

# How to Create a CAPA

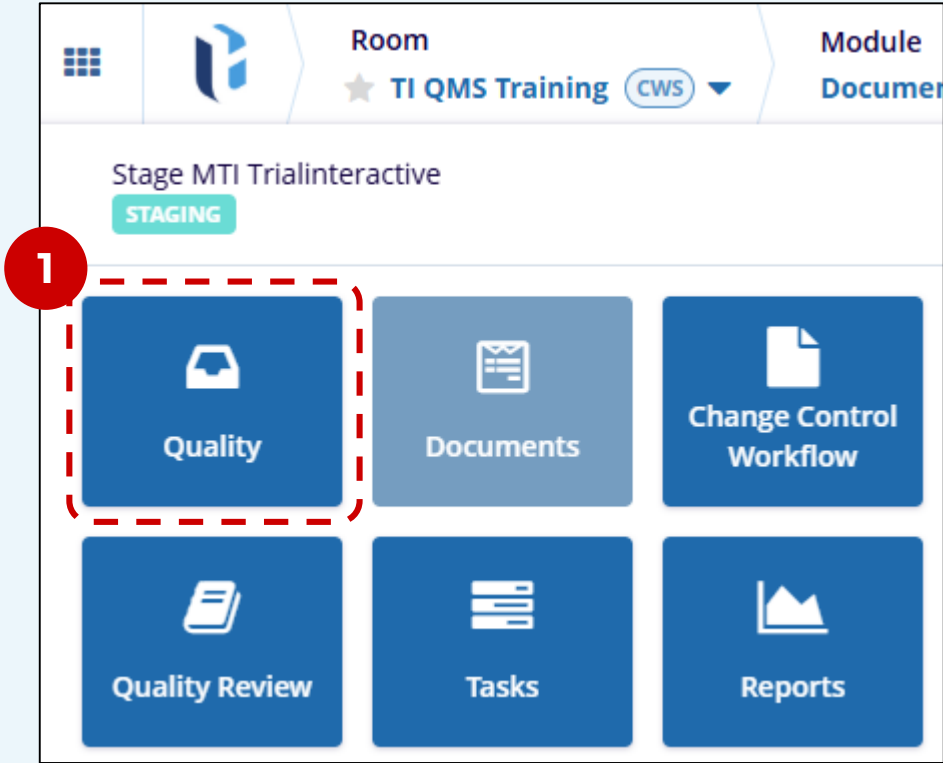
TI version 10.7

APPLICABLE TO:

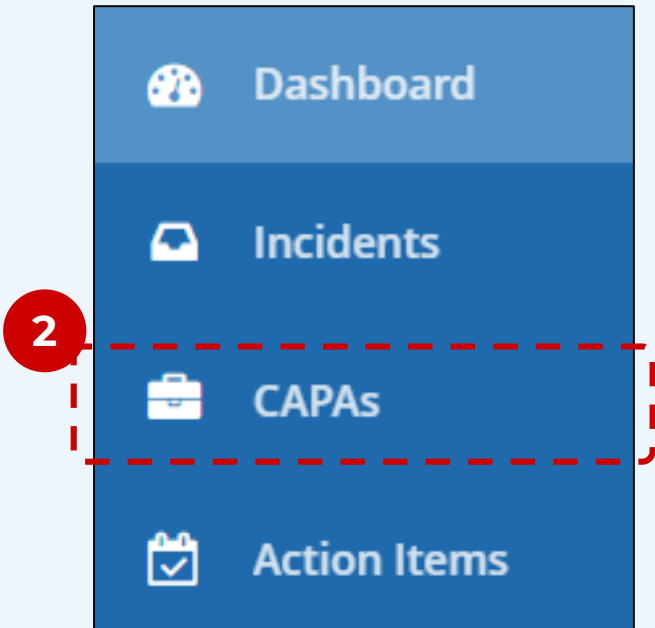
- ☒ Admin
- ☒ Manager
- ☒ Editor
- ☐ Reader
- ☒ QMS
- ☐ eISF

 Due to the flexible configuration of TI QMS, variations from the example shown should be expected . For example, different datafields may be required or displayed.

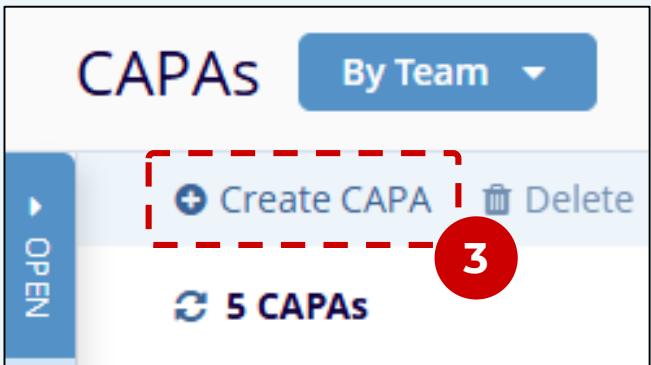
1 Enter a QMS-Enabled Collaborate room. Via the waffle or the module selector, navigate to the **Quality** module (the name may vary).



