Incident Management Deployment

1. Create ‘Departments’ and populate (site collection level). Add “Department Code” (required) and “Department Manager” (not required)
2. Create ‘Product List’ and populate (site collection level). Change ‘Title’ to ‘Product Name’ (not required?), and add ‘Product ID’ (not required)
3. Create ‘Customers’ and populate (site collection level). Change ‘Title’ to ‘CustomerNo’ (optional), and add

CustomerName text

ContactName text

ContactTitle text

Address text

City text

PostalCode text

StateOrProvince text

Country text

PhoneNumber text

FaxNumber text

1. Create ‘Suppliers’ and populate (site collection level)

‘Title’ -> SupplierNo

SupplierName text

ContactName text

ContactTitle text

Address text

City text

PostalCode text

StateOrProvince text

Country text

PhoneNumber text

FaxNumber text

Vendor Type text

1. Create ‘Audit References’ and populate

‘Title’ -> Audit Section ID

Audit Item ID text

Audit Section Name text

Audit Sub-Section ID text

Audit Sub-Section Name text

Audit Item text

Audit Item Type text

Audit Type ID text

1. Create ‘Audit Observations’

‘Title’ -> Audit ID

Study No text

Site No text

Auditor text(?)

Section text

Section ID text

Sub-Section text

Obs No text

Observation text

Corrective Action text

Obs Status Choice (Open, Closed)

Rating text

Sub-Section ID text

Date Closed Date only

Department text

Time to Close Calculated =IF([Date Closed]<>0,DATEDIF(Created,[Date Closed],"d"),"N/A")

Observation Rating-Description text

Audit Category choice (Internal Audit, External Audit, Client Audit, Inspection)

1. Create ‘Electronic Test Scripts’

‘Title’ -> Name1

CSVID text

Test Run text

System ID text

Test Result text

Document Number text

Revision text

Document ID text

1. Create ‘Safety Reports’

Safety Report Number text

Safety Report Description text

Safety Report Status text

1. Create Site ‘Incident Management’
2. Activate “Nintex Workflow” feature
3. Create ‘Incident Forms’ library, ‘SOP Library’, ‘Incident Form Attachments’, ‘Incident Investigation Reports’
4. Create Site Columns :

Incident ID text, O

Incident Status text, o

Incident Originating Dept text, o

Incident Reported By text, o

Incident Type Text, o

Incident Criticality text, o

Incident Reported Date Date only, o

QA Representative text(?), o

Corrective Action Taken Description note, o (maybe not necessary)

Incident Description note, o

[Additional Actions](http://devboa/qmw/_layouts/ManageContentTypeField.aspx?ctype=0x01010100152512AF11D1414B8EFD7CAA1B068B8900711B61269F0B0640B7C73C0208B5E468&List=5543d7d8-febe-4264-a987-0cb0931f3591&Field=Additional%5Fx0020%5FActions&Fid=%7Bab303886%2D15a9%2D41af%2Da0f5%2D2d15dac17aae%7D) text, o

Incident Valid text, o

Investigation Required text, o

Assigned Investigator text(?), o

Incident Investigated Date Date only, o (maybe Incident Reviewed Date)

Incident Reviewer text(?) o

[QA Approval Date](http://devboa/qmw/_layouts/ManageContentTypeField.aspx?ctype=0x01010100152512AF11D1414B8EFD7CAA1B068B8900711B61269F0B0640B7C73C0208B5E468&List=5543d7d8-febe-4264-a987-0cb0931f3591&Field=QA%5Fx0020%5FApproval%5Fx0020%5FDate1&Fid=%7Bbee10db2%2D039f%2D4335%2Db88a%2D89bda6436523%7D) Date only, o

Root Cause Category text, o

SOPReference ID Note(?), o

Audit Reference ID note(?), o

Product Reference ID note(?), o

Validation Reference ID note(?), o

Actions Taken Description note, o

Investigator People Only (maybe not necessary)

Cancelled By text(?)

Cancellation Date Date only

1. Create Site Content Type ‘Incident Investigation Report’ (p: Document, g: QMW Content Type)

Incident ID text

Status choice (core document column)

Investigator Person only

Document Number text (CDM)

1. Associate Content Type ‘Incident Investigation Report’ with library ‘Incident Investigation Reports’, no template, remove the default ‘Document’ content type
2. Update “Data Connections”, upload them to “Data Connection Library” to site (or site collection)
3. Export InfoPath form to Source Files, updated the info of external list to those in current environment and the info of data connections
4. Deploy InfoPath form to Site collection as content type, associating columns
5. Associate Form to Form Library ‘Incident Forms’
6. Create Document Library ‘Incident Form Attachments’
7. Create site (or site collection) content type ‘Incident Form Attachment’

Attachment ID Text

Parent Incident Management Lookup (Incident ID in Incident Forms)

1. Associate ct ‘Incident Form Attachment’ to library ‘Incident Form Attachments’
2. Deploy workflows “Incident Management Process” and “Incident Management Recording” to Library “Incident Management”

Q: GetCheckoutInformation?

‘Training Requests’, ‘CAPA’, ‘Document Activity Log’, ‘ITCC’, ‘Deviation Request Forms’

# Get Attachment from the form

1. Create site columns:

Parent IM Lookup (Incident Forms: Title)

IM Title text

Original FileName text

1. Create site content type:
   1. Incident Form Attachment
2. Associate the columns with content type, associate the content type to the library