

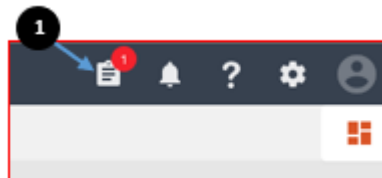
TASK MANAGEMENT (actions and tasks)

This guide outlines the process of managing tasks that have been assigned to an individual in a Management Plan.

The person assigned as responsible for managing a report in AIMS, completes a Management Plan and identifies tasks that need to be actioned to remove or mitigate the risk(s) associated with an incident or hazard reported in AIMS. These tasks are then assigned to someone to complete before the report can be finalised and closed.

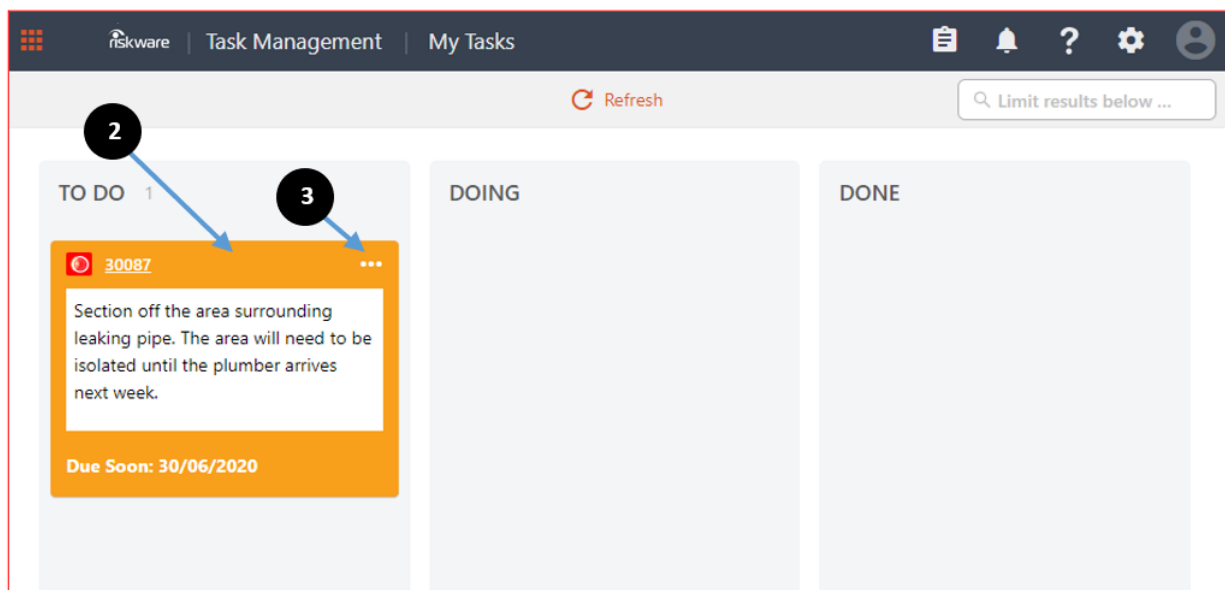
If you are allocated a task, you will receive an automated email notification outlining what needs to be done and with a link to AIMS.

Log into AIMS and click on the **'My Tasks'** icon **1** in the navigation bar, located in the top right-hand side of the screen.



Note, the **'My Tasks'** icon will display a red circle with the number of tasks that require your action.

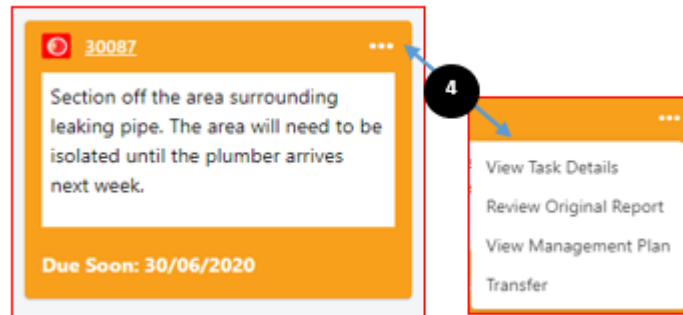
In **'My Tasks'** you will notice 3 columns labelled **'To Do'**, **'Doing'** and **'Done'**. These columns sort tasks based on their status.



