

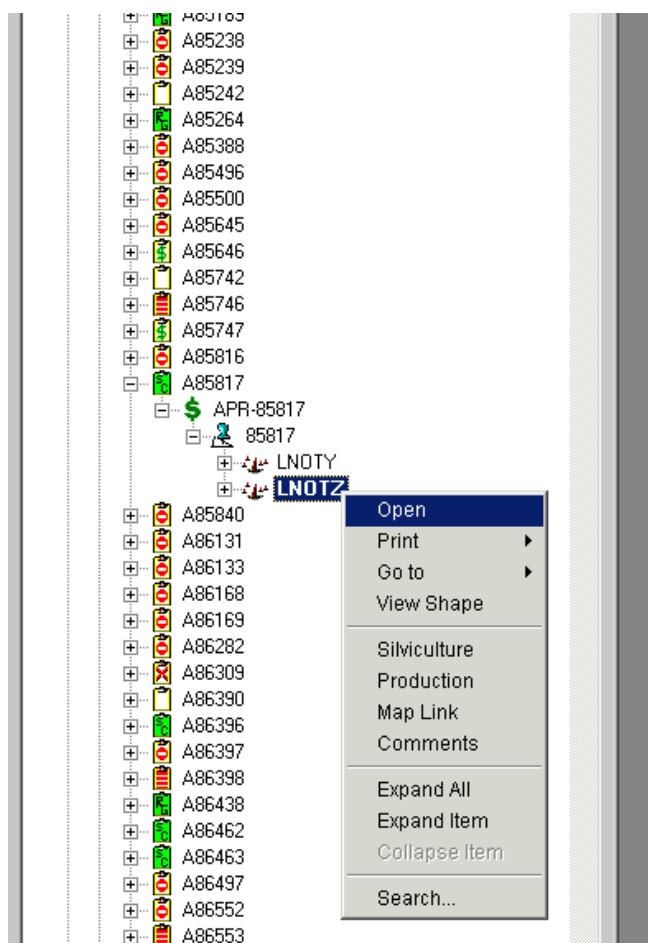
QUICK REFERENCE GUIDE- How to enter a new task and print the report.

This document was created to walk the user through how to create a new task that is important to communicate to all staff, various stakeholders and TSL holders. The document also walks you through how to open and run the report so you can communicate tasks at TSL preworks.

The document has two sections, how to create a new task and then how to run the report.

How to create a new task

- 1) Open Resources from DTS (Citrix Receiver) on your desktop or (<https://dts.gov.bc.ca/Citrix/XenApp/auth/login.aspx>) like you would normally.
- 2) When in resources, open the block screen of the block you need to enter the task for by right clicking and select open or by double clicking the block number.



- 3) Click on the task tab and this is what you are going to see when the task tab is clicked.

Mngmt Unit: Kamloops / Lic: A85817 / CP: APR-85817 / Mark: 85817 / Cut Block: LNOTZ

Details Allocation Activities Amendments **Tasks** Actions Cruise Sort Harvest Unit Inventory Timber Developed Stratification Transport Third Party Interest EMS

Issue: < All > Responsibility: < All > Overdue Items: ☐ Apply Filter

Target Date From: 0000/00/00 To: 0000/00/00 Completion Date From: 0000/00/00 To: 0000/00/00

Issue	Task Description	Responsibility	Target	Completion
Great Blue Heron	Communicate know presence	JASON YATES	0000/00/00	0000/00/00
<p>Province/Environment ☒ Government / Public ☐ Licensee Comments ☐ Forester Recommnd'ns ☐ Recomm Requirements</p> <p>of rookery in the adjacent stand (dropped block LN78H). TSL holder needs to be able to identify and stop operations if another rookery is found within or adjacent to the cutblock.</p> <p>Attachment</p>				
Invasive Plants	Communicate known presence	KAMLOOPS FIELD TEAM	0000/00/00	0000/00/00
<p>Province/Environment ☒ Government / Public ☐ Licensee Comments ☐ Forester Recommnd'ns ☐ Recomm Requirements</p> <p>Attachment</p>				
Range	Post harvest discussion with Range tenure	JASON YATES	0000/00/00	0000/00/00
<p>Province/Environment ☒ Government / Public ☐ Licensee Comments ☐ Forester Recommnd'ns ☐ Recomm Requirements</p> <p>Attachment</p>				

