

INVITING AND TRANSFERRING

This guide outlines how to invite others to view an injury/illness, near miss or hazard report in [AIMS](#), how to transfer a report for someone else to manage and how to transfer a task for someone else to complete. This guide is relevant to anyone who has been assigned to manage a report or complete a task in the Management Plan.

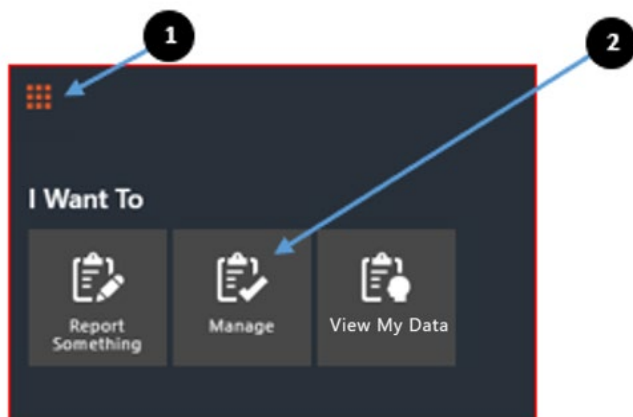
Employees with the responsibility of managing a report, can invite others to view the report as well as transfer a report to another person to manage. Additionally, an employee that has been assigned a specific task to complete can transfer the responsibility of the task to another person.

Inviting may be required in situations where you need specific advice to help formulate the Management Plan and the invitees have read and write access to the report, but you retain management responsibility. You can invite anyone in your organisation.

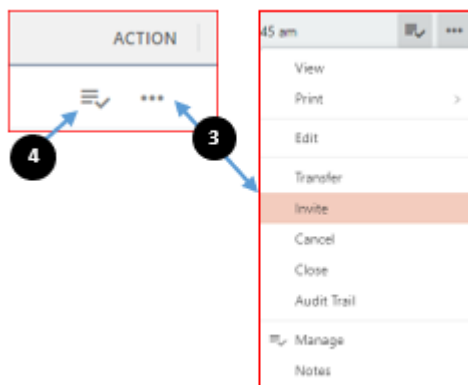
Transferring may be required in situations where the management of a report requires relevant expertise or escalation to a more senior person. When you transfer a report, you will no longer have access to it. You can transfer to anyone in the organisation.

Inviting others to view a report

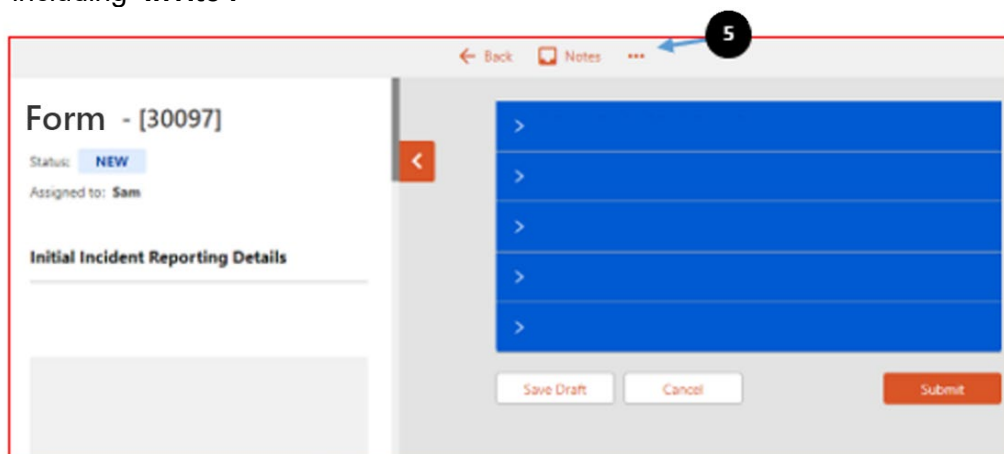
1. Log into [AIMS](#) and launch 'Manage' - Click on the **Menu button ①** in the top left corner to select 'I Want To' **Manage ②**.



