How to Perform an Incident Analysis

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How to Perform an Incident Analysis

This guide explains how to use Incident Analysis to review incident trends, filter results, generate reports, and use MargoAI to gain deeper insights into a service user's incidents

Takes 5 minutes

For: Managers & Seniors

Updated: 27th July 2026

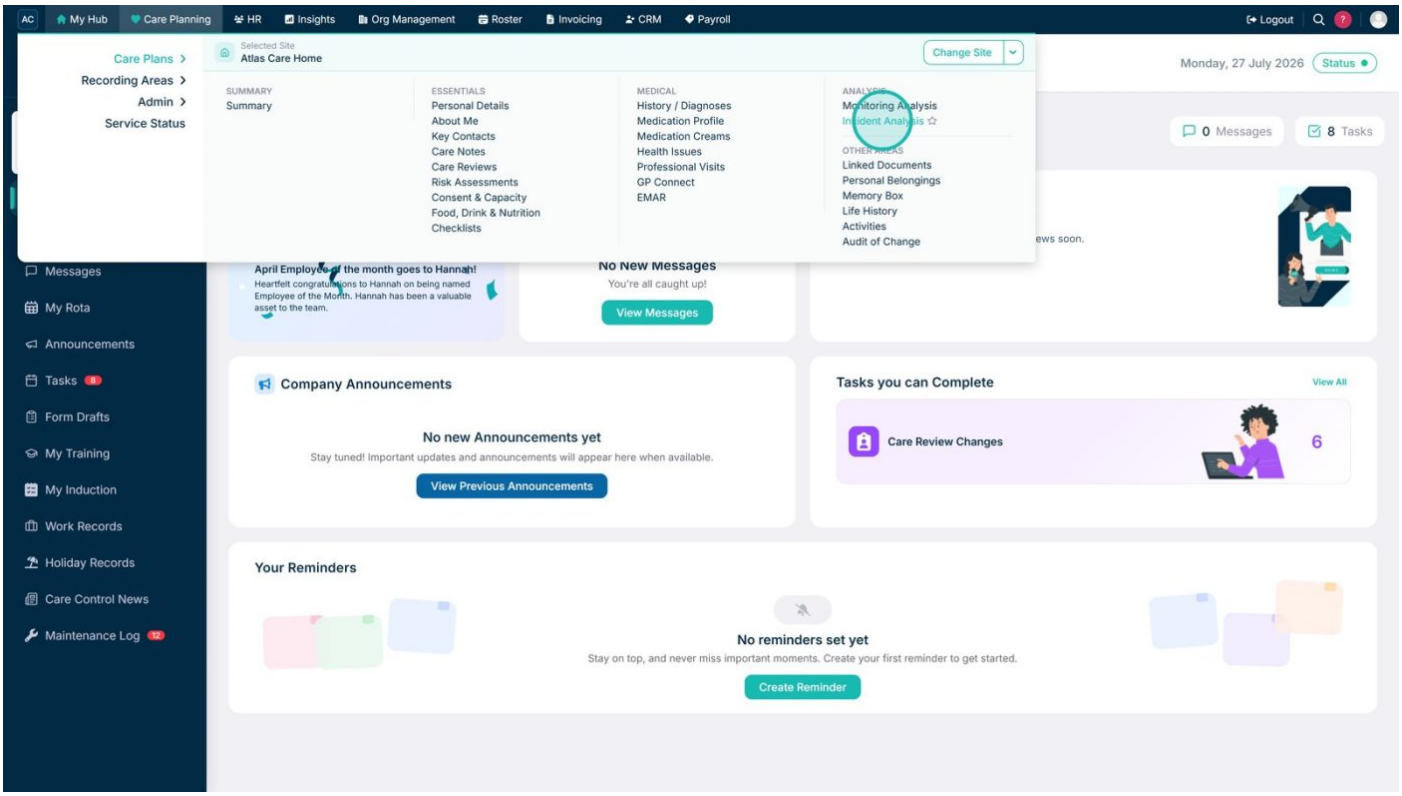
Introduction

Incident Analysis provides a comprehensive view of incidents recorded for a service user. You can review incident trends, apply filters, view detailed records, generate reports, and use MargoAI to identify patterns and produce AI-powered summaries.

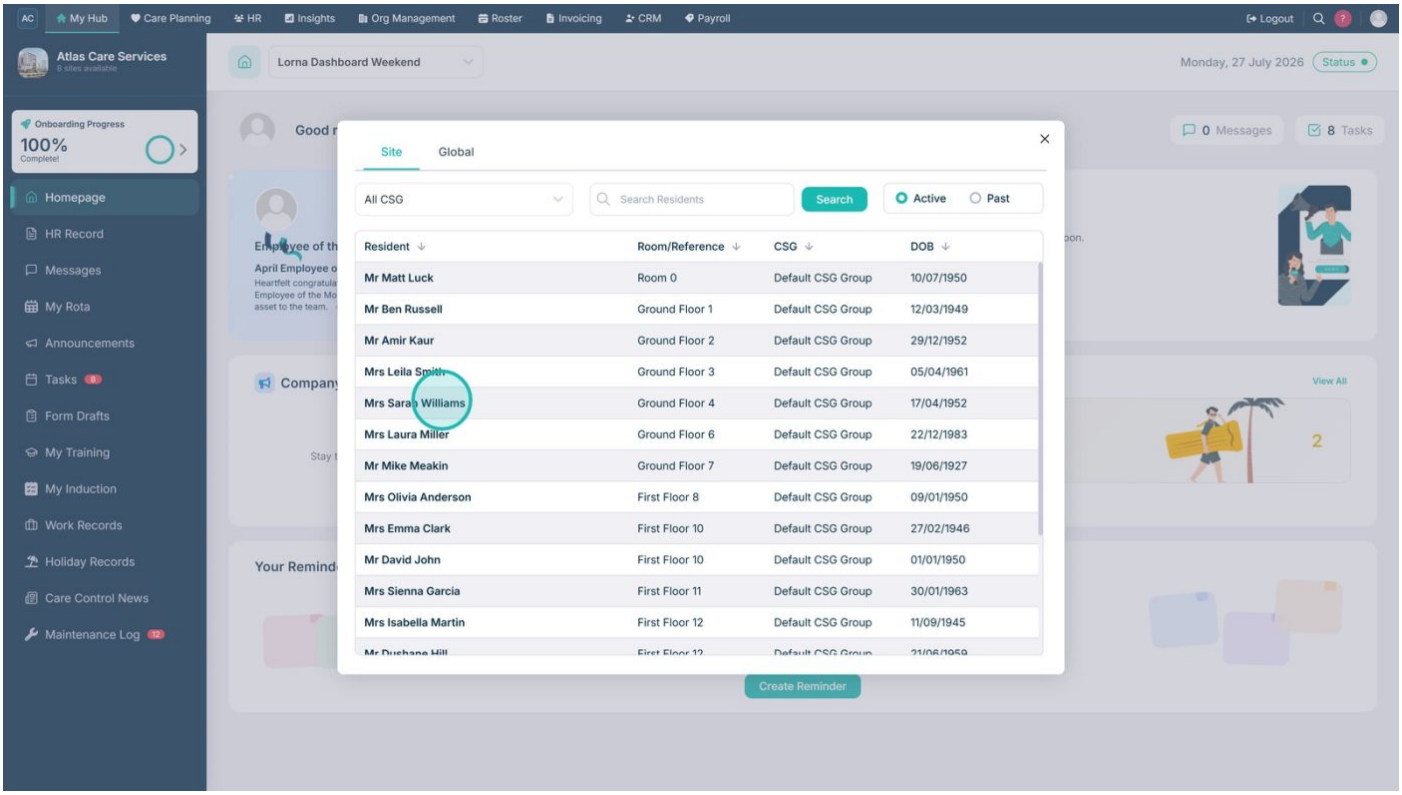
In this guide you'll learn how to:

