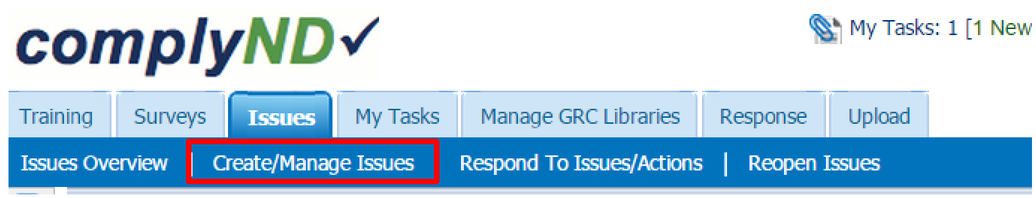
complyND✓ – Create Ad-Hoc Issues

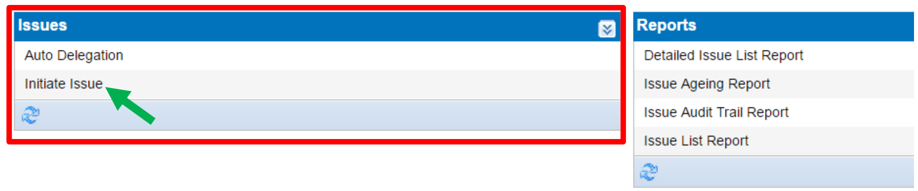
As an assessor/inspector or an inspection admin, you will be able to create ad-hoc issues that are not associated with a survey. Please refer to the ***complyND✓* *Inspection Management User Guide*** for more detailed information.

Create ad-hoc issues

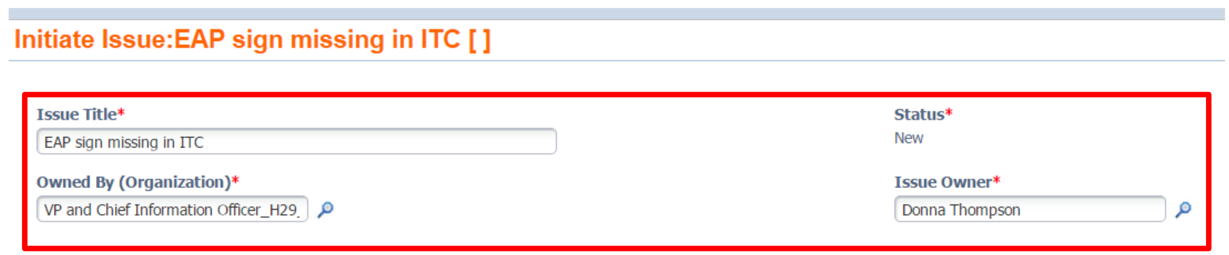
1. Log into comply.nd.edu
2. From the **Issues** tab, click **Create/Manage Issues**.



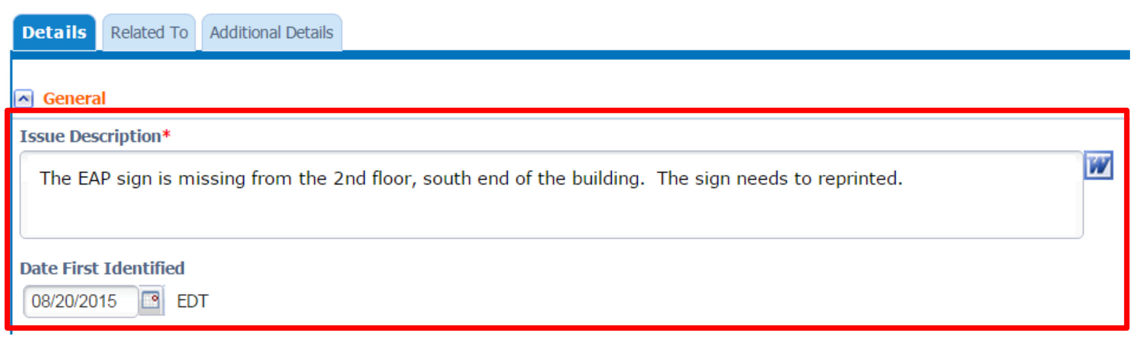
3. In the *Issues* infoport, select **Initiate Issue**.



4. In the **Issue Title** field, give the issue a title that helps describe the issue.
5. By default the **Status** is **New**.
6. The **Owned By (Organization)** and **Issue Owner** are the person who will be responsible for addressing the issue and that person's organization. Both fields are searchable.

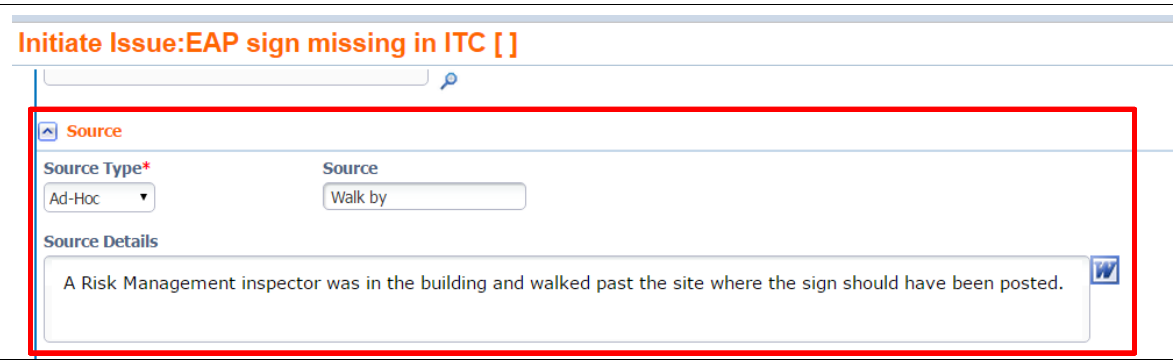


7. In the **Details** tab, the **Issue Description** field is a text field that allows you to describe the issue in detail. Click the **Word icon** text box to enter the issue description.
8. **Date First Identified** is the date the issue was found.

