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# Purpose

The purpose of this document is to provide a standardized procedure for the installation of the IMM (Incident Management Module) solution, version 0.1.0 or greater.

This Deployment Guide provides instructions for:

* Enumeration of Pre-requisites
* Installation of the IMM solution package

# Methodology

Install the IMM solution in accordance with the steps described herein.

No post-installation configuration is required.

# Prepare for Installation

## Assumptions

The following are assumptions made for the purposes of this deployment guide.

* The user performing the installation and configuration has the appropriate training and administrative privileges to perform the required operations.
* All images included in these installation procedures are for reference only and are provided to simplify reading of the instructions. Some variation may be observed between this document and the actual system.

## Minimum Hardware Requirements

No specific hardware requirements exist for the IMM solution.

## Minimum Software Requirements

The following table lists the minimum hardware and software requirements for the IMM installation.

| Minimum Requirements |
| --- |
| * Microsoft Windows Server 2008 or 2008 R2 * Microsoft Internet Explorer 7 or greater * Microsoft SharePoint Server 2010 Enterprise * Nintex Workflow 2010 version 2.3.1 + * ARX CoSign for SharePoint 5.6 + * ArtfulBits Cascaded Lookup 1.48 + * Microsoft OpenXml SDK 2.0 (installation file: *OpenXMLSDKv2.msi*)   <http://www.microsoft.com/download/en/details.aspx?id=5124>   * Montrium RUBi\_Methods 2.5.8 + * Montrium Task Access Enabler 2.0.0 * Montrium UDI |

## Prerequisites

| Prerequisite ID | Description |
| --- | --- |
|  | The server on which this installation is performed is identified. |
|  | A SharePoint Administrator account already exists:   * Is member of the local administrator’s group on the server * Has the necessary privileges to install and deploy SharePoint farm level solutions |
|  | The IMM installation folder with all deliverable files must be available. |

# IMM DCW Deployment

| Step | Instructions | Comment |
| --- | --- | --- |
|  | Login to the server as a SharePoint administrator with sufficient privileges to deploy solutions and features (identified in prerequisite PRQ-2) | n/a |
|  | In the IMM installation folder, right-click on the xMWInstaller.exe file, select “Run as administrator”. Click ‘Yes’ on the User Account Control dialog screen: | n/a |
|  | Select ‘Create a Workspace in existing Site-Collections. Click ‘Next’: | n/a |
|  | * Select the ‘Work Area’ and “Records Center’ site-collections. * Browse to and select the DCW file used for the IMM workspace creation. * Click on ‘Create’: | n/a |
|  | When the DCW deployment is finished, verify the deployment log file (created in the same folder) and ensure no errors have occurred. | n/a |
|  | Library -SOP Library- : remove all content types | n/a |
|  | Library -Investigation Reports- : remove all content types | n/a |
|  | Library – IM Form Attachments - : remove all content types | n/a |
|  | Library – IM Forms - : remove all content types | n/a |
|  | Library – Data Connector Library – : remove all content types | n/a |
|  | List – Department List - : add columns   |  |  |  | | --- | --- | --- | | Column | Type | Required | | Department Code | Single line of text | TRUE | | Department Manager | Person or Group | FALSE | | Department Name | Single line of text | FALSE | | Department Acronym | Single line of text | FALSE | | Business Unit | Lookup | FALSE | | n/a |
|  | List – Product List - : rename column Title to Product Name and add columns   |  |  |  | | --- | --- | --- | | Column | Type | Required | | Product ID | Single line of text | FALSE | | n/a |
|  | List – Customer List - : rename column Title to Customer No and add columns   |  |  |  | | --- | --- | --- | | Column | Type | Required | | Customer Name | Single line of text | FALSE | | Contact Name | Single line of text | FALSE | | Contact Title | Single line of text | FALSE | | Address | Single line of text | FALSE | | City | Single line of text | FALSE | | Postal Code | Single line of text | FALSE | | State Or Province | Single line of text | FALSE | | Country | Single line of text | FALSE | | Phone Number | Single line of text | FALSE | | Fax Number | Single line of text | FALSE | | n/a |
|  | List – Supplier List - : rename column Title to Supplier No and add columns   |  |  |  | | --- | --- | --- | | Column | Type | Required | | Supplier Name | Single line of text | FALSE | | Contact Name | Single line of text | FALSE | | Contact Title | Single line of text | FALSE | | Address | Single line of text | FALSE | | City | Single line of text | FALSE | | Postal Code | Single line of text | FALSE | | State Or Province | Single line of text | FALSE | | Country | Single line of text | FALSE | | Phone Number | Single line of text | FALSE | | Fax Number | Single line of text | FALSE | | n/a |
|  | List – Audit Reference List - : rename column Title to Audit Section ID and add columns   |  |  |  | | --- | --- | --- | | Column | Type | Required | | Audit Item ID | Single line of text | FALSE | | Audit Section Name | Single line of text | FALSE | | Audit Sub-Section ID | Single line of text | FALSE | | Audit Sub-Section Name | Single line of text | FALSE | | Audit Item | Single line of text | FALSE | | Audit Item Type | Single line of text | FALSE | | Audit Type ID | Single line of text | FALSE | | n/a |
|  | List – Audit Observation List - : rename column Title to Audit ID and add columns   |  |  |  | | --- | --- | --- | | Column | Type | Required | | Study No | Single line of text | FALSE | | Site No | Single line of text | FALSE | | Auditor | Single line of text | FALSE | | Section | Single line of text | FALSE | | Section ID | Single line of text | FALSE | | Sub-Section | Single line of text | FALSE | | Obs No | Single line of text | FALSE | | Observation | Single line of text | FALSE | | Corrective Action | Single line of text | FALSE | | Obs Status | Choice | FALSE | | Rating | Single line of text | FALSE | | Sub-Section ID | Single line of text | FALSE | | Date Closed | Single line of text | FALSE | | Department | Single line of text | FALSE | | Time to Close | Calculated | FALSE | | Observation Rating-Description | Single line of text | FALSE | | Audit Category | Choice | FALSE | | n/a |
|  | List – Electronic Test Script List - : rename column Title to Name 1 and add columns   |  |  |  | | --- | --- | --- | | Column | Type | Required | | CSVID | Single line of text | FALSE | | Test Run | Single line of text | FALSE | | System ID | Single line of text | FALSE | | Test Result | Single line of text | FALSE | | Document Number | Single line of text | FALSE | | Revision | Single line of text | FALSE | | Document ID | Single line of text | FALSE | | n/a |
|  | List – Safety Report List - : add columns   |  |  |  | | --- | --- | --- | | Column | Type | Required | | Safety Report Number | Single line of text | FALSE | | Safety Report Description | Single line of text | FALSE | | Safety Report Status | Single line of text | FALSE | | n/a |
|  |  | n/a |

