

# Sunward Portal Management System

## DOCUMENT INFORMATION

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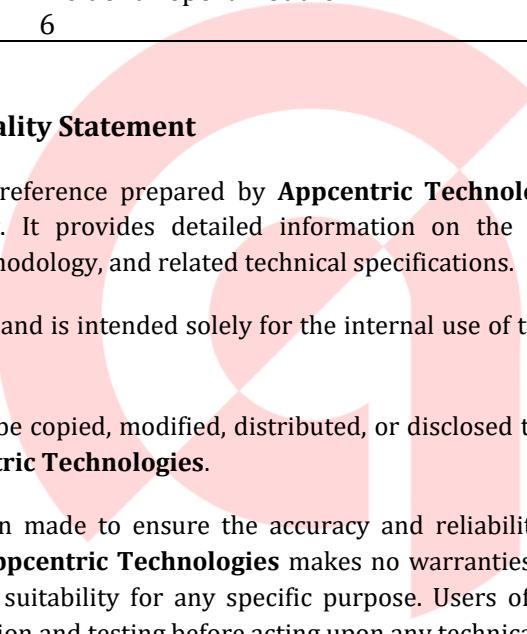
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## 1. Project Overview

The **Incident Report Module** is a central system for recording, tracking, analyzing, and managing production-related incidents within Sunward.

It captures incidents occurring on production lines, machines, facilities, and work areas.

The module integrates tightly with **DMS (Document Management System)** for file storage, **Email** for notifications, and **Notify PA Access** for authorized escalation.

It provides transparency across production teams, quality teams, and management to ensure timely corrective or preventive actions (CAPA).

## 2. Objectives

### Enhance Incident Tracking & Visibility

- Provide a centralized location to store and review production-related incidents.

### Ensure Document Integrity

- Attachments (PDF/images) are securely stored via DMS with controlled permissions.

### Improve Workflow Efficiency

- Automated actions: checkout, edit, view, email, review (Check By), and supporting document linking.

### Maintain Compliance

- Audit log for creation, modification, DMS updates, and workflow actions.

### Enable Multi-Company Reporting

## 3. System Modules & Key Functions

### 3.1 Incident Listing

View all incidents with:

- Profile No**
- Production Order No**
- Company**
- Location**
- Machine**
- Detected By**
- Subject / Description**
- Advanced filtering, grouping, and export.

### 3.2 File Attachment & Document Handling

Each incident entry may have:

- PDF incident report
- Image/video attachments
- Multiple supporting documents

#### Key Functions

- **View File** → Opens the uploaded PDF
- **Copy Link** → Generates sharable link
- **Check Out** → Locks file for editing
- **Supporting Documents** → Upload additional files
- **DMS Link** → Direct link to DMS folder

### 3.3 Workflow Actions (Right-side menu)

- **Update to DMS Folder**
- **Copy Link**
- **Checkout / Check-In**
- **View File**
- **Edit**
- **Email**
- **Check By (Verification)**
- **Supporting Documents**

## 4. Functional Components

### 4.1 Data Capture

Each incident stores:

- Profile No (auto-generated)
- Production Order No
- Location Code
- Machine Code
- Incident Description
- Detected By
- Modified By / Added By
- Attachments

## 4.2 DMS Integration

- Incident files are synced to DMS based on library selected in **Incident App Settings**.
- Generates DMS Links automatically for navigation.
- Permissions inherited from DMS Access module.

## 4.3 Review & Verification

Uses **Check By** workflow action.

Tracks:

- Verified By
- Verified Date
- Status

## 4.4 NAV Data Integration

Some modules fetch data from the NAV OData service:

- Production Simulation
- Tender Orders
- Delivery Orders
- Item Master

NAV company selection ensures correct data isolation.

