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How to read & use the Incident Report Overview?

The Incident report overview is found under the module group [HSEQ]

The screenshot displays the 'Incidents Overview - All Units' window in TM Master v2. It features a left-hand navigation menu with categories like Fleet, Ship, Inventory, and HSEQ. The main area is divided into three sections:

- Top Section:** An overview grid with columns for Name, Code, Workflow, Findings, Actions, and Jobs. It lists incidents for units like 'DSV Down Periscope', 'MSV The Black Pearl', 'MSV The Full Monty', 'MSV The Patriot Games', and 'Warehouse 13'.
- Middle Section:** A grid titled 'Incidents for Unit' showing individual incident reports. Columns include Incident no, Name, Workflow St..., Verification due..., Incident date, Incident Category, Incident Sub Cat..., Risk, Type, and Recurrence prob... It lists incidents such as 'INC-PAT-19-1004', 'INC-PAT-19-1000', 'INC-PAT-19-1001', 'INC-PAT-19-1003', and 'INC-PAT-19-1002'.
- Lower Section:** A grid titled 'Consequences registered' showing consequences linked to the selected incident. Columns include Consequence num, Name, Consequence type, Description, Person in charge, Noticed date, Reported date, Stopped work, Recommended..., and Lost time. It lists consequences like 'INC-PAT-19-100... Serious Injury du...', 'INC-PAT-19-100... Lost work', and 'INC-PAT-19-100... Damage Conseq...'.

The [Incident] overview is divided into three panes or sections (horizontally). The top section, the overview grid, shows an overview of all Incident reports, related actions, findings and maintenance jobs.

The middle section, the “incident Reports” grid will list the individual Incident reports, findings, actions, jobs and job history records depending on the selections made in the top section.

The lower section, the “consequence” grid, will list individual consequences (Actual & Potential) linked to the “Incident report” selected in the middle pane.

The Incident Report top overview grid

The overview grid is divided into 5 main vertical sections. Some of these sections are again divided into different single columns representing statuses, entities (such as findings, actions and jobs) Each main section will be discussed later in the document.

The main vertical sections are (in order left to right):

- Unit
- Incident Report Workflow
- Findings
- Actions

- Jobs

The rows in the overview are listing the units in the fleet. Each row will then show a count of the Incident report details linked to the unit, named on the row. (The onboard system will only list the current vessel).

Name	Code	Workflow							Findings			Actions				Jobs			
DSV Down Periscope	DPE																		
MSV The Black Pearl	TST																		
MSV The Full Monty	MON																		
MSV The Patriot Games	PAT	2	3				2	5		5					3				1
Warehouse 13	W13																		
Sum:		2	3				2	5		5					3				1

The Incident Report overview top grid

The Incident report overview top menu bar

In the top menu bar, you will find the following controls

1. [New]: This button will start the process of creating a new Incident report.
2. **Unit Group:** This is a selector allowing you to limit the list of failure reports in your overview to only show for units\vessels in certain predefined unit groups. This control is also available in several other of the fleet modules. (not available for the on-board system)
3. [FlexiGrid Reports]: This will list all available “FlexiGrid reports” available for the Incident report module.
4. [Refresh]: Will Refresh the overview, with any changes made to the data since last refresh.
5. **[Hide Incident]:** This is a “toggle” button, and when pressed it will hide the middle pane, the list of individual incidents and the “Consequence” grid will list all consequences related to the selections done in the Overview grid. This will allow you to list all consequences linked to a certain unit, or incidents in a given status. Clicking the button again will bring back the middle pane.

The Incident Report overview section – Incident Reports (Workflow)

This section lists all Incident reports, the different columns within this section represent different workflow statuses, the number in the intersecting rows and columns is a count of the Incident reports, in that status.

Draft: This column will list all incident reports created, but not yet submitted and given an Incident report number. Draft Incidents can be deleted (given that they have not been numbered), by the users who have created them and users with the user right to delete other users drafts.

Submitted: This column will list all Incident reports that have been submitted and are waiting to be processed further. Once an incident report has been submitted it has also been assigned an incident

report number and can no longer be deleted. Numbered Incident reports can be cancelled. Details that can be recorded at this stage can be, the official Incident description, witness statements, environment descriptions, actual and potential consequences

 **Details recorded:** Once all information related to the Incident has been recorded, it is possible to alter the status to “Details Recorded”, for further processing and analysis. Details that can be recorded at this stage is all the required actions and corrective actions (maintenance jobs) to correct the consequences of the incident and prevent the incident and its consequences from happening again.

 **Analysis completed:** When the analysis of the Incident and an action plan has been completed, the incident can be set to this status, awaiting an approval.

 **Approved:** If analysis and action plan is found satisfactory, it can be approved

 **Ready for Closure:** When all jobs and actions related to an approved incident report, has been completed, and a final review\assessment of the incident analysis and corrective- and preventive measures taken is due, the incident report can be set to this status.

 **Verified & Closed:** After everything relating to the incident has been addressed, it can be closed, and will be listed under this status. Closed Incident reports are write-protected, and will need to be reopened in order to be modified.

 **All Open Incidents:** This column will count and show all incidents regardless of status.

 **Cancelled:** This column will list all cancelled incident report

[The Incident Report overview section – Findings](#)

If during the Incident investigations non conformances are found, these findings can be recorded as part of the Incident report and tracked individually. One Incident report can be linked to several findings. An Incident can have 1 of 3 statuses

 **Open:** If finding has not been closed it will be listed in this column

 **Closed:** Findings which have been handled

 **Cancelled:** Cancelled Findings

[The Incident Report overview section – Actions](#)

The action section will list all the actions that have been added to the system in relation to any of the findings linked to any of the inspections. The section consists of the following columns



Draft: This column will list all actions in draft mode (not yet approved)
Draft actions will not be distributed to assigned users before it has been approved.



Open (Due): This column will list all “Due” actions.



Open (Overdue): This column lists all the overdue actions



Closed: This column will list all actions that have been signed out.



Cancelled: Once an action is approved, it is assigned a unique running number. To avoid “losing” running numbers it is not allowed to delete approved actions, they must be cancelled.

The Incident Report overview section – Jobs



Scheduled corrective jobs: This column will list all jobs linked to any of the actions.



Overdue scheduled corrective jobs: This column lists all the overdue jobs linked to any of the actions.



Signed out corrective jobs: This column will list all job history linked to any of the actions for corrective jobs that have been signed out.

How to create an Incident report?

1. Click [HSEQ] → [Incidents]
2. Click the [New] button found on the left-hand side of top menu bar
3. If user is creating the incident report in the office system, user will be asked to select what vessel the Incident occurred on. If created on board, the system will assume that it is for the unit in the unit system. The following dialog will appear

New Incident Report

Incident/Accident with actual consequences

"Near miss" (Incident with only potential consequence)

Clear Selection OK Cancel

4. Specify if the incident is to be considered:
 - a. An Incident/Accident with actual consequences.
 - b. A “Near Miss” (Incident with only potential consequences)
5. Click [OK], and the incident form (ref below) will show up.

6. Enter the details available. Please confer with company procedure of what fields should be used and how. All fields will be described in the following section, when and who should fill out these fields may vary based on your company procedure. Some of these fields have a question mark button next to it. Clicking this button will list all selectable values for each field, and might have an additional explanation\description.

“Incident Details:” section

- a. **Incident Name:** Enter a short description\name for the incident. This field is a system mandatory field. And is required to be populated before the incident report is [Submitted]
- b. **Incident date:** Enter the date and time the incident occurred, by default when creating a new incident report this date is set to “now”. Adjust the date time to fit the time of the incident.
- c. **Incident Category:** Select the appropriate Incident category
- d. **Incident Sub Category:** Select the appropriate sub category. Depending on the choice made in the category fields the sub category options may differ.
- e. **Reporting Party:** Select the party that reported the incident. A “party” is a loose term and for certain vessels the only “Reporting party” will be “Own crew” (or something similar) but can also be for example “Contractors” etc.
- f. **Operation in Progress:** Specify what operation was being done when the incident occurred.
- g. **Location on unit:** If the Incident occurred on a specific location on the unit\vessel, select the appropriate ship\unit location.

