

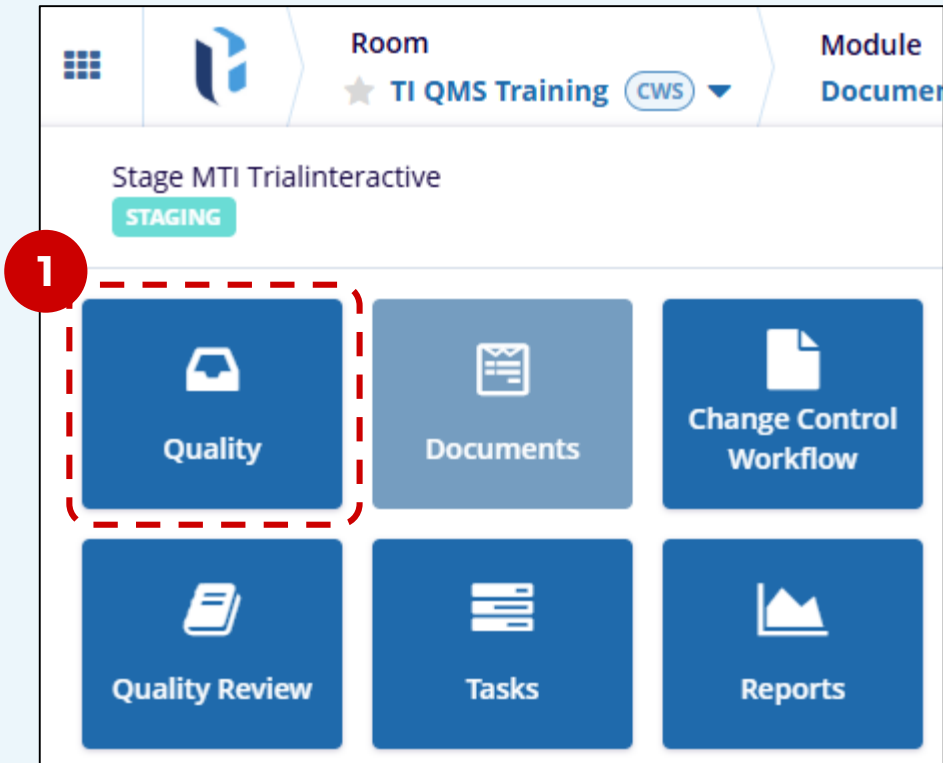
How to Create an Incident

TI version 10.7

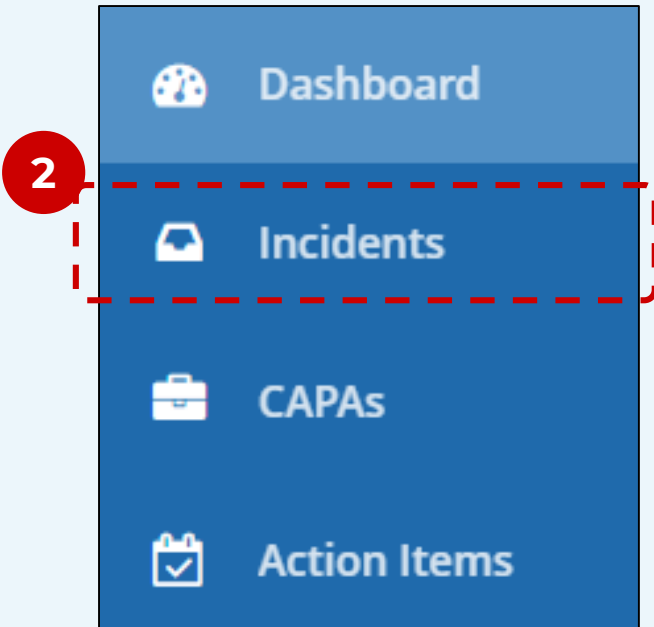
APPLICABLE TO:

