How to Create an Incident

TI version 10.7

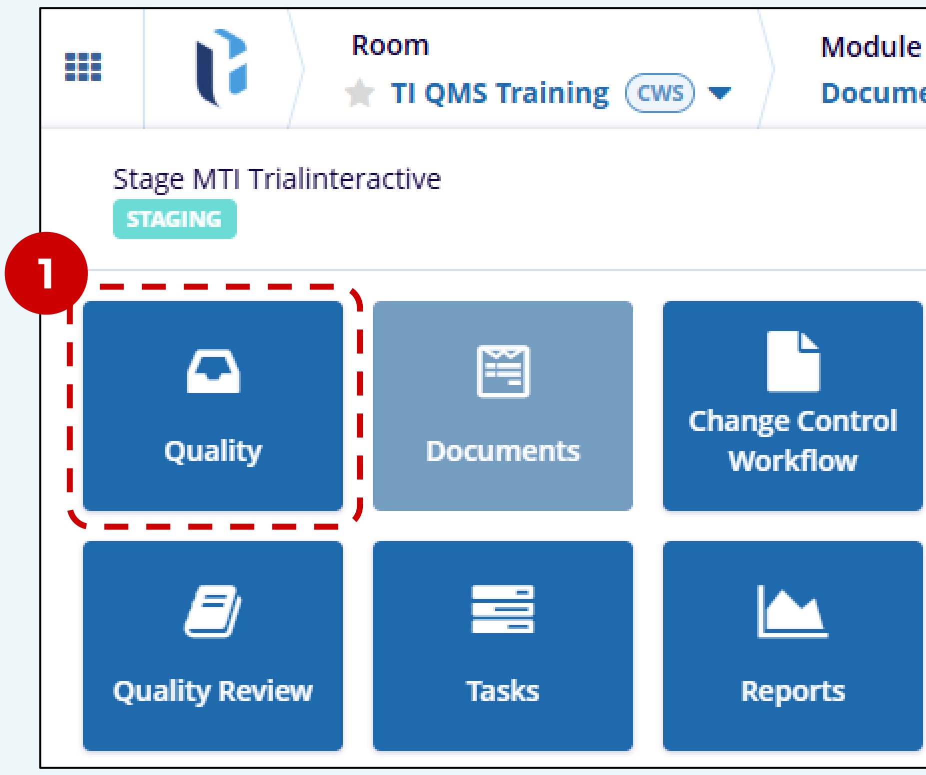
TRIAL INTERACTIVE

APPLICABLE TO:

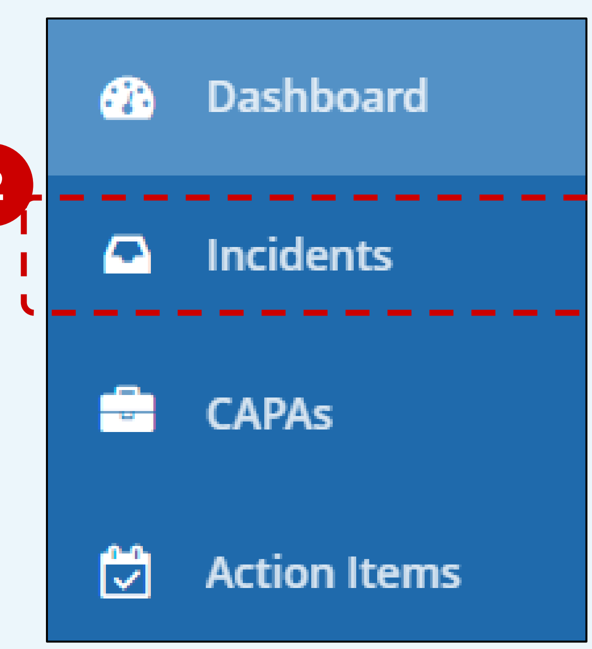
- ● Admin
- ● Manager
- ● Editor
- ○ Reader