- h. **Original Description:** This field is for the description of the incident. An incident report has two fields for the description. The original description will be treated as confidential once the incident report has been submitted. Only the creator of the incident and users with the user right to read the original description will be able to read it. This will allow the person entering the description to describe the incident as freely as possible. This field is mandatory to be populated in order to submit an incident report.
- i. **Official Description:** This is the description all users with access to the module will see, this is also the description that is used in the “Incident report” report.

“Assigned to:” section

- j. **Assigned to “Responsible party”:** This should reflect where the report of the Incident comes from if more than one party of crew can be found onboard. Example values can be “Own Crew” or “Contractors crew”.
- k. **Assigned to “Department”:** Select the department, that will be in charge of the Incident Report.
- l. **Assigned to “Crew Type”:** If the follow up should be done by a certain crew type, and not an individual crew member. Crew sign on and off all the time so assigning the incident to a certain crew type can make it easier to assign responsibilities.
- m. **Assigned to “Crew”:** If assigning an Incident report to a certain crew type is not accurate enough, the incident report can be assigned to a named Crew member, user or contact.
- n. **Verification Due:** Verification due is the “deadline” for when the Incident report should be completed. By default, this value is set to 7 days, but can be edited manually.

“Risk:” section

- o. **Risk: Recurrence probability:** Select a value describing the considered probability of the incident reoccurring. This field is used to set the “Risk” on the Incident.
- p. **Risk: Severity:** Specify the considered severity of the incident. This field is used to set the “Risk” on the Incident.

7. The remaining fields on this form (the right hand side fields) are not directly editable

- a. **Incident No:** This field will show the “Incident Report” number. The number is set when the Incident report is submitted. Once an Incident report has been numbered it will only be possible to cancel it, not delete it.
- b. **Incident type:** Depending on the choice made when creating the Incident report, this field will indicate if the incident report is considered a “near miss” or an Incident\accident with real consequences. It is possible to switch an incident from a “near miss” to a “Incident with consequences”, by clicking the [Change Type] button in the Incident report form menu bar.
- c. **Work Flow Status:** This is the current workflow status for the “Incident Report”

- d. **Verification Due Status:** Using the “verification due” date (described in 6 n.) this field will show if the verification is due or overdue.
- e. **Verification date:** This will show the date the “incident report” was actually set to verified and closed.
- f. **KPI tag:** Incident report Sub category codes, can be tagged with a KPI code. If the sub category is tagged with such a code it will show here.
 - a. **Risk:** This field is not possible to edit directly but will be filled based on the selections done in the two following fields “Severity rating” and “Probability” the value, will be retrieved from the risk matrix found under [System] → [Settings] → “Incident settings”. For more details on the Risk matrix please refer to [“How to configure the RISK matrix”](#)

“Additional Details:” tab.

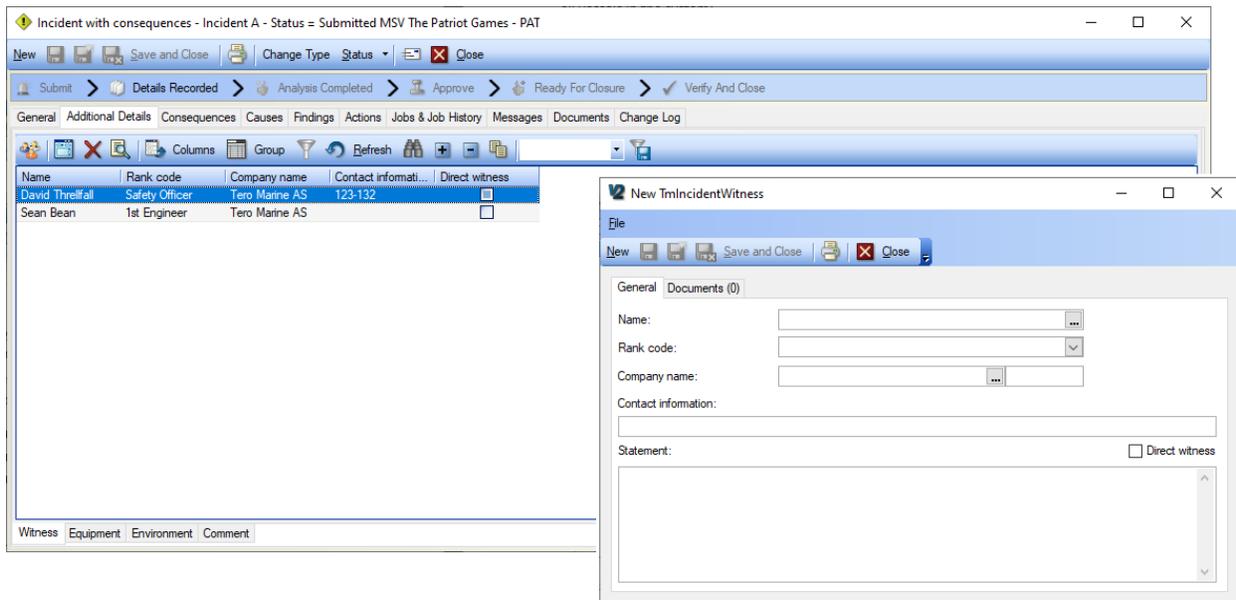
- 8. As the tab suggest additional details related to the incident report can be added to this tab and its sub tabs.
 - a. **“Witness” sub tab:** If any one witnessed the incident, their statements can be recorded on this tab. Please refer to “How to add a witness statement?” for more details.
 - b. **“Equipment” sub tab:** This tab has two free text fields for description of equipment involved and can be used if applicable.
 - i. **Description of safety equipment**
 - ii. **Description of tools involved**
 - c. **“Environment” sub tab:**
 - i. **“Clean Area Description”:** This is for the description of the area the incident took place.
 - ii. **Work Environment Description:** This field is used to describe the conditions relating to the work environment, such as lighting, noise level, temperature etc.
 - d. **“Comment” sub tab**
 - i. **Additional comments:** Any other additional information relating to the incident, that does not belong in any of the other available fields, can be added here.

How to add a witness statement to the Incident Report?

If someone witness the Incident, their statements can be recorded as part of the “incident report”. Their statements may be written in a separate document and may have been signed, so it is possible to attach a document (file) to the witness statement, but if it is desired the statement text should appear in the “incident report” report, their statements will also need to be added to the “Witness statement” fields. Here is how to record a witness statement.

1. Open the Incident report by double clicking it.
2. Click the “Additional Details” tab
3. Click the [Add Witness statement] button in the witness statement list menu bar.
4. Fill in the fields as follows:
 - a. **Name:** Click the [...] button at the end of this field to select a name from the system. Names available will be either “Crew”, “Users or “Contacts. If the witness is not listed as any of these it is possible to enter the witness name by typing it directly in this field.

- b. **Rank code:** If a crew, contact or user was selected in the “Name” field above, the system may auto fill this field based on recorded information on the selected person. If a name was manually added or no details appear when selecting a person, it is possible to manually type in a crew type/rank/position description in this field.
 - c. **Company name:** If a crew, contact or user was selected in the “Name” field above, the system may also auto populate this field using information from the system. If nothing appears it is possible to select a company from the “contacts” list by clicking the [...] buttons. It is also possible to type in the name directly if the company in question is not in the system.
 - d. **Contact Information:** If applicable, contact details can be added for the witness as free text.
 - e. **Direct Witness:** If the witness is considered a direct witness, the witness observed the incident as it occurred, tick the “direct witness” check box.
 - f. **Statement:** Enter the witness statement text
5. Click [Save]