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

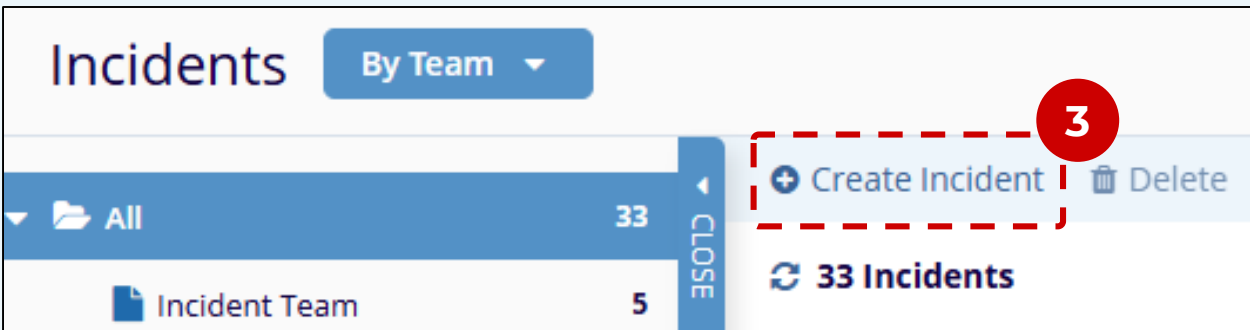
1 Enter a QMS-Enabled Collaborate room. Via the waffle or the module selector, navigate to the **Quality** module (the name may vary).



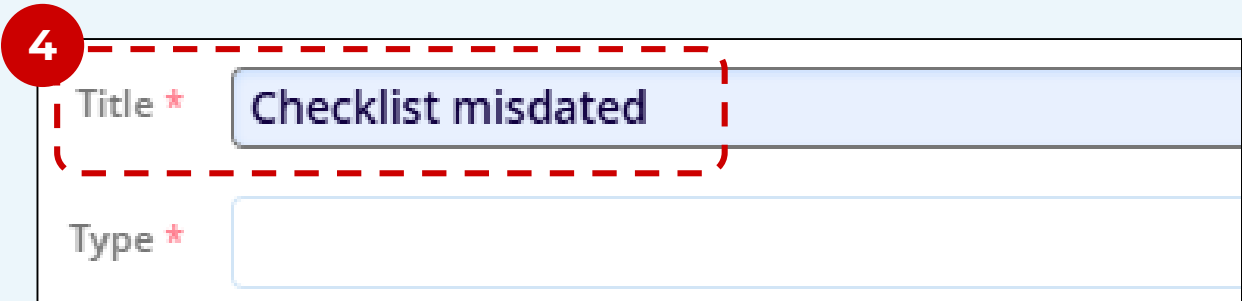
2 Select the option for **Incidents** from the navigation sidebar.



3 Click on **Create Incident**.

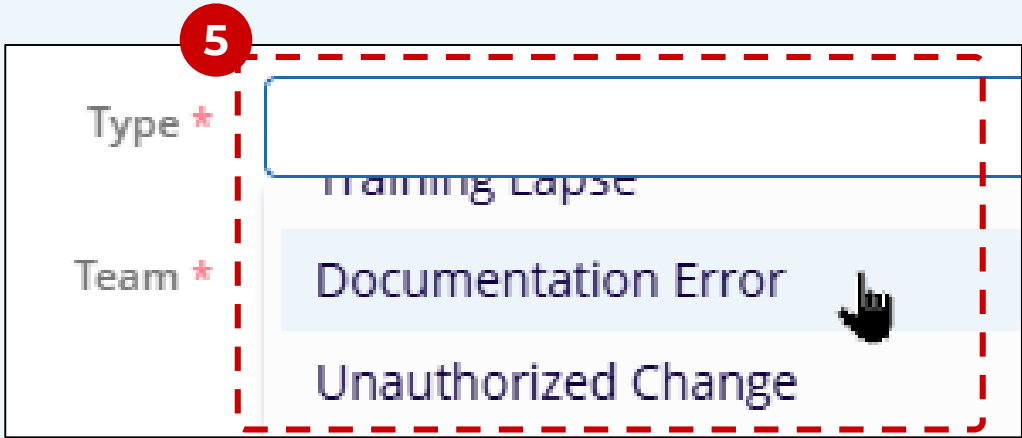


4 Give a **Title** to the Incident.



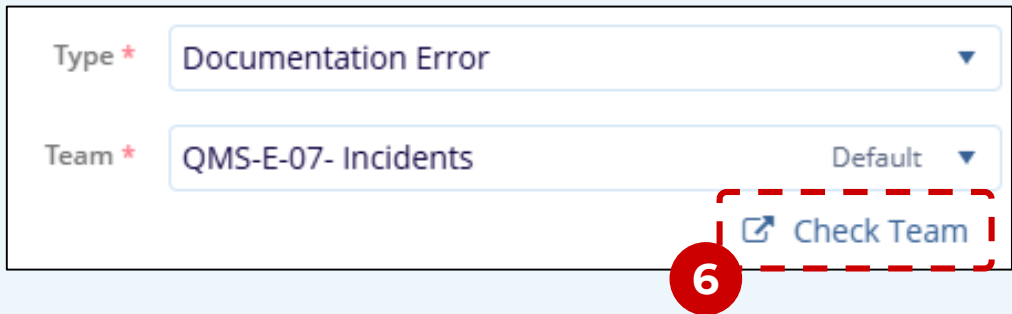
The screenshot shows the incident form with the 'Title' field highlighted by a red dashed box and a red circle with the number 4. The 'Title' field contains the text 'Checklist misdated'. Below it is the 'Type' field, which is currently empty.