- Open Incident Analysis and select a service user
- Review incident summaries and trends
- Filter analysis by date, incident type, and location
- View detailed incident records
- Generate reports and analyse incidents with MargoAI

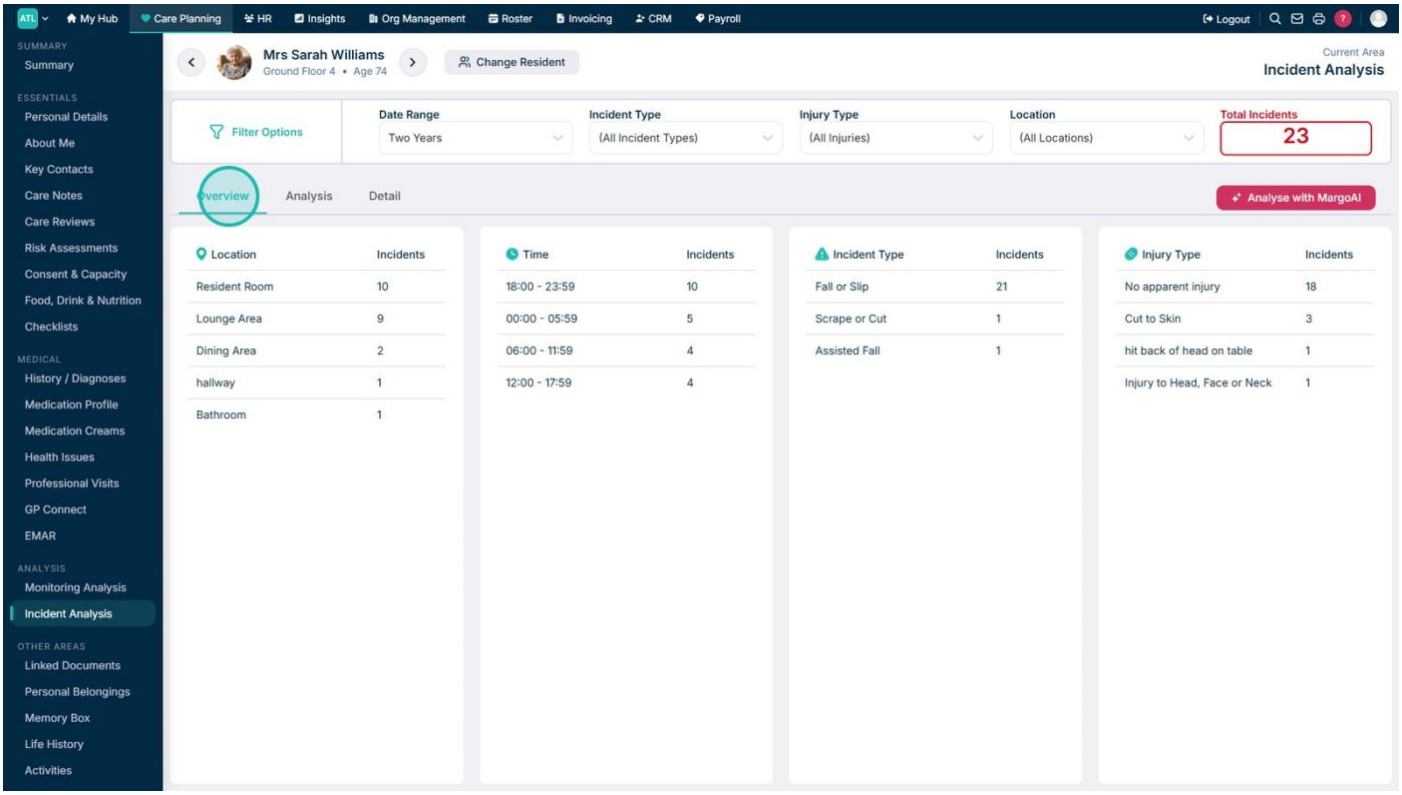
Open Incident Analysis from the left-hand menu.



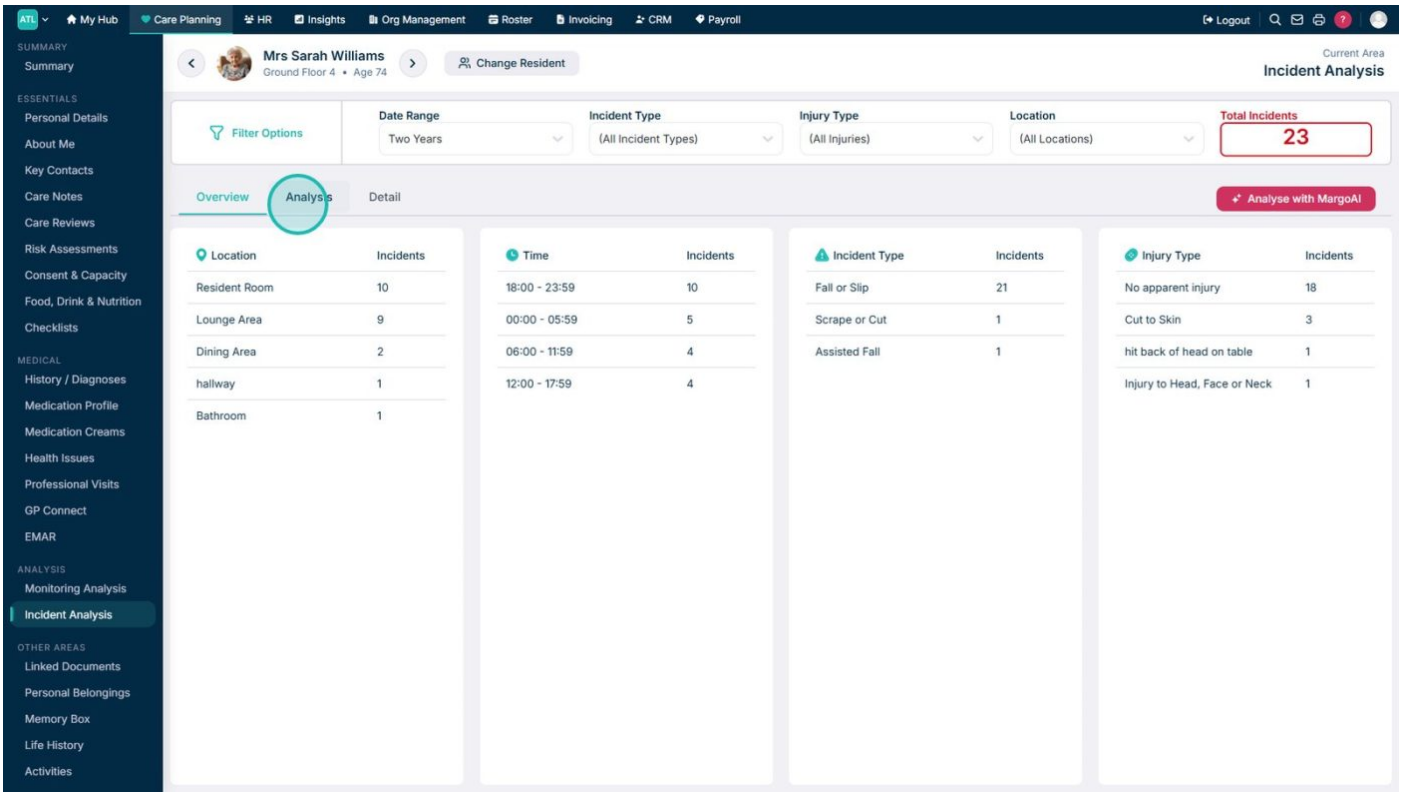
Select the service user you want to analyse.