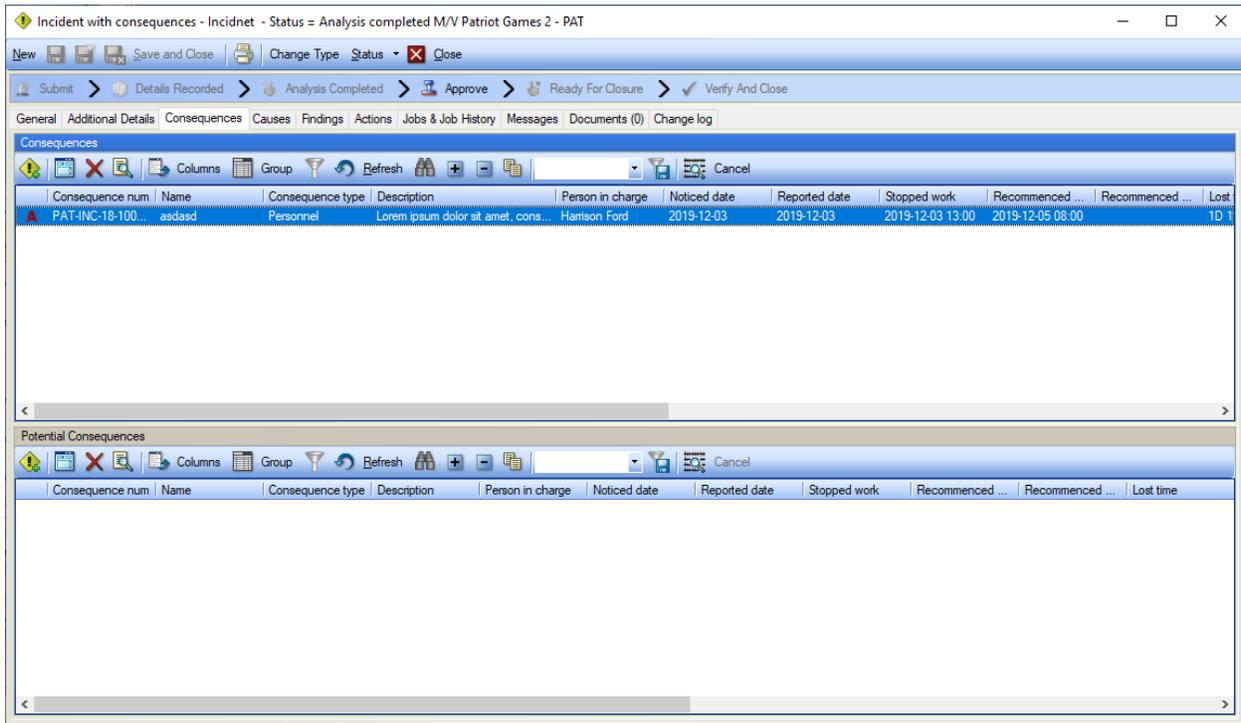


How to add Incident consequences?

When an Incident occur, they often have some sort of consequence. If it is a “near-miss” there is might not be actual consequences but potential consequences. When creating a new incident report, the first question asked by the system is if the new incident is considered a “near-miss” or an incident with actual consequences. If “Near-miss” is selected only “potential consequences” are possible to link to the incident report. If the Incident has an actual consequence it can’t be recorded if the incident is recorded as a “near-miss”. The procedure adding a “potential” versus an “actual” consequence is the same.

1. Open Incident report in question
2. Click the “Consequences” tab.

3. Depending on the selected Incident being recorded as a “near-miss” or an “incident with actual consequences” this tab will appear differently.
 - a. If it is a “Near-Miss” only the “Potential consequence” grid will be available.
 - b. If it is a “Incident with actual consequences both the “potential consequence” and the “actual consequence” grid will appear.



The “Consequences” tab on an “Incident with actual consequences”, showing both the potential and the actual consequence grids

4. To add a consequence, click the [New Consequence] button.

The 'New Consequence' dialog box is shown with a yellow warning icon in the top left corner. It contains the following options:

- Actual Consequence
- Potential Consequence

Below these options is a section titled 'Incident consequence type' with the following radio button options:

- Personnel
- Damage
- Pollution
- Security / Safety
- Financial
- Quality / Production
- Other

At the bottom of the dialog box are 'OK' and 'Cancel' buttons.

5. Select if this is considered a “Potential consequence” or and “actual consequence”

6. Specify what type of consequence this is. The consequence type selected will affect the available options and selections in the consequence form that will appear next. In this example we chose the “Personnel” consequence.
7. Click [OK]

The Personnel consequence form

Consequence details field group.

8. The three first fields should already be populated
 - a. **Consequence category:** This field will show if the consequence is an actual or a potential consequence
 - b. **Consequence type:** This field will reflect what type of consequence this is (the choice made in step 4.)
 - c. **Consequence number:** Will be constructed using the full Incident number and then adding a running number at the end using an “\” as a separator. Consequences created at the office will have a running number starting with “1000”, consequence running number recorded onboard will start at “0001”

9. Enter the details that apply:
 - a. **Consequence Name:** Enter a short consequence description
 - b. **Person in charge:** If somebody was in charge when the consequence occurred, select that person's name from either the Crew list, user list or contact list.
 - c. **Recurrence probability:** Select the considered probability value for this consequence. This value will be used to calculate the "risk" related to the consequence.

Dates field group.

It is possible to record several dates and times for the consequence, some serve just as information, and some are used to calculate "Lost time".

Dates	
Noticed date:	- - : : ▾
Reported date:	- - : : ▾
Stopped Work:	2019-11-28 12:10:00 ▾
Recommended work (estimate):	- - : : ▾
Recommended Work (actual):	2019-11-29 09:00:00 ▾
Lost time:	0D 20H 50M

- d. **Noticed date:** The date and time for when the consequence was discovered
- e. **Reported date:** The date and time the incident was reported.
- f. **Stopped Work:** If the consequence caused the affected person to stop work specify the date and time for when this occurred.
- g. **Recommended work (estimate):** If the person affected by the consequence has not yet started working again, and estimate can be set for when this is expected to happen.
- h. **Recommended work (actual):** The date and time the person returned to work.
- i. **Lost time:** The difference between "Stopped Work" and "Recommended work (actual)" is used to calculate the "lost time". It is displayed in the following format "1d 10H 45M"

Consequence classification

Consequence classification			
Category	Moderate injury ▾ ?	Severity	Moderate
Remedial action	Medical Treatment ▾ ?	Risk	Medium (4)
Outcome	Workday(s) lost ▾ ?	Case type	Lost Work Day Case

- j. **Category:** This field is used to categorise the consequence, the category options available will depend on what consequence type this is. Only options that are designated for "personnel" consequences will appear as available choices. The category codes can also be tagged with a "severity rating". When the category is selected the "severity" tag will appear in the "severity" field next to it.
- k. **Remedial Action:** What was done as a remedial action, again the codes available in this fields are also linked to the "consequence type" selected. Remedial action codes can be tagged as a "First aid" case or a "Medical treatment" case. This is coding used to as part of the "Lost Time Injury" calculation.
- l. **Outcome:** What was the "result" of the consequence. Outcome codes can be tagged with additional "Lost Time Injury" case tags, such as "Restricted Workday case", "Lost

Workday case”.

Please refer to the [Outcome code list description](#) for more details.

- m. **Severity:** This field can not be edited directly, the value shown in this field is the “Severity” tag on the selected consequence Category code. Please refer to the [consequence “Category” code list description](#) for more details.
 - n. **Risk:** This field is set based on the selected “Consequence” reoccurrence probability selected and the selected consequence category’s severity tag. It uses the [“Risk matrix”](#) to set the value.
 - o. **Case type:** This field will be set by either the “Remedial Action” or “Outcome” selected. Any of the “Outcome” case type tags will overrule any “Remedial action” case types. “Remedial action” case types will only remain if the selected “Outcome” code is not tagged with a case type. For more information relating to the “Lost Time Injury” (LTI) and Calculation of the “Lost time injury frequency” (LTIF) please review chapter [“How to read and use the Incident KPI module?”](#) The Case types only applies to the “Personnel” consequences.
 - p. **Consequence Description:** Enter a textual description of the consequence
10. Depending on the selected “Consequence type” some may have an additional specific tab for additional consequence details. This applies to the following consequence types
- o **Pollution:** This consequence type has an extra tab where the following details can be recorded.
 - **Quantity:** The amount of pollutant
 - **UOM Code:** The Unit of measure for the amount specified above
 - **Pollution type:** Select the general type of pollution
 - **Pollution code:** Specify the pollution substance
 - o Personnel

Personnel Consequence - New Consequence

New Save and Close Open incident Close

General Personnel Documents (0)

Personnel Details

Name of person Sean Bean Date of birth 1959-04-17

Crew type 1st Engineer Gender Male

Nationality GBR Occurs during On duty

Injury types

Rashes Asphyxia/drowning

Burns/heat Cut

Burns/chemical Dislocation

Concussion Poisoning

Fracture Foreign particle

Puncture(wound) Bruises

Arc(eye) Frostbite

Amputation Other

Cut Fracture

Head Abdomen Knee

Eye Pelvis Elbow

Ear Trunk Ankle

Mouth Finger Leg

Nose Foot Hips

Face Wrist Thigh

Neck Forearm

Back Hand

Chest Am

Protective equipment

Safety Shoes

Ear Defenders

Safety Harness

Chemical Resistant Gloves

Oil Resistant Gloves

Cold Weather Gloves

Safety Goggles

Causes

For some “Incident Reports”, a cause analysis might be required, this “cause-analysis” can be recorded on the “Incident Report” form “Causes” sub tab. The procedure adding causes to “Incident Reports” are the same as for Observations, Inspection findings and Failure Reports.