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



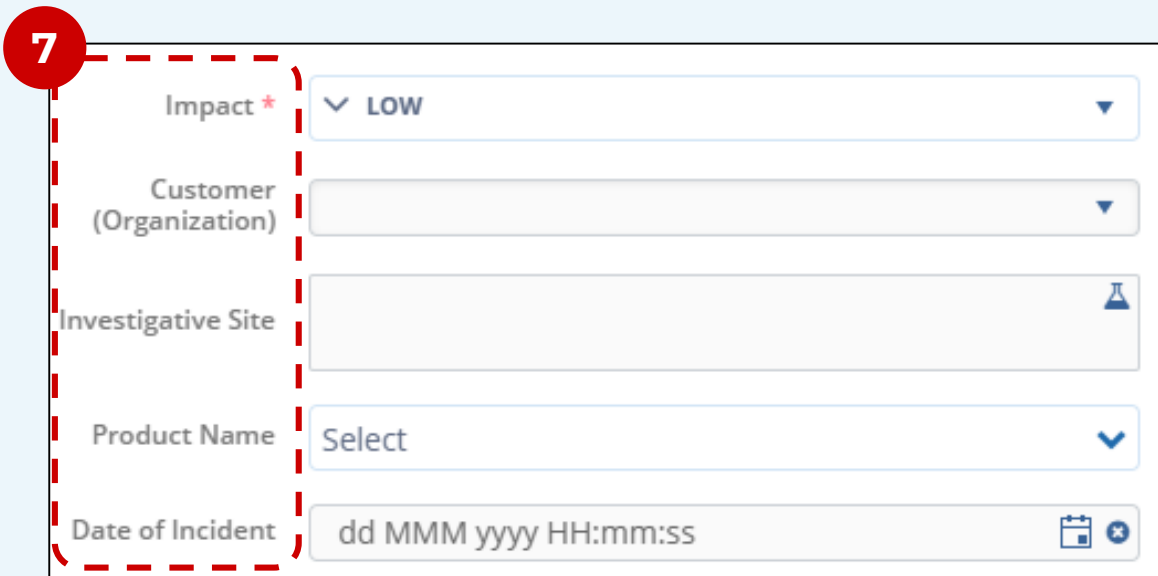
The screenshot shows the incident form with the 'Type' dropdown menu open. The dropdown menu is highlighted by a red dashed box and a red circle with the number 5. The dropdown menu contains three options: 'Training Lapse', 'Documentation Error', and 'Unauthorized Change'. A mouse cursor is pointing at 'Documentation Error'.

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



The screenshot shows the incident form with the 'Type' dropdown set to 'Documentation Error' and the 'Team' dropdown set to 'QMS-E-07- Incidents'. The 'Check Team' button is highlighted by a red dashed box and a red circle with the number 6. A red arrow points from the previous screenshot to this one.

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.



