Open an Investigation

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

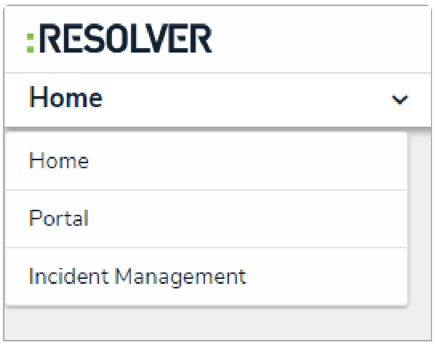
The Incident Owner can open an investigation and assign an Investigator to explore an incident further.

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:

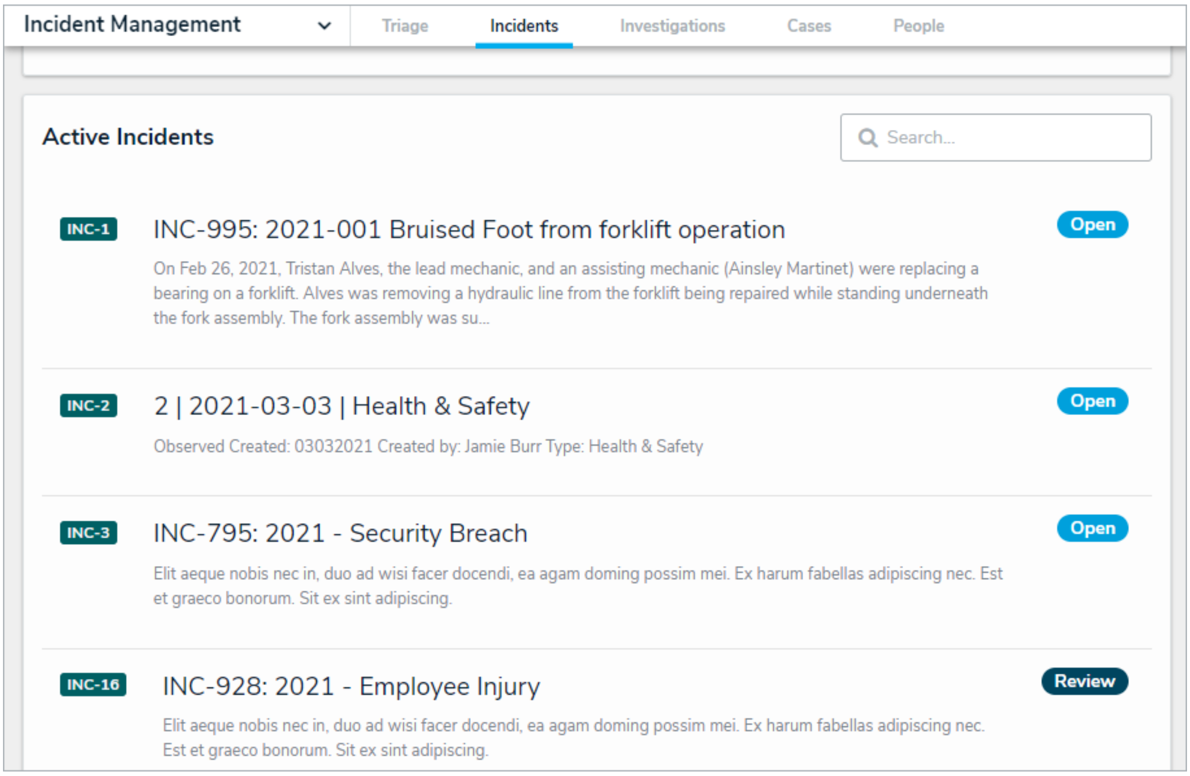
1. Log into a user account from the **Incident Owner** user group.

2. Click the dropdown in the nav bar **>** **Incident Management** to display the **Incidents** activity.

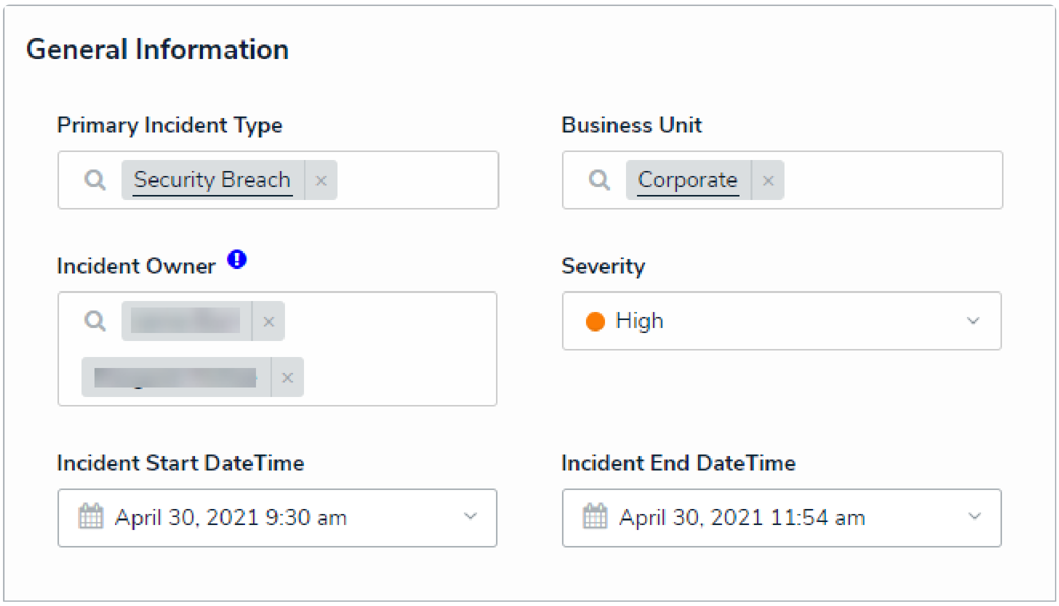


The nav bar.

