

Open an Investigation

Last Modified on 05/25/2022 1:12 pm EDT

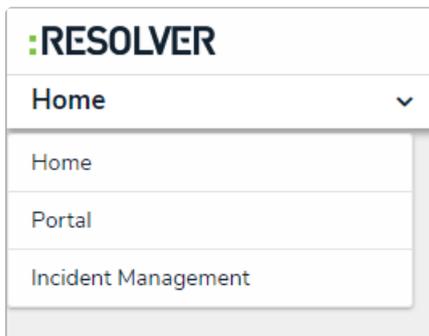
The Incident Owner can open an investigation and assign an [Investigator](#) to explore an incident further.



Investigations are only available for certain incident types. If the **Open Investigation** button is not visible on the **Incident Review** form, this incident type cannot be investigated.

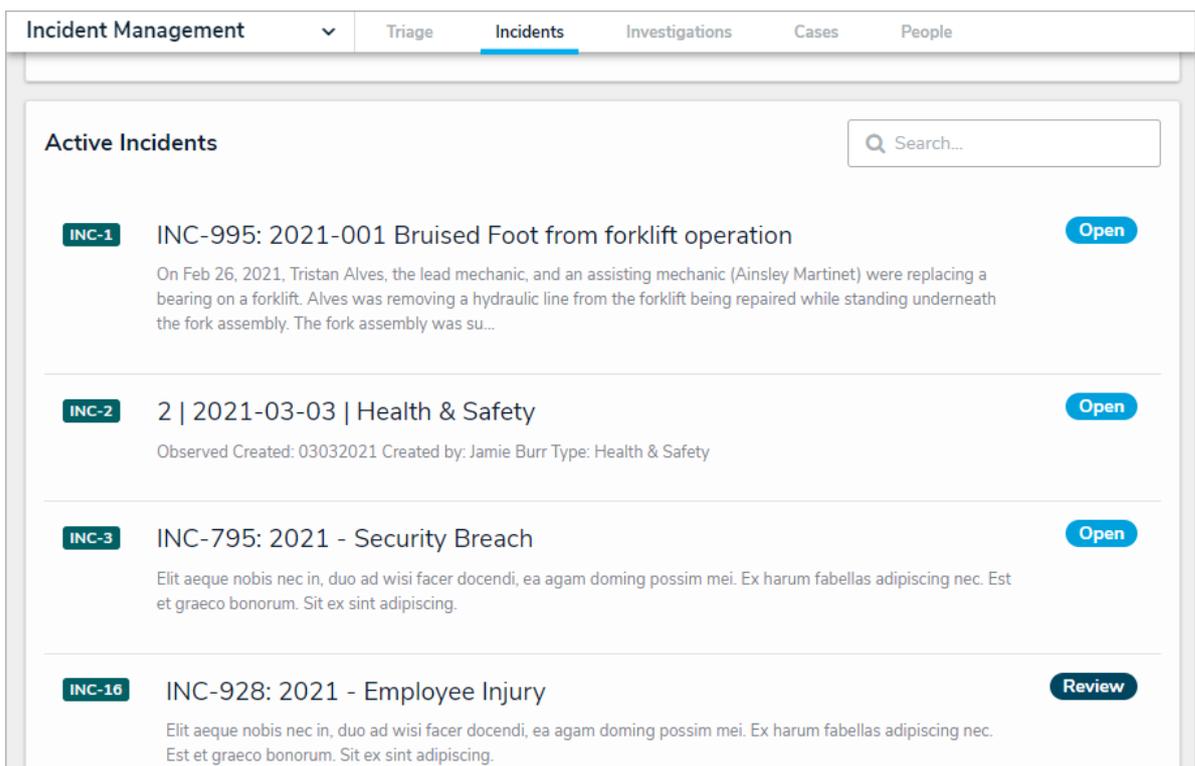
To open an investigation:

1. Log into a user account from the **Incident Owner** user group.
2. Click the dropdown in the nav bar > **Incident Management** to display the **Incidents** activity.

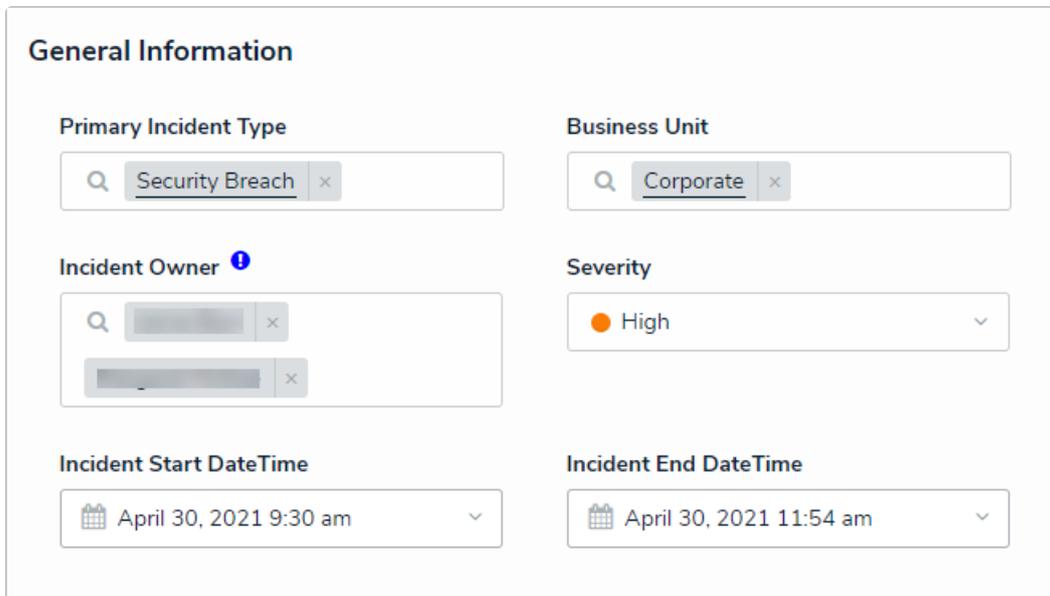


The nav bar.

