Incident Module User Guide

Reporting and tracking incident reports

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Overview

The Incident Module creates, tracks, and reconciles incident reports. Entering incidents into Building Engines allows you to effectively capture critical information and reduce operational liability.

Creating a New Incident

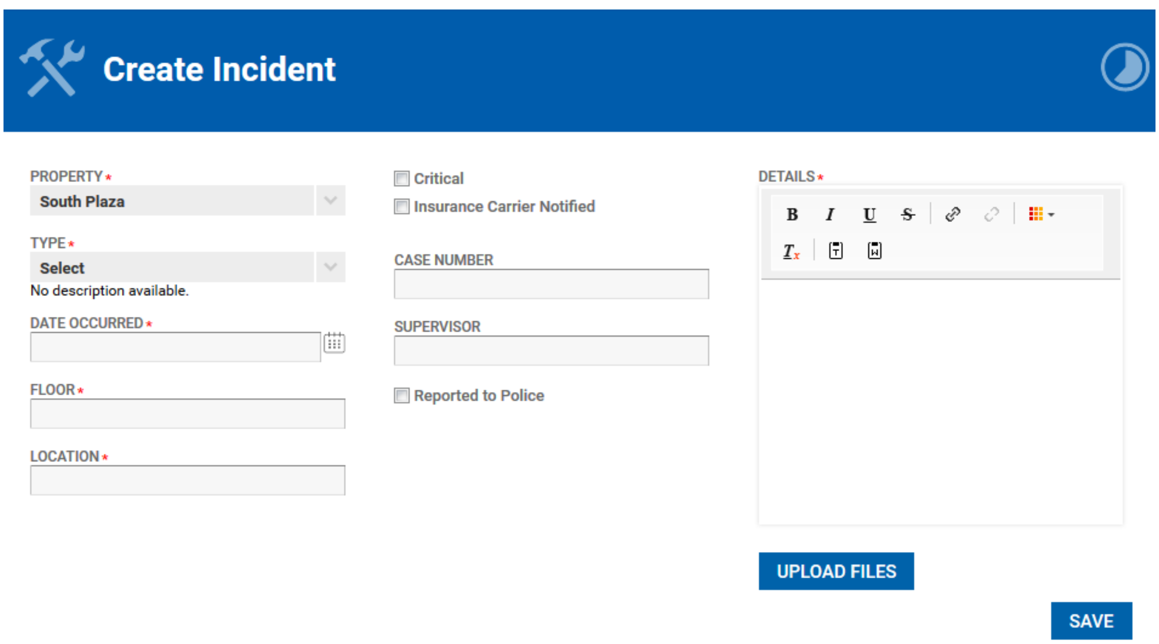
This section describes the process of creating a new incident, adding relevant people, items, emergency services, photos, documents, or URLs.

Entering the Primary Incident Information

When an incident occurs, the reporter may only have access to the primary details. To facilitate this, you can either submit an incident with primary information or primary and secondary information together.

To enter the primary information:

1. Click **Go To → Incidents → Create Incident**, or select **Incident** from the **Actions** dropdown.
2. Enter the primary information which denoted with a red (*). Primary information includes: **Building, Type, Location,** and **Details**.



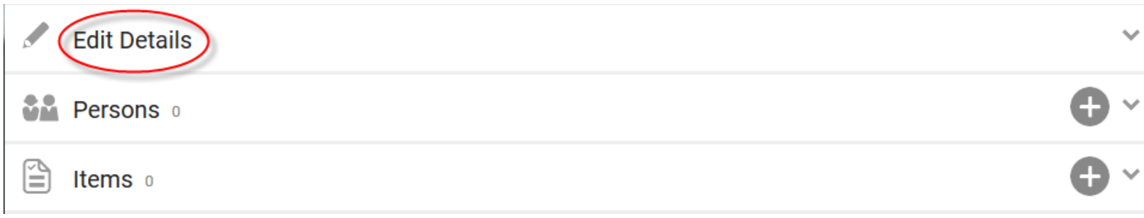
3. (Optional) Click the **Critical** and/or **Insurance Carrier Notified** button/s to provide additional, sortable, information on the search grid.
4. Click **SAVE**.