Hover over the **task card** **2** and click on the **'...'** icon **3** to view available actions. Once you click on the **'...'** icon, you will see a **drop-down list** **4** of actions.



Note you can **review the original incident or hazard report** and **view the management plan** at any time by selecting the relevant actions in the drop-down list.




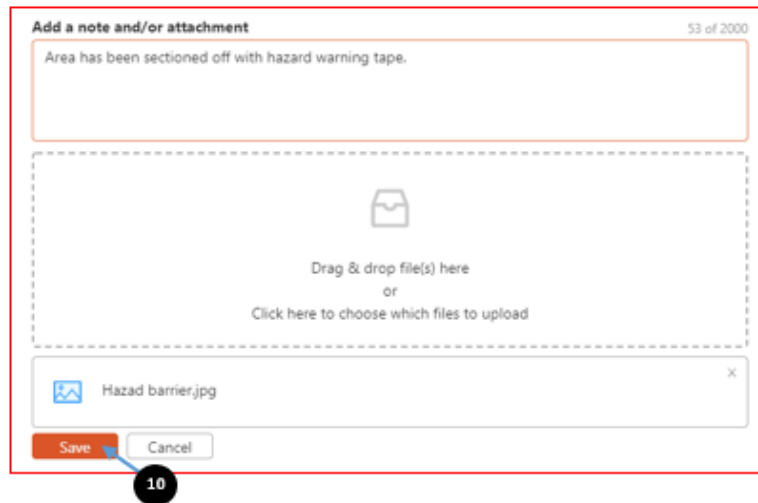
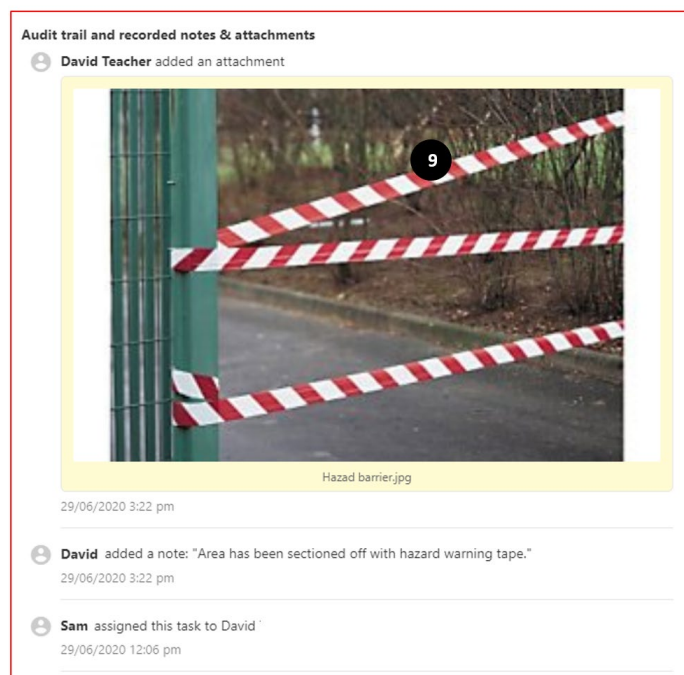
Click on '**View Task Details**' in the drop-down list to display the '**Task Details**' drawer on the right side of the screen.

The '**Task Details**' drawer displays a **task description** ⑤, **progress bar** ⑥, **audit trail, recorded notes and attachments** ⑦.

Click the '**Add a note and/or attachment**' ⑧ field to update the task with relevant information.