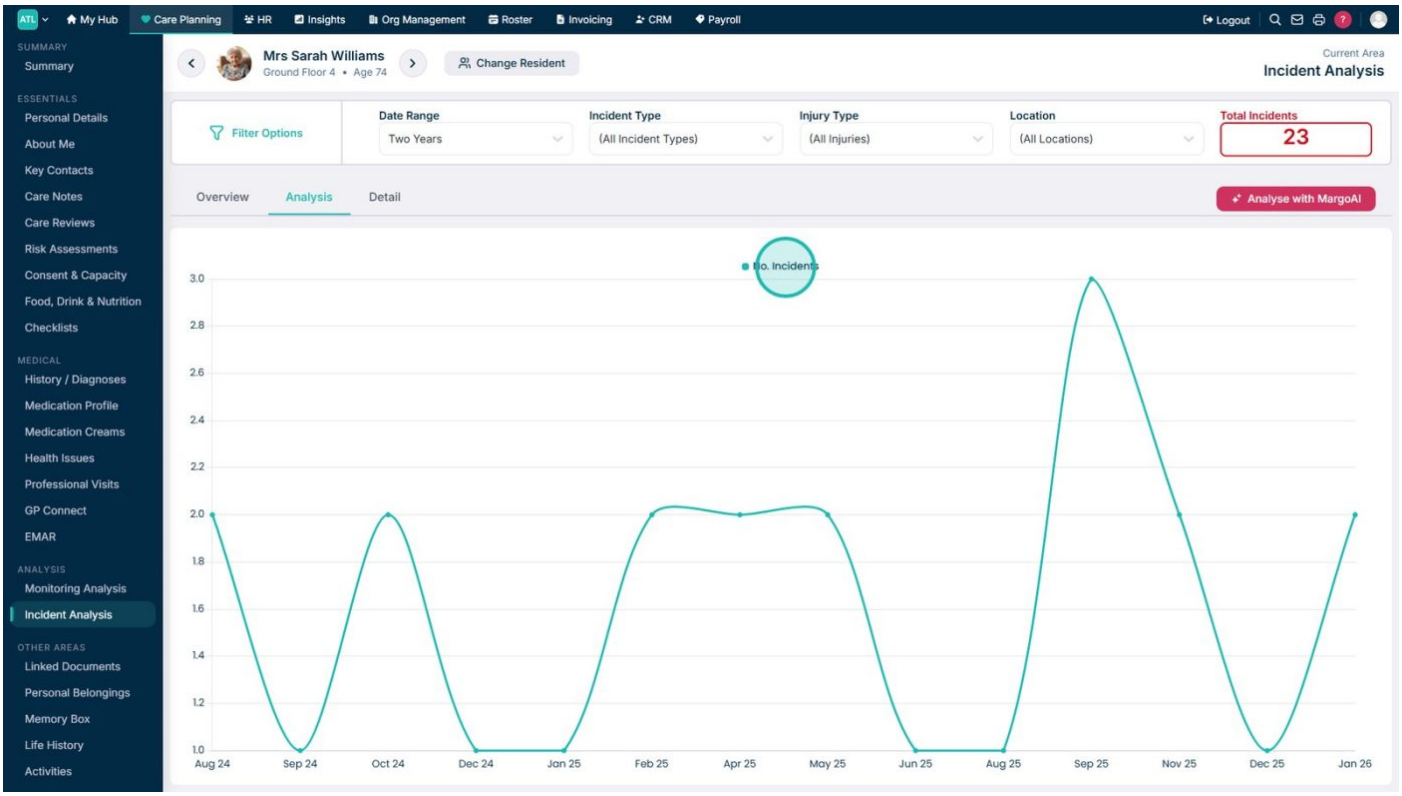
Review the incident overview, including location, time, incident type, and injury.



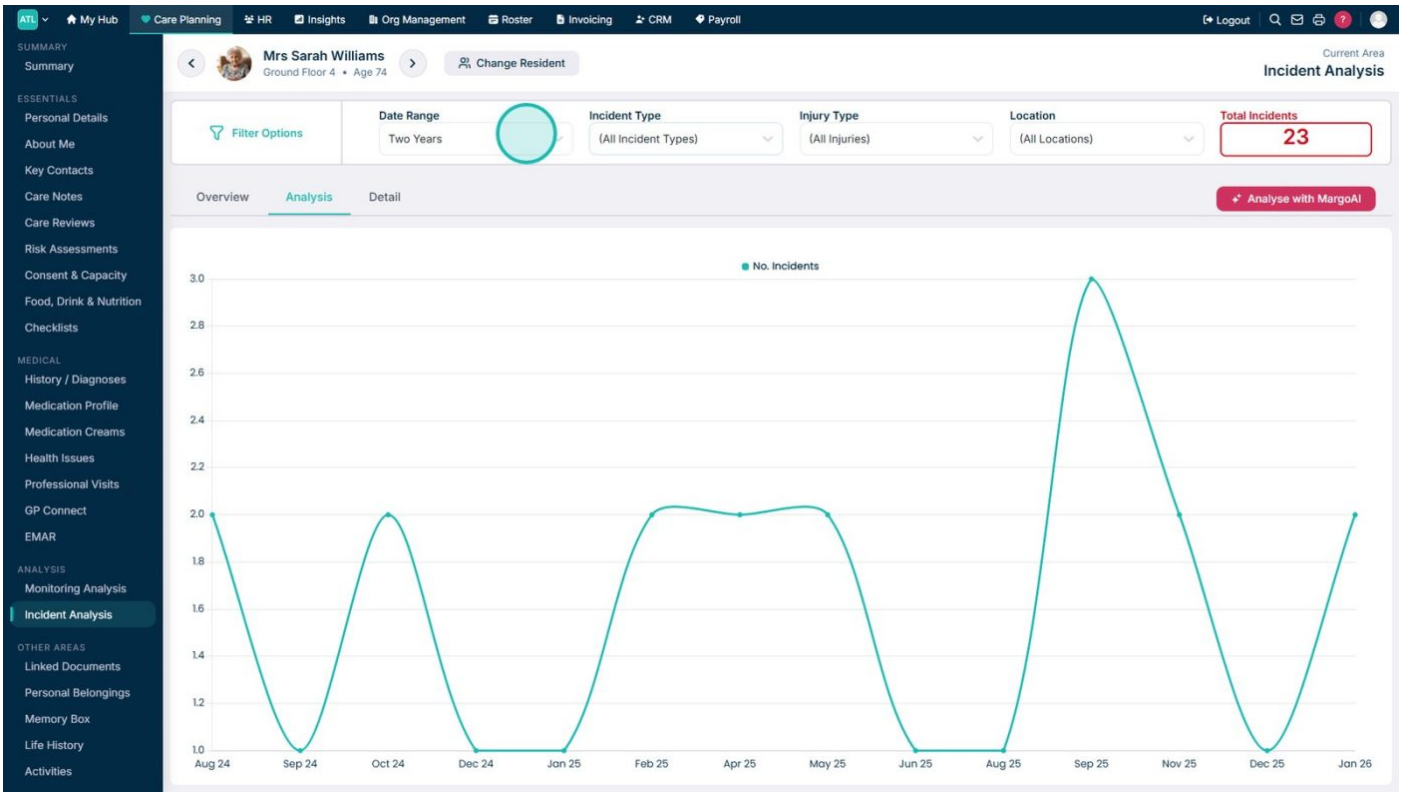
Open the Analysis tab to view incident trends and statistics.