- 4) To insert a new task, make sure there is a blue highlight. To get this highlight, click next to the issue as identified in the screen capture. This will put a blue highlight under the headings like in the screen capture in #2.

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- 5) Click the "insert record" button. By doing this a new record will be inserted as shown below.

6) From here you can select the issue and enter the information in the boxes.

- Enter the issue

- Enter the task description, responsibility and target dates.

NOTE: When entering the field team as a responsibility and when running the report with a field team responsibility, users should always run their name and then the Field team name as well. The reasoning behind this is that with staff turnaround it is hard to know which individual are going to be working on which sale. **As part of the follow up process for Certification reporting (this report is part of the SFM matrix that is posted on the website), the report should be run**

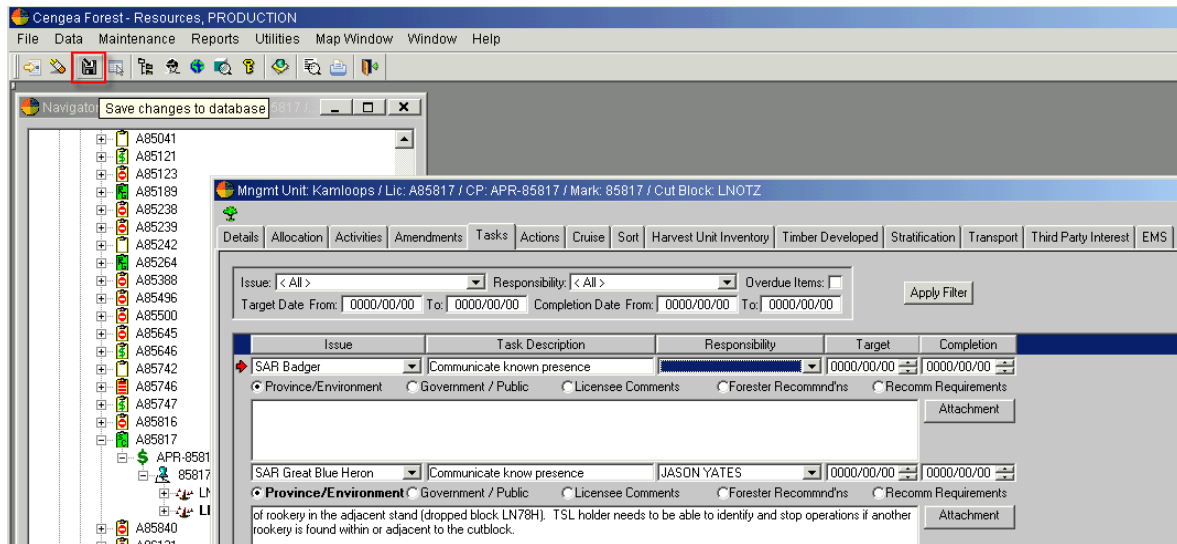
to check if complete dates have been entered or planned dates should be adjusted based on when the sale is to be sold. (Various responsibilities at this time)

Issue	Task Description	Responsibility	Target	Completion
SAR Badger	Communicate known presence	DEREK HETHERINGTON	0000/00/00	0000/00/00
SAR Great Blue Heron	Communicate know presence	DEVONA HAY	0000/00/00	0000/00/00

- Enter comments and add attachments so that all the necessary information is available