- ● QMS
- ○ eISF

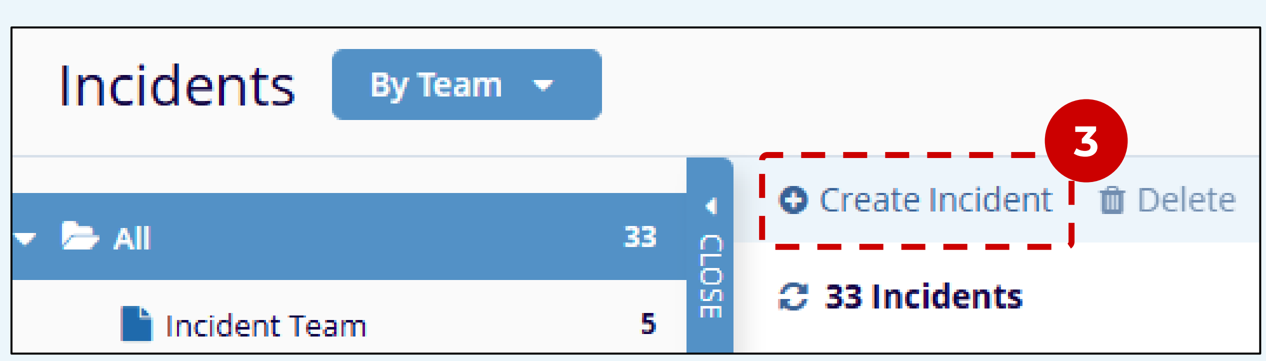
1 Enter a QMS-Enabled Collaborate room. Via the waffle or the module selector, navigate to the **Quality** module (the name may vary).



