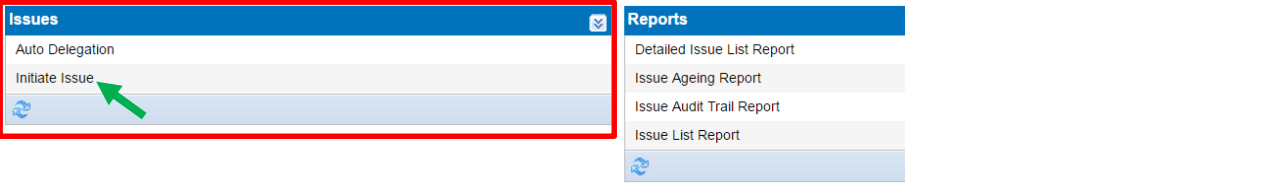

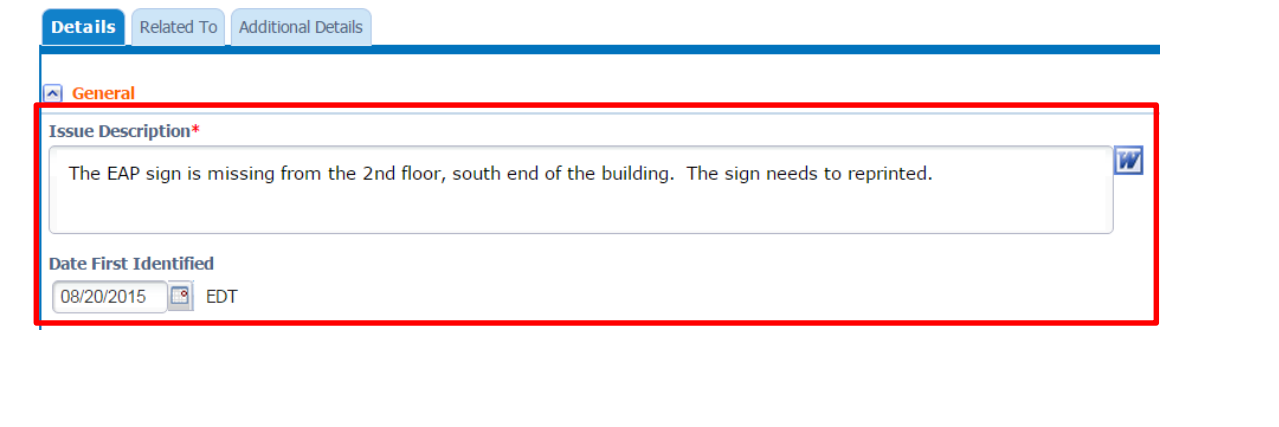


complyND[✓] – Create Ad-Hoc Issues

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

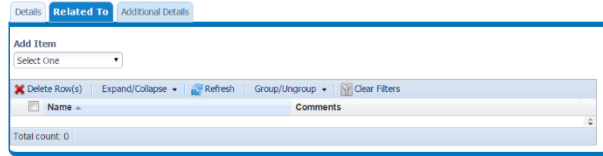
<ol style="list-style-type: none">1. Log into comply.nd.edu2. From the Issues tab, click Create/Manage Issues.	 <p>The screenshot shows the complyND[✓] dashboard. At the top right, it says 'My Tasks: 1 [1 New]'. Below that is a navigation bar with tabs for Training, Surveys, Issues, My Tasks, Manage GRC Libraries, Response, and Upload. Underneath is a secondary navigation bar with links for Issues Overview, Create/Manage Issues (highlighted with a red box), Respond To Issues/Actions, and Reopen Issues.</p>
<ol style="list-style-type: none">3. In the <i>Issues</i> infoport, select Initiate Issue.	 <p>The screenshot shows the 'Issues' infoport. On the left, there are two options: 'Auto Delegation' and 'Initiate Issue'. 'Initiate Issue' is highlighted with a red box and a green arrow points to it. On the right, there is a 'Reports' section with options like 'Detailed Issue List Report', 'Issue Ageing Report', 'Issue Audit Trail Report', and 'Issue List Report'.</p>
<ol style="list-style-type: none">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.	 <p>The screenshot shows the 'Initiate Issue' form. The title is 'Initiate Issue: EAP sign missing in ITC []'. Below the title are four fields: 'Issue Title*' with the value 'EAP sign missing in ITC', 'Status*' with the value 'New', 'Owned By (Organization)*' with the value 'VP and Chief Information Officer_H29', and 'Issue Owner*' with the value 'Donna Thompson'. All four fields are enclosed in a red box.</p>
<ol style="list-style-type: none">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.	 <p>The screenshot shows the 'Details' tab of the issue. There are three tabs: 'Details', 'Related To', and 'Additional Details'. Under the 'Details' tab, there is a 'General' section. The 'Issue Description*' field is a text area containing the text 'The EAP sign is missing from the 2nd floor, south end of the building. The sign needs to be reprinted.' Below it is the 'Date First Identified' field, which shows '08/20/2015' and 'EDT'. Both the text area and the date field are enclosed in a red box.</p>

- 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.

Issue Review/Approval

Action*

Send to Issue Owner

Comments

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.



Your Form "Initiate Issue" was submitted

Event 43535 has been processed

Continue

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).