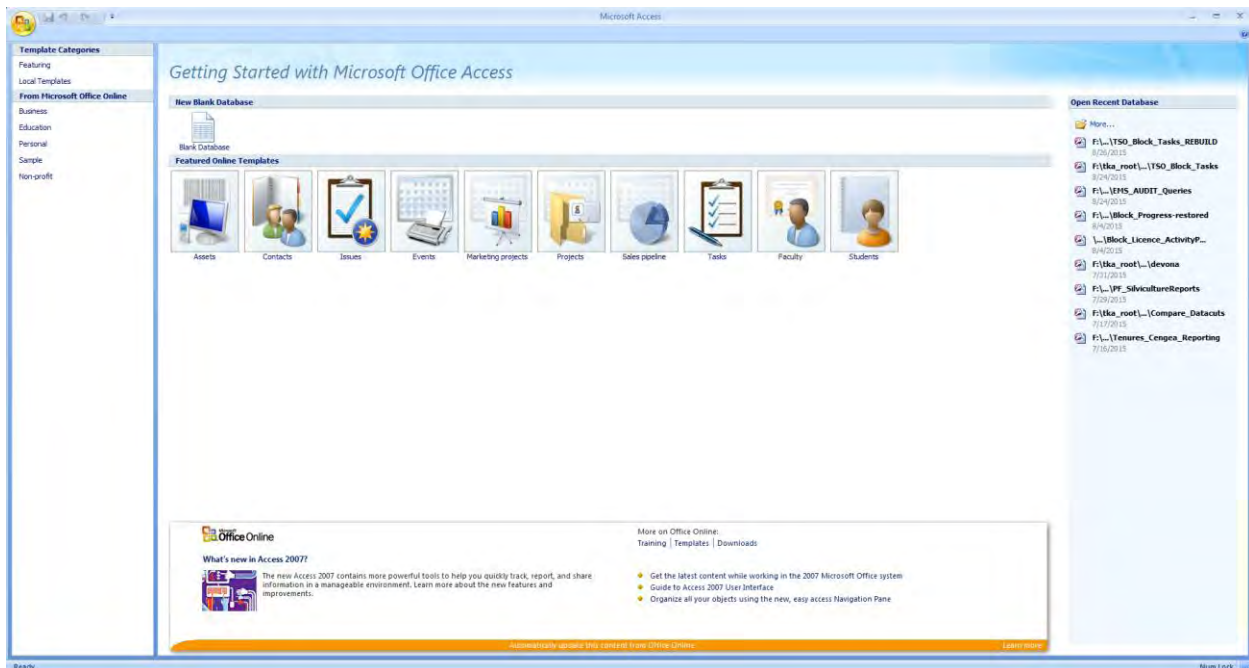
Issue	Task Description	Responsibility	Target	Completion
SAR Badger		DEREK HETHERINGTON	0000/00/00	0000/00/00
SAR Great Blue Heron	Communicate know presence	JASON YATES	0000/00/00	0000/00/00
Invasive Plants	Communicate known presence	KAMLOOPS FIELD TEAM	0000/00/00	0000/00/00

7) Don't forget to "save" the record.