## Library Update: SOP Library

| Step | Instructions | Comment |
| --- | --- | --- |
|  | Add new columns   |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | | SOP ID | Single line of text | TRUE | FALSE | 255 | Text | TRUE | TRUE | | SOP Description | Single line of text | FALSE | FALSE | 255 | Text | TRUE | TRUE | | n/a |
|  | Add new view to order like this:   |  |  | | --- | --- | | Title | Single line of text | | SOP ID | Single line of text | | SOP Description | Single line of text | | Created By | Person or Group | | Modified By | Person or Group | | Checked Out To | Person or Group | | n/a |

## Library Update: Investigation Reports

| Step | Instructions | Comment |
| --- | --- | --- |
|  | Add new columns  Status, Drop-Down, Fill-in, {Not Started, Draft, Reviewed, Scheduled, Published, Final, Expired}   |  |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | | Name | Type | Required | Unique | Max | Default | All Content Types | Default View | Multi | Allow | ChooseFrom | | Document Number | Single line of text | FALSE | FALSE | 255 | Text | TRUE | TRUE | NA | NA | NA | | Incident ID | Single line of text | FALSE | FALSE | 255 | Text | TRUE | TRUE | NA | NA | NA | | Investigator | Person or Group | FALSE | FALSE | 256 | Text | TRUE | TRUE | FALSE | PeopleOnly | AllUsers | | Status | Choice | FALSE | FALSE |  | Not Started |  |  |  |  |  | | n/a |
|  | Add new view to order like this:   |  |  | | --- | --- | | Title | Single line of text | | SOP ID | Single line of text | | SOP Description | Single line of text | | Created By | Person or Group | | Modified By | Person or Group | | Checked Out To | Person or Group | | n/a |
|  | Add new content type.  Name: Investigation Report  Parent: Document  Group: MTM – Incident Management Module  Level: | n/a |
|  | Add new columns to content type Investigation Report   |  |  |  | | --- | --- | --- | | Incident ID | Single line of text | Optional | | Status | Choice | Optional | | Investigator | Person or Group | Optional | | Document Number | Single line of text | Optional | | n/a |

## Library Update: Incident Form Attachments

| Step | Instructions | Comment |
| --- | --- | --- |
|  | Add new columns   |  |  |  | | --- | --- | --- | | Archiving Date | Date and Time | Optional | | Attachment ID | Single line of text | Optional | | Attachment Owner | Person or Group | Optional | | Parent Incident Management | Lookup | Optional | | Original FileName | Single line of text | Optional | | n/a |
|  | Add new view to order like this:   |  |  | | --- | --- | | Title | Single line of text | | SOP ID | Single line of text | | SOP Description | Single line of text | | Created By | Person or Group | | Modified By | Person or Group | | Checked Out To | Person or Group | | n/a |
|  | Add new content type on collection level.  Name: Incident Form Attachment  Parent: Document  Group: MTM – Incident Management Module  Level: | n/a |
|  | Add new columns   |  |  |  | | --- | --- | --- | | Archiving Date | Date and Time | Optional | | Attachment ID | Single line of text | Optional | | Attachment Owner | Person or Group | Optional | | Parent Incident Management | Lookup | Optional | | Original FileName | Single line of text | Optional | | n/a |