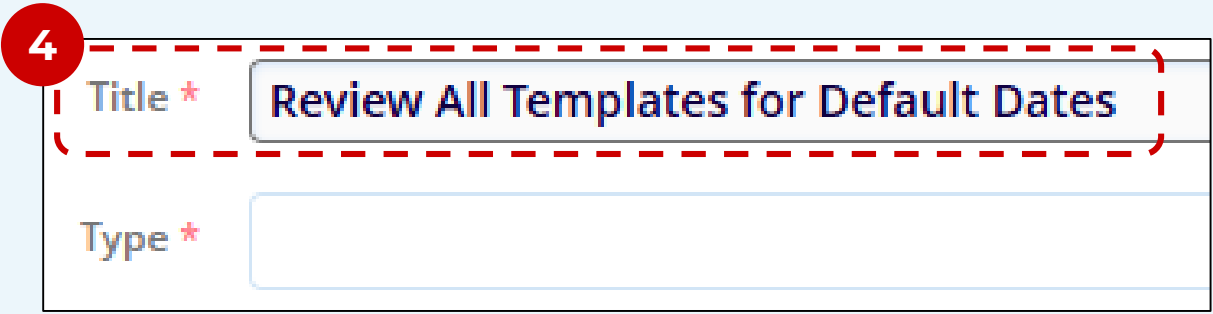
2 Select the option for **CAPAs** from the navigation sidebar.