How to create a printout of tasks – various methods

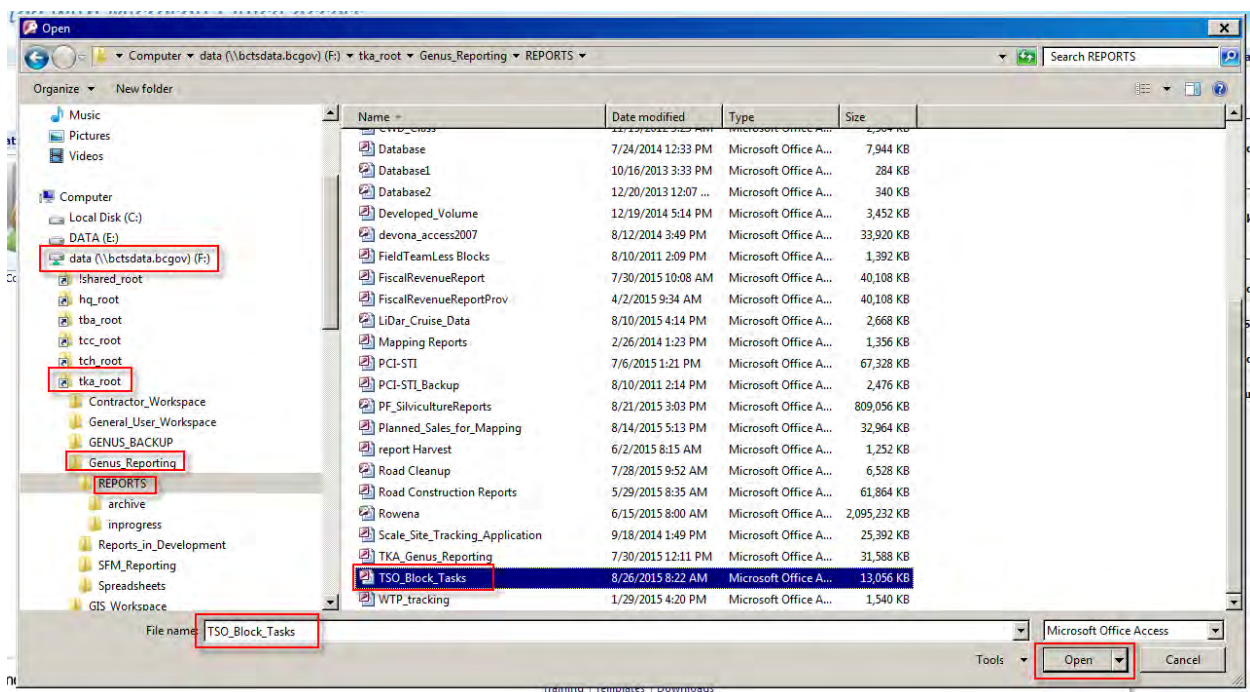
- 1) Open MS Access from the DTS environment just like you would open Resources (see #1 above). This is what you will see when you open the application.



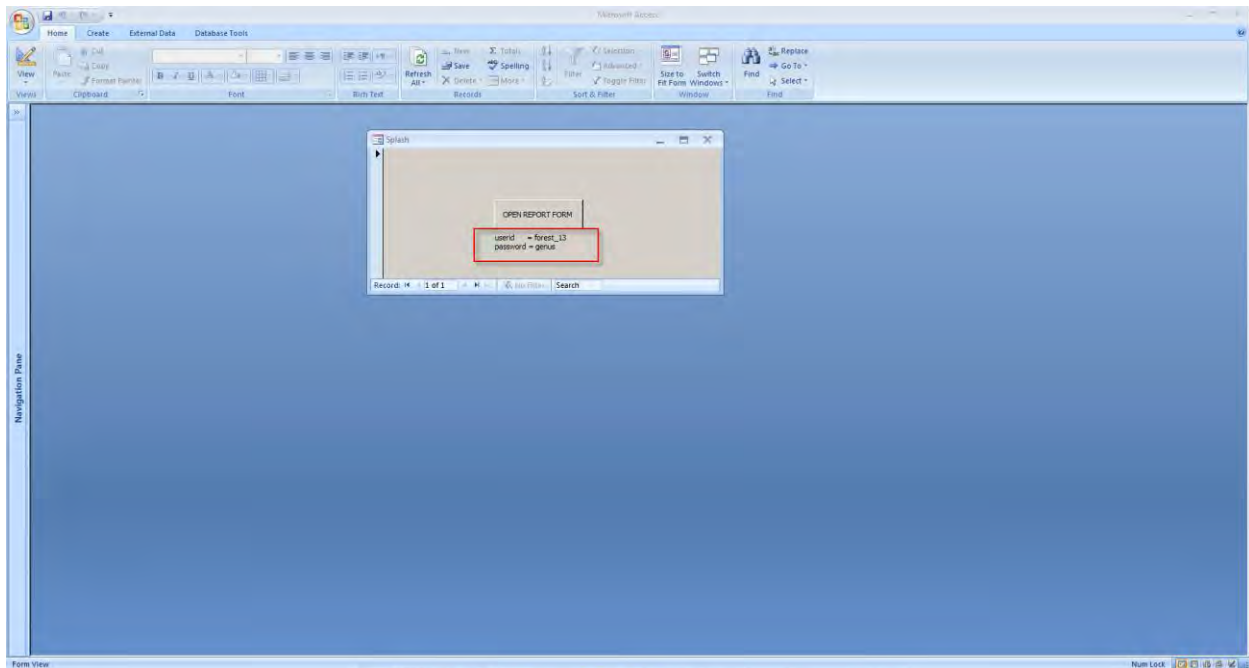
- 2) Navigate to the TSO_Block_Tasks.mdb report (f:\ tka_root\Genus_Reporting\REPORTS).



