**Emergency Operations Unit**
Email: emergency.preparedness@dpi.nsw.gov.au

Emergency Operations | Web EOC **HOW TO GUIDE**

# Task Resource Requests

## Contents

General ..... 1
Selecting TR board from main menu ..... 1
Tasking List ..... 2
Tasking List - Finance ..... 2
New TRs ..... 3
Create a TR ..... 3
Edit a TR ..... 3
Tasking Input ..... 3
Task ..... 3
Request details ..... 4
Delivery details ..... 4
Action details ..... 5
Finance ..... 6
Attachments ..... 6

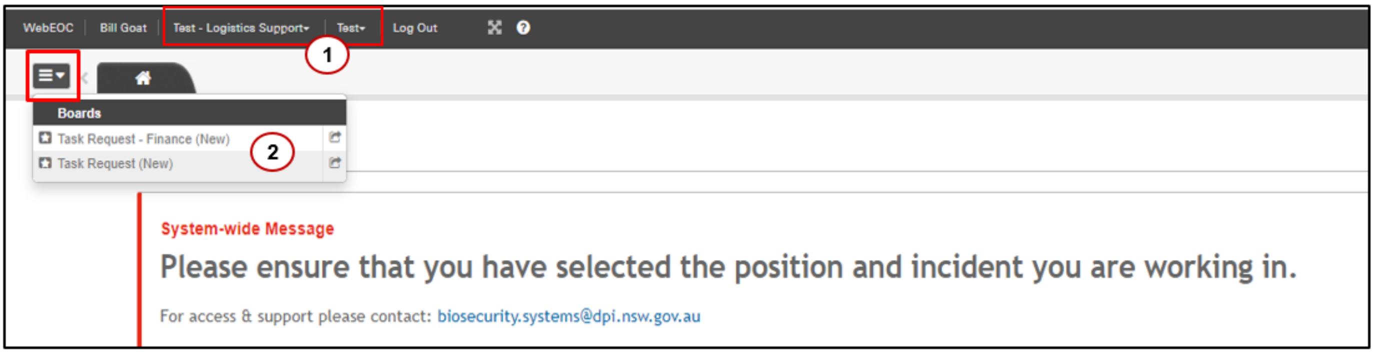
## General

Task / Resource Request (TR) boards in WebEOC track tasks and resource acquisition from request to completion including recording financial commitment and expenditure for emergency responses.

Users can request a task or resource that is then approved and actioned by appropriate response roles. The status of the task is updated and displayed in real time. It is the responsibility of personnel to regularly monitor the task list for required actions and progress. Approval requires an emergency financial delegation if there is a monetary cost associated with the task.

### Selecting TR board from main menu

1. Check your ‘position’ and ‘incident’ is correct.
2. In the main menu, select a board for ‘task request’ (for all users) or ‘task request – finance’ (limited to roles in Logistics, Finance, Planning and Control as it contains additional financial information).



Department of Primary Industries

Guide

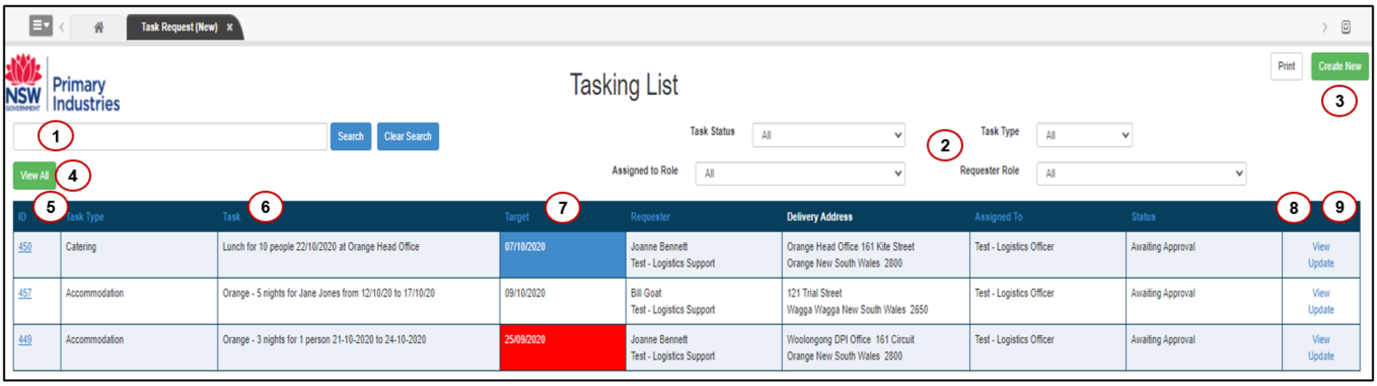
Emergency Operations Unit
Email: emergency.preparedness@dpi.nsw.gov.au

## Tasking List

The tasking list displays the real-time status of TRs, ability to create new and edit existing TRs.

