

Sunward Portal Management System

DOCUMENT INFORMATION

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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.

Q Filter...

Incident Report App x

My Day
Notify JD
Dynamic Dashboard
Notify PA

> Application Settings
> Settings
> Users
> HR Masters
> Planning Master
> Form
> DMS
> Reports
> Email
> Company Catlog
> Sales Order
> Production Activity
> Company Routine
> Registration
▼ Incident Report
 Incident Report App
> Planning
> SPC

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Q Enter

More

Update to DMS Folder
DMS Link
Copy Link
CheckOut
View File
Edit
Supporting Documents
Email
Check By

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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