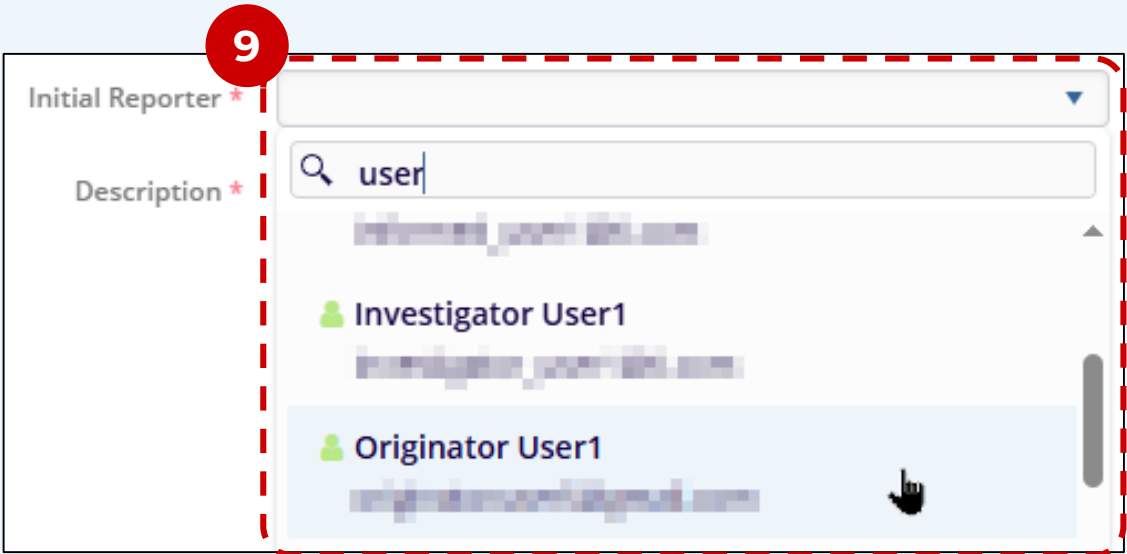
The screenshot shows the incident form with the 'Impact', 'Customer', 'Investigative Site', 'Product Name', and 'Date of Incident' fields highlighted by a red dashed box and a red circle with the number 7. The 'Impact' field is set to 'LOW'. The 'Customer' field is empty. The 'Investigative Site' field is empty. The 'Product Name' field is set to 'Select'. The 'Date of Incident' field is set to 'dd MMM yyyy HH:mm:ss'.

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.



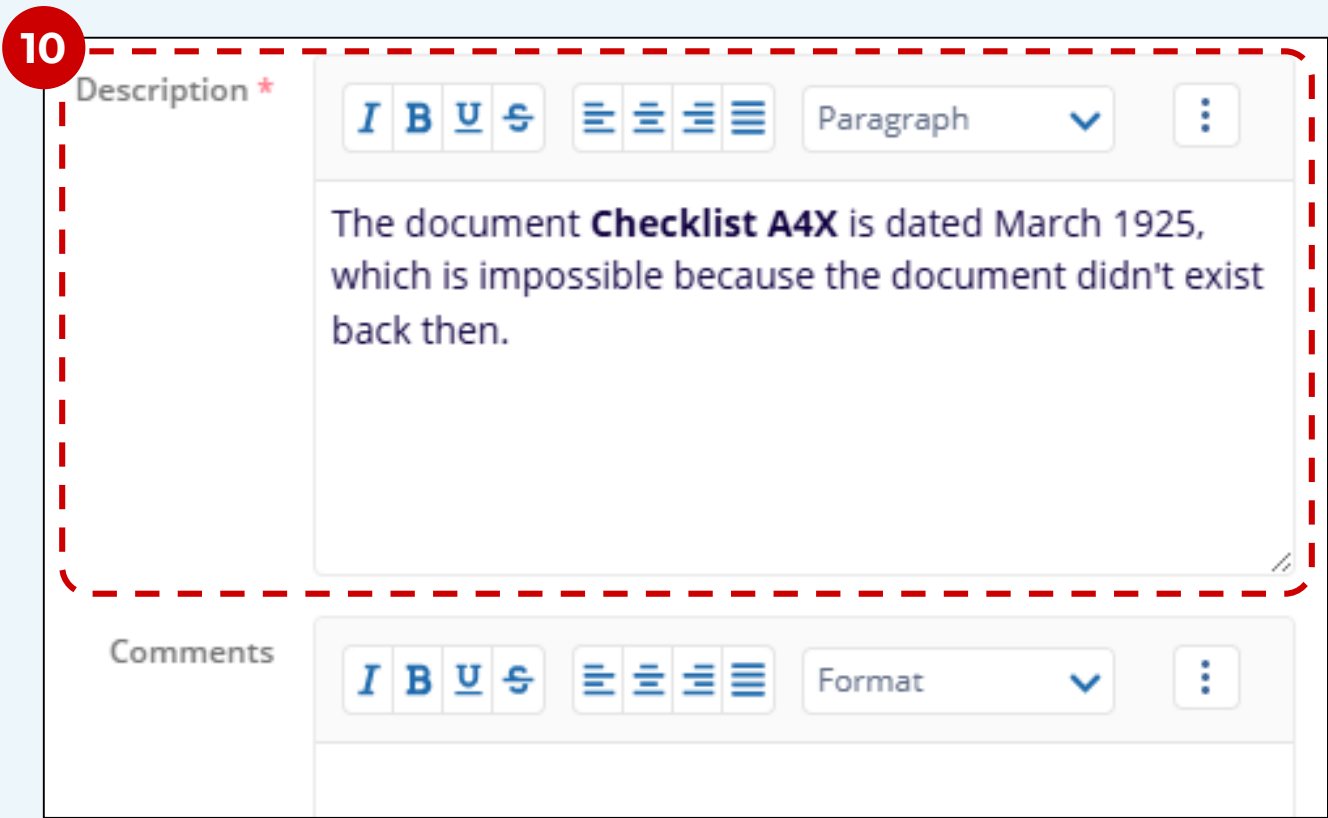
The screenshot shows the incident form with the 'Due Date', 'Awareness Date', and 'Reported On' fields highlighted by a red dashed box and a red circle with the number 7. The 'Due Date' field is set to '04 Jun 2025'. The 'Awareness Date' field is set to '13 May 2025'. The 'Reported On' field is set to '15 May 2025 08:14:00'. Each field has a calendar icon to its right.