How to add an immediate cause to an Incident Report?

To be better able to make the correct decision on what to do with an Incident, describing the cause of it is a good starting point. TM Master v2 can record “immediate causes”, and “system causes”. The “immediate cause” would be the most apparent ones. Here is how you record an immediate cause found during the analysis of the finding:

1. Open the Incident Report in question
2. Click the “Cause” sub tab.
3. Click the  [Add Immediate Cause] button
4. Fill in the “immediate Cause” details
 - a. **Name:** Enter a Cause description name

- b. **Type:** Select a “Cause type” from the “immediate cause” types. Please refer to chapter on cause types for additional details on how to configure them.
 - c. **Related to:** For immediate causes this field will not be available. Please refer to the chapter next chapter on adding “System Causes” for more details on it.
 - d. **Main Cause:** If this is to be considered the main cause for the finding, you can tick this check box. Please note only one cause pr. finding can be considered the main cause for it.
 - e. **Cause description:** Enter a description of the cause.
5. The additional fields in the “Cause Categorization” field group, is not possible to alter in this view as it is linked to the “Cause type”, and if alterations are required this must be done in the [Cause type] module

The Cause detail form

How to add a system cause to an “Incident Report”?

The chapter above described adding the “Immediate causes” for the Incident Report, which is all well and good. But it is not necessarily that easy to take actions based on the immediate cause description alone. We may need to find and describe the reason behind the immediate cause, and this is what TM Master refers to as “system causes”. Since the exercise of asking “Why?” to any reason given may end up system causes explaining system causes, it is possible to add any number of system-causes either related to the immediate cause or to another system cause.

The procedure adding a “system cause” is very similar to adding a “immediate cause” Here is how it is done.

1. Open the “Incident Report” in question.
2. Click the “Cause” tab
3. Select a previously added “Immediate cause” or “System cause” in the list of causes
4. Click the  [Add System Cause] button
5. Fill in the “System Cause” details
 - a. **Name:** Enter a Cause description name
 - b. **Type:** Select a “Cause type” from the “System cause types”. Please refer to chapter on cause types for additional details on how to configure them.
 - c. **Related to:** This shows information on which other cause this “system cause” is directly related / linked to. It can be an “immediate cause” or another “system cause”. It is also possible to change the cause it relates to by clicking the [...] button and selecting one of the other causes.
 - d. **Main Cause:** If this is to be considered the main cause for the finding, you can tick this check box. Please note only one cause can be considered the main cause for a Incident.
 - e. **Cause description:** Enter a description of the cause.

You may select one of all your added causes as the “Main Cause” for the Incident report, the main cause will also be available as part of the Incident Report grids and can be used to filter and search on.

Findings

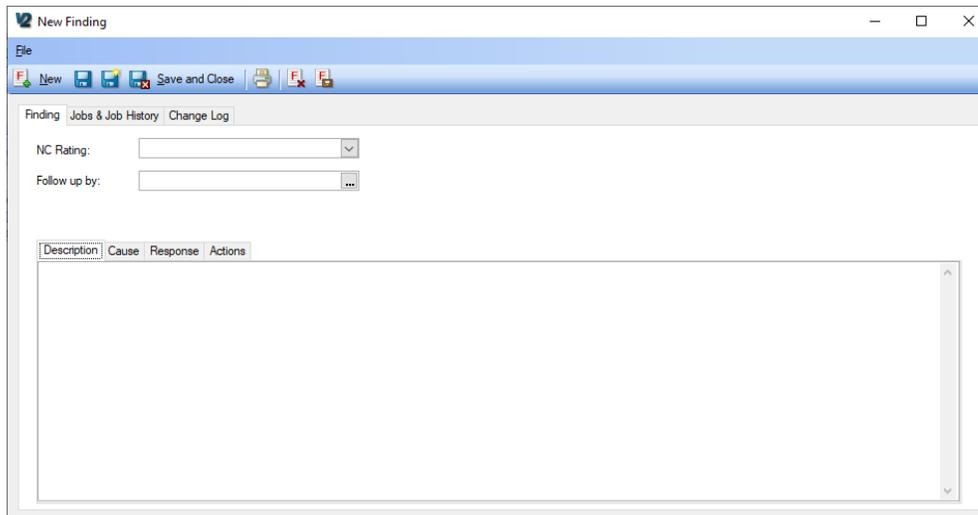
When Non-conformances are found during an Incident investigation they can be recorded as “findings” linked to the Incident report. These findings can have their own cause descriptions and actions. A finding can be closed individually. Here is how to create an Incident Finding.

How to add an Incident Finding?

When Non-conformances are found during an Incident investigation they can be recorded as “findings” linked to the Incident report. These findings can have their own cause descriptions and actions. A finding can be closed individually. Here is how to create an Incident Finding.

1. Open the Incident report in question.
2. Click the “Findings” tab

3. Click [Create Finding]



Finding dialog

4. **NC Rating:** Select an “NC Rating”
5. **Follow up by:** Assign the Finding to a person for follow up. Select either a Crew member, user or contact person.
6. **Description (sub tab):** Enter the Description of the findings
7. **Cause (sub tab):** Add any number of Causes. Please refer to the chapter [“Causes”](#) for more details.
8. **Response (sub tab):**
 - a. **Initial Response:** Enter the immediate response to the finding (if required).
 - b. **Initial response ready:** If the Initial response is considered completed tick this check box
 - c. **Subsequent Response:** Enter the complete description of the response to this finding. This might not be possible to fill in before all relevant actions has been performed etc. But this text will serve as a summary of the total response to the finding.
 - d. **Subsequent Response Ready:** If the subsequent response is considered completed tick this check box
9. **Actions (sub tab):** If any actions are required to resolve the finding they can be added to this list. Please refer to the chapter [“Actions”](#) for more details.
10. **Jobs & jobs History (tab):** It is possible to link jobs and job history to the “finding” the same way it is possible to link them to “Actions” and the “Incident report” directly. Please refer to the chapter [“How to link jobs and job history to actions?”](#) as it is the same procedure for findings.

How to process an incident finding?

The incident finding can be processed independent of the “Incident Report” as described above it can have its own cause descriptions, actions and jobs & job history linked to it. The workflow for a Finding is simple.

1. Create the Finding
2. Add cause descriptions

3. Add any actions or corrective maintenance job required
4. Describe the “Responses” (initial and subsequent) to the findings
5. When all actions have been signed out you can close the Finding
6. When closing the “incident report”, you will be notified of any still open “findings” linked to it.

Actions

A “Job” should be used to describe a corrective\preventive action of a “Incident” relating to equipment onboard, when signed out the job will be linked to the equipment as “maintenance history”. In some cases, however, the actions needed as part of the corrective or preventive plan does not fit as a “Job”, in those cases “Actions” can be used. Examples could be “create an order” or “Update a Procedure description” etc.

How to add actions to a Incident report?

1. Open the Incident Report in question.
2. Click the “Actions” sub tab
3. Click the  [Add action] button.
4. Fill in the details in the action form. (ref image below)
 - a. **Name:** This is for a name or short description for the action
 - b. **Department:** The “Department” that will be responsible for the action. All crew members with a crew type linked to this department will be able to see this action in their personal “Dashboard” if you will as actions assigned to their department.
 - c. **Crew Type:** The assigned crew type that should perform the action, all crew members of this type will be able to see this action in their personal “Dashboard”, as actions assigned to their crew type.
 - d. **Crew:** This will be the specific crew member, user (or contact) that will be responsible for this action. Users or Crew member selected will see this action in their personal “Dashboard” as assigned specifically to him or her.
 - e. **Category:** Assign a category for this action
 - f. **Type:** Is this considered a “Preventive” or “Corrective” action?
 - g. **Priority:** Assign the appropriate priority
 - h. **Deadline:** Assign a deadline/ due date for this action.
 - i. **Action Task:** Enter the description for the action to be performed

The remaining fields can’t be altered in this form and serve only as additional information:

- j. **Due Status:** All actions are considered “Due”, until they are considered “Overdue”
- k. **Done Status:** When a user starts signing out the action, he/she may indicate their progress as percent done, and it will show in this field.
- l. **Unit:** Is of course the unit/vessel the action is to be performed, which will of course be the same unit that has performed the inspection.
- m. **Source type:** Actions can so far be linked to either “Incident Reports”, “Inspections”, “Incidents” or “Observations”. This field will show which of the four the action stems from.