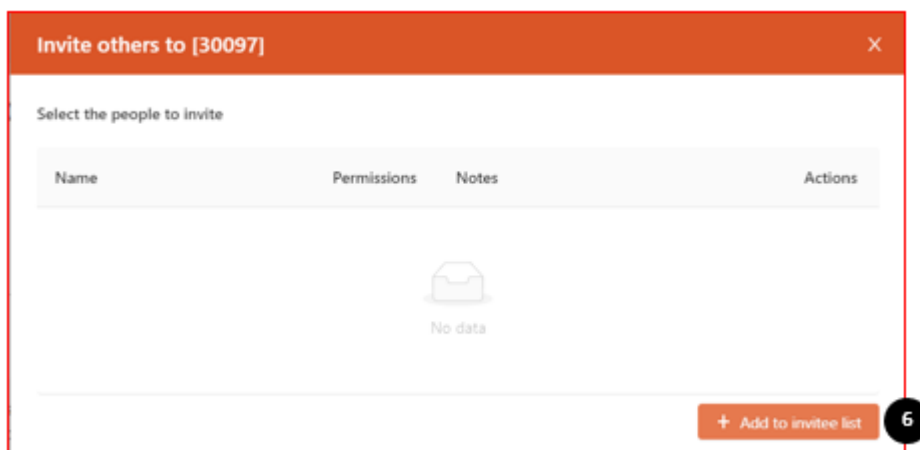
2. You will see the **Manage Register**, a register of reports assigned to you to manage.
3. Once you have found the report you wish to manage, scroll to the '**Action**' column on the far-right side of the table.
4. Clicking on the '...' icon **③** will display a drop-down list of actions available to you, including the '**Invite**' function



Alternatively, you can click on the **'Manage'** shortcut 4 to go the **Management Plan** and click on the **'...'** icon 5 on the toolbar at the top of the page, to display a drop-down list of actions including **'Invite'**.



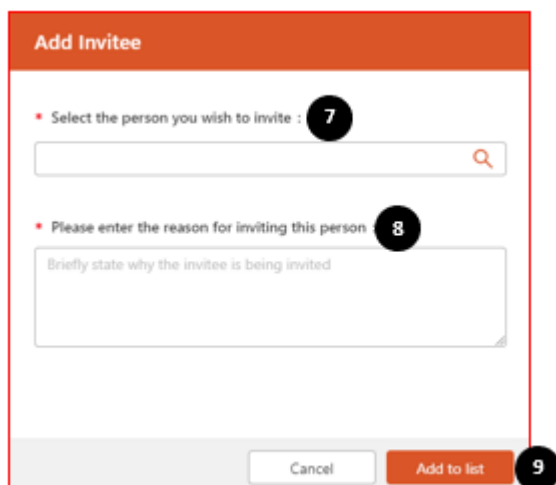
5. Once you select **'Invite'** you will see a drawer on the right. Click on **'+ Add to invitee list'** 6 to proceed.



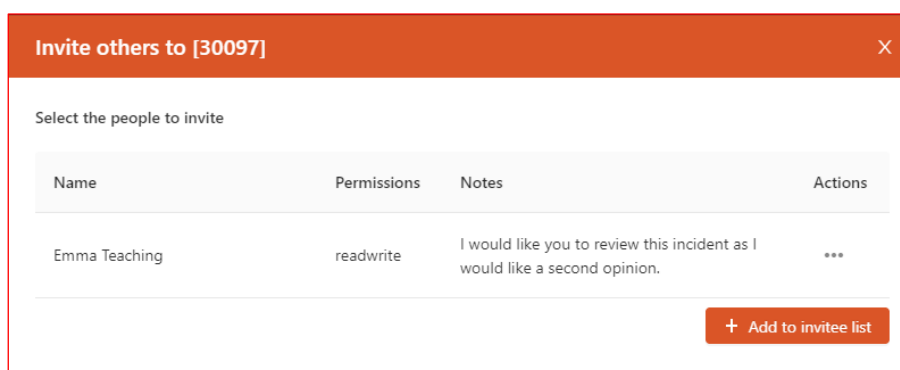
Now you select the person you wish to invite.

6. Click on the **invitee name** field 7 and begin typing to initiate a search. Alternatively you can press Enter to search and scroll down a list of staff names.
7. Use the **invite reason** field 8 to briefly state why you are asking this person to view the report.

8. Once you have completed all the details, click the **'Add to list'** button **9**.



You will now see the invitee listed in the table.



Name	Permissions	Notes	Actions
Emma Teaching	readwrite	I would like you to review this incident as I would like a second opinion.	...



You can invite multiple people to view the report. Click on **'+ Add to invitee list'** to add the next person you wish to invite (optional).