Editing Incident Information

On occasion, incident information may be entered erroneously. This section describes how to edit incident information.

To edit incident information:

1. Locate and open the incident.
2. Navigate to the **Edit Details** section and click **Edit Details**.



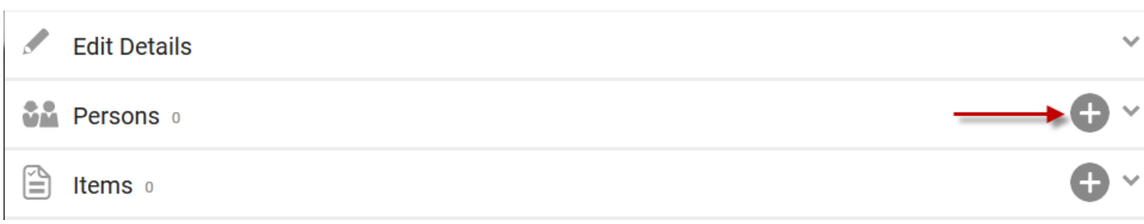
3. Correct the erroneous information, and click **SAVE**.

Adding Persons

After an incident has been created you are able to add relevant people to the incident file. Examples include: witnesses, victims, and suspects. This section describes how to add persons the incident file.

To add a person to an incident file:

1. Locate and open the incident.
2. Navigate to the **Persons** section and click the **(+)** button.



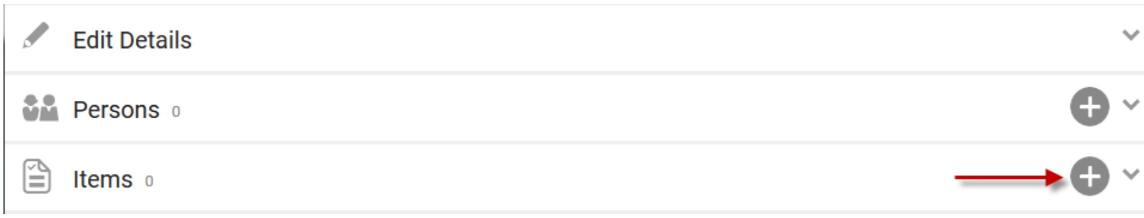
3. Enter the person's **NAME** and the **TYPE** of person they are in relation to the incident. For example: witness, victim, suspect, offender, or complainant.
4. (Optional) If available, you can also enter the person's contact information, address, and/or physical description.
5. Click **SAVE** or **SAVE AND ADD ANOTHER** to enter in additional persons.

Adding Items

After an incident has been created you are able to add relevant items to the incident file. This section describes how to add items to the incident file.

To add an item to an incident file:

1. Locate and open the incident.
2. Navigate to the **Items** section and click the **(+)** button.



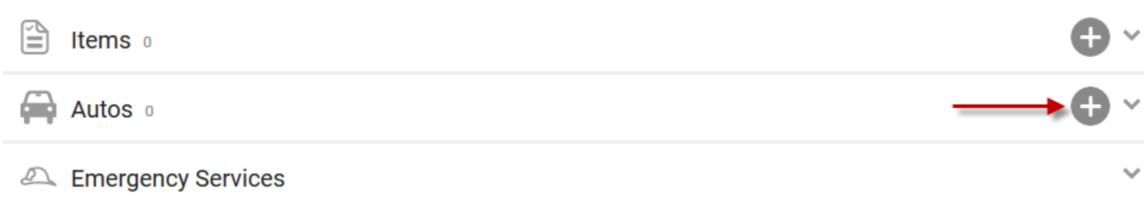
3. Enter the **NAME** of the item.
4. (Optional) If available, you can also enter the serial number and/or estimated value.
5. Click **SAVE** or **SAVE AND ADD ANOTHER** to enter in additional items.

Adding Autos

After an incident has been created you are able to add relevant autos to the incident file. This section describes how to add an auto to the incident file.