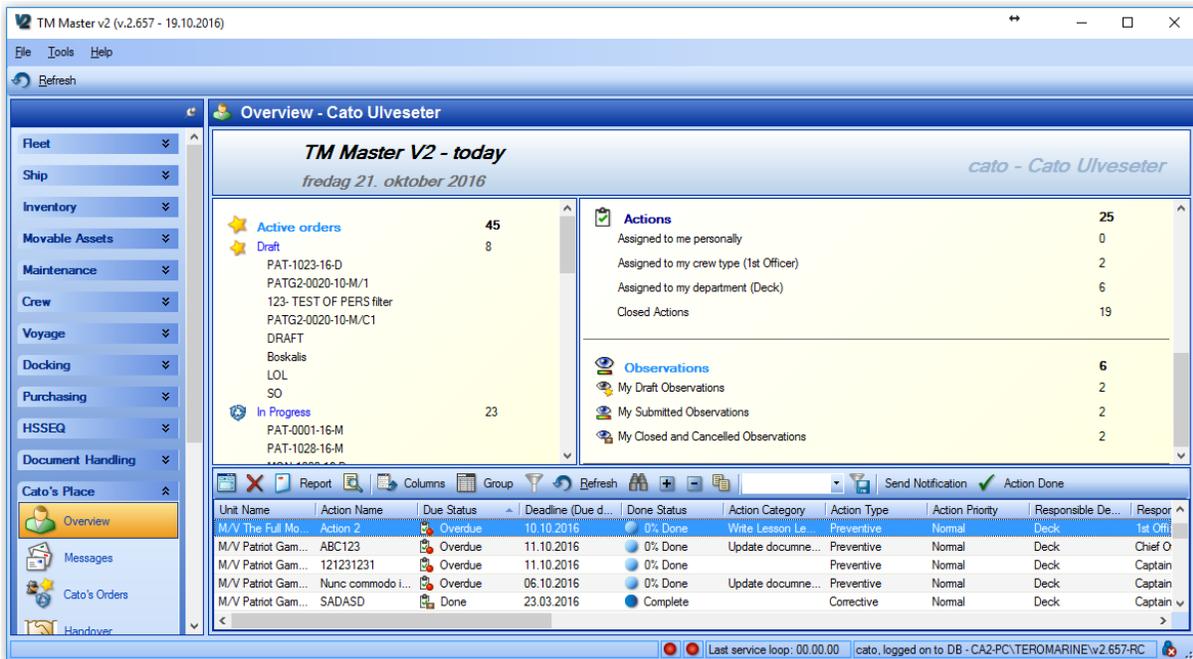
- n. **Source:** Will show the number for the exact “Incident Report”, “inspection”, “Observation” or “Incident, that this action stems from. The [...] button at the end will open the source Incident report, Incident, Inspection or Observation.
- 5. The Action form also has a document tab, so if any additional document or files are relevant to the action, this can be attached here.
- 6. By clicking the [Send notification] button in the top of the action form will allow you to send an email with the action details to whoever you require to notify. (This function does require TM Master v2 to be configured to connect to a mail server, if it should send external emails, otherwise it will only be sent as an internal TM Master email.

Action form

How can a user assigned to an action find it and sign it out?

Once an action has been assigned to a user, the user will need to find the action with the system in order to read it and sign it out. As mentioned in item 6. In the last chapter the action form has a [Send Notification] function, which allows for email notification to the assigned users. Users can also find the actions assigned to them using the “Personal Dashboard” found under the [My place] module.

Here is how it works:



The "My place" Overview (Dashboard)

1. Click ["User Name" place] → [Overview]
The section shows each individual user's name in the module group name.
2. On the Right-hand side in the lower part of the overview the "Action" section can be found.
3. The actions assigned are listed in 4 different groups as can be seen below, the number on the far right indicates the number of actions found within that group. By clicking any of these groups (click the text) a list of the actions within that group will appear below in the form.
By clicking the main heading "Actions" all the actions will be listed.

Actions	Count
Assigned to me personally	0
Assigned to my crew type (1st Officer)	2
Assigned to my department (Deck)	6
Closed Actions	19
4. In the list section that appear, you will in the belonging menu find the [Action Done] button to start signing the action out. Users can also double click the actions directly in the grid to open them for details. The [Action Done] button can also be found in the action detail form.
5. In the same menu the [Send Notification] button can also be found and used to notify when action has been done etc.

How to sign out an action?

Once an action has been performed, the action can be signed out, and this is the procedure on how to do it. There is no requirement from the system side that all fields need to be used and is up to each company's internal procedure and guidelines. This procedure will describe all fields.

1. Double click the action that is to be signed out.
2. If this action will result in a “Corrective action” added to the TM Master Maintenance module it is possible to add this job from the action form. This can be done on the “Job & Job History” tab. For more details, please see the chapter: How to link jobs & job history to actions?
3. Click the [Action Done] button found in the top of the “Action” form.

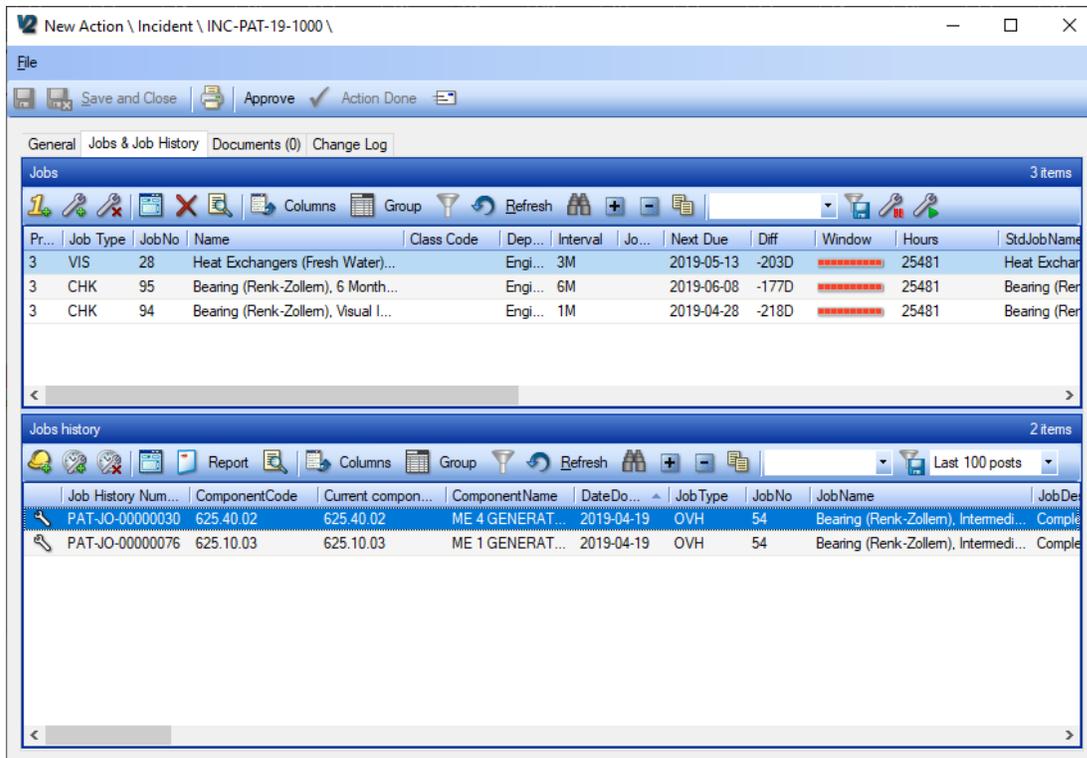
The screenshot shows a software window titled "Action Done for Ut commodo ipsum ullamcorpe". At the top, there is a toolbar with "Save and Close" and "Sign Out" buttons. Below the toolbar, the "General" tab is selected. The form contains several input fields: "Done Status" is a dropdown menu showing "0% Done"; "Done By" is a text field with "Mr. User" and a selection button "..."; "Done Date" is a date picker showing "2019-11-18"; "Signed Out By" is a text field with "Mr. User"; and "Signed Out Date" is an empty date field. At the bottom, there is a large text area labeled "Action Taken:".

