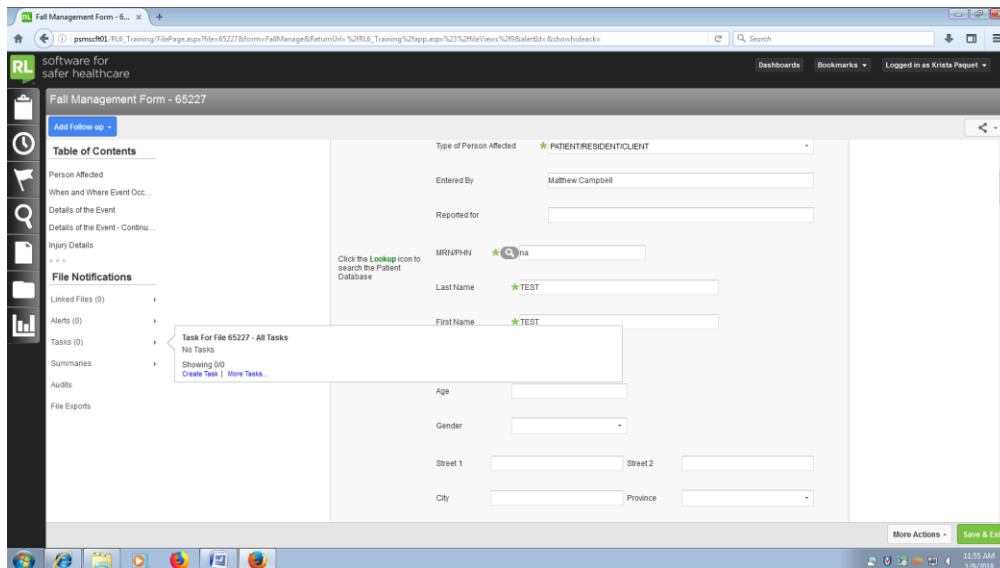# Provincial Safety Management System

Tasks

Step 1

Go to your **Info Center** and select the incident event by clicking on the underlined **File ID** number i.e.: <u>12345</u> to open the event.

Step 2

To create tasks within a file:

1. Click on Tasks located under **File Notifications** on left hand side of screen. The *Tasks* dialog opens as seen in this screen shot.

2. Click on Create Task. A window will open for you to complete the necessary task fields.

3. Complete the mandatory fields (*) as well as all other necessary fields. Be sure to delete your name from the **Re-Assign to** box and *replace it with the person you are sending the task to* by entering their name in the **Re-Assign to** box.

4. Put your task in the Description Box.

5. Select a reminder date. This should be a few days before the **Deadline Date**.

6. <u>Always</u> select the Email Notification box.

7. You have the option to send the email to yourself (Creator) and the Assignee **OR** just to the Assignee.

8. Once fields are completed select **OK. The Task has been now sent to the recipient. (Note:** If you would like to send another task to another person/recipient repeat the steps above.)

9. **To Save your task and exit the file:** Select **SAVE & EXIT** at bottom of page on right hand side.

10. **To Save your Task and continue working in the existing file:** Select the **More Actions** tab at the bottom of the right hand side and select from the drop down list **Save. Always** select **Save.** Then select **Exit.**

Step 3

To complete your task

1. Open up incident file as in Step 1.

2. Record action done for the Task by selecting **Add Follow Up** and then go to *Work Done on File - (***In the Subtype drop down list select "*Task Complete*" at the bottom of the drop down list and complete all necessary fields)**

3. Click on **ADD.** This will automatically save your work.

4. To show you have completed your task: Under **File Notifications** select **Tasks** and click on the word **Complete.** Please confirm to complete the task select **OK.**

5. Then select **More Actions** on bottom right hand side, and then select **Exit.**

Step 4

To Delete tasks that are completed

1. Select the white flag widget on the left hand side . Then select **My Completed Tasks** on the right hand side. Click on the box next to the Task ID number. Select the **MORE** tab at the top of the page then select **Delete Task**. Select **Yes** to complete confirmation. To

exit page select **Info Center** . To exit PSMS: Select **Logged in as** on the top right hand side of the page. Click on the drop down list and select **Logout**