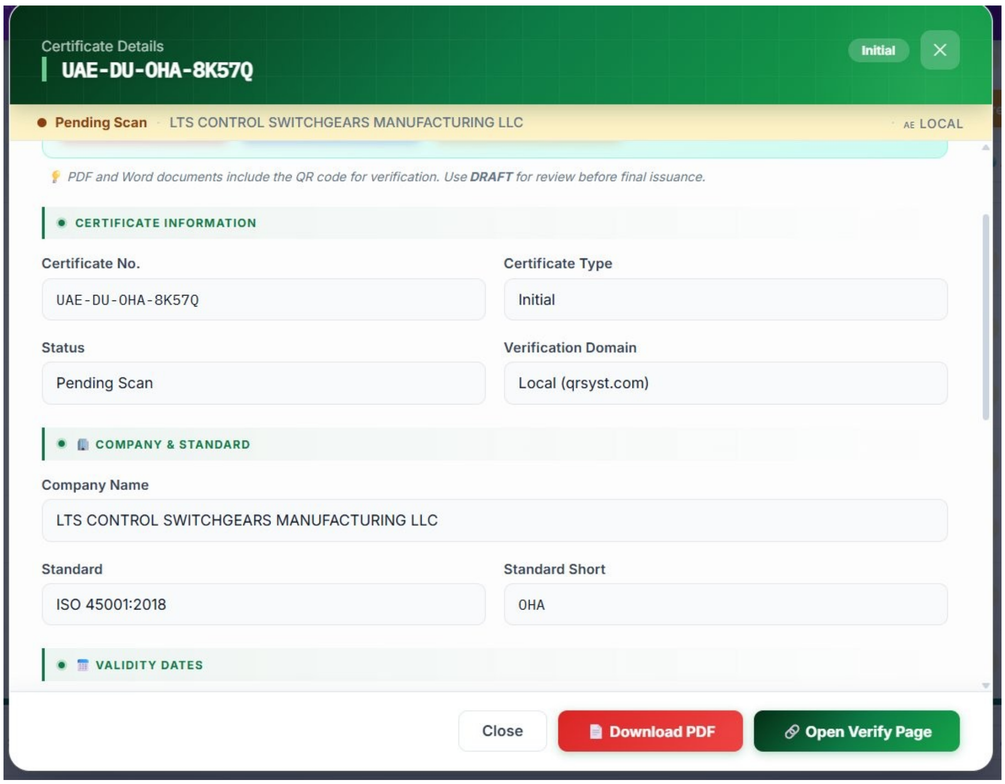

Figure 14.2 — Certificate Details modal, top: Certificate Information, Company & Standard.

Fields

Field	Description
Certificate No.	The unique number (also the modal title). Auto-generated, read-only.
Certificate Type	Initial / Surveillance / Recertification.
Status	Pending Scan / Active / Expired / Withdrawn.
Verification Domain	Local (qrsyst.com) — for local accreditation; International — for cross-border.
Company Name	Read-only from the company record.
Standard / Short	Full ISO code + short code (used in the cert number prefix).

Field	Description
▶ **“PDF and Word documents include the QR code for verification. Use DRAFT for review before final issuance.”** This message appears at the top of the modal — read it carefully before clicking Download.	

Bottom — Validity & Verification

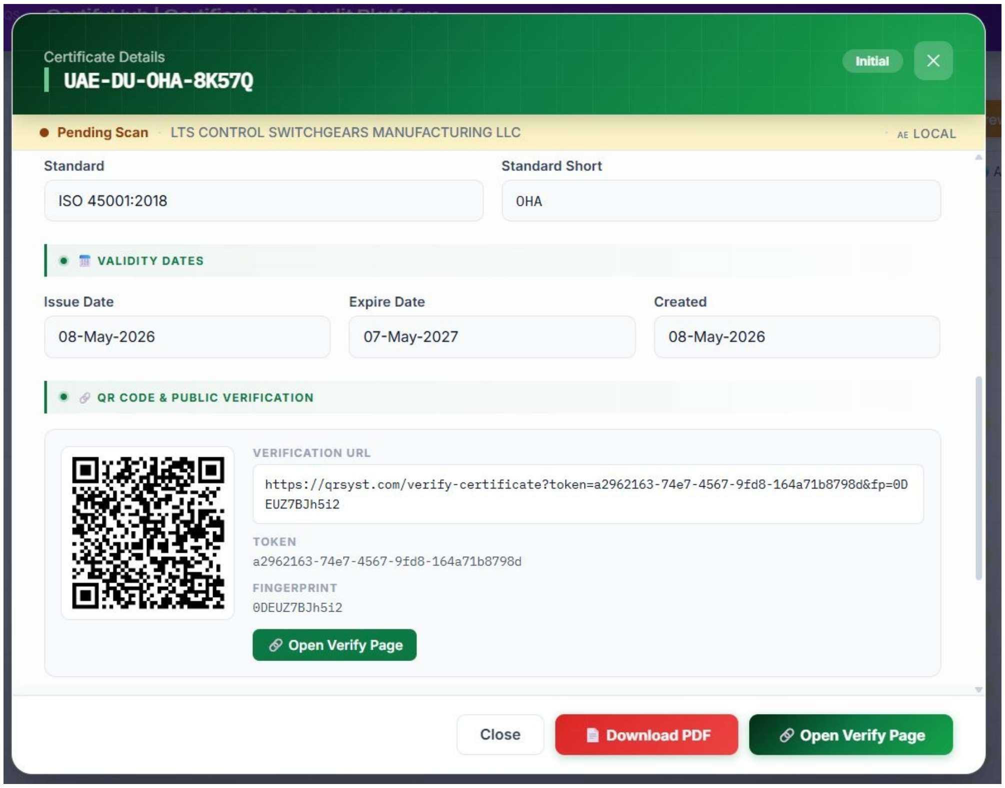

Figure 14.3 — Certificate Details modal, bottom: Validity Dates, QR code, Verification URL, token and fingerprint.

Validity Dates

- **Issue Date** — when the certificate was issued (e.g. **08-May-2026**).
- **Expire Date** — when it expires (e.g. **07-May-2027**).
- **Created** — when the record was created in the platform.

QR Code & Public Verification

Every digital certificate carries three linked artefacts that make forgery effectively impossible:

Artefact	Example	Purpose
QR Code	(image)	Scan with any phone — opens the verification page directly.
Verification URL	`https://qrsyst.com/verify-certificate?token=…&fp=…`	Opens the public page that proves the certificate is valid.
Token	`a2962163-74e7-4567-9fd8-164a71b8798d`	Server-side identifier that ties the URL to the

Artefact	Example	Purpose
		certificate.
Fingerprint	`0DEUZ7BJh5i2`	Cryptographic digest of the certificate contents — changing any field invalidates it.

Modal Footer Buttons

- **Open Verify Page** (green) — opens the public verification URL in a new tab.
- **Download PDF** (red) — downloads the certificate PDF with the QR code embedded.
- **Close** — closes the modal.

14.4 Certificate QR Code Modal

Clicking the QR icon on a certificate row opens a focused **Certificate QR Code** modal — used to print the QR code on physical certificates, share with clients, or embed in customer-facing documents.

