

Configuring ISO Survey Models

August 18, 2026

Preparing to Configure ISO Survey Models

Before creating records in **Configuration > ISO settings**, confirm that you have administrator access to create and edit **Survey Models**, **Survey Questions**, and **Available Survey Answers**. If the ISO settings screens do not show options to add, edit, or save records, ask the person who manages **Users**, **Roles**, or **Security** in Pams to review your access.

Define the purpose of each Survey Model before entering it in Pams. A Survey Model should cover one clear ISO assessment area, such as an internal audit, corrective action review, supplier evaluation, or process compliance check. Keeping each model focused makes it easier for respondents to understand the questions and for your team to review the results.

Prepare the content outside the form first so that the entries in **Survey Models** remain consistent. For each planned model, identify:

- The Survey Model name.
- The ISO process, audit area, or compliance topic being assessed.
- The questions respondents need to answer.
- The approved response choices for every question.
- The order in which questions should appear during the assessment.

Write each Survey Question in plain, direct language. Each question should assess one control, process, or condition. For example, avoid combining two separate checks into one question if they may need different answers during a review.

Also decide how the response choices will be used. Some questions may need one clear outcome, while others may need several available answers. If several questions measure the same type of outcome, prepare one consistent set of answer labels for them. Use different answer sets only where the assessment requires genuinely different response choices.

[SCREENSHOT: The ISO settings area showing Survey Models, Survey Questions, and Available Survey Answers.]

Creating an ISO Survey Model

Use **Survey Models** in **Configuration > ISO settings** to create the parent record for an ISO assessment. Each Survey Model groups the Survey Questions and Available Survey Answers that belong to the same review process.

1. Open **Configuration** and select **ISO settings**.
2. Open the **Survey Models** list. Review existing entries before creating a new one so you do not create a second model for the same audit area or ISO process.
3. Select the option to create a new Survey Model.
4. Enter a clear, recognizable name. Use wording that tells administrators and reviewers what the model is for, such as an internal audit, corrective action review, or supplier evaluation. Choose a name that remains meaningful when it appears alongside other Survey Models in the list.
5. Review the name carefully before saving. A consistent naming style helps your team distinguish similar assessments, especially when different departments maintain their own ISO review materials.
6. Click **Save**. Save the Survey Model before adding Survey Questions. This ensures that every question you create can be connected to the correct assessment record.

After saving, treat the Survey Model as the main record for that assessment. The questions and response choices you add afterward should support the purpose shown in the Survey Model name. If a question belongs to a different compliance topic or process, create or select the appropriate Survey Model instead of placing unrelated questions together.

[SCREENSHOT: A new Survey Model form with the name entered and the Save button available.]

When the Survey Model has been saved, keep the record open or return to it from the **Survey Models** list to begin adding its Survey Questions.

Adding and Ordering Survey Questions

Add Survey Questions after the Survey Model has been saved. The Survey Questions are the items respondents will read and answer during the ISO assessment, so enter them exactly as they should appear on the survey.

1. Open the saved Survey Model from the **Survey Models** list.

2. In the questions area or related question list, select the option to add a Survey Question.
3. Enter the question text. Keep the wording focused on one ISO control, process step, or compliance condition. A respondent should be able to understand what is being checked without needing to interpret several requirements at once.
4. Confirm that the Survey Question is assigned to the intended Survey Model. This link controls which assessment the question belongs to. Do not assign a supplier evaluation question to an internal audit model, or the question may appear in the wrong review.
5. Set the sequence or display order where Pams provides that option. Place questions in the same order used by the team during the ISO assessment. For example, arrange them to follow the normal process being reviewed rather than entering them in the order they were drafted.
6. Click **Save** and repeat the process for each required question.

After adding the questions, return to the Survey Model and review the full question list. Check for duplicate questions, overlapping wording, and missing controls. If two questions produce the same answer in every case, consider whether one clearer Survey Question would be sufficient.

[SCREENSHOT: A Survey Model showing its related Survey Questions in display order.]

A well-ordered Survey Model helps reviewers complete the assessment consistently and helps respondents move through the same audit flow every time.

Defining Available Survey Answers

Use **Available Survey Answers** to define the response choices that respondents can select for each Survey Question. Clear answer labels are essential because they determine how people record the outcome of an ISO assessment.

1. Open **Available Survey Answers** from **Configuration > ISO settings**, or open the answer area available from the relevant Survey Question.
2. Select the option to create a new Available Survey Answer.
3. Enter the answer label exactly as respondents should see it. Use brief, unambiguous wording that reflects an approved assessment outcome. Depending on your organization's ISO process, response choices may include labels such as

Compliant, Partially Compliant, Non-Compliant, Applicable, or Not Applicable.

4. Attach the Available Survey Answer to the relevant Survey Question. Check the question wording before saving so that the response choice makes sense for that specific question.
5. Add every approved answer choice that respondents need for the Survey Question, then click **Save**.
6. Open the Survey Question again and check that only the intended Available Survey Answers are listed.

Use the same answer wording consistently when several Survey Questions measure the same kind of ISO outcome. For example, if one group of questions uses **Compliant, Partially Compliant, and Non-Compliant**, use those exact labels across the same assessment type. Consistent labels make the completed survey easier to read and compare.

Do not reuse an answer merely because the wording is similar. A question that needs a different response set should have Available Survey Answers that match its purpose. For example, an applicability question may need **Applicable** and **Not Applicable**, while a compliance question may need a fuller assessment outcome set.

[SCREENSHOT: A Survey Question with its approved Available Survey Answers displayed beneath it.]