2 Select the option for **Incidents** from the navigation sidebar.



3 Click on **Create Incident**.



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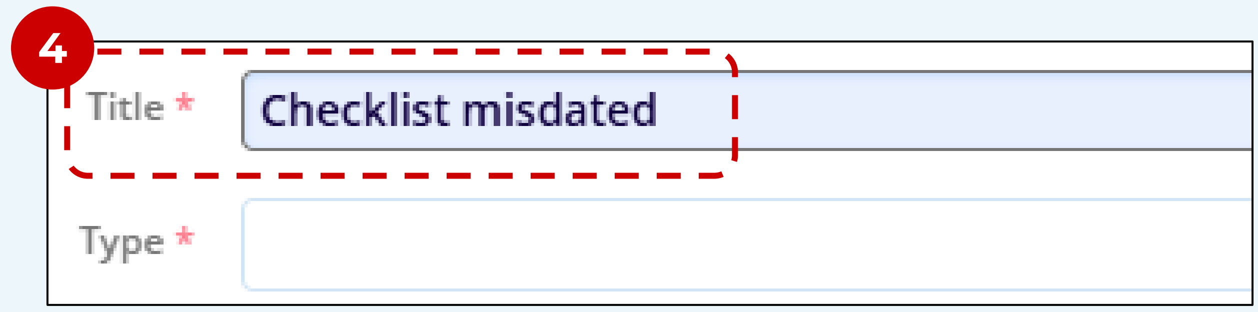
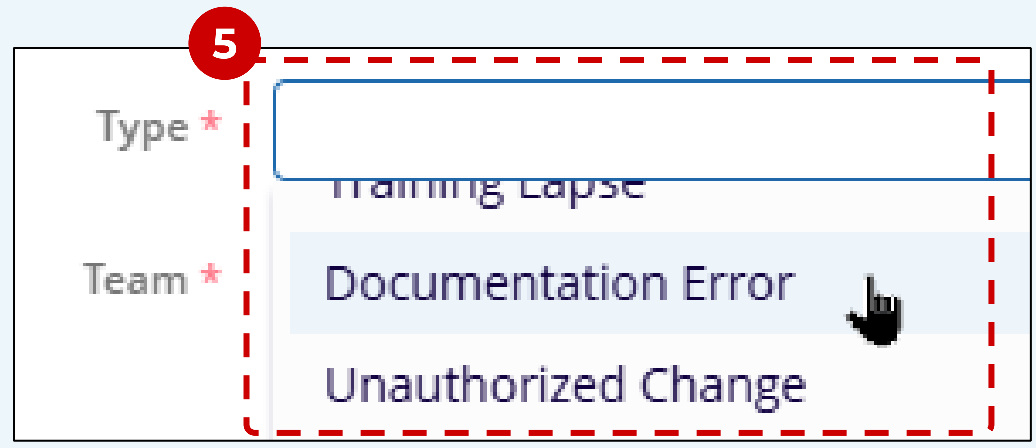
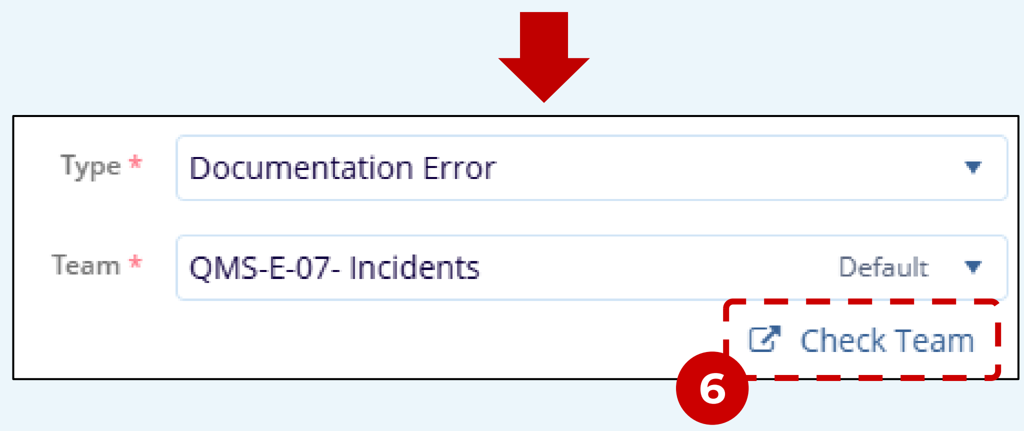
4 Give a **Title** to the Incident.



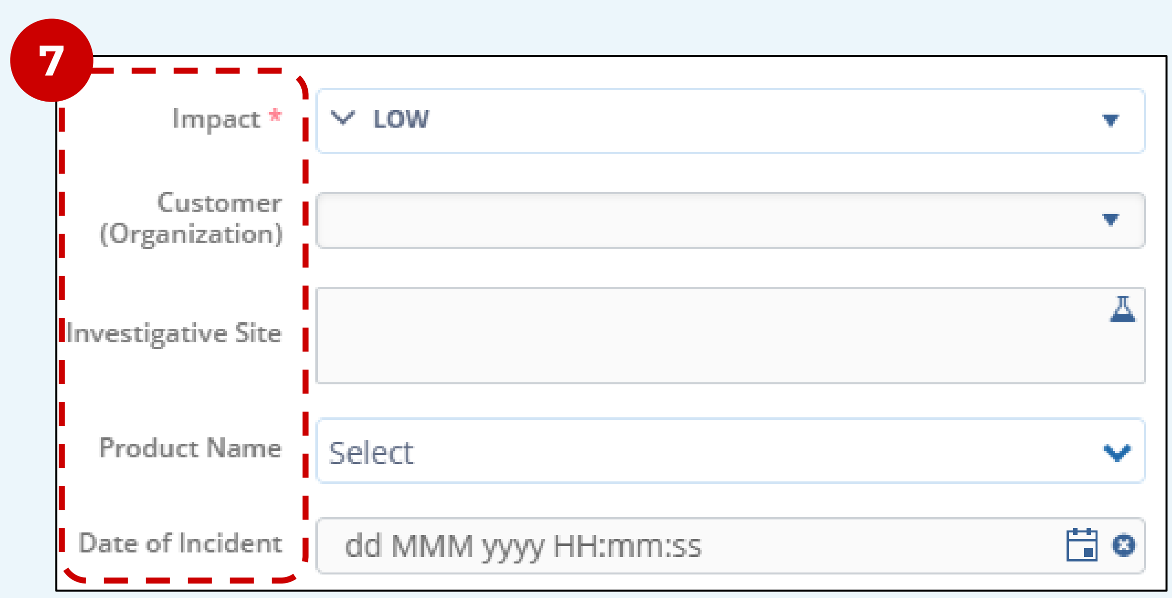
5 Select the Type of Incident from the **Type** dropdown.
This will also auto-select the Team assigned to that type, if any.



