



## vPSI Online Pre-Task Planning Tool & Library System: Quick Start Guide

We recommend that you read or print this “Quick Start Guide” before logging on to the vPSI Online System. After logging on, you can find this information again by clicking on the “Help” button.

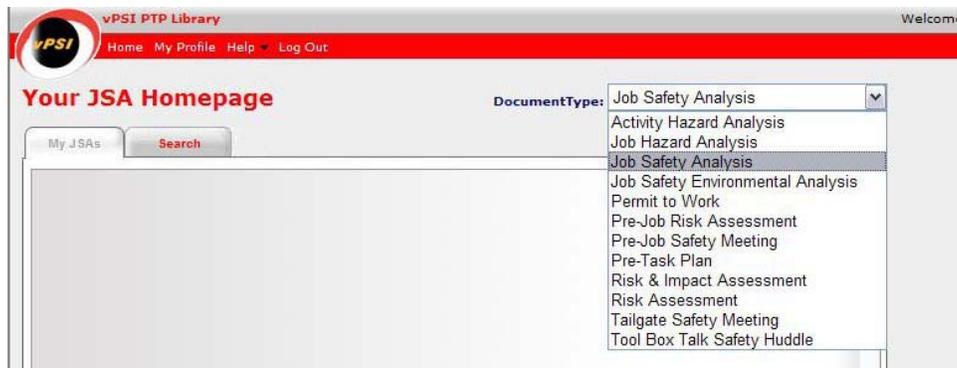
### Getting Started

When you log on for the first time you will see a screen like this:



This page will be blank until you add some documents as “Favorites”.

You can select your preferred document type from the dropdown list:



Set this preference as your default document type on the “My Profile” page.