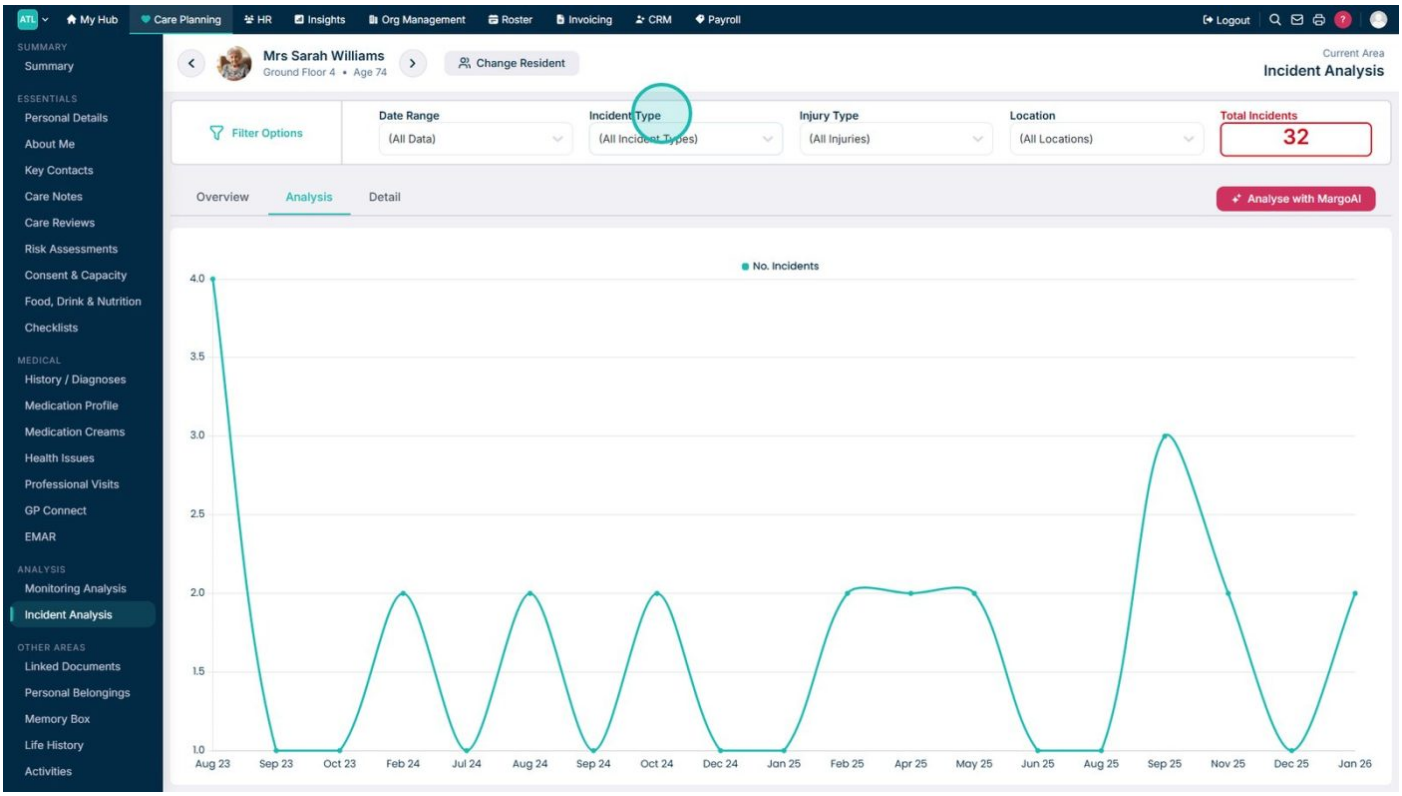
Review the incident trend chart for the selected period.



