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RI Incident Management

**Incident Management** is one of a number of applications available via **Risk Intelligence Central** which is **Willis Towers Watsons’** latest offering in client facing technology.

Our vision is to create a series of market-leading risk management applications, using the latest technology, providing our clients with a one-stop digital experience, so they can make more informed decisions based on fact, rather than perception.

The Risk Intelligence Central Incident Management application, from Willis Towers Watson, provides clients with a single, intuitive interface for capturing all types of loss management data across their portfolio, while reducing the duplication and errors of using multiple input systems. Combined with a seamless ability to securely share data internally across multiple organisational entities, as well as with external insurance partners, the use of RI Central Incident Management provides instantaneous notification of reported losses within an organisation, however geographically or functionally diverse, whole focusing management time to actively address these risks.
Landing Page

The application is accessed via single sign on (SSO).

When clicking the Incident Management link from the ribbon, you will be brought into the application landing page. This shows all recently created Incidents in a list of ‘This Month’s Events’ down the left of the screen (1) along with the links to Incident Management Analytics and the ‘Event Listing’ (2). On the right of the screen, graphical representations of the data already held are displayed showing ‘Event Tracking by Status’, ‘Incidents by Type’ and ‘Incidents by Cause’ (3). There is also a graph showing ‘Events by Day of Week’ (4).

From the list of logged events which shows a month’s items, you can enter each record by clicking the link or you can ‘view all’ by clicking the link at the bottom of the list. Items can be edited until the status becomes ‘submitted’.

Once submitted any errors would have to be amended by the Risk Manager. Within the ‘View all’ list view, you can filter the events using the title bar at the top of the screen:

Clicking on will re-order the content within the list.

You can click on the graphical visualisations of data held within the system which can also be interrogated/ drilled into.

You can also create a new event on this screen by clicking the ‘New’ button in the top right.
You can expand each of the graphs by clicking on them and select to view the data as a report. The graph will expand in the middle of the screen when selected and a key will be shown in the top right of the screen. If you wish to close the graph down you can click the cross at the top right of the graphic.

To view the data in a report, click ‘View Report’ at the bottom right:

The individual items will be listed at the bottom of the screen and again a key will be displayed at the top right of the screen. The ‘headline’ data is shown in the ribbon beneath the title and the data can be filtered and interrogated using the icons in the top right. You can also export the data using the ‘export button at the top right of the screen – the other icons are explained further down this page:

If you hover over the graph in the centre of the screen, information will be displayed showing the segment being highlighted. If you click on the segment, the list of items is reduced to just those which are represented:

You can also click on the items in the key and it will highlight the relevant section of the graph, update the headline figures in the ribbon and re-sort the list of items at the bottom of the screen:

To hide the graph from the screen, click ‘Toggle Chart’

To apply a filter to the data, select the ‘Filter Icon’ This will present a filter selection pane in the top right of the screen. Clicking on the selection criteria will present the available selections:

When you have made your selections, you can click ‘Refresh’ to update the graph and table.

The final icon on this and other graphics is ‘Options’ - clicking this will present whatever criteria can be displayed/hidden to tailor the graphic to your requirement:
If you select ‘Export’, you can choose between a pre-formatted report or ‘Details Only’ data dump. If selecting ‘Formatted Report’, the format remains greyed out and pre-selected as Excel; if choosing ‘Details Only’ you can select a comma delimited text file and also choose the encoding that you require:

The Formatted Report generated looks something like this:
Viewing/Editing Existing Event (from list)

From the list of 'This Month’s Events’ on the bottom left of the screen, you can enter the individual records from the purple links which will underline when you hover the mouse over them.

This will open the full record for this incident from which any underlying records can also be accessed.

To edit the record, select the ‘Edit’ button at the top right of the screen.

At the top of the Event record there is a ‘status’ bar which shows the progress of this record through the workflow. The record will be ‘In Progress’, ‘Submitted for Review’ or ‘Status Complete’.

The Event Record has the provision for other associated incidents, any attached witnesses, notes and any attached files.

Most file types are supported for attachments barring zip files; you can add as many attachments as required but files should be 10MB or smaller.

A history is also maintained.

NOTE: You should always use the calendar; the date will default to your personal time and date if entered in error. US/UK date variants can cause issues so it is always safer to use the calendar.

The incident reporter will create an event record for the overall accident; a number of incident records which are the result of the underlying event can be attached to this record. The event is the parent record in the hierarchy and the incident is the child; the event holds general information but it doesn’t feed the metrics which are taken from the Incident level.

To create a new ‘Event’, from the ‘View all’ list view, select

NOTE: Wherever you see an icon, you can hover over this to display a tool tip.
Creating a New Event

From the ‘View All’ list beneath ‘This Month’s Events’, select ‘New’ from

This will open a ‘New Event’ record. The record is a mix of text and numeric entry, drop-down selection and date fields. The form is split into six sections: Basic Details, Reporter Details, Event Location, Company Premises, Event Location and Near Miss.

Mandatory fields are denoted by a red asterisk. Tooltips are available throughout.

When all mandatory fields have been populated, select ‘Save’.

This will generate a new ‘Event Record’ and assign it an event reference:

EVENT ID: EV18000351

The Event Status will be ‘In Progress at this point – the general data will have been populated in the ‘Event Data’ on the right hand of the screen which is also split into the same six sections: Basic Details, Reporter Details, Event Location, Company Premises, Event Location and Near Miss. To edit any of this general information, you can click ‘Edit’ at the top right of the screen.