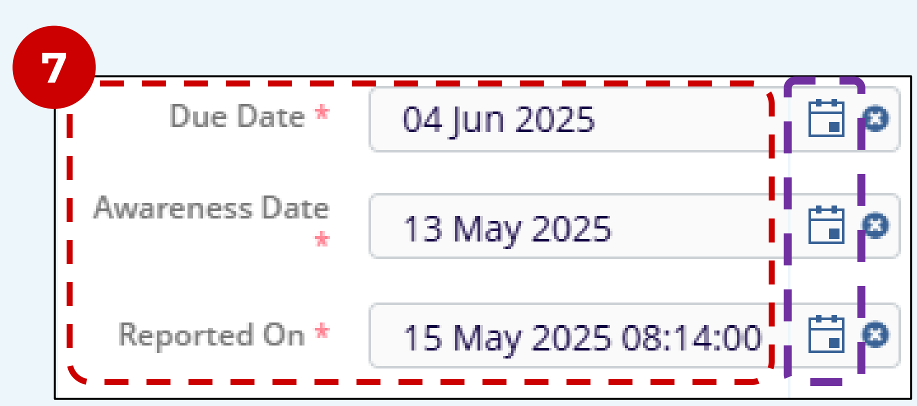
6 The **Check Team** button allows you to review what users are members of the selected Team.



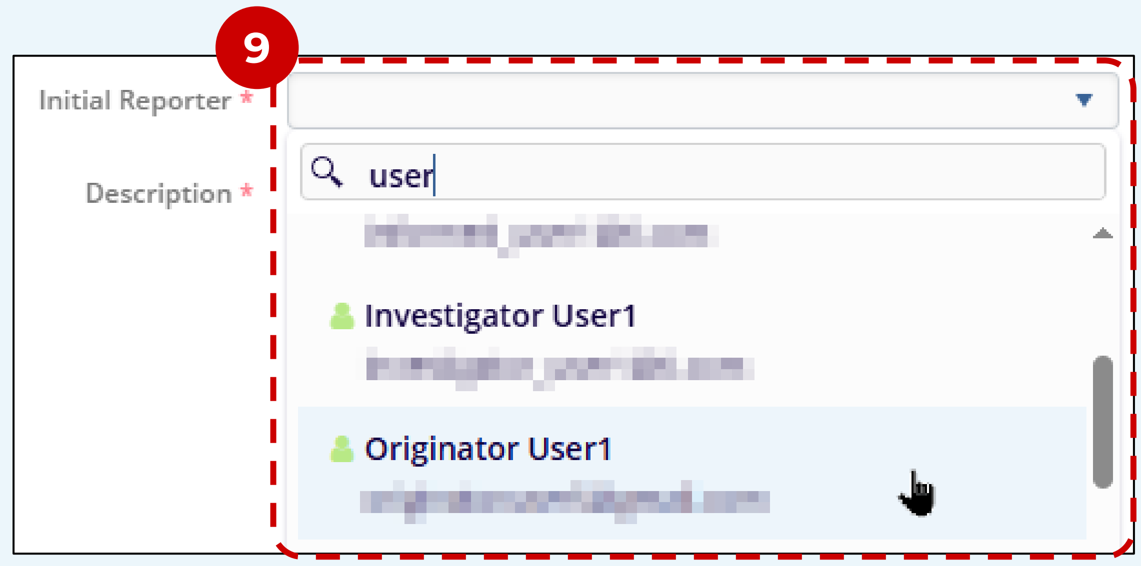
7 Change or define these fields as needed: Impact, Customer, Investigative Site, Product Name, Date of Incident.
Available fields may vary due to configuration differences.