- a. **Done Status:** If the job doing the action has not been completed, this can be indicated by setting a percent done value.
 - b. **Done by:** This should be the user/crew/contact that has actually done the action, by default this is set to the user signing the action out. But by clicking the [...] button at the end of the field you can select a different user/crew/contact.
 - c. **Done Date:** Should be the date the action was performed, by default it is set to today's date but can be set to any previous dates if required.
 - d. **Signed out by:** Will always be the user signing the action out.
(The user who will at the end click on the [Sign out button])
 - e. **Signed Out date:** This will reflect the date when the action is Signed out.
The date the [Signe Out] button was pressed.
 - f. **Action Taken:** Here a short description of the action is added.
4. If the Action is not completed, it is possible to [Save] the current entry and continue the sign out procedure later. Any previous saved information will appear the next time a user clicks the [Action Done] button for this action. This also allows companies to quality assure the action sign out descriptions prior to sign out. This can be done by only given a limited number of people the user right to “actually” sign out the action, but regular user can still fill in the “Action done” details, set it to 100% Done, and the manager can then review the information, and then sign it out if accepted.
 5. To Sign out the action click the [✓ Sign Out] button
 6. Confirm the sign out.

How to link jobs & job history to actions?

Some “Actions” created based on observations, Incidents or Inspection findings will also result as a corrective action being added as a Job in the system. By linking the Job to the action, it is possible to keep track of these jobs within the Observation, Incident or Inspection module depending on the source of the action. They will be shown in the top overview grid in these modules in the section “Jobs”. This is the procedure to link a job or a job history record to an action.

1. Open the action in question
2. Click the “Job & Job history” tab.



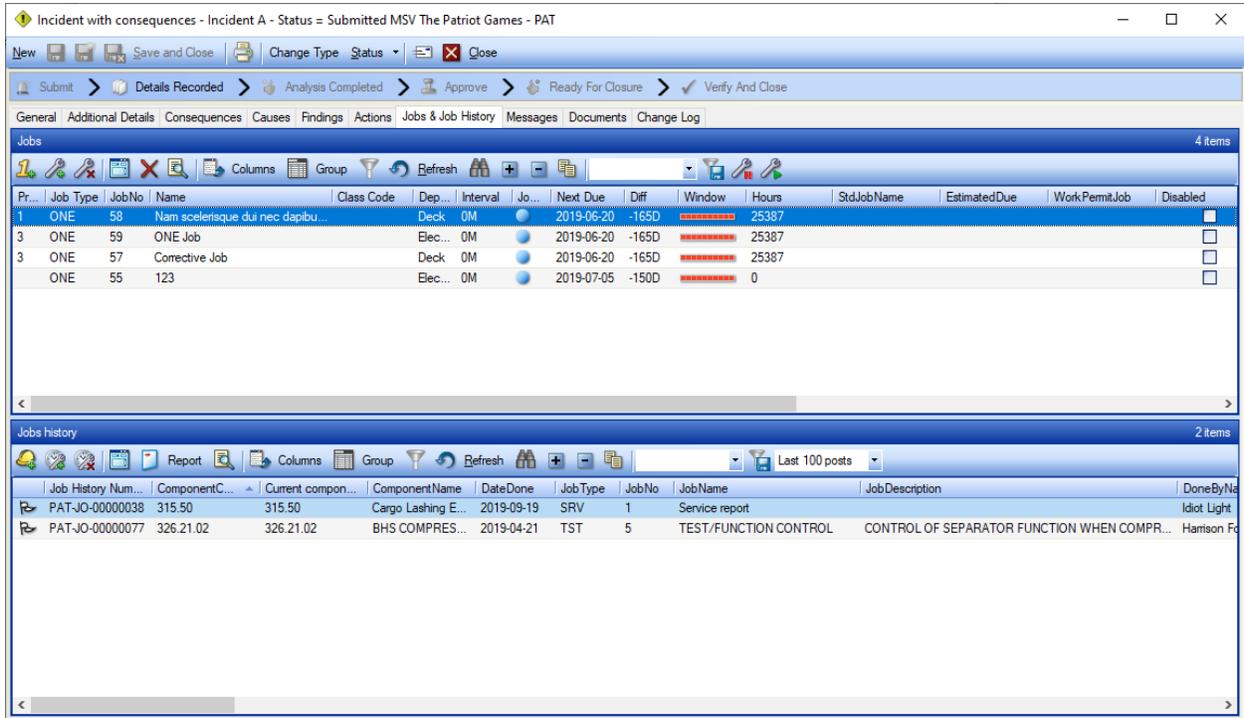
3. This view is divided into two sections “Jobs” on top and “job history” below.
4. From here you can perform the following actions:
 - a. **Create a new “One Off” job which will be linked to the action**
 - i. Click the [Create One Off job] button
 - ii. Select the component you wish to add the One Off job for
 - iii. Fill in the One Off job details
 - b. **Link to an existing job from the due list (One off and regular scheduled jobs)**
 - i. Click [Link to existing job] button
 - ii. Select job from the due list dialog
 - iii. Click [Link Selected]
 - c. **Remove an already linked job or job history.**
 - i. Select the job you wish to remove the link to
 - ii. Click the [Delete link to job] button
 - iii. This will not delete the job in the due list, only the jobs link to the action.

- d.  **Add (Create) a “Service Report” if the job has already been done.**
 - i. Click the [Create Service Report] button
 - ii. Select the component you wish to add the service report for.
 - iii. Fill in the Service Report details
 - e.  **Link an existing job history record to the action**
 - i. Click the [Link to existing job history record]
 - ii. Select the job history record you wish to link. (By default, the list will only consist of the last 100 history records, by altering the filter in the grid menu additional records can be selected)
 - iii. Click [OK]
 - f.  **Remove link between action a job history**
 - i. Select re job history records you wish to unlink
 - ii. Click the [Remove link to job history] (Please note this does not delete the job history record it simply remove the link between the action and the job history.)
5. The “One off jobs” and “Service Reports” are created as normal maintenance jobs and service reports, the details on the procedure for this can be found in the TM Master User manual.

Jobs & Job history

Any maintenance jobs or job history that is linked to one of the Incident reports actions will be listed on the “Job & History” tab on the Incident form. It is also possible to link job and job history directly to an Incident report. It is done in the exact same manner as for linking job & job history to actions.

1. Open the Incident report in question
2. Click the “Job & Job history” tab.



Pr...	Job Type	JobNo	Name	Class Code	Dep...	Interval	Jo...	Next Due	Diff	Window	Hours	StdJobName	EstimatedDue	WorkPemitJob	Disabled
1	ONE	58	Nam scelerisque dui nec dapibu...	Deck	0M			2019-06-20	-165D	██████████	25387				<input type="checkbox"/>
3	ONE	59	ONE Job	Elec...	0M			2019-06-20	-165D	██████████	25387				<input type="checkbox"/>
3	ONE	57	Corrective Job	Deck	0M			2019-06-20	-165D	██████████	25387				<input type="checkbox"/>
	ONE	55	123	Elec...	0M			2019-07-05	-150D	██████████	0				<input type="checkbox"/>

Job History Num...	ComponentC...	Current compon...	ComponentName	DateDone	Job Type	JobNo	JobName	JobDescription	DoneByNa
PAT-JO-0000038	315.50	315.50	Cargo Lashing E...	2019-09-19	SRV	1	Service report		Idiot Light
PAT-JO-0000077	326.21.02	326.21.02	BHS COMPRES...	2019-04-21	TST	5	TEST/FUNCTION CONTROL	CONTROL OF SEPARATOR FUNCTION WHEN COMPR...	Harrison Fd