3 Click on **Create CAPA**.



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

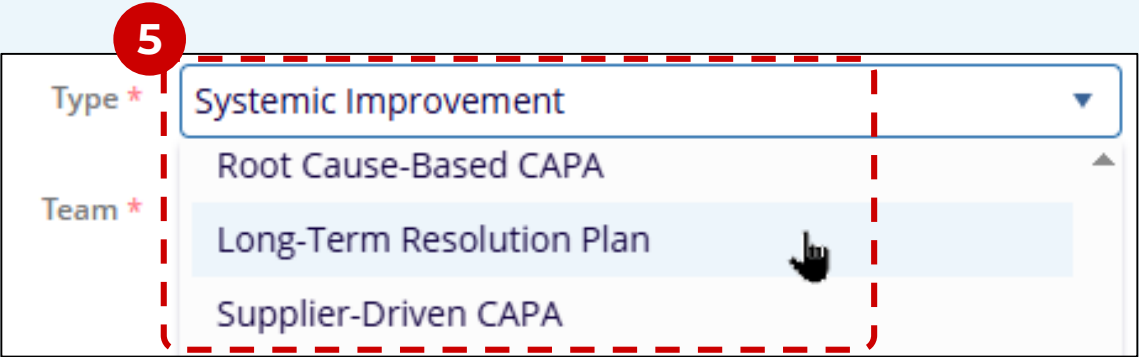


4

Title \* Review All Templates for Default Dates

Type \*

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

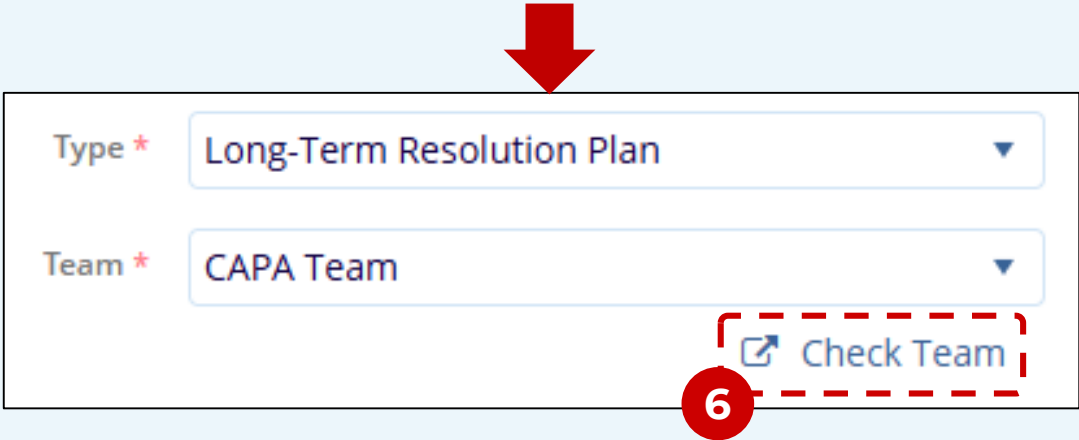


5

Type \* Systemic Improvement

Team \* Long-Term Resolution Plan

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



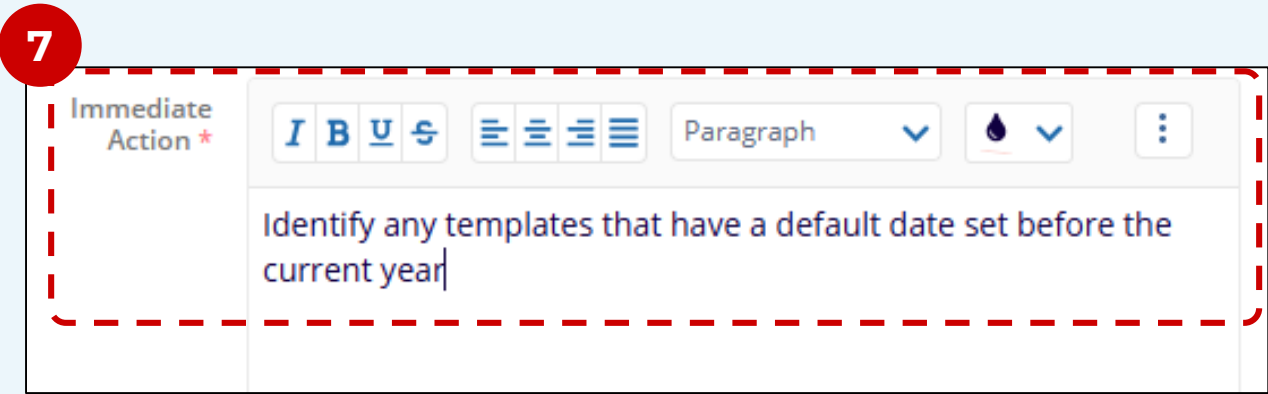
6

Type \* Long-Term Resolution Plan

Team \* CAPA Team

Check Team

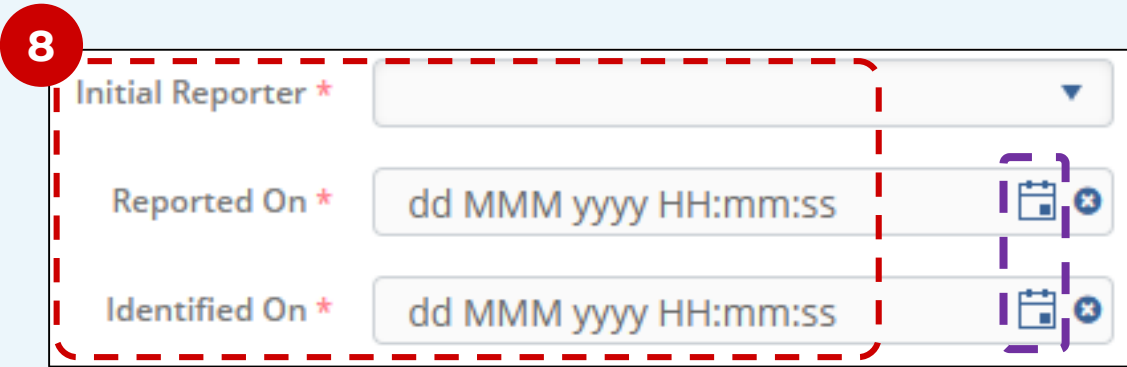
7 Populate the 'Action' text fields. Required fields are marked with a red asterisk.  
**Text boxes like these support rich text, including pictures and Tables.**



7

Immediate Action \* Identify any templates that have a default date set before the current year

8 Set the Reporting fields. You can use the **calendar** buttons to select day and time.



8

Initial Reporter \*

Reported On \* dd MMM yyyy HH:mm:ss

Identified On \* dd MMM yyyy HH:mm:ss

9 Complete any other fields as required.

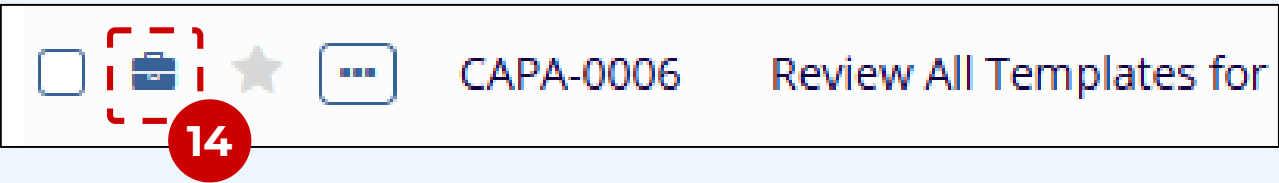
10 Click on **Next** to move to the second part of CAPA setup, which is adding evidence.

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

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

13 Once Created, a CAPA can be found in the CAPAs browser with its current status.

**14** Click on the **Inbox Icon** to display a full page view of the CAPA – or click on the record name to display details in the side panel.



**15** Only if you chose Create in step 12, the CAPA can be advanced from Draft to active status by clicking the **Submit for** button above the side panel.