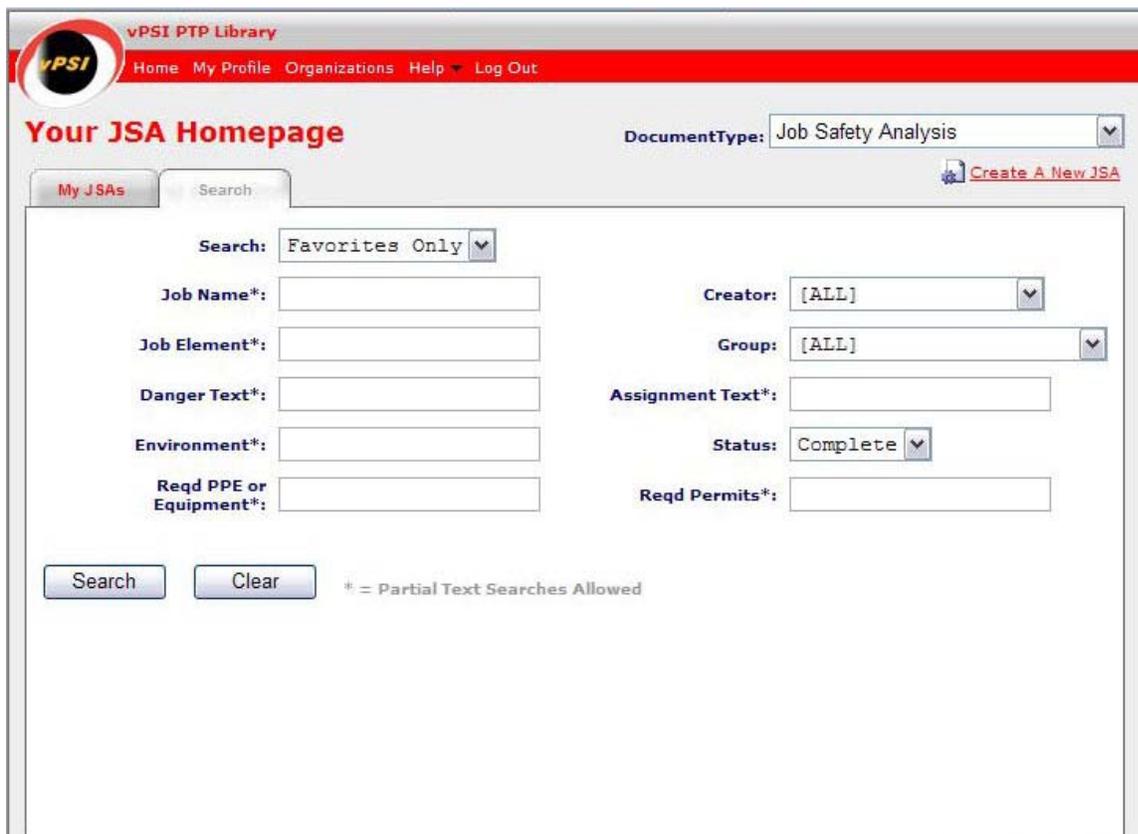


## Searching the Pre-Task Planning Document Libraries

Search for an existing document that may suit your requirements by clicking on the “Search” tab:



This opens up a powerful search function:



The first time you search, try selecting “All Available” to see a full listing of the Pre-Task Planning documents that you have access to. This will vary according to which Libraries you have been granted permission to use.



## Working With An Existing Pre-Task Planning Document

If you find an existing document that is close to what you require, you can use it as a template, or starting point. Click on the “New” button shown below, which will open the document in the Preview page where you can modify the existing document to suit your needs:



Remember to give your new document a different name!

Depending on your User permissions, you may also have access to Edit an existing document. Click on the “Edit” button shown below, which will open the document in the Preview page where you can edit it:





## Create A New Pre-Task Planning Document

You can create a new Pre-Task Planning Document by clicking on the “Create A New ...” button shown below, which will lead you through the Pre-Task Planning Wizard.



The Pre-Task Planning Wizard provides instructions throughout. Your new document is constructed in four stages:

Step 1: Split the Task into “Key Elements”. Note that considering the task as a whole, rather than reproducing a step-by-step procedure as is common in old-style JSAs, will eliminate duplication and enable the Pre-Task Plan to be more focused and user-friendly. The vPSI Online Pre-Task Planning Tool supports the use of a single Key Element or allows the user to split the Task according to changes in personnel, main activity, environment, etc.

Step 2: Identify Hazards that are at hand during the Task (either from the Task itself or the environment / context in which the Task is being carried out). The vPSI Online Pre-Task Planning Tool uses the well-established Energy Sources method.

Step 3: Identify those Hazards that may present actual Danger during the Task.

Step 4: The Pre-Task Planning Wizard will prompt you to come up with at least one precaution that will be taken to mitigate each of the identified Dangers.

In a vPSI-style Pre-Task Planning document, these precautions take the form of assignments that are essentially preventive corrective actions. As such, they must meet the same criteria as any other corrective action:

- clarity of responsibility,
- schedule,
- relevance and effectiveness in addressing the identified problem.

The Pre-Task Planning Wizard will automatically leave a blank for the assignees name or initials. The schedule in Pre-Task planning is either prior to or during the Task. Relevance is handled by linkage between Danger and precaution within the Pre-Task Planning Wizard. Effectiveness is the responsibility of the User.

Note: Avoid using your browser’s back button while in the Pre-Task Planning Wizard; you will get a chance to correct any mistakes or edit your document later at the Preview page.



### **Preview Your Pre-Task Planning Document**

On the Preview page, depending on your User permissions, you can add, delete or edit any of the information in the document. Mouse over a field to see what options are available to you.

### **Printing Your Pre-Task Planning Document**

When your new or modified Pre-Task Planning document is complete, click on the "Email" button to have the document sent to you for printing. Note that if you are a member of a Subscribing Organization, the document will be delivered to you already formatted according to the relevant custom template.

### **Online Help**

Additional information is available after logging on to the vPSI Online System by clicking on the "Help" button.