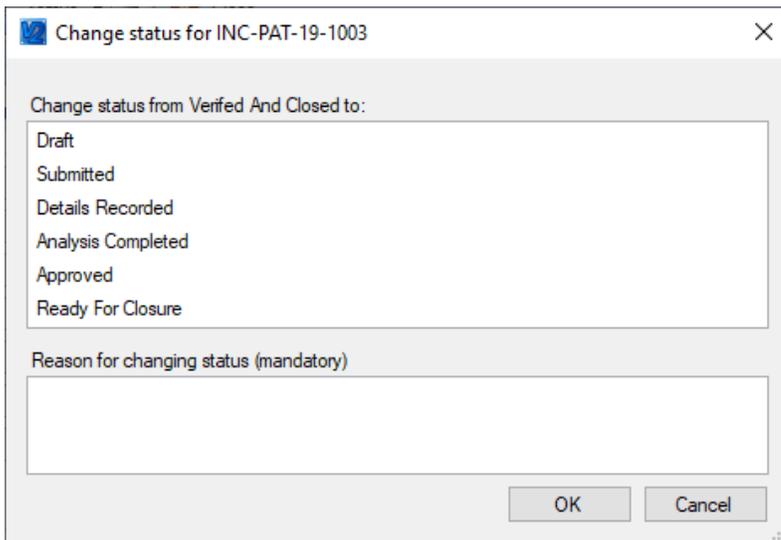
3. This view is divided into two sections “Jobs” on top and “job history” below.
4. From here you can perform the following actions:
 - a.  **Create a new “One Off” job which will be linked to the action**
 - i. Click the [Create One Off job] button
 - ii. Select the component you wish to add the One-Off job for
 - iii. Fill in the One-Off job details
 - b.  **Link to an existing job from the due list (One off and regular scheduled jobs)**
 - i. Click [Link to existing job] button
 - ii. Select job from the due list dialog
 - iii. Click [Link Selected]
 - c.  **Remove an already linked job or job history.**
 - i. Select the job you wish to remove the link to
 - ii. Click the [Delete link to job] button
 - iii. This will not delete the job in the due list, only the jobs link to the action.
 - d.  **Add (Create) a “Service Report” if the job has already been done.**

- i. Click the [Create Service Report] button
 - ii. Select the component you wish to add the service report for.
 - iii. Fill in the Service Report details
 - e.  **Link an existing job history record to the action**
 - i. Click the [Link to existing job history record]
 - ii. Select the job history record you wish to link. (By default the list will only consist of the last 100 history records, by altering the filter in the grid menu additional records can be selected)
 - iii. Click [OK]
 - f.  **Remove link between action and a job history**
 - i. Select re job history records you wish to unlink
 - ii. Click the [Remove link to job history] (Please note this does not delete the job history record it simply remove the link between the action and the job history.)
5. The “One off jobs” and “Service Reports” are created as normal maintenance jobs and service reports, the details on the procedure for this can be found in the TM Master User manual.

How to set Workflow status to a previous Status?

At some point it may be required to be able to move the workflow status backwards, either due to it being closed and not editable or just because a mistake has been made. It is possible for users with appropriate user rights to force the workflow status backwards. Here is how it is done:

1. Open the Incident report in question
2. Click the [Status] dropdown button
3. Select “Change Status”
4. A list of all “previous” statuses will appear.



Change status for INC-PAT-19-1003

Change status from *Verified And Closed* to:

- Draft
- Submitted
- Details Recorded
- Analysis Completed
- Approved
- Ready For Closure

Reason for changing status (mandatory)

OK Cancel

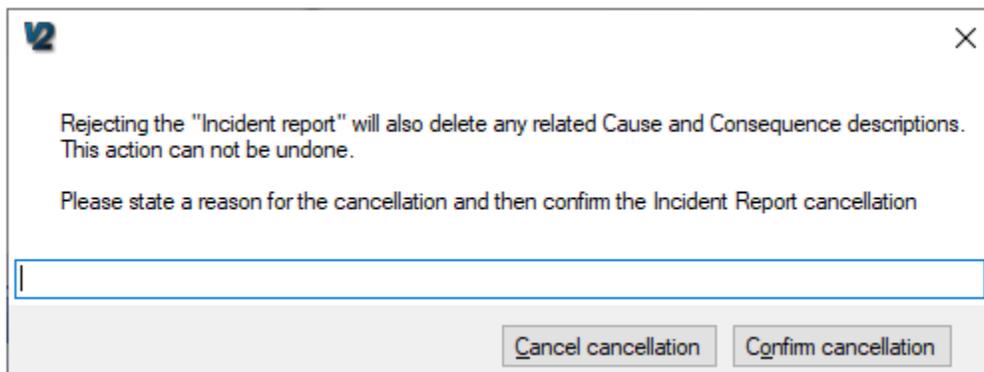
5. Select the status you wish to set on the “Incident report”

6. Enter a short comment to why the status is set back
7. Click [OK]

How to reject a “Incident Report”?

In some instances, there might be a need to “reject” or “cancel” the Incident report. If the Incident report has been submitted, it is no longer possible to just delete the Incident report. Here is how you “Reject” or “Cancel” a submitted Incident report.

1. Open the Incident report in question.
2. Click the [Status] drop down button in the Incident report top menu bar.
3. Select “Reject Incident”
4. The following dialog should appear, stating cancelling the Incident report will delete any related causes and consequences, and delete any “Draft” actions and cancel any “approved” actions



5. Clicking [Confirm Cancellation] will cancel the Incident report.

How to read and use the Incident KPI module?

Incidents KPI - M/V Patriot Games 2

Code	FAC	MTC	RWC	LWC	PPD	PTD	Fatality	LTI	LTIF	TRC	TRCF	TRCF/1000	Date	Days	Date	Days
M/V The Full Monty	MON	1	1	1	1	1	0	2	2.42	4	4.83	827.760	2016-08-24	1196	2016-08-24	1196
M/V Patriot Games 2	PAT	1	1	5	10	0	0	11	14.41	17	22.27	763.440	2019-08-14	111	2019-08-14	111
Warehouse 13	W13	0	1	1	2	1	1	1	56.92	7	79.69	87.840	2016-07-05	1246	2016-07-05	1246
M/V Down Petscope	DPE	0	0	0	2	0	0	2	4.25	2	4.25	470.304	2016-08-16	1204	2016-08-16	1204
TOTAL		2	3	7	15	2	1	20	9.31	30	13.96	2,149,344				