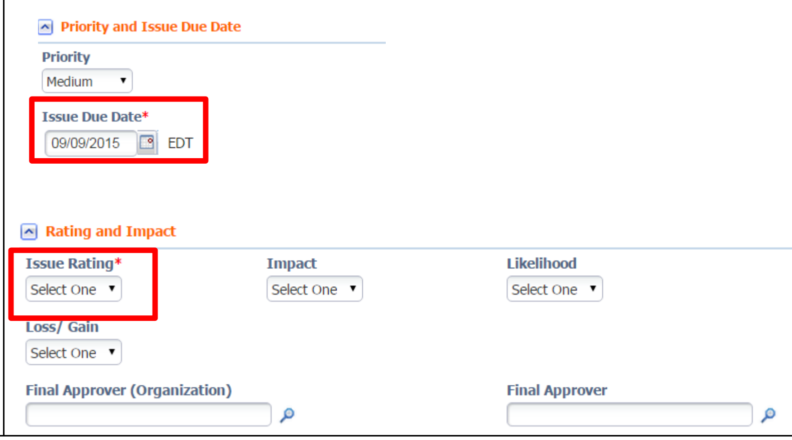


9. The **Issue Type** is a searchable field that identifies the type of issue. For example, in this case, the issue type is *BISP Emergency Action Plan*.
10. The **Exception Type** is generally not used.
11. If there is another issue that is related to this issue, you can search for and identify it in the **Related Issue** field.
12. The **Repeat Issue** field allows you to state whether or not this issue has occurred before.

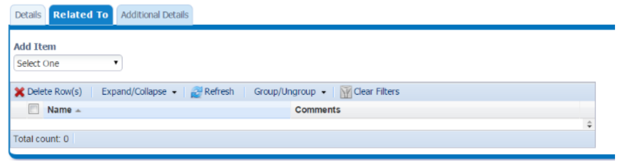
13. In the **Source** section, the **Source Type** is a required field. The options are **Ad-hoc** or **Survey**. Any time the issue is not found during an inspection, the source is **Ad-hoc**.
14. The other two fields in this section, **Source** and **Source Details**, are not required fields. Both are text fields, and you can provide details of how the issues was identified.



15. In the **Priority and Issue Due Date** section only the **Due Date** is required. The **Priority** dropdown field provides a choice of **high**, **medium**, or **low** priority. The due date is based on the priority level of the issue.
16. In the **Rating and Impact** section, the only required field is **Issue Rating**. This identifies whether the impact of the issue is **high**, **medium**, or **low**.

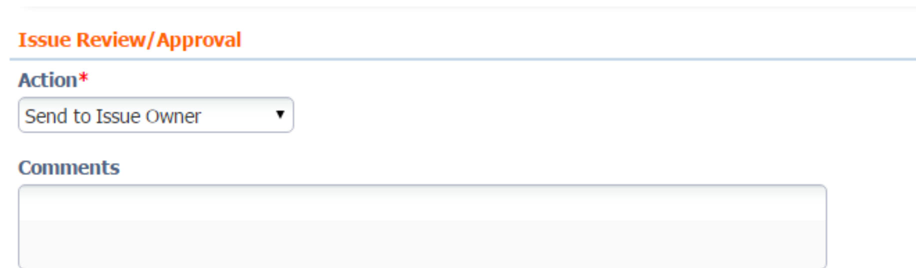


17. The **Related To** tab is not required.

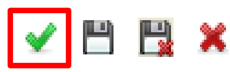


18. The **Additional Details** tab provides an opportunity to add a file to the issue. For example, if you have a picture of the issue, you can attach it here.

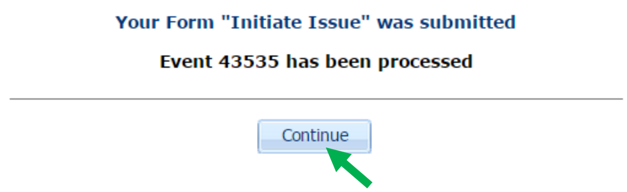
19. In the **Issue Review/Approval** section there are three options for **Action**. The options are to **Send to Issue Owner**, **Send for Review**, or **Save and Continue Working**.
20. The **Comments** field is not required. Any comments you add here will become part of the issue's comment history.



21. Click the green checkmark to submit the Issue Review/Approval.



22. A popup window will open to tell you that your survey has been accepted. Click **Continue** to accept the message.



*NOTE: See Chapter 3, **Inspection Management Solution**, in the **complyND Inspection Management User Guide** for more detailed information.*

*Searching

In many complyND forms, you can search for the object you are looking for like a survey, organization, or even an issue contact. Most of the time when you are searching, you need to use the wildcard sign (%) before and after the search term in order to return all objects containing that term. If you are in the Ad Hoc form and you search on the term "fire" you will not return any results. The same search using the wildcard symbol (%fire%) will return all the objects with Fire in the name. Remember, with any search you have to click **Go** or **Submit** to begin the search (just hitting **Enter** will NOT submit the search criteria).