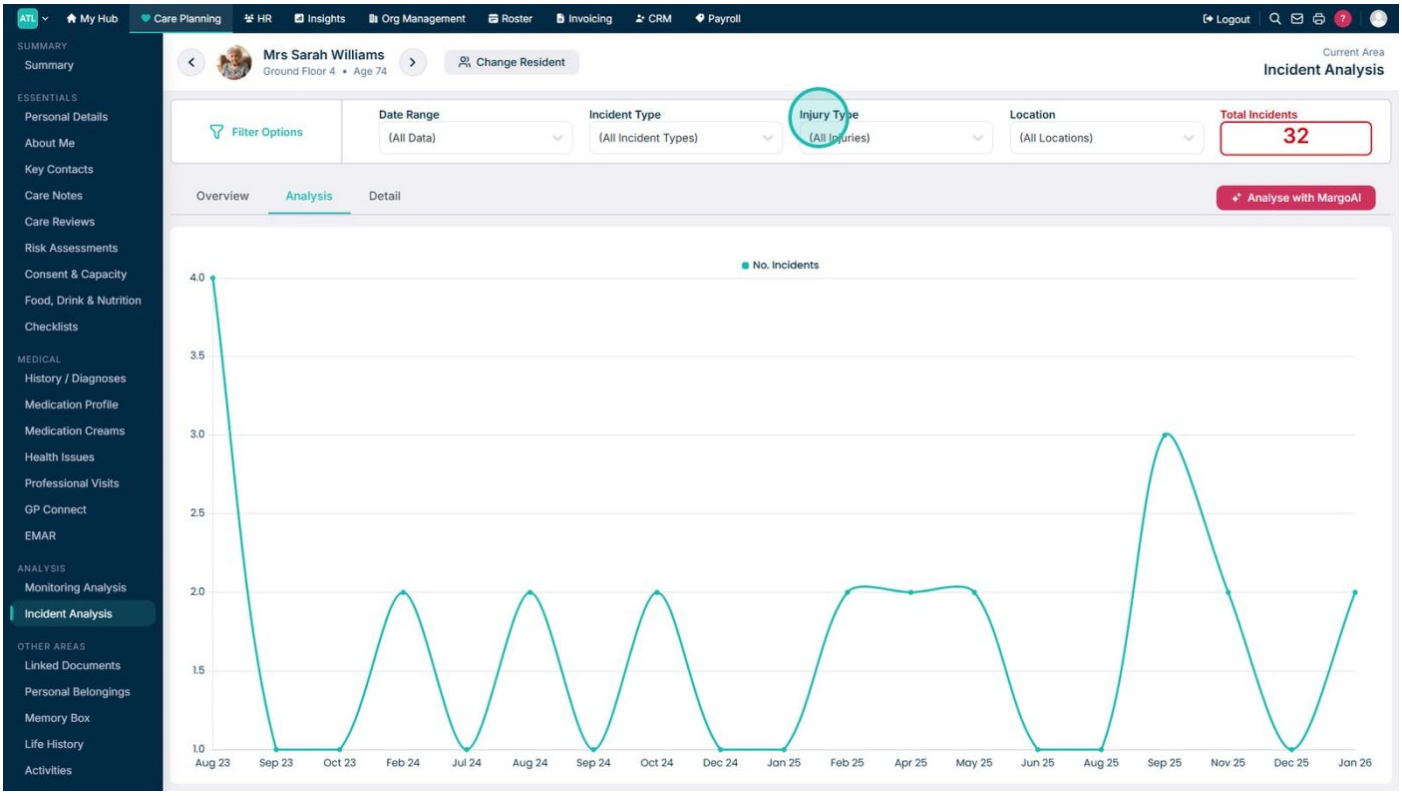
Select a date range to change the analysis period.



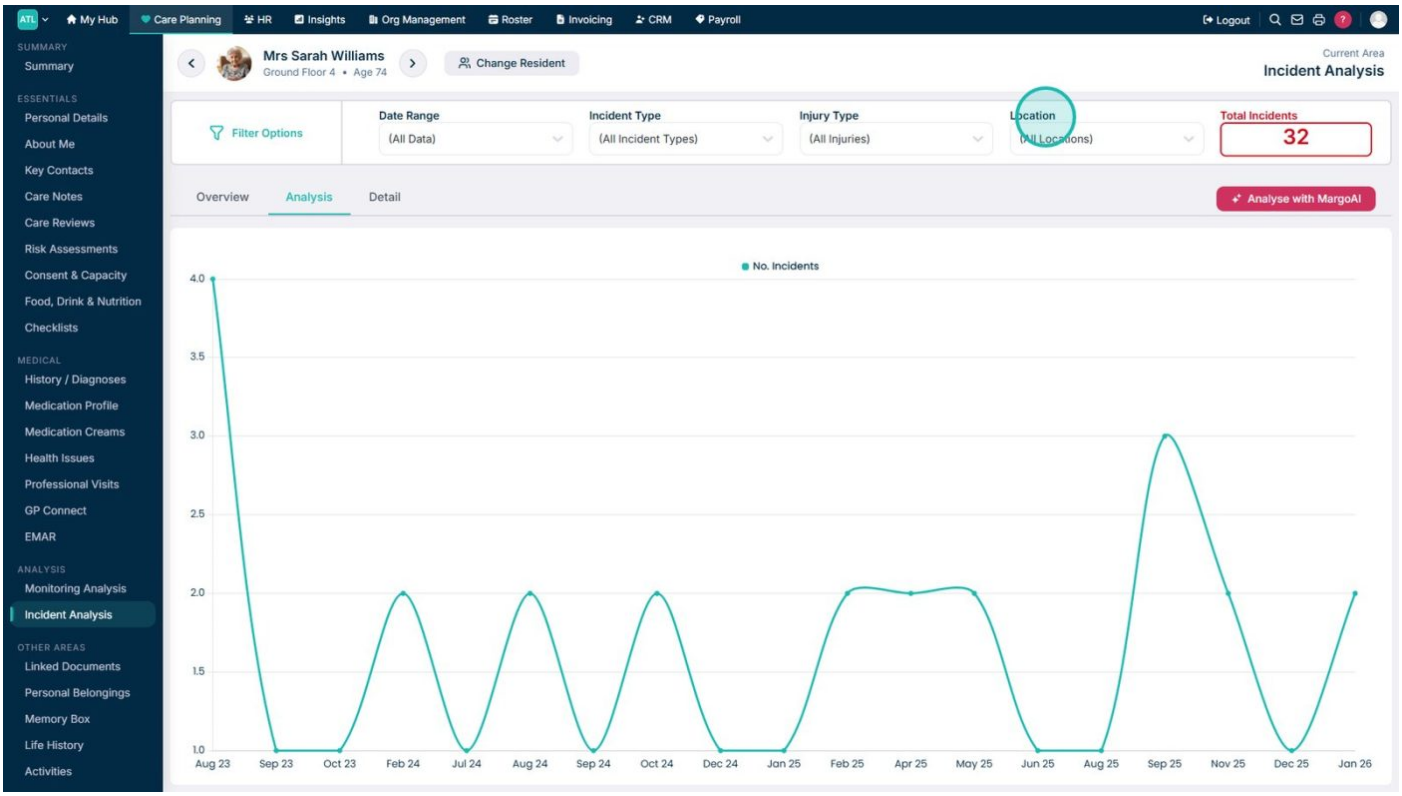
Select an incident type to filter the analysis.