Details 33 Consequences

Consequence num	Name	Consequence type	Risk	Reported date	Stopped work	Recommended	Lost time	Category	Outcome	Remedial action	KPI Case	Recurrence
PAT-INC-19-100...	Broken arm	Personnel	Low (2)	2019-08-14 00:20	2019-08-15 00:00	2019-08-15 00:00	00 23H 40M	Moderate injury	Workday(s) lost	Medical Treatment	Lost Work Day C...	Low Prc
W13-INC-16-100...	Arm injury	Personnel	Low (2)	2019-08-06	2019-08-06 03:00	2019-08-07 01:00	00 22H 0M	First Aid	Workday(s) lost	First Aid	Lost Work Day C...	Medium
MON-INC-16-100...	Person snublet	Personnel	Medium (5)	2016-08-25	2016-08-24 00:00	2016-08-25 00:00	1D 0H 0M	Serious injury / #...	Permanent Par...	Medical Treatment	Permanent Partia...	Medium
DPE-INC-16-000...	Crew man injury	Personnel	Medium (4)	2016-08-15	2016-08-15 00:00	2016-08-17 00:00	2D 0H 0M	Moderate injury	Workday(s) lost	Medical Treatment	Lost Work Day C...	Medium
MON-INC-16-100...	123123	Personnel	Medium (4)	2016-07-05	2016-07-05 00:00	2016-07-06 00:00	1D 0H 0M	First Aid	N/A	First Aid	First Aid Case	Medium
PAT-INC-16-101...	My Consequence	Personnel	Medium (4)	2016-07-04	2016-07-04 00:00	2016-07-04 00:00	0D 0H 0M	Moderate injury	Restricted Dut...	Medical Treatment	Restricted Work...	Medium
PAT-INC-16-101...	wewae	Personnel	Medium (4)	2016-07-04	2016-07-04 00:00	2016-07-04 00:00	0D 0H 0M	Fatality	Fatality	First Aid	Fatality	Medium
DPE-INC-16-000...	Friday injury	Personnel	Medium (4)	2016-05-26	2016-05-26 00:00	2016-05-27 00:00	1D 0H 0M	Moderate injury	Workday(s) lost	Medical Treatment	Lost Work Day C...	Medium
PAT-INC-16-101...	My Consequenc...	Personnel	Medium (5)	2016-05-24	2016-05-24 00:00	2016-05-26 00:00	2D 0H 0M	Serious injury / #...	Workday(s) lost	Medical Treatment	Lost Work Day C...	Medium
PAT-INC-16-101...	Personal injury	Personnel	Medium (5)	2016-05-24	2016-05-24 00:00	2016-05-25 00:00	1D 0H 0M	Serious injury wit...	Workday(s) lost	Medical Treatment	Lost Work Day C...	Medium
PAT-INC-16-101...	sKADE I FOT	Personnel	Medium (5)	2016-05-09	2016-05-09 00:00	2016-05-11 00:00	2D 0H 0M	Serious injury / #...	Workday(s) lost	Medical Treatment	Lost Work Day C...	Medium
MON-INC-16-100...	My consequence 1	Personnel	Medium (4)	2016-04-14	2016-04-14 00:00	2016-04-21 00:00	2D 0H 0M	Moderate injury	Workday(s) lost	Medical Treatment	Lost Work Day C...	Medium
PAT-INC-16-101...	L0L 2	Personnel	Medium (5)	2016-04-28	2016-04-28 00:00	2016-04-29 00:00	1D 0H 0M	Serious injury / #...	Workday(s) lost	Medical Treatment	Lost Work Day C...	Medium
PAT-INC-16-101...	Person B injured	Personnel	Medium (4)	2016-04-19	2016-04-19 00:00	2016-04-21 00:00	2D 0H 0M	Moderate injury	Workday(s) lost	Medical Treatment	Lost Work Day C...	Medium
PAT-INC-16-101...	Eye injury	Personnel	Medium (4)	2016-04-18	2016-04-18 00:00	2016-04-19 00:00	1D 0H 0M	Moderate injury	Workday(s) lost	Medical Treatment	Lost Work Day C...	Medium
PAT-INC-16-101...	Person B injured	Personnel	Low (2)	2016-04-14	2016-04-14 00:00	2016-04-15 01:00	0D 19H 0M	Moderate injury	Workday(s) lost	Medical Treatment	Lost Work Day C...	Low Prc
PAT-INC-16-100...	Consequence 1	Personnel	Extreme (12)	2016-04-05	2016-04-05 00:00	2016-05-30 00:00	55D 0H 0M	Fatality	Restricted Dut...	Medical Treatment	Restricted Work...	High Prc
PAT-INC-16-100...	NAME CON	Personnel	Medium (4)	2016-03-09	2016-03-10 00:00	2016-03-13 00:00	3D 0H 0M	Moderate injury	Workday(s) lost	Medical Treatment	Lost Work Day C...	Medium
PAT-INC-16-100...	322323	Personnel	Medium (4)	2016-02-11	2016-02-11 00:00	2016-02-11 00:00	0D 0H 0M	MDR_INJ	Workday(s) lost	Medical Treatment	Lost Work Day C...	Medium
PAT-INC-16-100...	1212	Personnel	Medium (4)	2016-01-12	2016-01-12 00:00	2016-01-13 00:00	1D 0H 0M	MJR_ING	Workday(s) lost	First Aid	Lost Work Day C...	Low Prc

Configuration

How to configure the Risk Matrix?

The Risk matrix in TM Master is shared among several modules. Observations, Incident reporting, Inspections and Failure reporting. Here is how to configure the matrix. (Once set up it is replicated to all vessels in the system)

1. Configure the “risk matrix” codes first (described above)
2. Go to [System] – [Settings] – the “Incident settings” tab.
3. If the Matrix is empty, click the [Generate Matrix] button
4. The matrix is generated based upon the “Risk Probability” codes (vertically) and the “Risk Severity” codes (horizontally). Row and column headers are sorted by the codes numerical value and names. It will assign a “risk factor value” to each intersection by multiplying the intersecting

“probability values” and “severity values”

Risk Assessment Matrix

Generate

Recurrence Probability	Severity			
	Minor	Moderate	Serious	Critical
Very High Probability	Medium (4)	High (8)	Extreme (12)	Extreme (16)
High Probability	Low (3)	Medium (6)	High (9)	Extreme (12)
Medium Probability	Low (2)	Medium (4)	Medium (6)	High (8)
Low Probability	Low (1)	Low (2)	Low (3)	Medium (4)

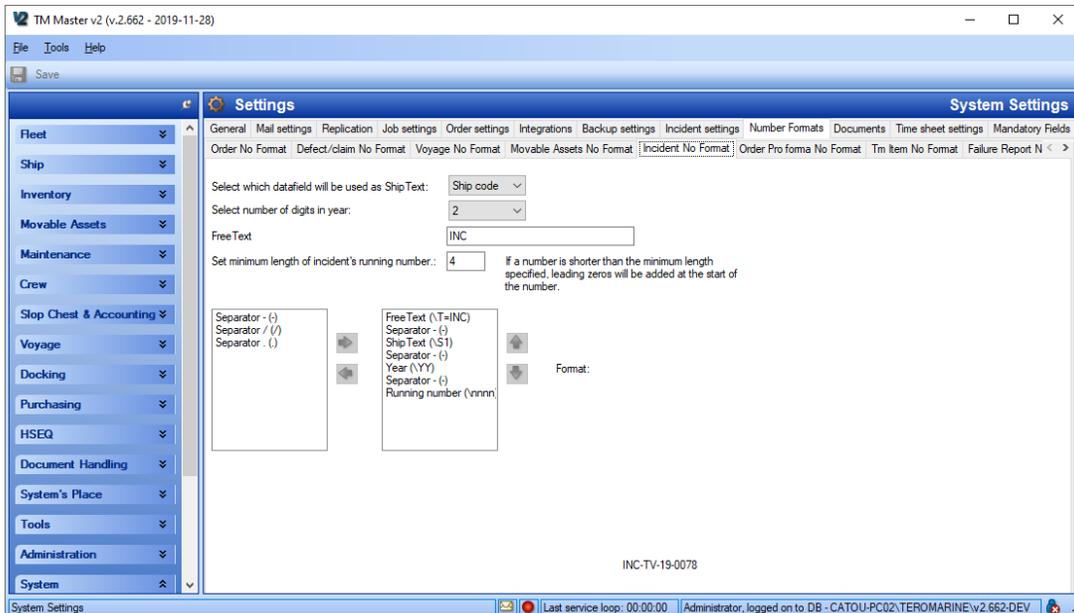
- Click in each of the intersections, and select the “Risk Factor” name and colour
- Click [Save]

How to configure the Incident report number?

Each Incident Report is given a unique number, similar to the order number in TM Master v2. The procedure to configure the “Incident Report” number is also very similar to how it’s done for the order number. Please be aware that the number must be configured for each individual installation.

To configure the Failure Report number, do the following:

- Start and log on TM Master v2 with an admin enabled account.
- Click [System] → [Settings] → “Number formats” tab → “Incident Report No Format”



The “Failure Report No Format” form.

- Select which data field that should be used to identify which vessel the Incident report is created for. You can use the “Ship Code, or “Ship Alternative Code” or create a custom value.
- Select the number of digits of the Year to be used (YY or YYYY)

5. Enter the minimum of numbers the Incident Report running number should display. If for example 4 digits are entered the first failure report number will be "0001"
6. If desirable a free text can also be included in the Incident Report number. This will make it easier to distinguish what the number refers to compared to other similar numbers (PO no, Voyage no etc.) For example: "INC"
7. Select the elements desired to be a part of the "Incident Report" number in the list on the left-hand side and click the [→] arrow button to push it into the right-hand side list. Please note that a separator ("-" dash, "/" slash or "." period) is required between each element for the number configuration to be accepted.
8. You can move the selected elements up and down in the right-hand list. An example of how the number format will look like is shown below the boxes. If the example is displayed in red, you have not separated one or more of the elements with one of the available separators.
9. We recommend you, to use a configuration that is sortable. For example: INC-BOU-2013-0001 ([Free text] – [Unit Code] – [Year] – [Running number]).
10. Once the configuration is to your liking, click [Save].

[Incident Report Related Codes.](#)

Action Type: A category code for actions. Example values: "Update procedure", "Create Corrective Job"

Body Parts:

Incident & Observation Category

Incident & Observation Sub Category

Incident Consequence Category:

Incident Consequence Outcome:

Incident Consequence Remedial Action:

Injury type:

Protective Equipment

Risk Recurrence probability

Risk-Severity

Risk Factor:

HSEQ Area:

Pollution type:

Pollutable: