Create a Case

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The following provides instructions for creating a case in the Incident Management application. Only case managers and incident investigators have access to the **Cases** activity.

To create a case:

1. Log into a user account that's been added to the **Case Manager** user group.

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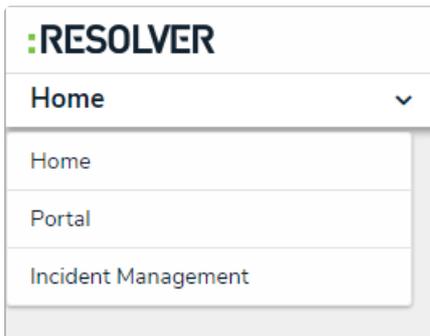

The nav bar.

3. Click **Create Case**.
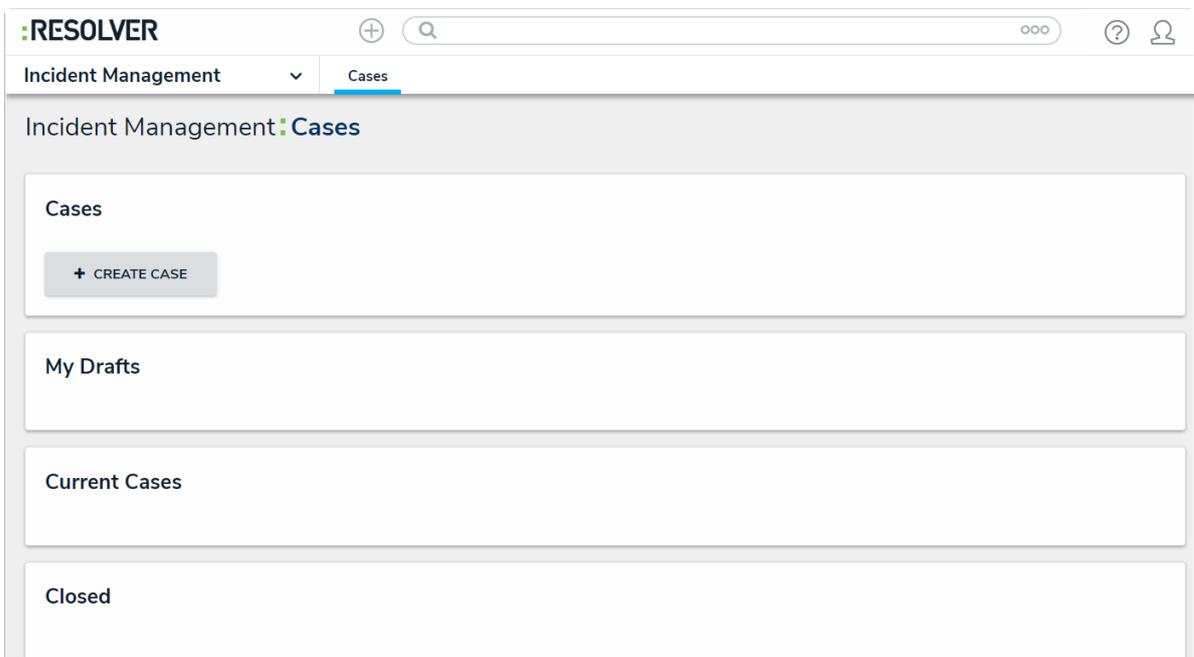
The Cases activity in the Incident Management application.

4. Click **Case Name**, then enter a name for the case.
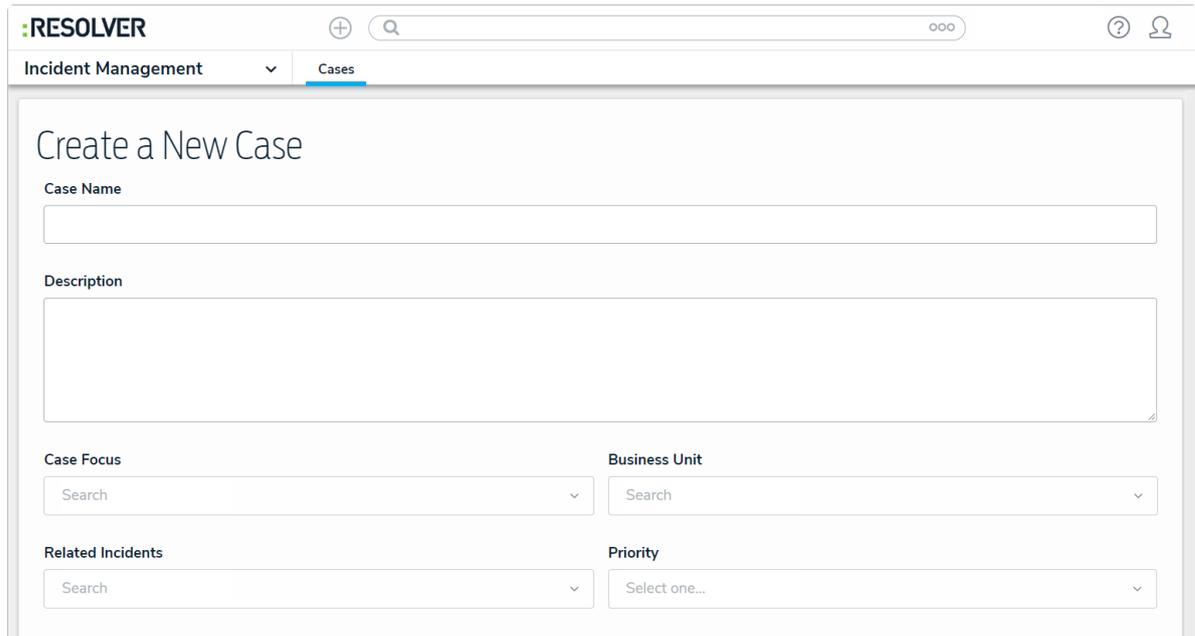
The Create a New Case form.

5. Click **Description**, then enter a description.

6. Click **Case Focus**, then begin typing keywords to display a list of available options, then click to select the appropriate case focus. A case focus can be a person or a location.

7. Click **Business Unit**, then begin typing to display a list of available business units, then click to select.

8. Click **Related Incidents** and search for incidents that you want to include in this case. You can add additional incidents later, if needed.

9. Click **Priority** to display a list of options, then click to select.

10. Click **Create** to move the case into the **Draft** workflow stage. Transition the case to move it to the **Open** stage.