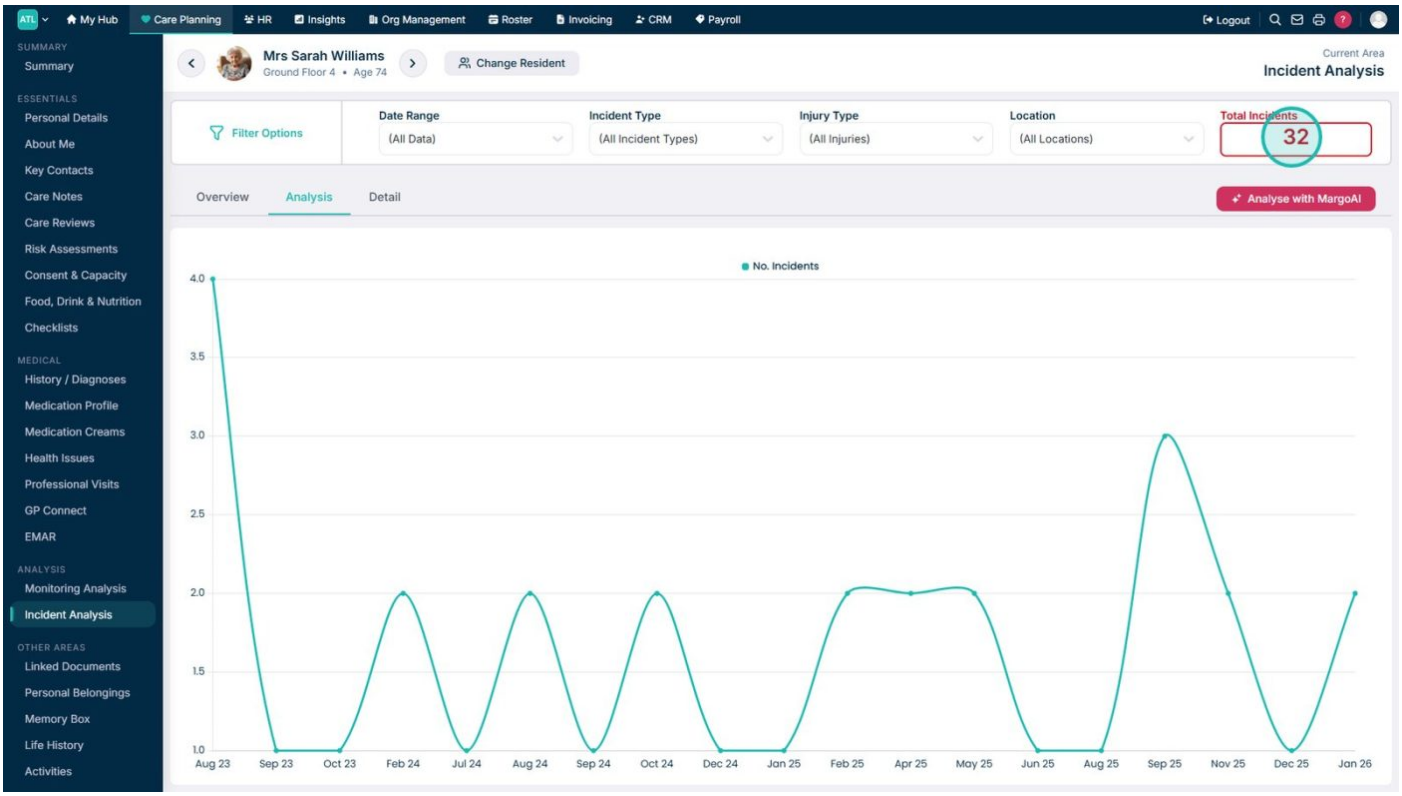
Review the Incident Analysis dashboard.



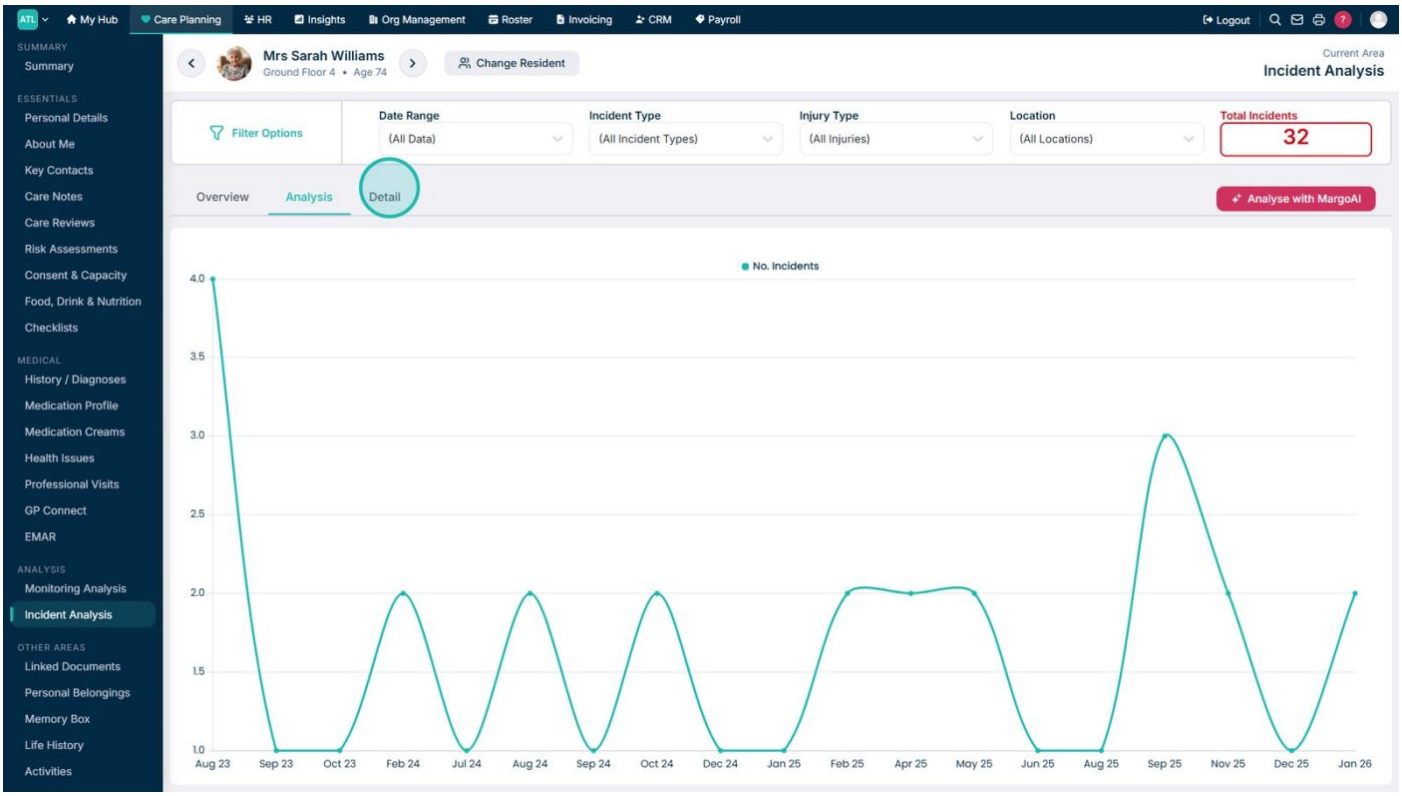
Select a location to filter incidents by area.