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

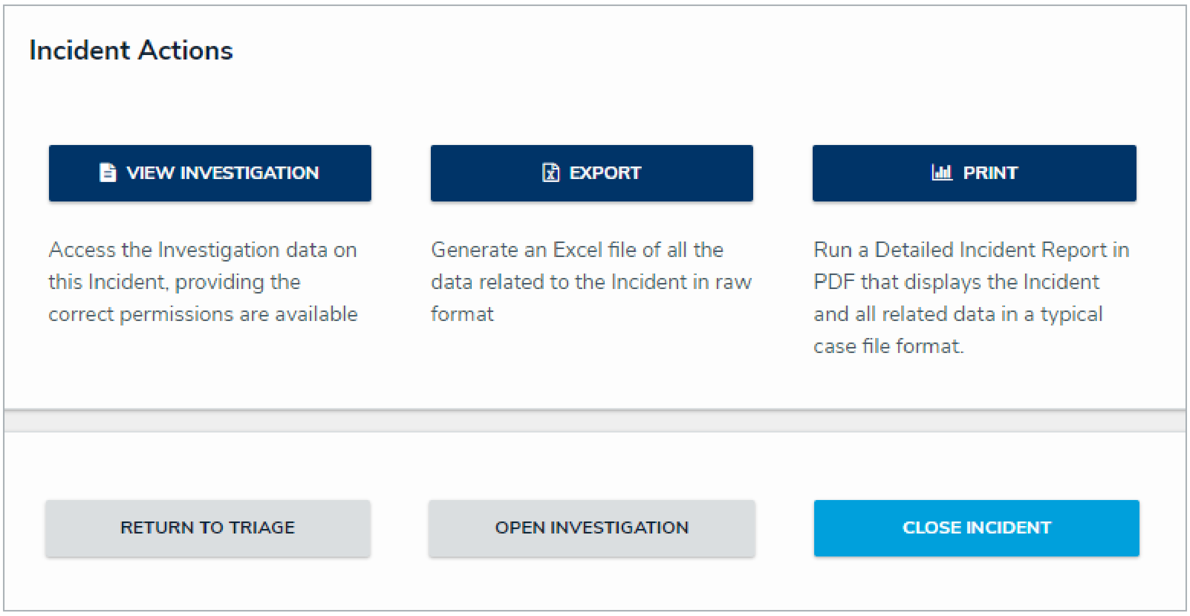


4. Click the **Primary Incident Type** field, begin typing keywords, then click to select the relevant option.

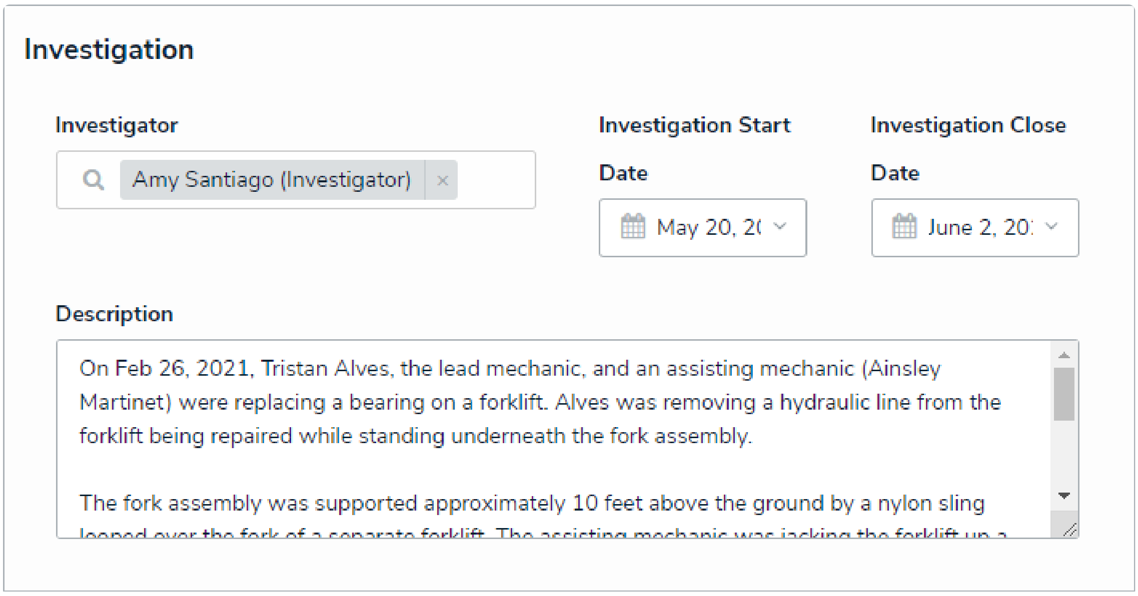


The Primary Incident Type on an Incident form.

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

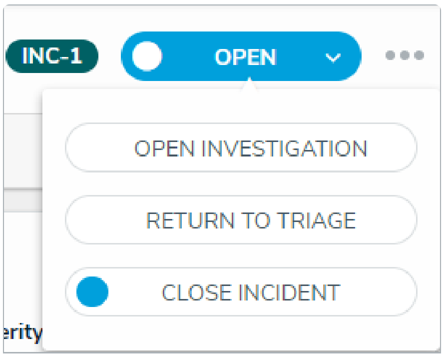


7. In the **Investigator** field, begin typing investigator usernames, then click to select the relevant person.



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.