3. Click an open incident to open the **Incident** form.



- Click the **Primary Incident Type** field, begin typing keywords, then click to select the relevant option.



General Information

Primary Incident Type
Q Security Breach x

Business Unit
Q Corporate x

Incident Owner ⓘ
Q [Redacted] x
Q [Redacted] x

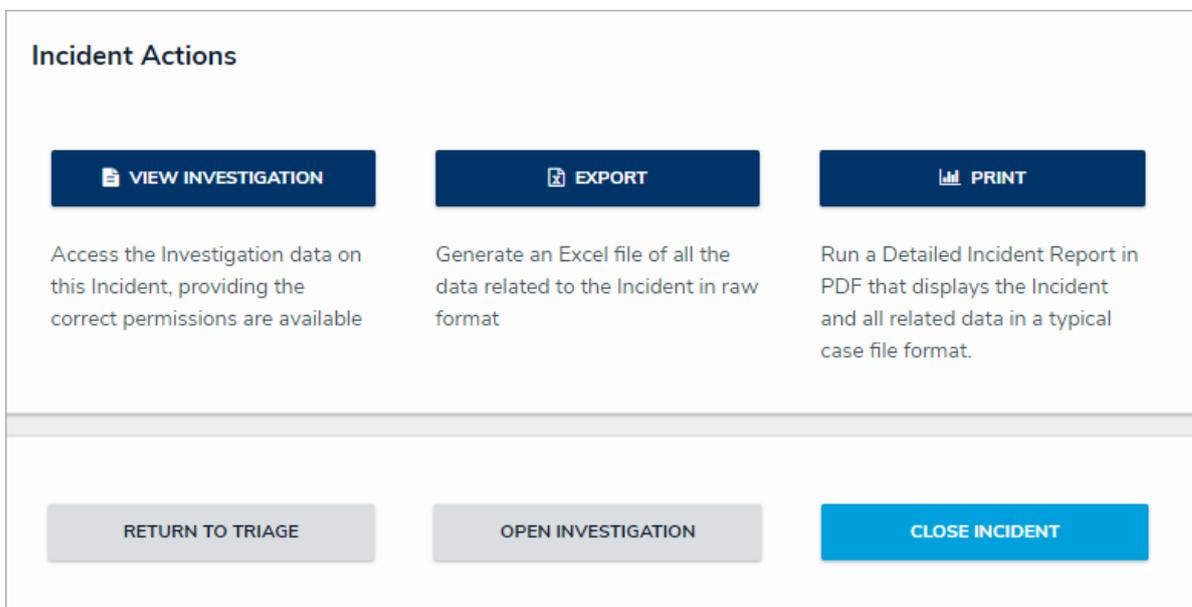
Severity
● High v

Incident Start DateTime
📅 April 30, 2021 9:30 am v

Incident End DateTime
📅 April 30, 2021 11:54 am v

The Primary Incident Type on an Incident form.

- Enter additional details of the incident, as required. Read more here: [View and Edit Assigned Incidents](#).
- In the **Incident Actions** section (bottom of the screen), click the **View Investigation** button.



Incident Actions

VIEW INVESTIGATION
Access the Investigation data on this Incident, providing the correct permissions are available

EXPORT
Generate an Excel file of all the data related to the Incident in raw format

PRINT
Run a Detailed Incident Report in PDF that displays the Incident and all related data in a typical case file format.

RETURN TO TRIAGE **OPEN INVESTIGATION** **CLOSE INCIDENT**

- In the **Investigator** field, begin typing investigator usernames, then click to select the relevant person.

Investigation

Investigator
Q Amy Santiago (Investigator) x

Investigation Start
Date May 20, 2021

Investigation Close
Date June 2, 2021

Description

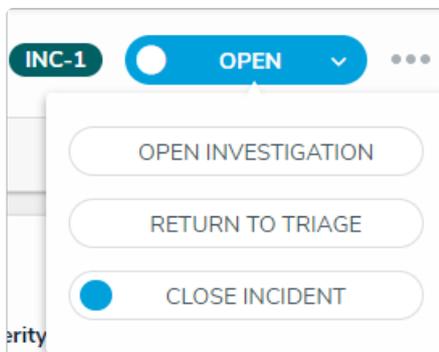
On Feb 26, 2021, Tristan Alves, the lead mechanic, and an assisting mechanic (Ainsley Martinet) were replacing a bearing on a forklift. Alves was removing a hydraulic line from the forklift being repaired while standing underneath the fork assembly.

The fork assembly was supported approximately 10 feet above the ground by a nylon sling looped over the fork of a separate forklift. The assisting mechanic was jacking the forklift up a

Selecting an investigator.

8. Click **Open Investigation**.

- You can also open an investigation by clicking the header card workflow select list, then **Open an Investigation**.
- Once an investigation is opened, the Incident Owner will be able to view, but not edit, the incident.
- The incident will move to the **Under Investigation** state and an email will be sent to the assigned Investigator with a link to the incident.



Click Open Investigation in the header card.