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



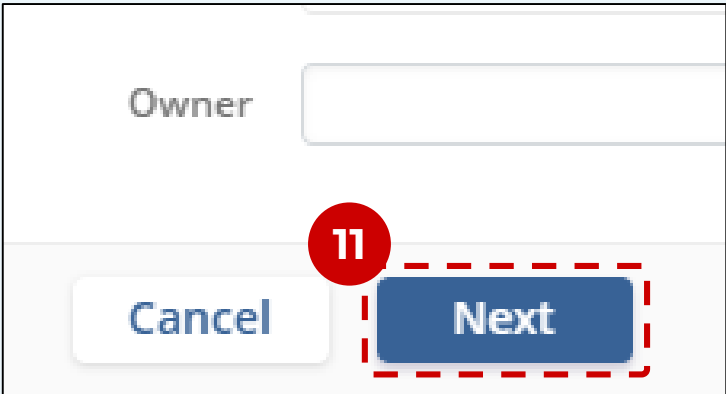
A screenshot of the 'Initial Reporter' dropdown menu. The menu is open, showing a search bar with the text 'user'. Below the search bar, there are three user entries: 'Investigator User1' and 'Originator User1', both with email addresses. A red dashed box highlights the entire dropdown menu, and a red circle with the number '9' is positioned above it.

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



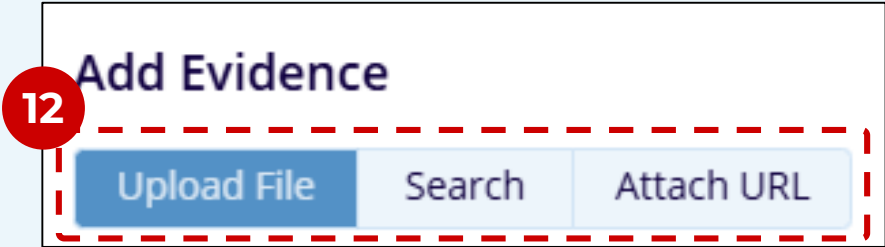
A screenshot of the 'Description' and 'Comments' text boxes. The 'Description' box is at the top, containing the text 'The document **Checklist A4X** is dated March 1925, which is impossible because the document didn't exist back then.' The 'Comments' box is below it. Both boxes have a rich text editor toolbar with options for bold, italic, underline, link, bulleted list, numbered list, and paragraph format. A red dashed box highlights both text boxes, and a red circle with the number '10' is positioned above the 'Description' box.

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



A screenshot of the 'Owner' field and the 'Next' and 'Cancel' buttons. The 'Owner' field is at the top, and the 'Next' and 'Cancel' buttons are at the bottom. A red dashed box highlights the 'Next' button, and a red circle with the number '11' is positioned above it.

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

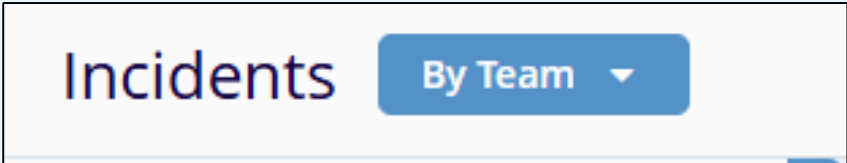


A screenshot of the 'Add Evidence' section. It contains three buttons: 'Upload File', 'Search', and 'Attach URL'. A red dashed box highlights the 'Upload File' button, and a red circle with the number '12' is positioned above it.

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.

