Use Intelligent Triage to Tag Entities

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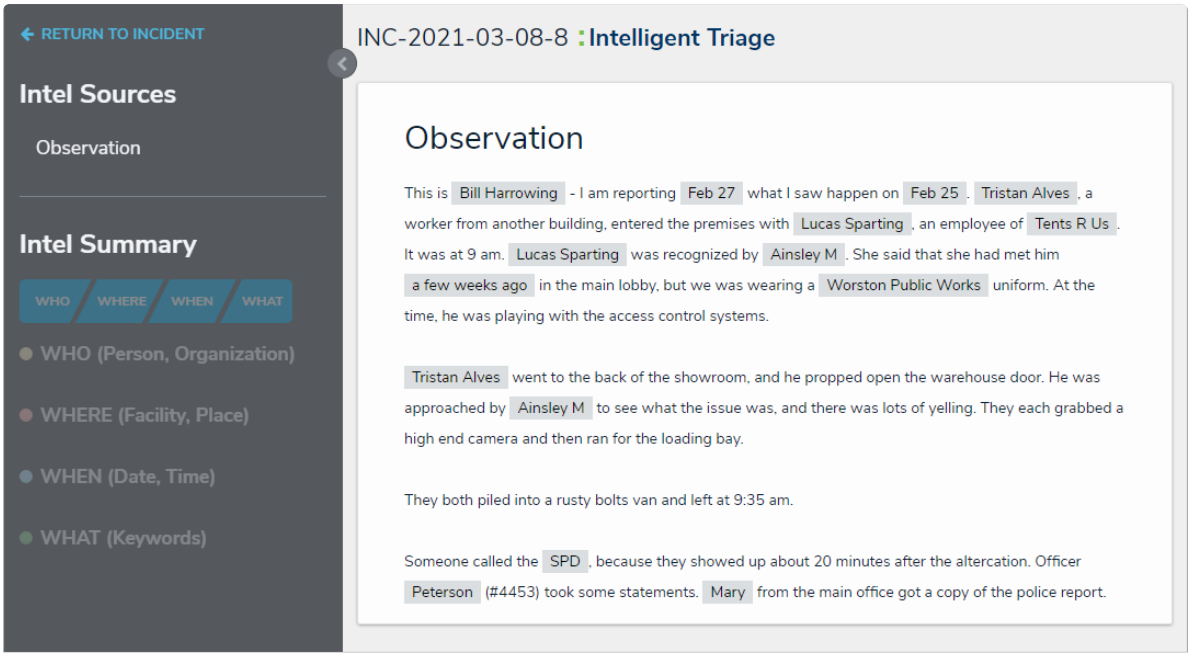
To use Intelligent Triage:

1. Open an Incident object in the **Triage** state.
2. Select a Primary Incident Type to display the involvement fields.

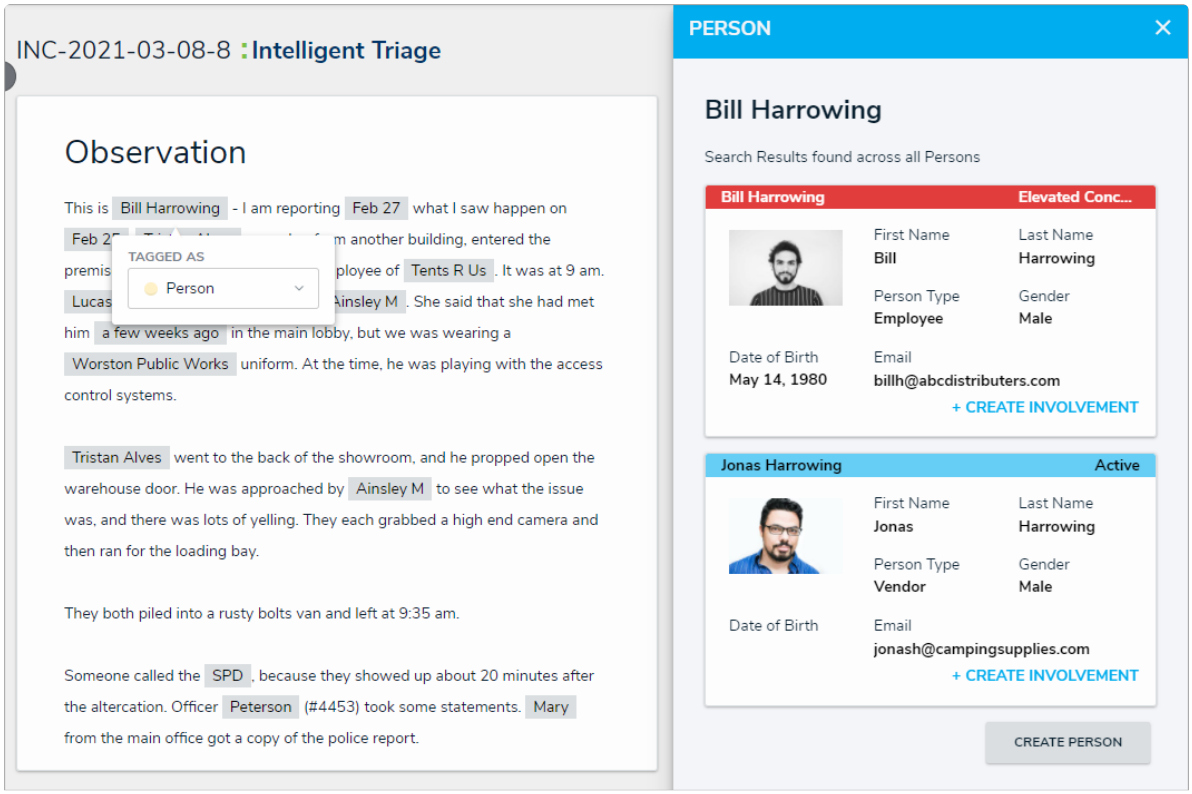
> Administrators select which entity/involvement fields are populated from Intelligent Triage.

3. Click the ellipsis icon at the top-right of the form, then click **Analyze Text** to display the **Intelligent Triage** screen.
4. Review the text highlighted in grey, which have been identified as possible entities.



Possible entities, highlighted in grey.

5. Click the grey-highlighted text to display possible matching objects and the tagged entity type. For example, if you clicked John Doe, it would be tagged as a Person, and would show any exact or partially matching Person objects. If the tag is incorrect, select a different entity from the **Tagged As** dropdown menu, which will refresh the search results in the palette.



Clicking on a possible entity will display more options in a palette.

For more detailed information on the different entity types and how they're tagged, see Intelligent Triage Entities.

6. If an existing object matches the entity, click **Create Involvement** below that object. To create a new record, click **Create [Entity Type]**, which will create a new library object with an involvement on the current incident.

For Date and Time entities, there will not be a **Create [Entity Type]** button. Instead, users will be able to directly edit the date using a calendar picker and will be able to create a timeline by entering a custom time, or selecting pre-created options.

7. If an entity was not automatically tagged, highlight the text with your cursor, select an entity type from the **Tagged As** dropdown menu, then repeat step 6.
8. Continue to repeat the above steps, as needed. Saved involvements appear in the **Intel Summary** section.

Confirmed entities.

> Involvements saved to an incident through Intelligent Triage can only be removed from the Incident form on the previous page.

9. When finished, click **Return To Incident**.