## Library Update: Incident Forms

| Step | Instructions | Comment |
| --- | --- | --- |
|  | Add new content type on collection level.  Name: Incident Form  Parent: Form  Group: Microsoft InfoPath  Level: | n/a |
|  | Add new columns   |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | | SOP ID | Single line of text | TRUE | FALSE | 255 | Text | TRUE | TRUE | | SOP Description | Single line of text | FALSE | FALSE | 255 | Text | TRUE | TRUE | | n/a |
|  | Add new view to order like this:   |  |  | | --- | --- | | Title | Single line of text | | SOP ID | Single line of text | | SOP Description | Single line of text | | Created By | Person or Group | | Modified By | Person or Group | | Checked Out To | Person or Group | | n/a |
|  | Add new content type.  Name: Incident Form  Parent: Form  Group: MTM – Incident Management Module  Level: | n/a |
|  | Add new columns with Status=Optional   |  |  |  | | --- | --- | --- | | Name | Type | Level | | Actions Taken Description | Multiple lines of text | coll | | Additional Actions | Single line of text | site | | Audit Reference ID | Multiple lines of text | coll | | Cancellation Date | Date and Time | coll | | Cancelled By | Single line of text | coll | | Corrective Action Taken Description | Multiple lines of text | coll | | Current Activity | Single line of text | site | | Current Activity Owner | Person or Group | site | | Immediate Actions Taken Text | Single line of text | coll | | Incident Criticality | Single line of text | coll | | Incident Description | Multiple lines of text | coll | | Incident Description Text | Single line of text | coll | | Incident ID | Single line of text | site | | Incident Investigated Date | Date and Time | coll | | Incident Originating Dept | Single line of text | coll | | Incident Reported By | Single line of text | coll | | Incident Reported Date | Date and Time | site | | Incident Reviewer | Single line of text | coll | | Incident Status | Single line of text | site | | Incident Type | Single line of text | coll | | Incident Valid | Single line of text | coll | | Product Reference ID | Multiple lines of text | coll | | QA Approval Date | Date and Time | site | | QA Representative | Single line of text | coll | | SOP Reference ID | Multiple lines of text | coll | | Time to QA Approval | Calculated | coll | | Time to Review Completion | Calculated | coll | | Validation Reference ID | Multiple lines of text | coll | | n/a |

## Library Update: Data Connection Library

| Step | Instructions | Comment |
| --- | --- | --- |
|  | Add new columns   |  |  |  | | --- | --- | --- | | Name | Type | Status | | Current Activity Owner | Person or Group | Optional | | Connection Type | Choice | Optional | | Description | Single line of text | Optional | | Keywords | Single line of text | Optional | | UDC Purpose | Choice | Optional | | n/a |
|  | Add new content type on collection level.  Name: Universal Data Connection File  Parent: Document  Group: \_Hidden  Level: | n/a |
|  | Add new content type on collection level.  Name: Office Data Connection File  Parent: Document  Group: \_Hidden  Level: | n/a |

# Activate and Configure CoSign

| Step | Instructions | Comment |
| --- | --- | --- |
|  | Navigate to the ‘Work Area’ root site.  From ‘Site Settings’ 🡪 ‘Site-collection features’, activate the “ARX CoSign Signatures Tasks” feature: | n/a |
|  | Navigate to the QMW site. From ‘Site Settings’ 🡪 ‘Manage site features’, activate all 4 CoSign features: | n/a |

# InfoPath Deployment

| Step | Instructions | Comment |
| --- | --- | --- |
|  | * Navigate to the ‘Work Area’ root-site, ‘Data Connection Library’. * Upload all data connection files from the IMM installation folder. * Approve each file. | n/a |
|  | Remove the ‘Form’ content type from this library. | n/a |

# XSL Transforms

| Step | Instructions | Comment |
| --- | --- | --- |
|  | N/A | n/a |

# Workflow Constants

| Step | Instructions | Comment |
| --- | --- | --- |
|  | N/A |  |

# Nintex Workflows

| Step | Instructions | Comment |
| --- | --- | --- |
|  | Publish the following workflows in the ‘Incident Management Process’ list:   * Generate Incidents | n/a |
|  | Publish the following workflows in the ‘Incident Management Recording’ list:   * Generate Workflow Management for each Incident | n/a |

# Records Center – Content Organizer Settings

| Step | Instructions | Comment |
| --- | --- | --- |
|  | * N/A | n/a |

# Records Center – Content Organizer Rules

| Step | Instructions | Comment |
| --- | --- | --- |
|  | * N/A | n/a |

# Secure Store Target Application

| Step | Instructions | Comment |
| --- | --- | --- |
|  | * N/A | n/a |

# Configure InfoPath Forms Services

| Step | Instructions | Comment |
| --- | --- | --- |
|  | * From the Center Administration site, navigate to ‘General Application Settings’ * Click on ‘Configure InfoPath Forms Services’ * In the ‘User Browser-enabled Form Templates’:   + Allow users to browser-enable form templates: **ENABLED**   + Render form templates that are browser-enabled by users: **ENABLED** * In the ‘Authentication to data source (user form templates)’:   + Allow user form templates to use authentication information contained in data connection files: **ENABLED** * Click ‘OK’ | n/a |