- With the “open” window up, select “F:\ drive”
- Navigate to tka_root\Genus_Reporting\Reports
- Scroll down in the right side of the screen to find the report
- Select it so it shows up in the “filename” section
- Click open

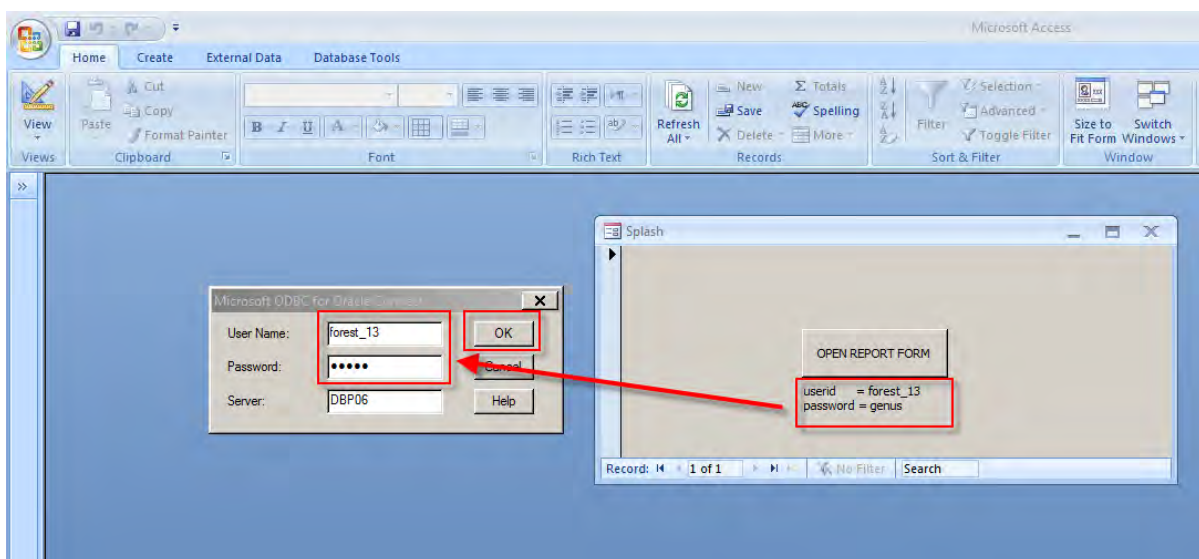


- When you click open, take note of the userid and password (this is different than most of our other reports) Userid = forest_13, password = genus



4) When you click the “Open Report form” button. The “ODBC Oracle Connect” window will pop up. This is where you want to enter the userid and password that you needed to take note of in #3.