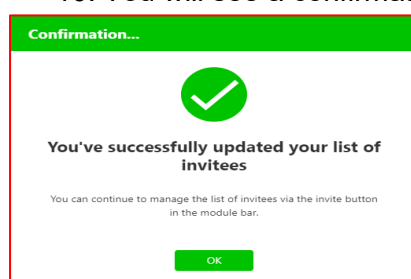


Note all invitees will have **read and write** access to the report.

9. Click **'Update'** on the bottom right side of the screen to send the invitation.



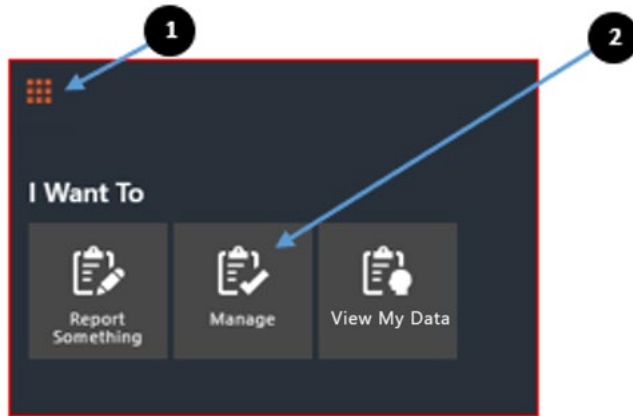
10. You will see a confirmation pop-up. Click **'OK'** to continue.



Note each invitee will receive an email notification with a link to the report. Invitees will be able to see the report in their 'Manage' Register. The invitation will also be recorded in the report's audit trail.

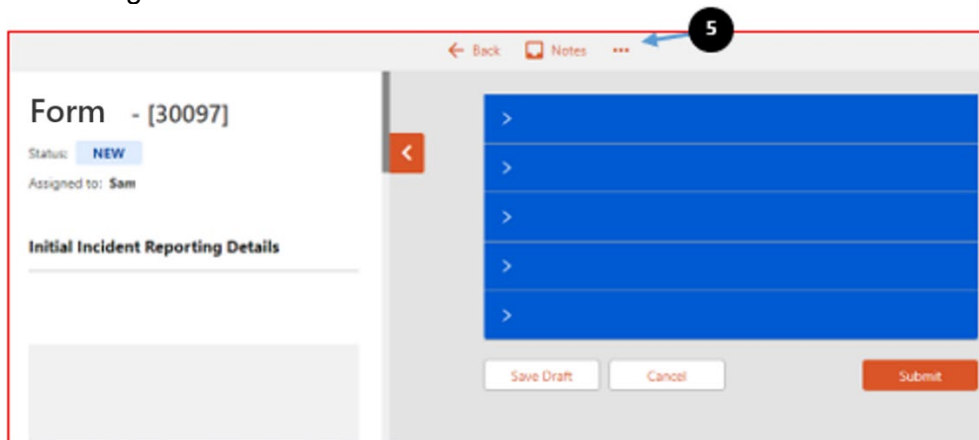
Transferring a report

1. Launch Manage - Click on the **Menu button ①** in the top left corner to select 'I Want To' 'Manage' **②**.



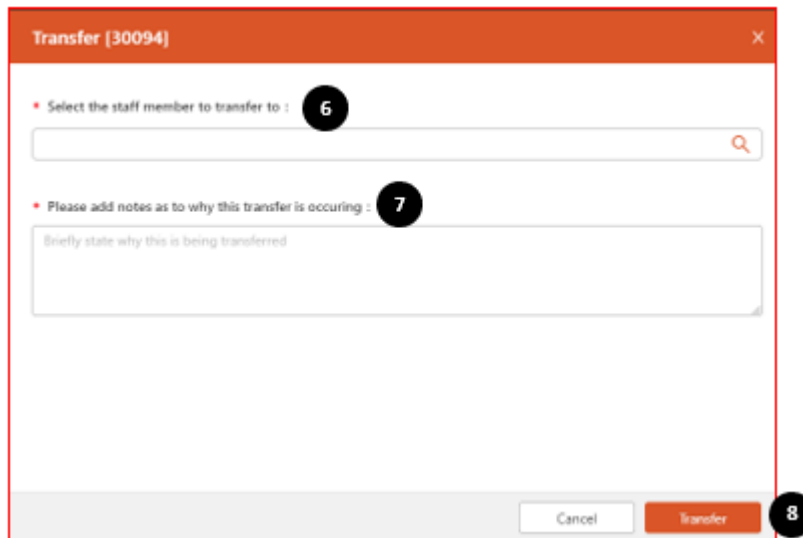
You will see the **Manage Register**, an overview of reports assigned to you.