Maintaining Models, Questions, and Answer Sets

Review **Survey Models, Survey Questions, and Available Survey Answers** whenever an ISO process, assessment scope, or approved wording changes. Regular maintenance keeps the ISO settings area aligned with the forms your team expects to use.

1. Open the relevant record in **Survey Models, Survey Questions, or Available Survey Answers**.
2. Update the Survey Model name if the assessment scope or ISO process name has changed. Before saving, review the linked Survey Questions to confirm that they still belong to the revised model.
3. Edit Survey Question wording when an ISO control requirement changes. Read the revised question together with its Available Survey Answers. A change in

wording may mean that an existing answer no longer gives a clear or valid outcome.

4. Add a new Available Survey Answer when a new response has a different meaning. Do not rename an existing answer label to represent a new outcome if that answer may already be used elsewhere in the ISO configuration.
5. Review duplicate, outdated, or obsolete Survey Models and Survey Questions before making them unavailable or inactive. Confirm that administrators are not still using them for current assessments.
6. Click **Save** after each reviewed change and reopen the record to verify that the updated text, model assignment, and answer choices are correct.

Maintain consistent naming across the configuration lists. For example, if your team uses a particular wording for a compliance outcome, keep that wording unchanged across related Survey Questions. Small differences in labels can cause uncertainty during audit reviews.

[SCREENSHOT: An ISO configuration record showing editable Survey Model, Survey Question, and Available Survey Answer details.]

When retiring an older model, review its questions and answers first. This prevents a current ISO assessment from losing required content because a shared question or answer choice was changed without checking where it is used.

Testing the Survey Configuration

Test each completed Survey Model before your team uses it for an ISO assessment. Testing helps you catch missing Survey Questions, incorrect ordering, and unsuitable Available Survey Answers while the configuration is still easy to adjust.

1. Open the completed Survey Model in **Configuration > ISO settings**.
2. Review the Survey Questions listed for the model. Confirm that every planned question is present and that the display order follows the sequence used during the assessment.
3. Open each Survey Question and verify its wording. Check that it is assigned to the correct Survey Model and that no question from another audit area has been included by mistake.
4. Review the Available Survey Answers attached to each Survey Question. Make sure respondents will see only valid choices and that every needed outcome is

available.

5. Run a test survey or use a preview option where Pams provides one. Read each question as a respondent would and select the available answers to confirm that the wording and response labels are understandable.
6. If a Survey Question or Available Survey Answer does not appear, return to its record. Confirm that you clicked **Save**, linked it to the correct Survey Model or Survey Question, and did not mark it unavailable or inactive.
7. Repeat the test after making corrections. Continue until the Survey Model shows all required questions and response choices in the expected order.

[SCREENSHOT: A completed Survey Model test or preview showing ordered questions and selectable answers.]

Use the test to check the assessment from an operational perspective. A reviewer should be able to move from one question to the next without guessing what is being assessed or what each answer means.

Overview

In Pams, **ISO settings** provide a structured way to prepare the questions and response choices used in ISO-related assessments. The configuration is organized around three connected records:

Configuration record	What you use it for
Survey Models	Define the overall ISO assessment, audit area, or compliance topic.
Survey Questions	Create the individual checks that respondents must answer.
Available Survey Answers	Define the approved answer choices for each Survey Question.

Start with the Survey Model because it identifies the assessment that your questions belong to. Add Survey Questions next so the model contains each required control or process check. Then create and attach Available Survey Answers so every question presents the correct response choices.

This structure is useful when your team carries out repeatable reviews, such as internal audits, corrective action reviews, supplier evaluations, or process compliance checks. Instead of re-entering question wording for each review, administrators maintain the approved questions and answer labels in **ISO settings**.

The quality of the completed assessment depends on how clearly the configuration is prepared. A Survey Model with a specific name, focused Survey Questions, and consistent Available Survey Answers gives respondents a clear path through the review. It also helps reviewers interpret the selected outcomes without needing to guess what different labels mean.

Use one Survey Model for one defined assessment purpose. Where the assessment process differs significantly, create separate Survey Models rather than mixing unrelated questions in a single list. Keep answer labels consistent across questions that assess the same compliance outcome, and only create a different response set when the question genuinely needs different choices.

[SCREENSHOT: The relationship between a Survey Model, its Survey Questions, and the Available Survey Answers attached to each question.]

Prerequisites

Before working in **Configuration > ISO settings**, make sure the ISO assessment content has been agreed by the people responsible for your organization's compliance process. Pams can store the Survey Model, Survey Questions, and Available Survey Answers, but the wording and response choices should reflect your organization's approved ISO requirements.

You need access that allows you to work with the following ISO settings records:

- **Survey Models**
- **Survey Questions**
- **Available Survey Answers**

If you can open **ISO settings** but cannot create, edit, or save one of these records, do not attempt to work around the restriction. Ask the person who manages **Users**, **Roles**, or **Security** in Pams to confirm the access available to you.

Prepare the assessment content before opening the creation forms. At a minimum, have the following ready:

- A clear name for each Survey Model.
- The audit area, ISO process, or compliance topic covered by each model.
- The full wording for every Survey Question.
- The approved Available Survey Answers for each question.
- The intended question order.

Review existing entries in **Survey Models**, **Survey Questions**, and **Available Survey Answers** before adding new records. An existing model may already cover the same process, or an existing answer label may already be approved for the type of assessment you are configuring. Reusing consistent wording where appropriate prevents unnecessary duplicate records.

For related configuration work, continue with [Managing Attachment Categories](#) to organize the categories used for attachments in Pams.