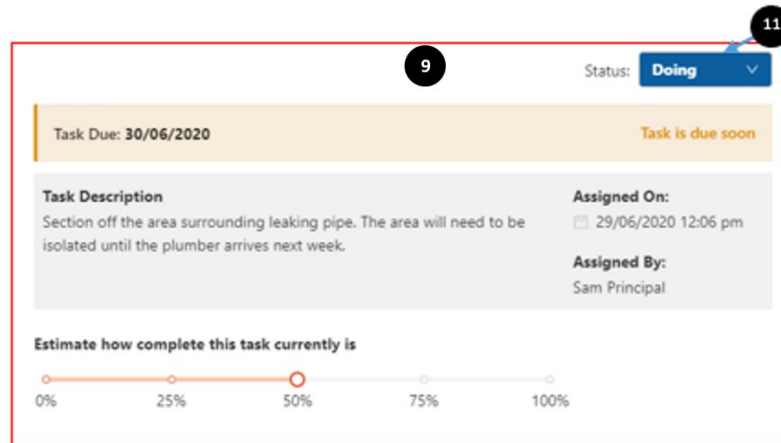
The notes field will expand and allow you to type free text. You can also drag and drop files or click to choose files to upload in the **marked area** ⑨. Once you have added in notes and/or an attachment (optional), click '**Save**' to submit your updates.

 Please note you can only upload one attachment at a time. If you wish to add additional attachments, click the ‘**Save**’ **10** button to upload before proceeding to the next attachment.

You will now see your notes and attachment added to the **audit trail**.

You can use the progress bar to record an estimate of how complete the task is. Note: updating the progress bar will change the **status field** **11** of the task to ‘**Doing**’.



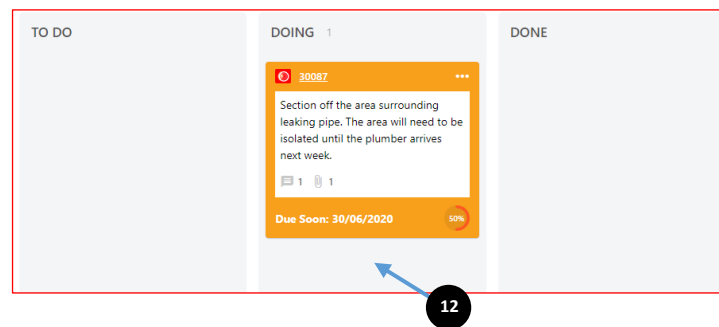
Task card edit form. At the top right, a status dropdown menu is set to 'Doing' (labeled 11). Below it, a yellow banner shows 'Task Due: 30/06/2020' and 'Task is due soon'. The main area contains a 'Task Description' field with the text 'Section off the area surrounding leaking pipe. The area will need to be isolated until the plumber arrives next week.' To the right, 'Assigned On:' is '29/06/2020 12:06 pm' and 'Assigned By:' is 'Sam Principal'. At the bottom, a progress slider is labeled 'Estimate how complete this task currently is' with markers at 0%, 25%, 50%, 75%, and 100%. The slider is currently positioned at 50% (labeled 9).

Click '**OK**' to save your selection.



Two buttons: 'Cancel' and 'OK'.

Note, a change in the status of your task will automatically move your task from the '**To Do**' column to the '**Doing**' column in '**My Tasks**'. You will also see the estimation of how complete the task is, displayed on the task card **12**.



Task board view with three columns: 'TO DO', 'DOING 1', and 'DONE'. A task card is in the 'DOING' column. The card has a red status icon, ID '30087', the same description as the edit form, and a progress bar at the bottom showing 'Due Soon: 30/06/2020' and '50%'. A blue arrow points to the progress bar (labeled 12).

Once all tasks have been completed, and the task card is in the '**Done**' column, the report will automatically close.

Updated 25/08/2023