2. Once you have found the report you wish to manage, scroll to the '**Action**' column on the far-right side of the table.
3. Clicking on the '...' icon **③** will display a drop-down list of actions available to you, including the '**Transfer**' function.

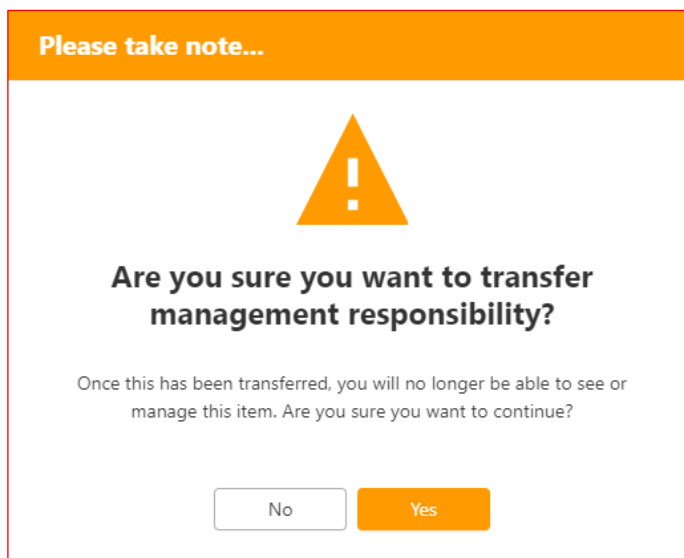


Once you select '**Transfer**' you will see a drawer on the right.

4. Click on the **staff member** field **⑥** and begin typing the name of the person you wish to transfer the report to. Alternatively you can press Enter to search and scroll down a list of staff names.



5. Use the **notes** field **7** to briefly state why you are transferring the report. When all fields have been completed, click the **'Transfer'** button **8**.
6. A pop-up will ask you to confirm the transfer. Note, once the transfer occurs, you will no longer be able to see or manage the report. Select **'Yes'** to continue.



The report has now been transferred. The person you selected will receive an email notification advising that they have been assigned as the manager of the report. The transfer will also be recorded in the report's audit trail.



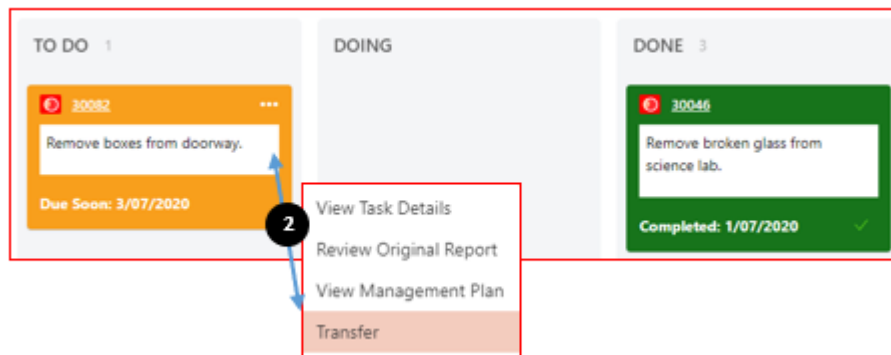
The report will be permanently removed from your Manage Register.

Transferring a task

1. Launch My Tasks
2. Click on the **'My Tasks'** icon ❶ in the navigation bar, located in the top right-hand side of the screen and you will be in the Task Management screen.



3. Hover over the **task** you wish to transfer and click on the **'...'** icon ❷ to view a drop-down list of available actions. Click on **'Transfer'** function.



Once you select **'Transfer'** you will see a drawer on the right.

4. Click on the **staff member** field ❸ and begin typing the name of the person you wish to transfer the report to. Alternatively you can press Enter to search and scroll down a list of staff names.
5. Use the **notes** field ❹ to briefly state why you are transferring the task.
6. When all fields have been completed, click the **'Transfer'** button ❺.



When transferring a task, you **will not** receive a pop-up asking you to confirm the transfer.

The task has now been transferred. The person you selected will receive an email notification advising that they have been assigned the task. The transfer will also be recorded in the task's audit trail.