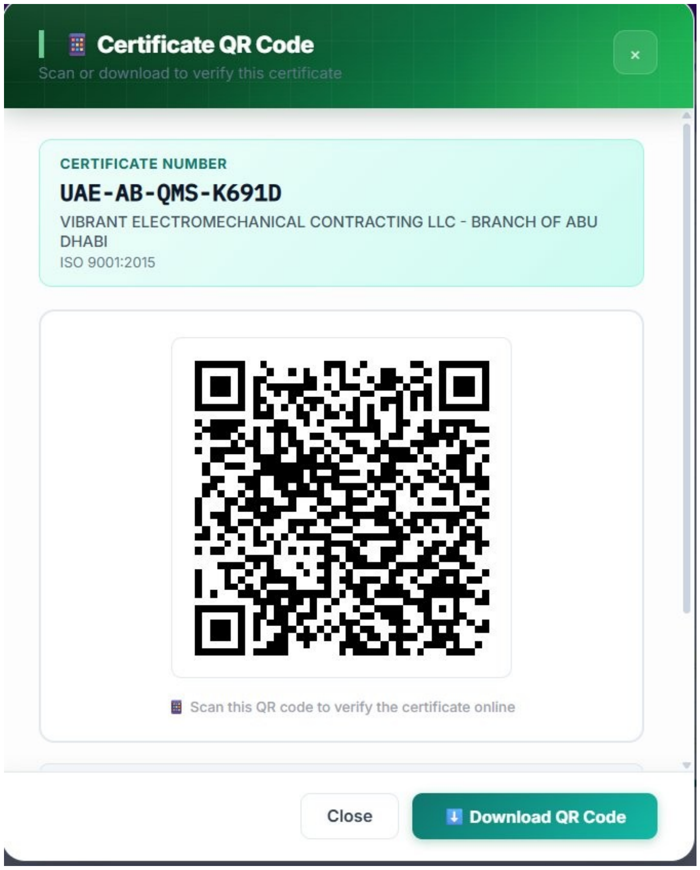

Figure 14.4 — Certificate QR Code modal.

What the Modal Shows

- **Certificate Number** — e.g. `UAE-AB-QMS-K691D`.
- **Company name** — e.g. VIBRANT ELECTROMECHANICAL CONTRACTING LLC - BRANCH OF ABU DHABI.
- **Standard** — e.g. ISO 9001:2015.
- **QR code image** — large and scannable, with the instruction *Scan this QR code to verify the certificate online*.
- **Download QR Code** button — downloads the PNG for use in print or other documents.

Public Verification — How Clients Verify

10. **Scan the QR code** with any smartphone camera — the verification page opens automatically.
11. Or **visit the verification URL** manually and enter the **Certificate Number** or **Fingerprint**.
12. The page shows: company name, standard, issue date, **valid / expired** status.

13. If the certificate is suspended or withdrawn, the page shows a clear warning — clients cannot be fooled.

✓ **No one can produce a fake certificate.** The combination of unique certificate number + token + fingerprint + QR code means any tampering immediately fails the verification. The platform is the **single source of truth**.

14.5 Bulk Upload Scans

After signing physical certificates, you usually have a folder of scanned PDFs. Instead of attaching each one by hand, use **Bulk Upload Scans** to upload up to **200 files at once** — the platform reads the filename, finds the matching certificate, attaches the scan, and flips the status to **Active**.

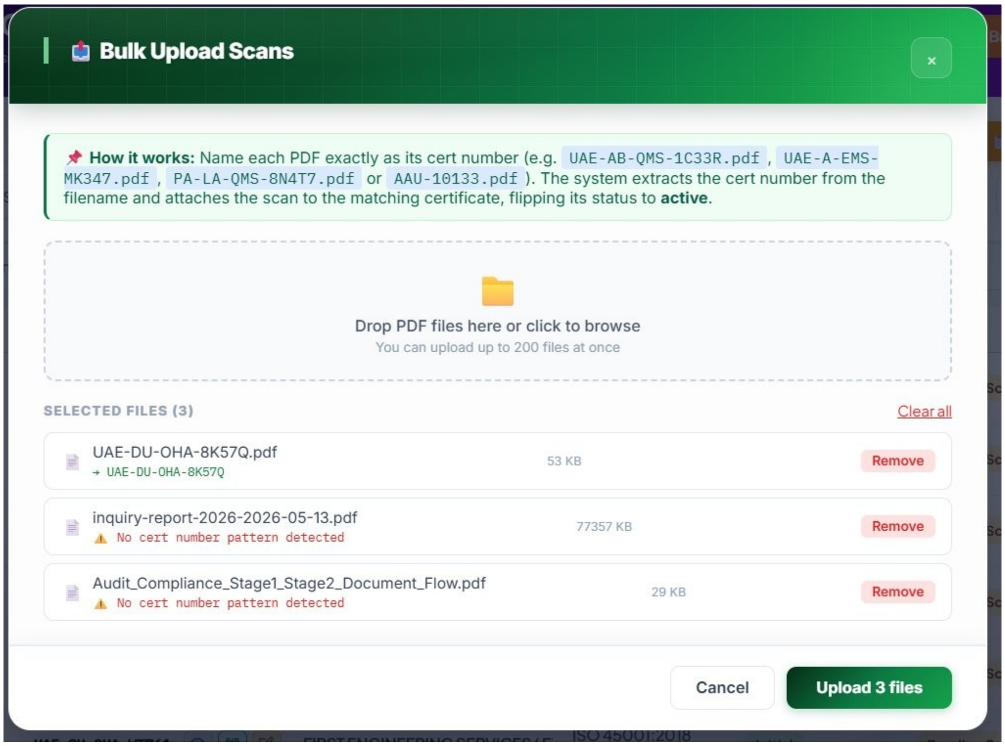

Figure 14.5 — Bulk Upload Scans modal.

How it Works

ℹ️ **Name each PDF exactly as its certificate number**, e.g. `UAE-AB-QMS-1C33R.pdf`, `UAE-A-EMS-MK347.pdf`, `PA-LA-QMS-8N4T7.pdf` or `AAU-10133.pdf`. The system extracts the certificate number from the filename and attaches the scan to the matching certificate, flipping its status to **Active**.

Step-by-Step

14. Click the orange **Bulk Upload Scans** button on the Certificates Module top-bar.
15. Drag and drop your PDF files into the drop zone — or click to browse.
16. The platform validates each filename:
    - **Green** ✓ — cert number pattern matched (e.g. `UAE-DU-OHA-8K57Q.pdf → UAE-DU-OHA-8K57Q`).
    - **Yellow** ⚠️ — no cert number pattern detected (file will be skipped).
17. Review the file list, click **Remove** on any file you don't want.
18. Click **Upload N files** — the platform attaches every matched scan in one batch.

19. Each successfully matched certificate moves from **Pending Scan** to **Active** automatically.

14.6 Why Going Digital Matters

Aspect	Digital Certificate
Number generation	Automatic, based on standard short-code + region + sequence. No duplicates possible.
Forgery resistance	Token + fingerprint + QR code cross-check. Any tampering breaks the verification.
Verification time	Seconds — scan QR or enter cert number.
Distribution	Email link, embed QR on letterheads, print on signed PDFs.
Suspension / withdrawal	Update status in the platform — public page instantly shows the new state.
Audit trail	Every issue, edit, suspension, renewal logged with user and timestamp.
Renewal	Originally Registered date is carried forward — continuity preserved.

14.7 Public Verification Pages — What Clients See

Section 14.4 showed the in-platform QR code modal. This section shows what the end-user — a client, a procurement officer, a regulator — sees when they verify the certificate from outside the platform. Two entry paths lead to the same place: scanning the QR code on the certificate, or typing the certificate number into the public verification page on the corporate website.