## 5. Business Logic

### 5.1 Required Field Validation

Cannot submit incident without:

- Company
- Location
- Machine
- Detected By
- File Attachment

### 5.2 Check Out Logic

When a file is checked out:

- Editing becomes exclusive to that user
- Others can only view
- Check-in required to release the file

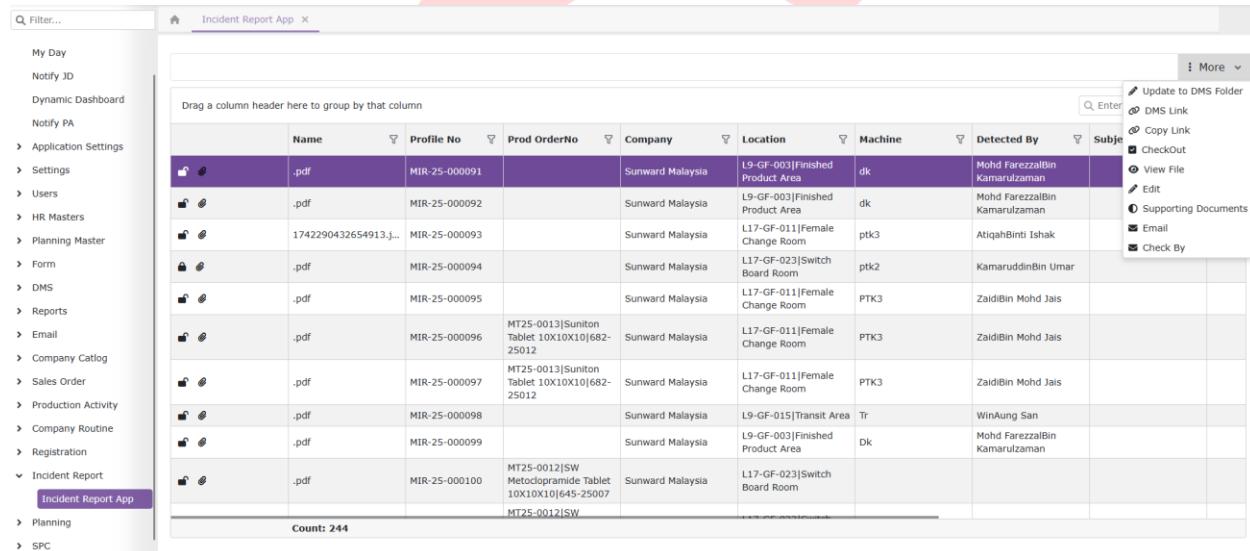
## 5.3 DMS Sync Rules

When “Update to DMS Folder” is clicked:

- File is copied to the assigned DMS library
- DMS Link is created
- Incident cannot be removed from DMS afterwards

## 5.4 Email Workflow

- Only users with **Email Access** can email incidents.



The screenshot shows a web-based application interface for managing incidents. On the left is a sidebar with navigation links including 'Filter...', 'My Day', 'Notify JD', 'Dynamic Dashboard', 'Notify PA', 'Application Settings', 'Settings', 'Users', 'HR Masters', 'Planning Master', 'Form', 'DMS', 'Reports', 'Email', 'Company Catalog', 'Sales Order', 'Production Activity', 'Company Routine', 'Registration', 'Incident Report', and 'Incident Report App' (which is selected). The main area is titled 'Incident Report App' and contains a table with columns: Name, Profile No., Prod OrderNo., Company, Location, Machine, Detected By, and Subject. A red callout bubble points to the 'More' button in the top right corner of the table header, which reveals a context menu with options: 'Update to DMS Folder', 'DMS Link', 'Copy Link', 'CheckOut', 'View File', 'Edit', 'Supporting Documents', 'Email', and 'Check By'. The table has 244 rows. One row is highlighted with a purple background and shows a file icon, indicating it's selected.

## 6. Summary

The **Incident Report Module** ensures that all production-related incidents are captured, documented, secured, and audited properly. Its integration with DMS, email workflows, supporting documents, and multi-company structure makes it a complete solution for compliance, traceability, and operational improvement.

This module significantly reduces manual record-keeping, enhances accountability, and improves communication across production & quality teams