

## Action Setup Procedures – Quick Start

To get going quickly with Action Management the following lookup lists which are use for classification and functional purposes within 3iVerify.

1. **Risk Perspectives** – These are used throughout the system and particularly in Action Management. You can create any type of Risk Matrix. We recommend a minimum of 4 x 4 and ideally 5 X 5 risk matrices. We also recommend ensuring that all Risk Matrices are set to “Global” so that they are used across multiple sites for consistency. To create and edit Risk Perspectives go to Admin>Action>Risk Perspective.
2. **Action Types** – These are important to be able to assign and track different types of action, e.g. corrective Action, Preventive Action, Sales Action, Marketing Action, Health and Safety, etc. We will also use these to determine who can see different types of action. When setting up an Action you should again always set them to Global actions so that they are available for ALL sites in the Group. An Action will require a Prefix (used in the numbering system for logging actions, e.g. CA1001 would be a Corrective Action). You can also set the Action to be Critical, Major, Minor, etc. This can then be used for reporting purposes and other functionality later as we develop intelligence and AI applications in the future. Action Types can be set in Admin>Action>Action Type.
3. **Action Sources** – This list is used to log the source of an Action, e.g. Customer, Audit, Meeting, Etc. This can be used in reporting and segmentation for tracking where actions come from. Again, use the “Global” setting for use across all sites. Action Source can be set in Admin>Action>Action Source.
4. **Task Types** – This list is used for classifying Tasks. Set these up as Global for cross site use. These can be set up in Admin>Task Settings>Task Type
5. **Document Types** – Mainly used in documents module but also used when uploading a Document, you can manage this list in Admin>Document Settings>Document Type. Again, set these to Global.
6. **Escalations** – We will park these for now, but they can be managed in Admin>Action>Escalations. Again, set to Global if using these.

If you have any questions, please email [jf@primority.com](mailto:jf@primority.com).