To add an auto to an incident file:

1. Locate and open the incident.
2. Navigate to the **Autos** section and click the **(+)** button.



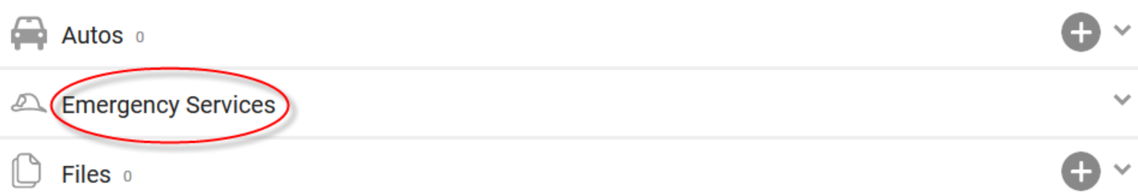
3. Enter the **MAKE** and **MODEL** of the auto.
4. (Optional) If available, you can also enter the color, year, state of registration, plate number and expiration date.
5. Click **SAVE** or **SAVE AND ADD ANOTHER** to enter in additional autos.

Adding Emergency Services

After an incident has been created you are able to add emergency services information to the incident file. This section describes how to add emergency services to the incident file.

To add emergency services to an incident file:

1. Locate and open the incident.
2. Navigate to the **Emergency Services** section and click **Emergency Services**.



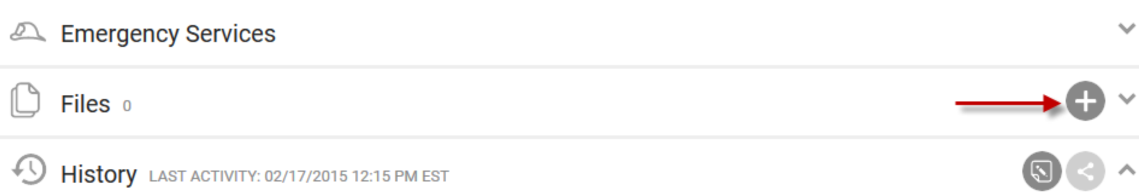
3. Enter the emergency services information, and click **SAVE**.

Adding Files

After an incident has been created you are able to add relevant files to the incident file. This section describes how to add files to the incident file.

To add a file to an incident file:

1. Locate and open the incident.
2. Navigate to the **Files** section and click the **(+)** button.



3. Click **ADD FILES**, or drag and drop files into the **Upload New File(s)** box.
4. Click **SAVE**.

Incident Dashboard

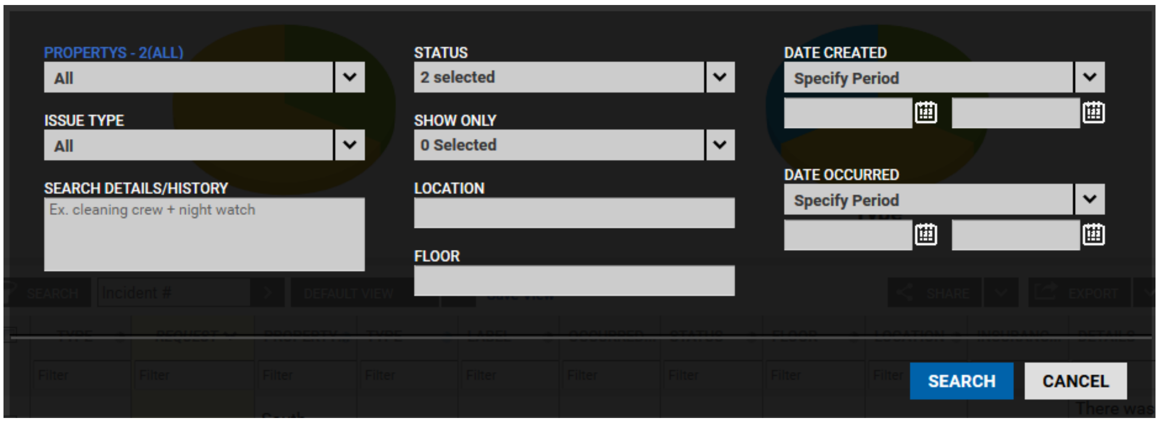
The Incident Manager dashboard provides you with customizable and sortable incident information. Using the **Search** tab and the customizable columns users can modify the information into a useful format.