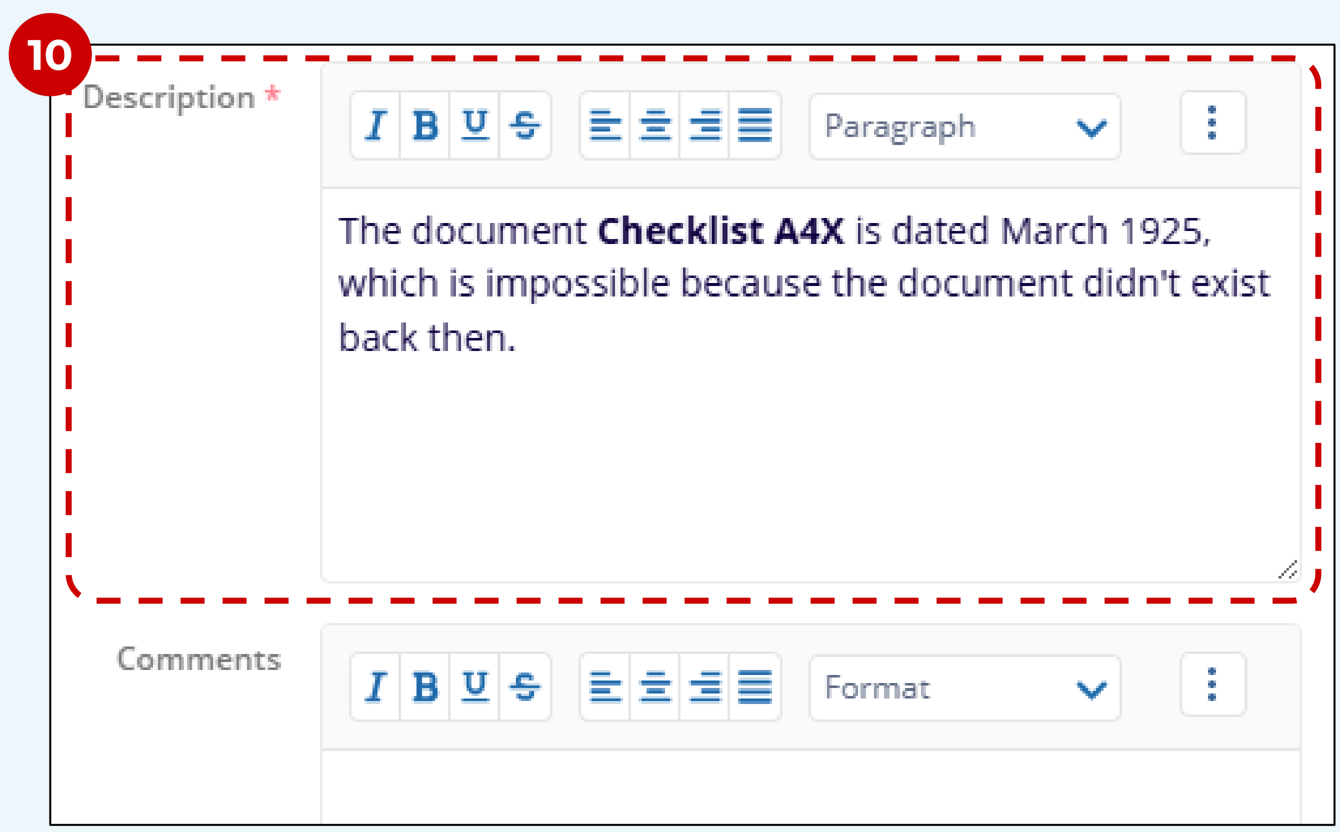
8 Set the required **Date Fields**. Only Due Date is populated automatically, based on current date.
You can use the **calendar** buttons to select day and time.