The user can now work through the additional items, adding records where relevant:

NOTE: Near Miss is an incident with no financial impact.

When adding a ‘Property’ to the event, these are created and maintained in Exposure Management
If the event did not occur on company premises, an event location details is required. Enter Country and the State/City will be provided as a subset based on the first entry.

Financials are entered onto incidents and then aggregated in the parent ‘Event’ record.
New Incidents

Once the ‘Event’ has been created, individual ‘Incidents’ can be added;

In the ‘Incidents’ section at the top left of the Event record, select ‘New’;

You can now select from seven pre-defined Incident Types. Selecting the correct scenario from the list will determine the fields that are available and which are mandatory for selection. Fill in all mandatory fields which are denoted by red asterisks – if trying to save without populating you will be highlighted the fields required.

NOTE: There is no validation on postal code/address although the email field will validate that the data entered is a valid email format

Once all data is entered, you can select ‘Save’ to store the record against the event. If there are additional incidents to add, you can select ‘Save and New’ to start another entry. Upon successfully saving, you will be returned to the event record.
**Witness Records**

Now you can add/create any witnesses to the record. Witnesses are shown on the left hand side of the Event record beneath this icon:

When clicking ‘New’, a data capture form will open – again mandatory fields are denoted by red asterisk’s and the fields are a mixture of text and numeric entry, drop-down selection and date fields.

Once you have entered all required information and clicked ‘Save’, the witness will appear in the grid on the Event record. The entry can be accessed by clicking on the purple link on the left of the table; hovering over the link will make the cursor change shape.

**Adding Notes**

You can also add ‘Notes’ to the record:

These will be saved as a txt file against the record. When you click ‘New’, it will open up a window as below for you to enter your text note.

Any files that accompany the note can be added to the ‘Files’ tab just below.
The limit for attachments is 10MB but most file types are supported. The system doesn’t support zip files. Files can be navigated to by clicking ‘Upload Files’ or can be dragged and dropped into the area. You can also add a name or reference.

Finally, an Event History is maintained and can be seen on the record:

**Incident Management Analytics**

Clicking on **Incident Management Analytics** from the Incident Management page will load six graphical representations of the data held in the database:

Graphics available are *Incidents by Region, Incidents by Location, Incidents by Type, Incidents by Review Status, Incidents by Cause* and *New Events this Week*

As with the other graphics, you can expand each graph and expand the data in specific items. You can view the data as a report and these export in the same way as shown on page 8.
**Event Listing**

Clicking the [Event Listing] will show all Events in a List view:

![Event Listing](image)

**NOTE:** there is a known bug on this List view; the ‘owner’ may not be shown. This has been raised with the vendor and should be fixed in a later release.

To edit an incident, you can click on the ▼ at the far right of the record. The below controls are available to sort the data:

- ‘**List View Controls**’ will display any criteria that you can displayed/hidden to tailor the graphic to your requirement.

- ‘**Display as Table**’ allows you to toggle between the default table view and any other configured view types.

- ‘**Refresh**’; will update the data when you have finished with your selections

- ‘**Inline Edit**’ is disabled by default

- ‘**Show Charts or Filters**’ allows you to present the data as a graphic.
Dashboards

From this page you can access a number of different dashboards. The left hand column shows all the currently available dashboards – these are set and any additional required dashboards would need to be requested via the product team.

Selecting ‘Dashboards’ from the ribbon will display the below page:

Recent and All Dashboards will show all Dashboards currently available, in the initial phase the other dashboard types are not required. A search facility also exists as well as an option drop-down which allows you to select the fields displayed in the Dashboard selection grid or reset the column widths.

Selecting the ‘Property Management’ dashboard will show 9 graphics which can be manipulated in the same way as other graphics displayed on the main landing page.


You can view a dashboard by clicking on the link in the grid or using the drop down on the far right of the grid:

You can also sort the title columns by clicking on the headers:
The Property Dashboard looks like this – other dashboards may have more or less graphics – you will note that in the below example, the graphics have not yet been populated as this client is yet to have events logged.

The graphics displayed vary for each dashboard. Should you have any issues or questions around the graphics – please contact the project team.

You can expand any of the graphics using the button in the top right of each tile.

You can view the graphical data as a report by clicking on the link at the bottom right of the tile:

View Report (Property Matrix)

A chart or graph will be displayed along with the data that has been used to populate it:

You can filter this data in the same way that you can filter data in the graphics displayed in the landing page. You can also export the data and this works in the same way that other exports work in the system.
Reports Tab

From this page you can access a number of different reports. The left hand column shows all the currently available reports. Recent and All reports will show all Reports currently available. A search facility also exists.

You can run the report or chose the option to export. When ‘Run’ is selected, the report will be presented within the application – where you can apply filters or export the data.

If an ‘Export’ is chosen, the report will be exported to a file format chosen by the user – see below.
If you have additional questions regarding available functionality that has not been covered in this guide, help is always at hand, you can contact your account manager for assistance in the first instance or your CFT Region Manager who can usually deal with these issues.

If this does not answer your query, you can email riskintelligencecentral.siteadmin@willistowerswatson.com or contact the CFT Programme team who will be able to assist.