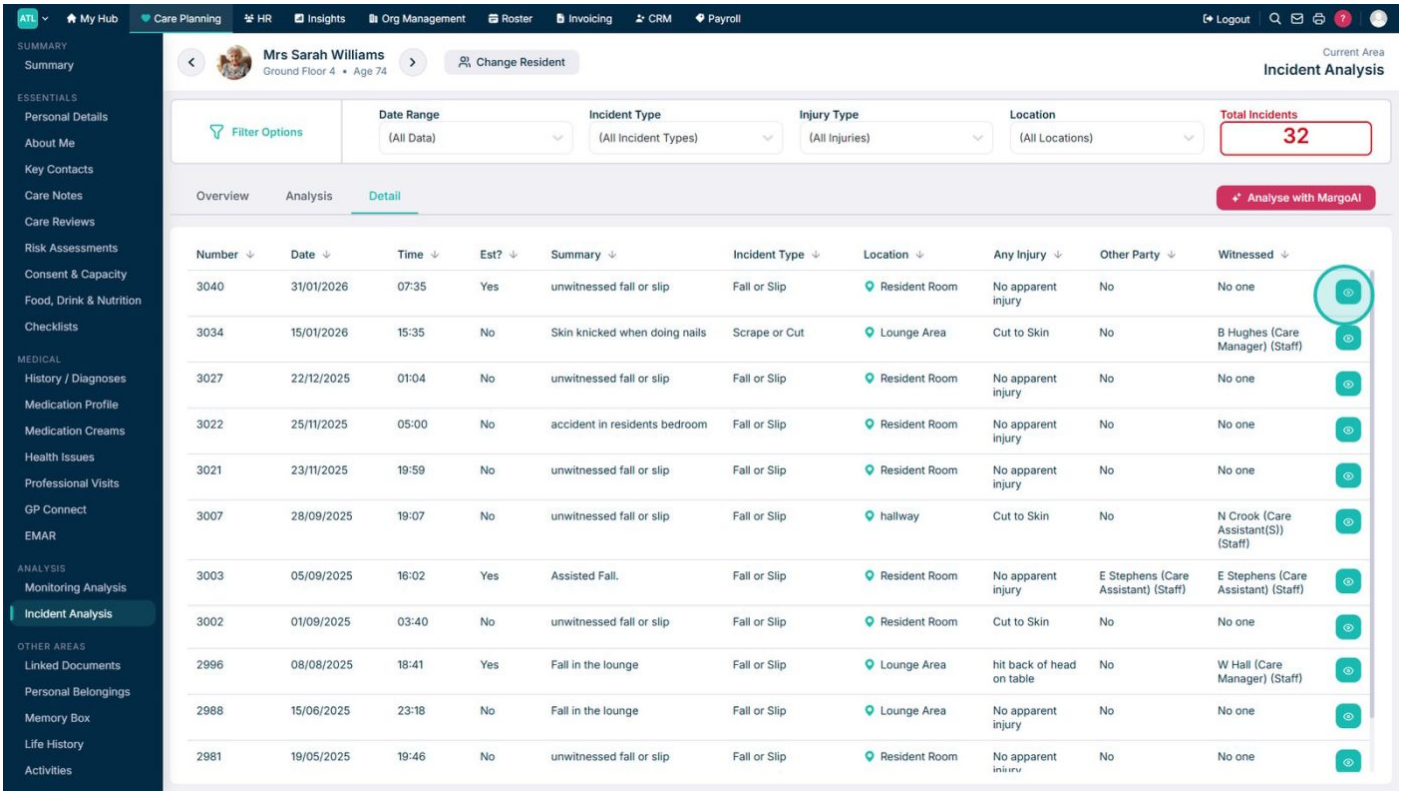
Review the total number of incidents for the selected filters.



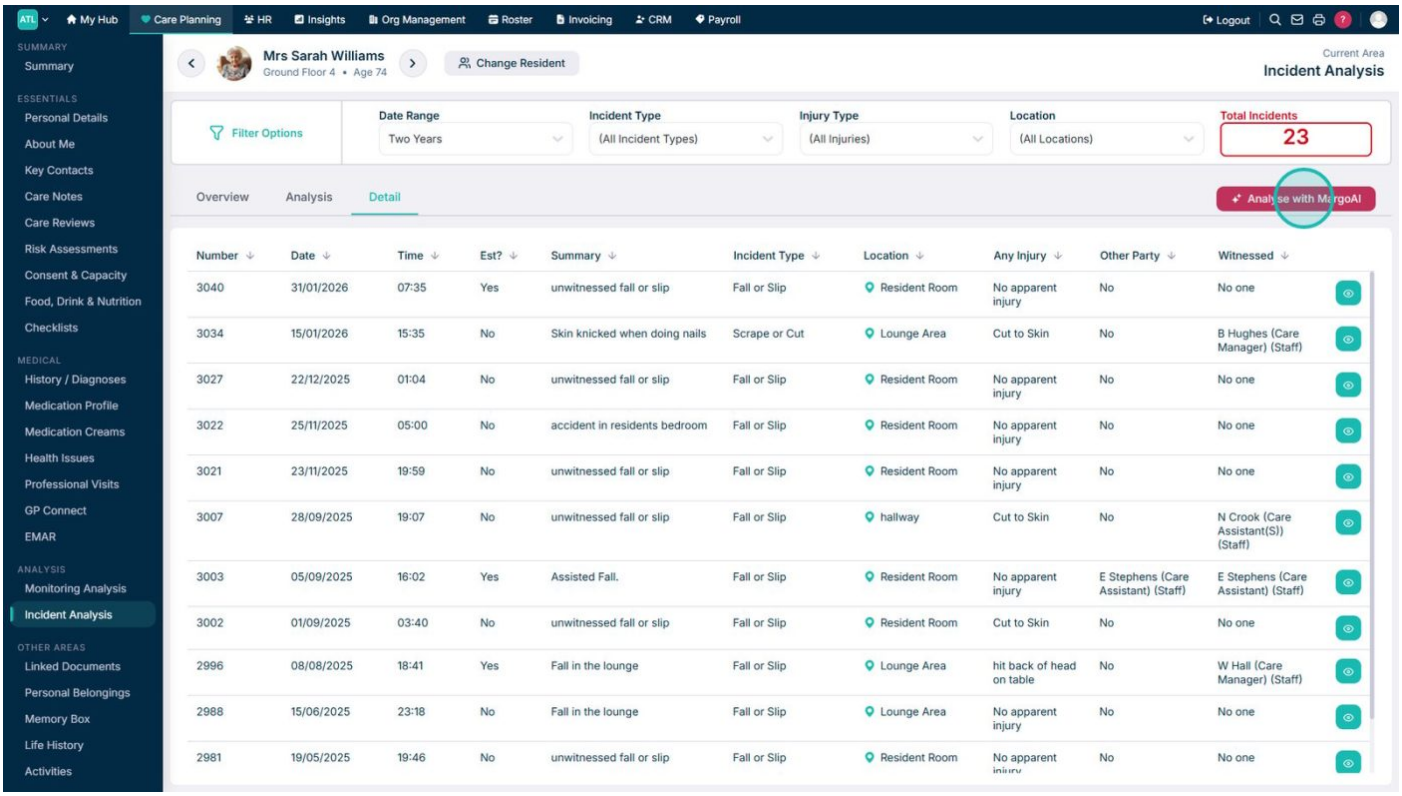
Open the Detail tab to review individual incidents.