- Enter the Userid and password
- Click “OK”



5) Once you click “OK”, the Task Report Filters window will pop up. Please note the “MANDATORY FILTERS”

frmTSO

TSO Block Task Report

Filters

MANDATORY Management Unit

1 Field Team

Licence

2 Cutting Permit

Cut Block

3 Operating Area

Landscape Unit

4 Target Year (yyyy)

5 MANDATORY Responsibility

OK Reset Form

Record: 1 of 1 No Filter Search

6) Select your filters and click "OK"

frmTSO

TSO Block Task Report

Filters

MANDATORY Management Unit: Kamloops

1 Field Team: Clearwater

Licence:

2 Cutting Permit:

Cut Block:

3 Operating Area:

Landscape Unit:

4 Target Year: (yyyy)

5 MANDATORY Responsibility: ROWENA MUGLICH

OK Reset Form

Record: 1 of 1 No Filter Search

- 7) Once clicking “OK” it will take a few minutes to apply the filters and then produce the report. Good time to go and grab a coffee! Your report will look like the following once produced.

TSO_Block_Task

Kamloops TSO Block Task Report

BCTS - Kamloops

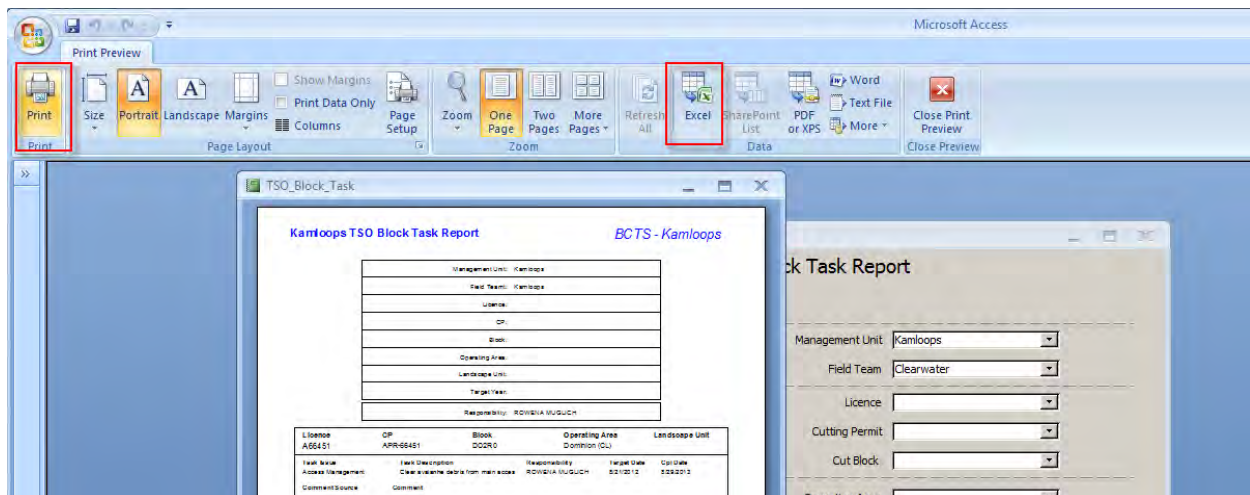
Management Unit: Kamloops
Field Team: Kamloops
License:
CP:
Block:
Operating Area:
Landscape Unit:
Target Year:
Responsibility: ROWENA MUGICH

License	CP	Block	Operating Area	Landscape Unit
A66451	APR-66451	DOGR0	Domhion (OL)	
Task Issue	Task Description	Responsibility	Target Date	Op/Date
Access Management	Clear avalanche debris from main access	ROWENA MUGICH	5/21/2012	5/22/2012
Comment Source	Comment			
Recomm Requirements	Debris was cleared along with other maintenance work (Mar 2014 07/16) Clear avalanche debris from main access road prior to sale (2012)			

Total Number of Blocks with Issues: 1

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8) You can then print or export this out to excel.



Document Change Tracking

Version	Date of Issue	Author(s)	Brief Description of Change
1.0	August 2015	Devona Hay	- Update existing document to include any updated screen captures, add in document change tracking, add in printing out a report of tasks by licence or responsibility, insert footer information
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