Customizing the Incident Dashboard

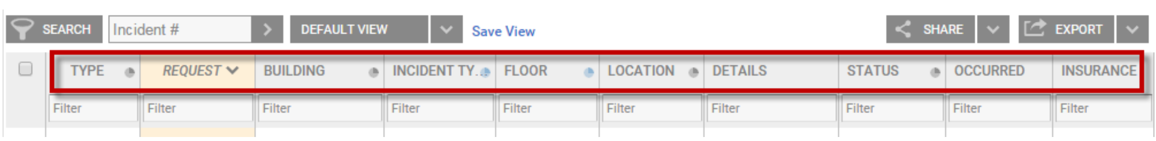
This section describes how to customize the Incident Dashboard.

To customize the Incident dashboard:

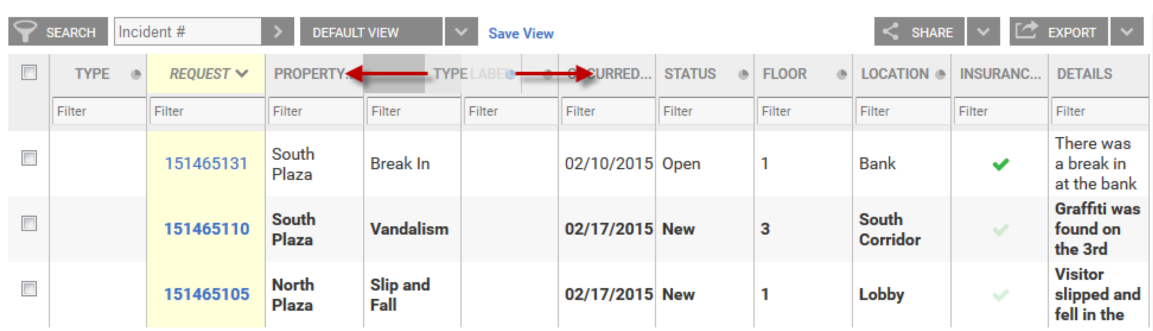
1. Click **Go To → Incidents → Create Incident**, or select **Incident** from the **Actions** dropdown.
2. Click the **SEARCH** tab.
3. Use the incident fields to choose which information will be rendered on the incident grid and click **SEARCH**.



4. (Optional) To specify the columns and the order they are displayed on the grid:
   a. Right click the column title bar and then select the columns you want displayed via the pop up box.



   b. To rearrange the column order: left click on the column title bar and drag it into your preferred order.

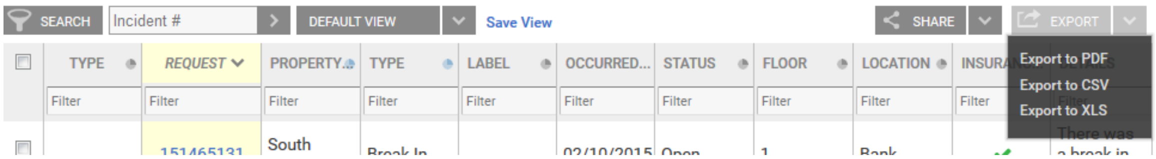


Exporting the Incident Dashboard

This section describes the process of exporting the Incident Dashboard.

To export the incident dashboard:

1. Click **Go To → Incidents → Create Incident**, or select **Incident** from the **Actions** dropdown.
2. Click **EXPORT,** and select a format.