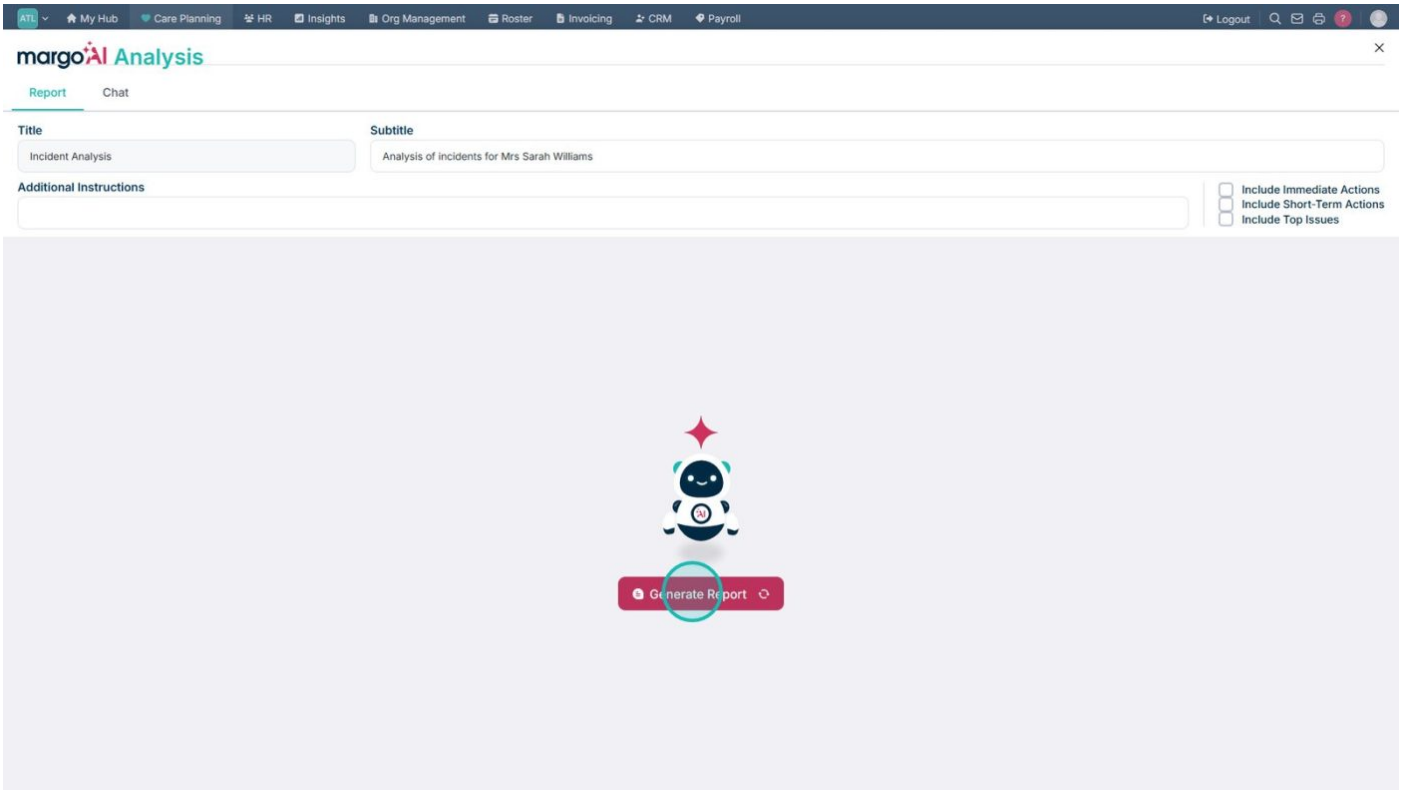
Select View to open a detailed incident record.



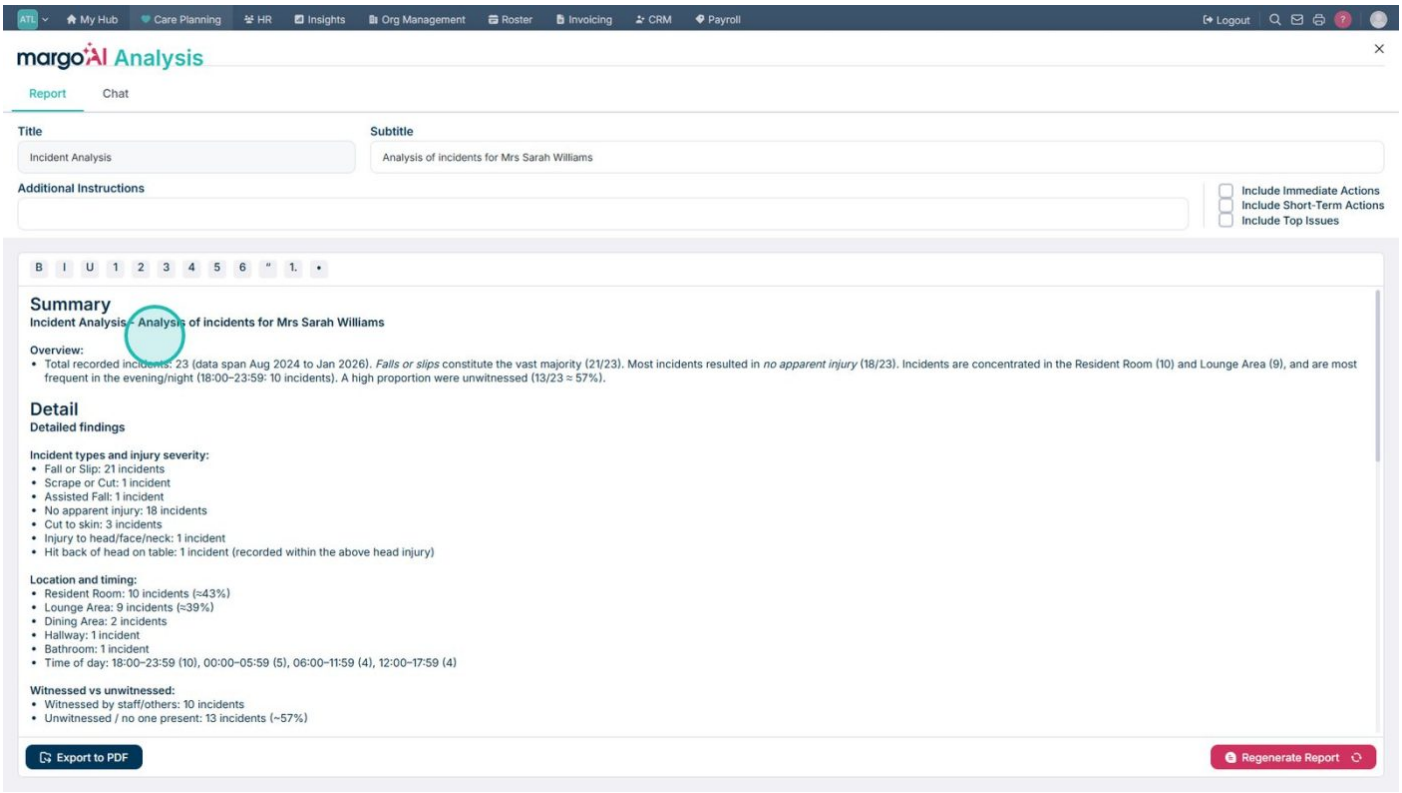
Select Analyse with MargoAI to generate AI-powered insights.



Select Generate Report to create an incident analysis report.



Review the completed incident analysis report.



Top tip

Use the filters to narrow your analysis before generating reports or using MargoAI for more targeted insights.

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