Managing Incident Categories and Sub-Categories

> **Incident Categories** and **Sub-Categories** in OPS-COM are used to define and classify incidents reported within the system. This feature allows administrators to organize incident types, control their visibility in reports, and manage associated checklists, ensuring precise documentation and effective analysis of various occurrences.

Using this Feature

The **Edit Categories and Sub Categories** page allows you to add, edit, and manage both main incident categories and their more specific sub-categories.

Adding

1. On the **Edit Categories and Sub Categories** page, click **Add New Category** located at the bottom of the page.
2. Fill out the details for your new **Category Name**.
3. Select whether it's an **"In-House"** category (for internal use).
4. Enter the **GIS number** (optional, used by clients with geographic location codes).
5. Select if you'd like this category to be **Included in Reports**.
6. Click **Save Incident Category**.

Editing

1. On the **Edit Categories and Sub Categories** main page, locate the desired category from the listed items.
2. Click the **pencil icon** next to it to edit.
3. Make your changes and click **Save Incident Category** to apply your changes.

Managing Sub-Categories

Sub-categories provide a finer level of detail for incidents.

1. To check a category for its sub-categories, click the **Sub** button next to the Category name.
2. The list of Sub-Categories for that item will display. You can add a new sub-category at the bottom of the list.
3. Enter the **Name** of the sub-category and enable the desired functions:
   - If a **Checklist** is required for incidents under this sub-category, click **Required**.
   - If it's to be **Included in Reports**, click **Include**.
   - If you wish to archive it, enable the **Archive** checkbox.
   - If you want to change the name of an existing one, click in the text box and change it.

Once you have finished, click **Save Sub-Categories**.

Best Practices & Considerations

- **Logical Hierarchy**: Create a clear and logical hierarchy between categories and sub-categories to ensure accurate incident classification (e.g., Category: "Theft," Sub-Categories: "Vehicle Theft," "Personal Belongings Theft").
- **Report Inclusion**: Carefully consider which categories and sub-categories should be **Included in Reports** based on your organization's analytical and compliance needs.
- **In-House vs. Reportable**: Distinguish between "In-House" categories (for internal tracking) and those intended for broader reporting or external sharing.
- **Checklists for Consistency**: Utilizing the "Required Checklist" option for sub-categories can ensure that all necessary information is collected consistently for specific types of incidents, improving data quality.
- **Regular Review**: Periodically review your incident categories and sub-categories to ensure they remain relevant to your incident reporting needs and operational changes.

Revision #2
Created 19 June 2025 08:15:41 by Shannon Jones
Updated 19 June 2025 08:59:15 by Shannon Jones