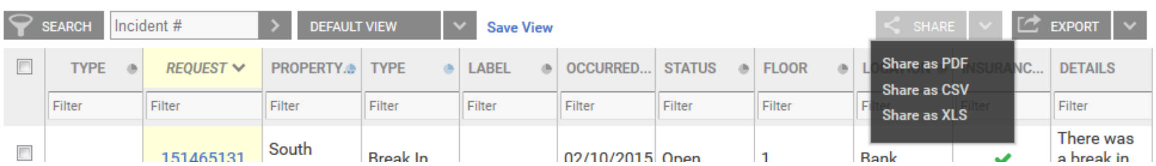
3. Exports appear at the bottom of the browser page.

Sharing the Incident Dashboard

This section describes the process of sharing the Incident Dashboard.

To share the incident dashboard:

1. Click **Go To → Incidents → Create Incident**, or select **Incident** from the **Actions** dropdown.
2. Click **SHARE** and select a format.



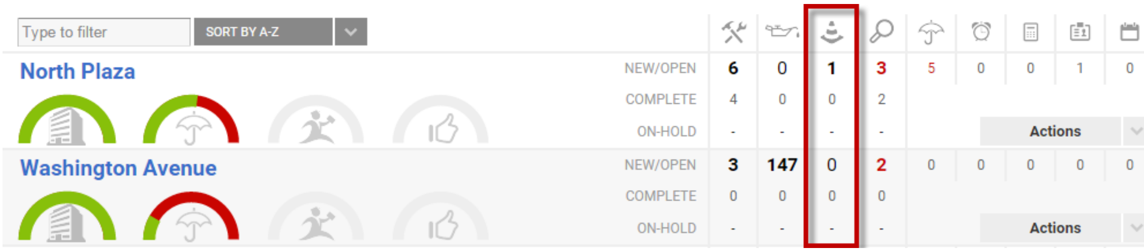
3. By default, **Sender Alias**, **Subject**, and **Message** are populated, however, each of these fields can be overridden.
4. Use the recipient widget to select your recipients.
5. Click **Send**.

Searching for an Existing Incident

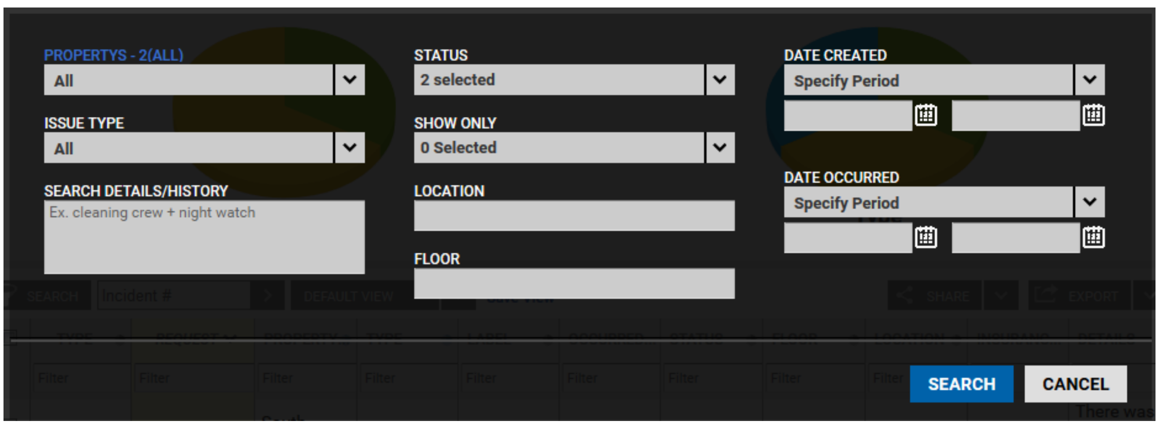
If you want to access an existing incident file you can either search for it by using filters to narrow down the list of incidents, or by entering the incident number directly in to the **Incident #** field. Both methods are described in this section.

To search for an existing incident file using the search fields:

1. Select a value from the Incident column on the homepage.



2. Click **SEARCH.**
3. Use the incident fields to choose which information will be rendered on the incident grid and click **SEARCH**.



To search for an existing incident by number:

1. Click **Go To → Incidents → Incident Dashboard**.
2. Enter the incident number into the **Incident #** field and click **[>]**.