> ℹ️ Two entry paths → one verification result. (1) Scan the QR code printed on the PDF certificate with any phone camera → the verification result page opens directly. (2) Visit https://qrs.ae/verify-certificate (or whichever public domain is configured under Settings → Verification Domain) → type the certificate number → the same verification result page opens. Both paths land on the same page; only the entry differs.

Path 1 — Verify by Certificate Number

From the corporate website, the user clicks Verify Certificate in the top navigation. A blue-themed page titled Certificate Verification appears with a single search box and an instruction line: "Search by certificate number to verify certifications."

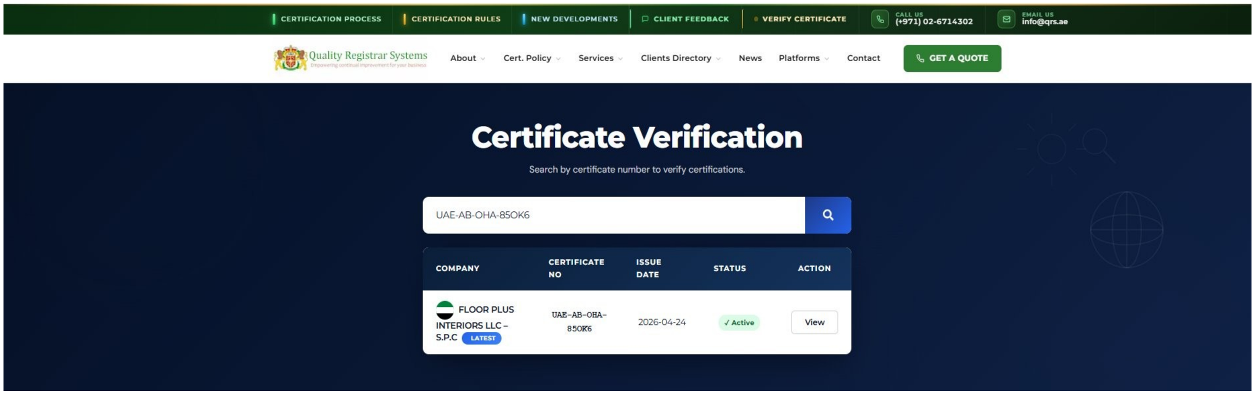

Figure 14.6 — Certificate Verification page on the QRS public website. The user types the certificate number (e.g. UAE-AB-OHA-850K6) and clicks the search icon. Matching results appear below with the company name, certificate number, issue date, status badge (✓ Active / Expired / Withdrawn) and a View button.

Result Row Fields

Field	Description	Example
Company	Flag icon + legal name of the certified company.	🇦🇪 FLOOR PLUS INTERIORS LLC – S.P.C
Certificate No	Exact certificate number entered for the search.	UAE-AB-OHA-850K6
Issue Date	When the certificate was issued.	2026-04-24
Status	Live status badge — Active / Expired / Withdrawn / Suspended.	✓ Active (green)
LATEST tag	Blue badge on the most recent renewal — useful when a client has historic certificates.	LATEST
Action	View button — opens the Confirmation of Certificate page (Path 2 below).	(button)

Path 2 — Verification Result (Confirmation of Certificate)

Whether the user came from the QR scan or clicked View from the search result, they land on the same Confirmation of Certificate page. The page is split into four blocks: a coloured status banner, the certificate body, the gold-seal authorised signatory block, and a dark footer carrying the verification reference.

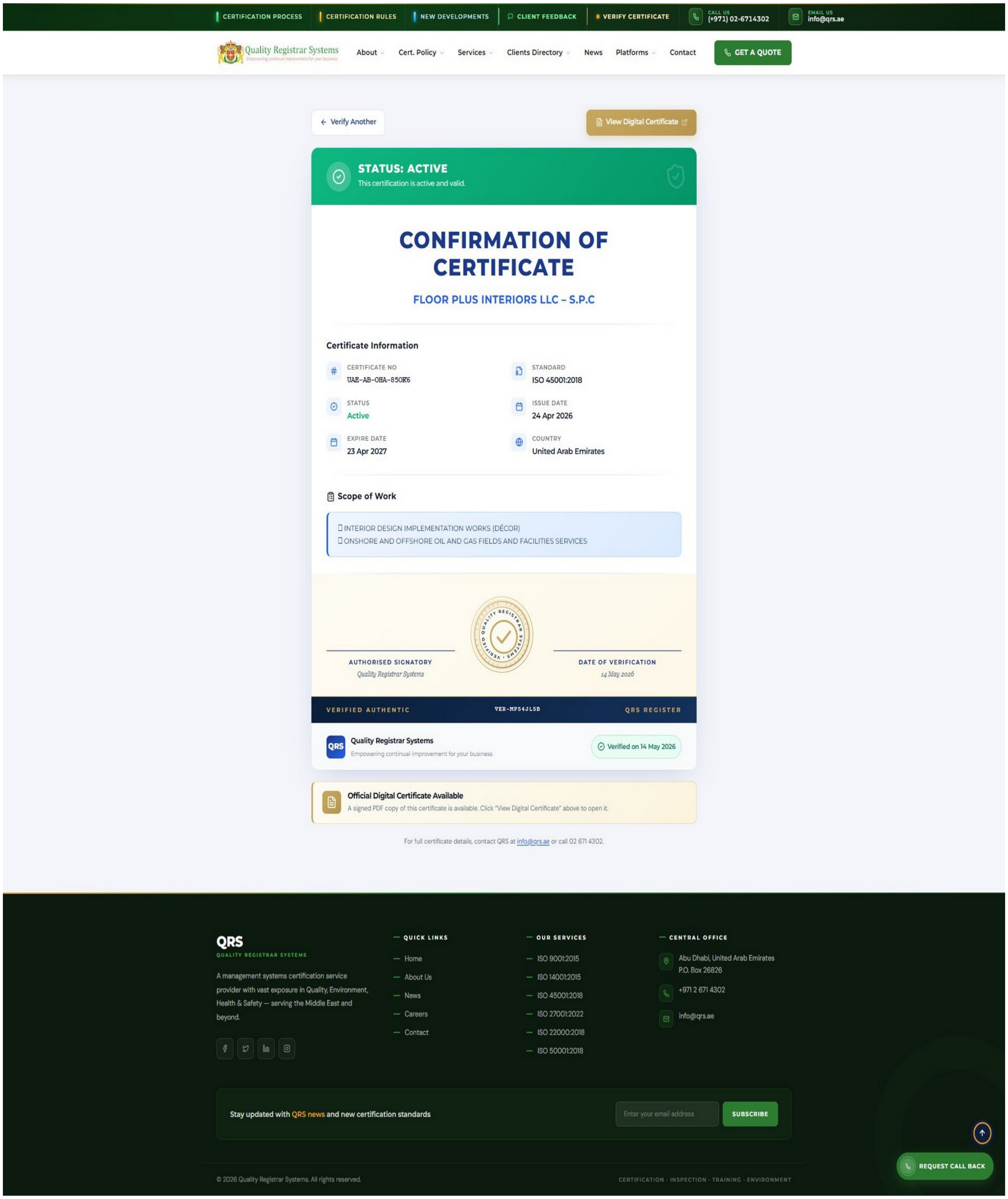

Figure 14.7 — Confirmation of Certificate result page on qrs.ae. The page shows a green STATUS: ACTIVE banner, the full certificate body (number, standard, status, issue & expire dates, country, scope of work), the gold authorised-signatory seal, and the dark verification footer with the unique verification reference (e.g. VER-MP54JLSB).

Status Banner Colours

Banner	Meaning

STATUS: ACTIVE (green)	Certificate is live and valid. The block reads "This certification is active and valid."
STATUS: EXPIRED (orange)	Certificate has passed its expire date. The block recommends contacting the company for a renewal.
STATUS: WITHDRAWN (red)	Certificate has been withdrawn / cancelled by QRS. The block warns it must not be relied upon.
STATUS: SUSPENDED (amber)	Temporarily suspended pending corrective action. The block notes the certificate is not in effect during the suspension.

Certificate Information Block

The Certificate Information block on the result page shows exactly what a verifier needs in the order they expect it: Certificate No, Standard, Status, Issue Date, Expire Date, Country, and Scope of Work. The Scope of Work is shown in a light-blue bordered card to mirror the printed certificate.

"View Digital Certificate" Button

Two buttons sit above the verification page: ← Verify Another (returns to the search page) and the gold View Digital Certificate ↗ button. Clicking View Digital Certificate opens the full digital PDF copy of the certificate in a new tab — the same PDF that was generated when the certificate was issued, complete with the QR code, fingerprint, and all formatting. This is the document the client typically downloads and attaches to tender submissions or supplier portals.

> ℹ️ Official Digital Certificate Available — A pale-gold info card sits below the certificate body on the result page with the message: "A signed PDF copy of this certificate is available. Click 'View Digital Certificate' above to open it." This is to remind verifiers that the PDF — not the web page — is the artefact they should download and store.

Verification Reference (VER-XXXXXXX)

The dark navy footer on the result page shows three pieces of information from left to right: VERIFIED AUTHENTIC (label), the unique verification reference number (e.g. VER-MP54JLSB), and QRS REGISTER (the source authority). This reference is regenerated on every page load and is the audit trail showing that the verification did happen — useful when a regulator later asks "how do I know you verified it?"

A small chip below the QRS branding row reads "✓ Verified on 14 May 2026" with the date being the date the verification was performed (the today date when the page is opened). This is a timestamp for the verifier's own records — they can screenshot the page to keep evidence that they checked the certificate on that exact date.

End-to-End Verification Journey

Step	What the Verifier Does	What the Platform Shows
1	Receives the certificate PDF from the supplier.	PDF carries the QR code and the visible certificate number.
2a	OR scans the QR code with a phone camera.	Phone opens https://qrs.ae/verify-certificate?token=...&fp=... directly.
2b	OR visits the QRS public website and clicks Verify Certificate, then types the certificate number.	Search results table shows the matching company with the Active badge and a View button.
3	Lands on the Confirmation of Certificate page.	Page shows green STATUS: ACTIVE banner + full certificate body + authorised-signatory seal.
4	Clicks View Digital Certificate (gold button, top-right).	Full digital PDF copy opens in a new tab — same file the company gave them, served from QRS, signed and watermarked.
5	Optionally screenshots the page and notes the VER-XXXXXXX reference.	VERIFIED AUTHENTIC footer with the unique reference number gives them an audit trail.

✓ Why this matters — A supplier can't fake a QR code on a certificate, because scanning it goes through QRS's servers, not the supplier's. If the cert was withdrawn, the result page shows the withdrawal in real time — even if the supplier is still circulating the original PDF. The certificate number + token + fingerprint + QR code together make forgery effectively impossible: tamper with any field and the verification page rejects it.

What if the Certificate Number is Not Found?

If the typed certificate number does not match any record, the page shows a red Not Found result with the message "No certificate found with this number. Please check the number and try again, or contact QRS at info@qrs.ae." This is also what happens if someone tries to forge a certificate number that has never been issued.

⚠️ If the certificate is found but the status is anything other than Active (Expired, Withdrawn, Suspended) — the supplier is no longer certified for that scope. The verifier should treat the supplier accordingly: ask for a current certificate, escalate to procurement, or remove them from approved-supplier lists.

14.8 Reports — Filtered Report Generation

The Certificate module's Reports button delivers the artefact at the end of the workflow — what's been issued, what's draft, what's active, what's expiring, what's been withdrawn. This is the report that procurement officers, accreditation bodies and the management board all want to see. The Scheme Department runs it after every certificate batch; the Coordinator runs it monthly to plan the renewal campaign.

Step-by-Step — Generating a Certificates Report

Step 1 ► Apply filters

Status (Pending Scan / Active / Expired / Withdrawn / Suspended), Certificate Type (Initial / Surveillance / Recertification), Verification Domain (Local / International), Date Range (issue date or expiry date).

Step 2 ► Pick the report angle

Issued this month — Status = Active · Issue Date this month. Expiring soon — Expire Date in the next 30 / 60 / 90 days. Draft pending scan — Status = Pending Scan.

Step 3 ► Click Reports → PDF / Excel

PDF for management and clients; Excel for the bulk-renewal mail-merge.

Step 4 ► Save / Distribute

File pattern: CertificatesReport_<YYYY-MM-DD>_<filters>.pdf — e.g. CertificatesReport_2026-05-14_Active_Expiring60days.pdf.

What's Inside the Certificates Report

Section	Contents
Cover	Title · Date · Filter summary · Generator (user).
Status block	Count by Status — Active / Pending Scan / Expired / Withdrawn / Suspended.
Issuance block	By Certificate Type — Initial / Surveillance / Recertification. Useful to see the renewal share vs new-client share.
By Standard	Count of certificates per ISO standard — QMS / EMS / OHSMS / ISMS / FSMS / FMS / EnMS.
Expiring block	Certificates expiring in the next 30 / 60 / 90 days, with the client contact email pre-listed — the input to the renewal campaign.
Detail table	Cert No · Company · Standard · Type · Issue Date · Expire Date · Status · Verification Domain · Originally Registered · Days to Expiry.
Draft pipeline	Certificates with Status = Pending Scan — what's waiting for signed scans to be uploaded via Bulk Upload Scans.

Footer	Page X of Y · QRS contact · Confidentiality.

Use Cases by Role

Role	Typical Filter Combination	What They Use the Report For
Scheme Dept.	Status = Pending Scan.	Worklist — which signed scans are still needed. Drives the bulk-upload session.
Coordinator	Expire Date next 60 days.	Renewal pipeline — companies to contact this month. Output is the renewal mail-merge list.
Marketing	Status = Active · Issue Date last 12 months.	Customer-success report — count of active certifications, broken down by standard for the website's "Trusted by ..." page.
Super-admin	Whole year · Status = Withdrawn.	Compliance audit — withdrawals and why, for accreditation review.
Management	Certificate Type = Initial · This quarter.	Sales pipeline output — new-client certifications closed this quarter.

ℹ️ Expiry early-warning — Run the Expire Date next 60 days filter on the first working day of every month. The output is your monthly renewal-call list. A renewal opened 60 days before expiry has a 90%+ retention rate; opened 7 days before, retention drops to ~60%. The report is the early warning.

✓ Draft / Digital split — Run the Status = Pending Scan filter to see the draft pipeline; run Status = Active to see what's live; run Status = Expired to see what's gone. The Certificate Reports show the full lifecycle in one place.

14A. Module — Chat (Internal Messaging)

The Chat module is the platform's built-in internal messaging tool — a WhatsApp-style space where Marketing, the Coordinator and the Scheme Department can communicate without leaving the platform. Whether it's an urgent question about a client's scope, a quick handover between Stage 1 and Stage 2 audits, or a file that needs reviewing right now, Chat is faster than email and keeps the conversation linked to the people who actually work on the certification.

Who Uses Chat

Role	Typical Use of Chat
Marketing	Ask the Scheme Dept. to clarify scope before submitting an inquiry; chase up missing inputs.
Coordinator	Confirm audit dates with the auditor; share schedule files with Marketing; relay client requests.
Scheme Department	Send draft audit packs for review; flag NCRs to the Coordinator; co-ordinate certificate issuance.
Auditor	Confirm arrival logistics, share photos / scans from site, escalate findings in real time.
Super-admin	Broadcast platform-wide notices, support users, audit chat history for compliance.

ℹ️ Why an in-platform chat and not WhatsApp? — Two reasons. (1) Compliance: every message is logged inside the platform and tied to the same user IDs that own the audits and certificates, so the audit trail is complete. (2) Context: when you chat about "that audit for Bin Harmal", a future auditor can find the conversation against the company record, not buried in a personal phone.

14A.1 Opening Chat

Chat is always one tap away. The floating purple chat button is pinned to the bottom-right corner of every page in the platform (Dashboard, Companies, Inquiries, Audit Compliance, Job Registrar, Certificates — every screen). Click it to open the chat panel; click the X on the same button to close it.

Unread messages show a red badge with the unread count on the floating button. When you open the panel the badge clears for the conversations you've read.

14A.2 Starting a New Message

Click + New Message (or the pencil-on-paper icon inside the chat panel) to open the Team Members directory. The header shows the total number of teammates currently in the platform — e.g. 22 team members.

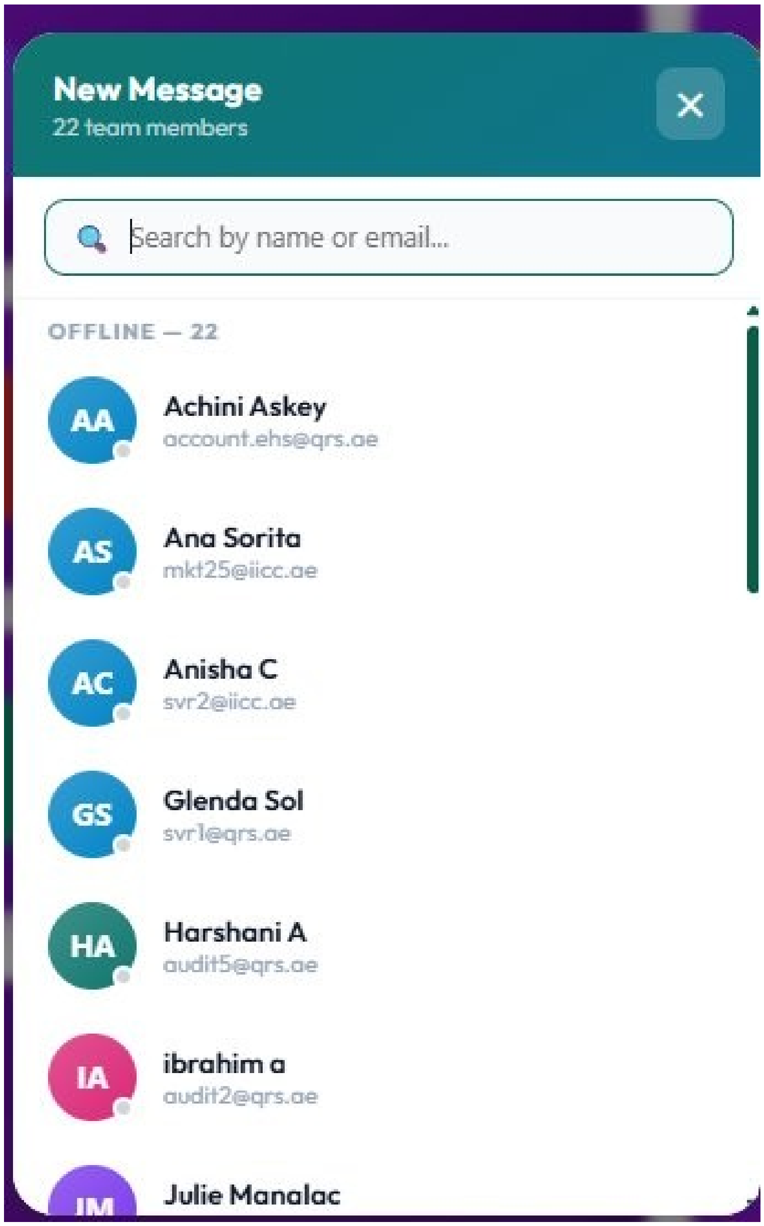

Figure 14A.1 — New Message dialog. Search by name or email at the top; the list below shows every teammate with their avatar (colour-coded initials), full name, and work email. A green dot on the avatar means Online; greyed-out OFFLINE entries are grouped under the OFFLINE — N header.

Anatomy of the New Message Dialog

Element	What It Shows / Does

Header strip (teal)	Title "New Message" and the live count of teammates (e.g. "22 team members").
Search bar	Type any part of a name or email — list filters live as you type. Useful when the directory is large.
Status group header	ONLINE — N at the top (if any), then OFFLINE — N. The split makes it obvious who you can chat with right now.
User row	Coloured circular avatar (initials), full name, work email — click the row to open a one-to-one chat.
Status dot on avatar	Green = Online · Grey / no dot = Offline · Yellow = Away · Red = Do Not Disturb.
Close (X, top-right)	Closes the New Message dialog without starting a chat.

ℹ️ Tip — Avatars use the first letter of the first name + first letter of the last name (e.g. "Harshani A" → HA). Each user is given a stable background colour so you can recognise teammates at a glance, even without reading the name.

14A.3 The Chat Window

Selecting a teammate (or opening an existing conversation) opens the chat window. The header shows the other person's avatar, full name (e.g. KHOLA SAJID) and live status (Online / Offline / typing...). On the right of the header sit two icons — a magnifying-glass (search inside this conversation) and a diagonal arrows icon (expand the chat to full-screen mode for long handovers).

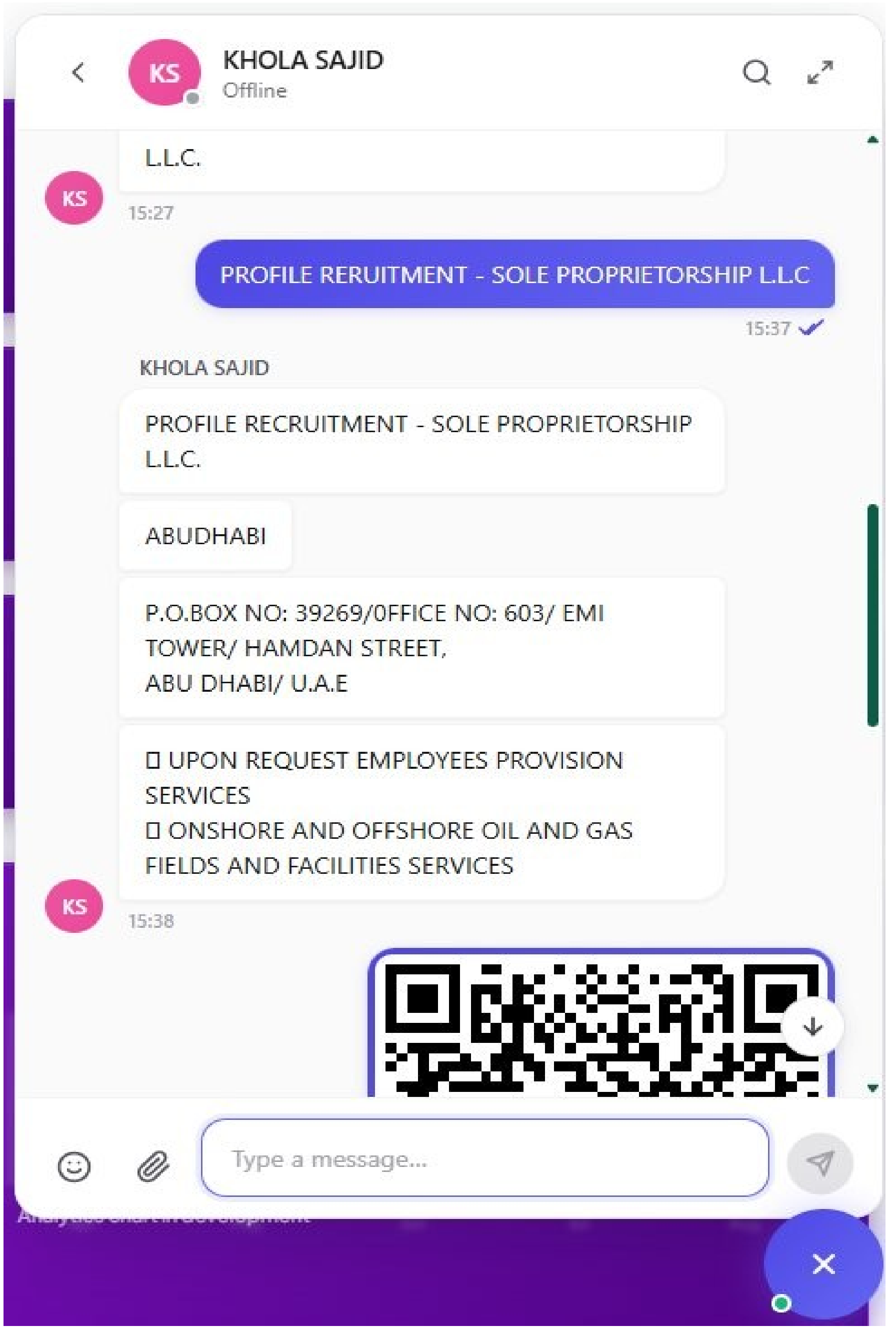

Figure 14A.2 — Chat conversation view. Incoming messages appear on the left with the sender's avatar and timestamp; messages you sent appear on the right in blue with white text. Files, images, QR codes and forwarded company profiles render inline. The composer at the bottom carries emoji, attachment and send actions. The floating purple X (bottom-right) closes the chat panel.

Reading the Conversation

Direction	Appearance
Incoming (from the other person)	Left-aligned message bubble in white with grey border, sender's avatar to the left, sender name above on the first message of a burst,

	timestamp below.
Outgoing (from you)	Right-aligned bubble in blue (purple gradient on hover) with white text, no avatar, single ✓ when delivered, double ✓ when read.
System notice	Centred grey pill — "Achini joined the group", "Khola pinned this message", "3 new messages" etc.
Date divider	Centred faint line with the date label — "Today", "Yesterday", "14 May 2026".

14A.4 Sending Messages, Files & Forwarded Records

The composer at the bottom of the chat window has four controls — emoji, attachment, the text input, and Send. The text input grows as you type; press Enter to send, Shift+Enter for a new line.

Composer Controls

Control	What It Does
Emoji 😊	Opens the emoji picker — categorised, with a search box. Pick to insert at the cursor.
Attachment 📎	Opens the file picker. Supports PDF, DOCX, XLSX, PNG, JPG up to 25 MB per file. Multiple files can be sent in one message.
Text input	Type your message. Live spell-check is on by default; @ to mention a teammate (turns into a clickable chip).
Send ✈️	Sends the message. Greyed out when the input is empty. Keyboard: Enter to send.

Three Things You Can Send

Step A ► Plain text

Just type and press Enter. Supports basic formatting — **bold**, *italic*, `code`, and clickable URLs.

Step B ► Attachments

Click the paperclip, pick one or more files, optionally add a caption, then Send. PDFs and images render inline; other types show as a file card with name, size and a download button.

Step C ► Platform records (company / certificate / audit cards)

Inside a Company, Certificate or Audit record, click the Share to Chat icon (small chat bubble on the top-right of the record) → pick the teammate → the platform sends a rich card containing the legal name, address, scope of work, and a deep link back to the record. This is how the conversation in Figure 14A.2

shows the "PROFILE RECRUITMENT — SOLE PROPRIETORSHIP L.L.C" card. Recipients can tap the card to jump straight to the live record.

ℹ️ QR codes & verification links — When you share a certificate from the Certificate module, the chat message includes the QR code image and the public verification URL inline. The recipient can tap the QR to verify on the spot, or forward it to a client without leaving Chat.

14A.5 Search, Expand & Conversation Tools

Search Inside the Conversation

Click the magnifying-glass icon in the chat header to open the in-conversation search bar. Type any term — message text, sender name, file name — and the conversation scrolls to each match with the term highlighted. Use the up / down arrows to step between matches.

Expand to Full Screen

The diagonal-arrows icon next to the search expands the chat into a full-screen view — useful when you're sharing your screen on a call, or when you need to review a long handover thread without the rest of the platform crowding the page. Click the same icon to collapse back to the side panel.

Other Per-Message Actions

Action	Where	What It Does
Reply	Hover any message → speech-bubble icon.	Sends a new message that quotes the original above your reply.
Forward	Hover any message → arrow-right icon.	Pick one or more teammates to forward the message (and its attachments) to.
Copy text	Hover any message → copy icon.	Copies the message text to your clipboard.
Delete (for me / for everyone)	Hover your own message → bin icon.	For me removes it from your view; for everyone removes it from all recipients within 1 hour of sending.
Pin	Hover any message → pin icon.	Pins to the conversation's pinned-messages list — useful for important policy or links.

14A.6 Online / Offline / Read Receipts

Indicator	Meaning

Green dot on avatar	User is signed in and active in the last 5 minutes.
Yellow dot on avatar	User is signed in but idle (no input for 15 minutes).
Grey / no dot	User is offline. Messages still deliver and are read when they next sign in.
Single grey tick (✓) on your message	Sent to the server.
Double grey tick (✓✓) on your message	Delivered to the recipient's device.
Double blue tick (✓✓) on your message	Read by the recipient.
typing...	Shown under the recipient's name in the chat header when they're typing a reply.

14A.7 Privacy, Retention & Compliance

Chat conversations are part of the platform's audit trail. Messages are stored encrypted at rest, retained for the configurable retention window (default 3 years), and visible to Super-admins for compliance audits. End-users cannot retrieve messages they have permanently deleted — but Super-admins can, from the platform's compliance console.

> ⚠️ Do not use Chat for confidential client information that should not appear in a regulator audit. Chat is internal-only — never use it to send personal data of clients (passport numbers, financial data) unless the client has consented to be discussed inside the platform. For sensitive matters, use the Documents area on the company record, which carries access-control.

> ✓ Chat closes the last gap in the certification workflow — between people. Companies, Inquiries, Audits, Schedules, Certificates handle the records; Chat handles the conversations. Together they're a single source of truth for everything that happens around a certification.

15. Module — Previous Certificates

Previous Certificates is the historical archive of certificates issued before the Platform was deployed — typically the **last 10 years** of legacy records (UAE legacy + overseas + migrations). It stores every old certificate number, the standards it covered, issue and expiry dates, and the original source. The archive is more than just a record: when issuing a **new** certificate, the platform looks here first to **reuse existing certificate numbers** for continuity — so clients keep the same number across renewals.

15.1 Previous Certificates — List View

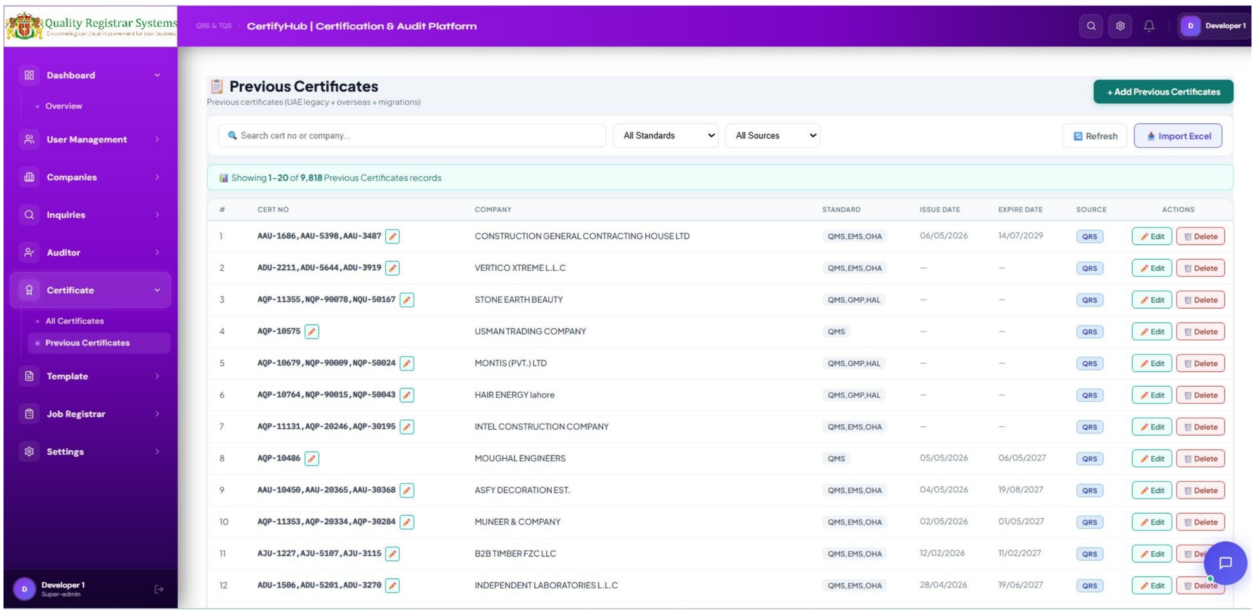

Figure 15.1 — Previous Certificates list view, showing 9,818 records from the historical archive.

Top-Bar

Button / Filter	Purpose
+ Add Previous Certificates (green)	Add a legacy certificate record manually.
Search	Live search by certificate number or company name.
All Standards	Filter to one ISO standard.
All Sources	Filter by source — QRS / TQS / overseas / migration.
Refresh	Reload from server.
Import Excel	Bulk-import a spreadsheet of legacy certificates (Super-admin only).

List Columns

Column	Description	Example
#	Sequence number on the current page.	1, 2, 3 …
Cert No	Legacy certificate number(s). Multiple when an IMS covers multiple standards.	`AAU-1686, AAU-5398, AAU-3487`
Company	Client organisation.	CONSTRUCTION GENERAL CONTRACTING HOUSE LTD
Standard	Standards covered, comma-separated short codes.	QMS, EMS, OHA
Issue Date	Original issue date (where known).	06/05/2026
Expire Date	Original expiry date (where known).	14/07/2029
Source	Certification body that originally issued it.	QRS
Actions	Edit / Delete.	(buttons)

15.2 Edit Previous Certificate — Form

Clicking the **Edit** action opens the **Edit Previous Certificate** modal. The form is structured around the fact that legacy certificates often covered multiple standards under a single Integrated Management System (IMS) — and each standard had its own certificate number.

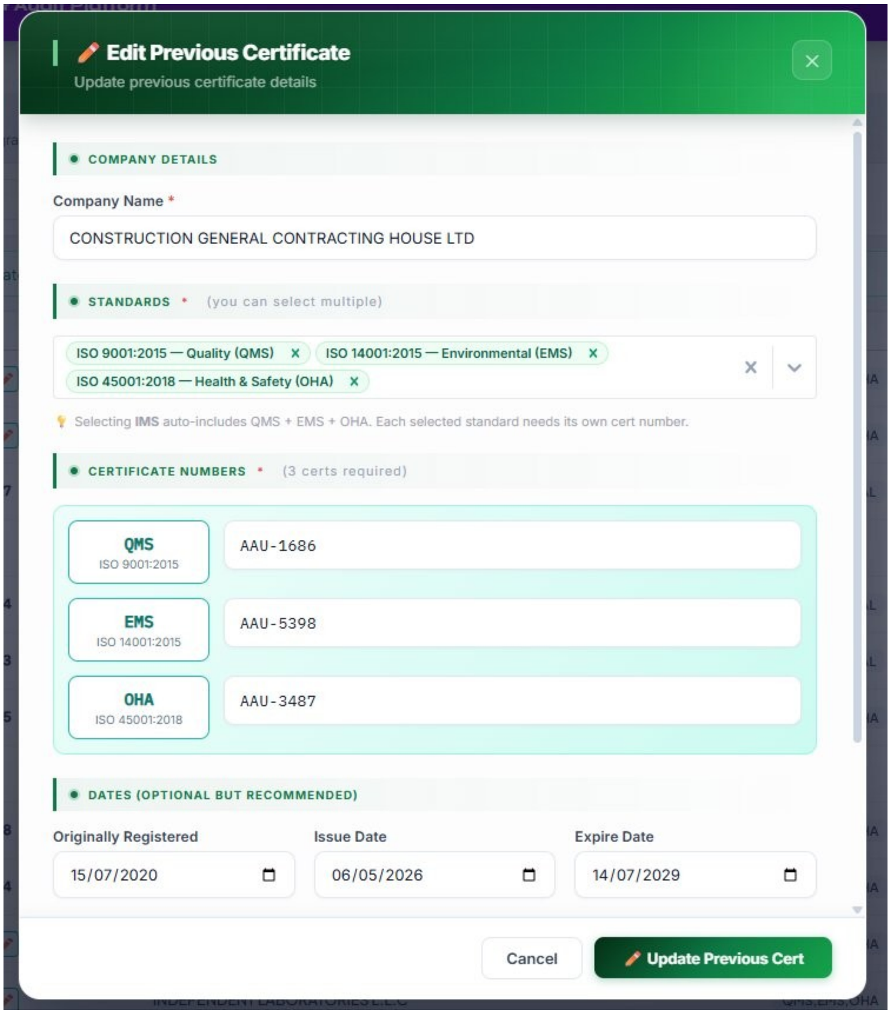

Figure 15.2 — Edit Previous Certificate form: multi-standard with per-standard certificate numbers.

Section A • Company Details

Step 1 ► Confirm the Company Name

Pre-filled from the previous record. Edit if a typo needs correction. **Mandatory**.

Section B • Standards

Step 2 ► Select Standards (multiple allowed)

Pick one or more standards. Each tag (e.g. **ISO 9001:2015 — Quality (QMS) ✕**) is removable. **Selecting IMS auto-includes QMS + EMS + OHA.** This matches the way legacy certificates were issued.

Section C • Certificate Numbers (one per standard)

Step 3 ► Enter a certificate number for each selected standard

If you selected 3 standards (e.g. QMS, EMS, OHA), you must provide 3 certificate numbers, one per row. The form labels each row with the standard short code so there is no confusion: **QMS — ISO 9001:2015**, **EMS — ISO 14001:2015**, **OHA — ISO 45001:2018**. Example values: `AAU-1686` (QMS), `AAU-5398` (EMS), `AAU-3487` (OHA).

Section D • Dates (optional but recommended)

Step 4 ► Originally Registered

The very first date the client was certified — used for continuity. Carried forward to **all future renewals**.

Step 5 ► Issue Date and Expire Date

The legacy issue and expiry. If unknown, leave blank — the platform will only use the Originally Registered date.

Step 6 ► Save

Click the green **Update Previous Cert** button. The record is updated and immediately searchable from the **Issue Certificate** form (Module 14) so the legacy numbers can be reused for continuity.

15.3 Why This Module Matters

- **Continuity** — clients keep the same certificate number across renewals. Their suppliers, regulators and procurement portals don't have to update records.
- **Audit trail** — if a client claims they have been certified since 2014, the platform can prove it from this archive.
- **Duplicate prevention** — before issuing a new certificate, the platform checks this archive to make sure the number isn't already used.
- **Standard-aware numbering** — each standard gets its own number (one per QMS, EMS, OHA, ISMS, ...). Legacy IMS records correctly show 3 numbers.

> ⚠️ Previous Certificates is **read-only for non-admin roles**. Edits are restricted to Super-admins because these records anchor the certification history of every long-standing client.

16. Module — Settings

Settings is the platform-level configuration area, accessible to Super-admins only. It also hosts the **Standards** and **Countries** sub-pages (covered in Modules 10 and 11).

Key Configuration Sections

Section	What You Configure
Company Profile	Quality Registrar Systems branding, logo, address shown on certificates.
Email / SMTP	Outgoing email server used for OTPs and notifications.
OTP Policy	OTP length (default 6 digits), expiry (default 10 min), resend cool-down.
Password Policy	Minimum length, complexity, expiry, history.
Certificate Numbering	Pattern used when generating Certificate No. (prefix, body, suffix).
Branding & Themes	Primary / secondary colours, default font, login-page logo.
Backup / Restore	Schedule automatic backups and restore from a previous snapshot.
Standards (sub-page)	See Section 10.
Countries (sub-page)	See Section 11.

Notifications

The **bell icon** in the header shows unread notifications. Triggers include: a new user registers, an audit is overdue, a certificate is expiring within 30 days, an NCR is raised, or a job is assigned to the current user. Click any notification to jump straight to the related record.

17. End-to-End Document Generation Flow

The table below summarises the full lifecycle of an audit — from the moment a company is added to the platform up to the issuance of the digital certificate. Each row is an action that either generates a document or moves the audit to the next stage.

#	Action	Module
1	Add or convert a company from an Inquiry	Inquiries → Companies
2	Schedule Stage 1 (date, auditor, standard)	Companies / Audit Compliance
3	System auto-creates a Job	Job Registrar
4	Stage 1 documents produced (Plan, Checklist, Report, NCR…)	Templates (Stage 1) + Content
5	Mark Stage 1 = Completed (close any NCRs)	Audit Compliance
6	Schedule Stage 2	Audit Compliance
7	Stage 2 on-site documents produced	Templates (Stage 2) + Content
8	Mark Stage 2 = Completed	Audit Compliance
9	Generate Draft Certificate (printable, editable)	Certificate
10	Generate Digital Certificate (No., URL, Fingerprint)	Certificate
11	Job auto-closed; surveillance schedule begins	Job Registrar + Audit Compliance

18. Recommended Document Naming Convention

A consistent naming convention is essential because each company can have 10+ documents per audit cycle across multiple standards and years. The pattern below was designed to sort naturally in any file explorer, be readable to humans and usable by the platform's filters.

Master Pattern

ℹ️ `{STAGE}_{STANDARD}_{DOCTYPE}_{COMPANYCODE}_{YYYYMMDD}_v{VERSION}.pdf`

Field Reference

Field	Allowed Values	Example
STAGE	S1 / S2 / SUR / REC	S1
STANDARD	ISO9001 / ISO14001 / ISO45001 / ISO27001 / ISO22000 / ISO41001	ISO9001
DOCTYPE	AP (Audit Plan), CL (Checklist), RPT (Report), NCR, SCOPE, MIN (Minutes), REC (Recommendation), CERT	AP
COMPANYCODE	From the company record	CET-2025-10-000111
YYYYMMDD	Audit or document date	20251203
VERSION	1.0, 1.1, 2.0 …	1.0

Stage 1 Examples (for ISO 9001 audit on 03 Dec 2025)

What it is	File name
Stage 1 Audit Plan	`S1_ISO9001_AP_CET-2025-10-000111_20251203_v1.0.pdf`
Stage 1 Checklist	`S1_ISO9001_CL_CET-2025-10-000111_20251203_v1.0.pdf`
Scope Summary Report	`S1_ISO9001_SCOPE_CET-2025-10-000111_20251203_v1.0.pdf`
Stage 1 Audit Report	`S1_ISO9001_RPT_CET-2025-10-000111_20251205_v1.0.pdf`
NCR (if raised)	`S1_ISO9001_NCR_CET-2025-10-000111_20251205_v1.0.pdf`

Stage 2 Examples (on-site audit 15 Dec 2025)

What it is	File name
Stage 2 Audit Plan	`S2_ISO9001_AP_CET-2025-10-000111_20251215_v1.0.pdf`

What it is	File name
On-Site Audit Checklist	S2_ISO9001_CL_CET-2025-10-000111_20251215_v1.0.pdf
Opening Meeting Minutes	S2_ISO9001_MIN-OPEN_CET-2025-10-000111_20251215_v1.0.pdf
Closing Meeting Minutes	S2_ISO9001_MIN-CLOSE_CET-2025-10-000111_20251217_v1.0.pdf
Stage 2 Audit Report	S2_ISO9001_RPT_CET-2025-10-000111_20251218_v1.0.pdf
Certification Recommendation	S2_ISO9001_REC_CET-2025-10-000111_20251218_v1.0.pdf
Draft Certificate	S2_ISO9001_CERT-DRAFT_CET-2025-10-000111_20251220_v1.0.pdf
Digital Certificate	S2_ISO9001_CERT-DIGITAL_CET-2025-10-000111_20251220_v1.0.pdf

✓ All S1_* files group together, all S2_* files group together, and inside each group the documents follow the chronological audit order (AP → CL → MIN → RPT → REC → CERT). **Sorting by name = sorting by workflow.**

— END OF MANUAL —

For technical support or feature requests:

Altayaboon IT Network Services L.L.C ● contact@altayaboon.com ● +971 5632 96231