9 Select the **Initial Reporter** (dropdown behaves like a search bar).

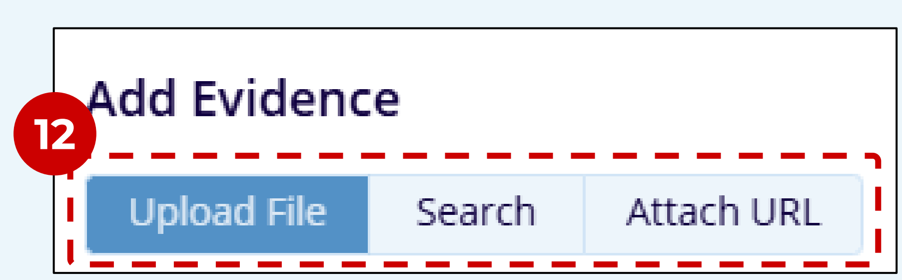


10 Insert a **Description**, and Comments as appropriate. Text boxes like these support rich text, including pictures and Tables.

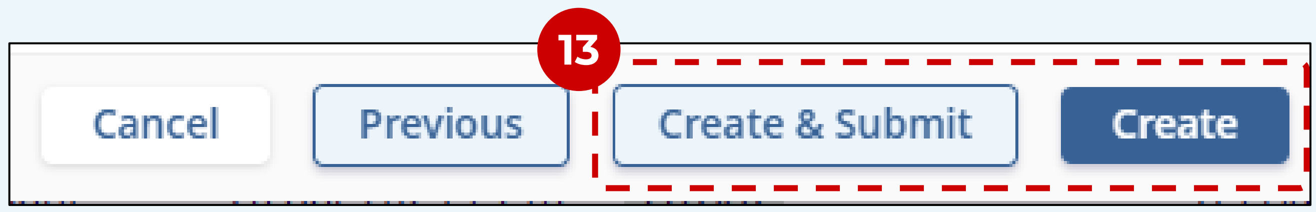


11 Click on **Next** to move to the second part of Incident setup, which is adding evidence.

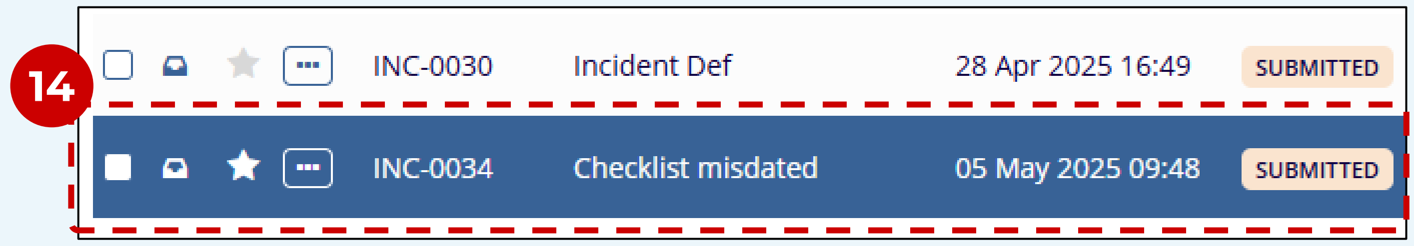
12 Choose how you'll add incident evidence. You may Upload files, Search for existing content in the current room, or type/paste URLs.



13 Complete Adding Evidence as chosen, then click **Create** to generate a Draft Incident, or **Create & Submit** to send the Incident to the first contributor.



14 Once Created, incident can be found in the browser with its current status.



15 Click on the **Inbox Icon** to display a full page view of the Incident – or click on the incident name to display details in the side panel.