Features of the Tasking List allows the list to be customised by users and includes:

1. Search – for id, task (short and long description), requester (name and role), delivery address, comments, project code, assigned to fields
2. Filters – cumulative filters for ‘task status’, ‘task types’, ‘assigned to role’ and ‘requester role’
3. ‘Create New’ button - links to a blank TR input screen
4. ‘View All’ – default view limits list to most recent 200 TRs (improving update time and effort); click this button for the complete list of TRs
5. Unique ID for each TR – this is a non-sequential number
6. Sortable headers (in blue) – sorts list in ascending or descending alphabetical, numerical or date order
7. Target date warnings – red for today or overdue, blue for tomorrow or the next day
8. View – links to complete TR (which can be printed and sent to suppliers) and enables attachments to be viewed
9. Update – allows editing of an existing TR for approval, actioning, entering financial data and adding/deleting attachments

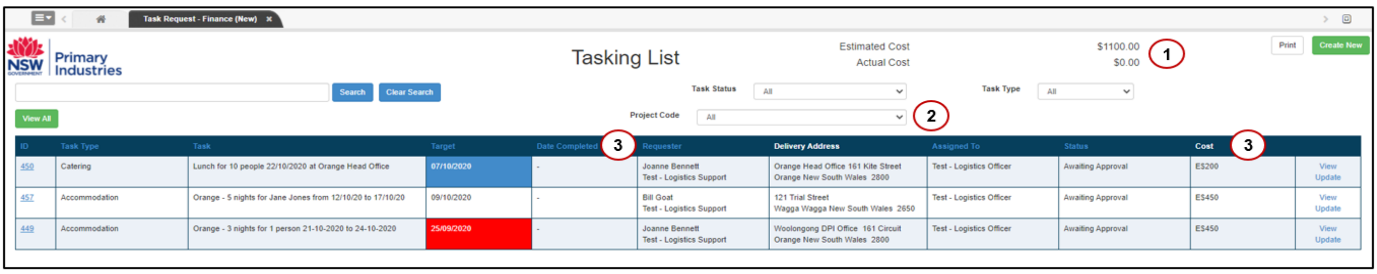



## Tasking List - Finance

The Tasking List for finance has similar features to Tasking List for all users. The variations include:

1. Totals for Estimated Cost and Actual Cost – varies with filter selection

   For total incident costs, filters should be blank, or ‘all’ selected, except for selecting the appropriate ‘project code’.
2. Filter for ‘project code’. Note the filters for ‘assigned to role’ and ‘requester role’ have been removed.
3. Additional columns - ‘date completed’ and ‘cost’ (which includes estimated (E) and final (F) costs when entered)



**Emergency Operations Unit**
Email: emergency.preparedness@dpi.nsw.gov.au

## New TRs

### Create a TR

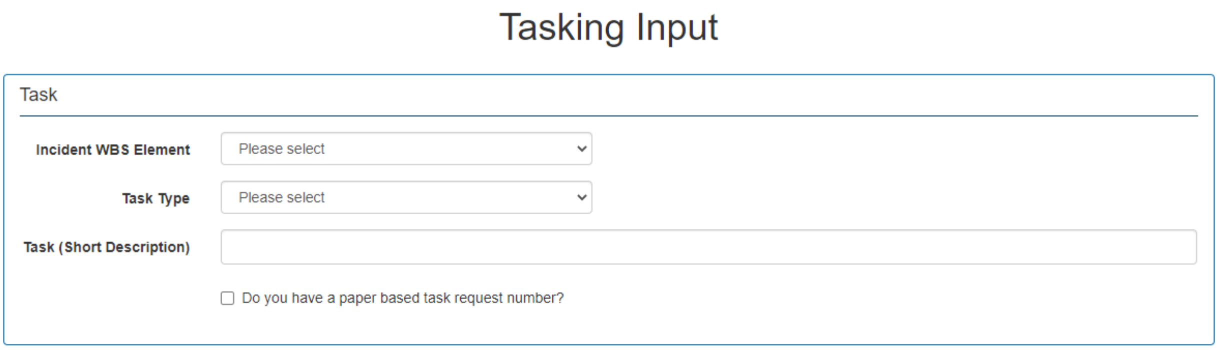
1. Click 'create new' button on Tasking List screen
2. Enter information (as described below in Tasking Input) to describe the task to be completed or resource to be acquired, including attaching relevant files
    - Field names (in the tables below) with * are mandatory
3. Assign to an appropriate role for approval (or save as a draft while the remaining information is being collected)
4. Click 'save' – an id number will be generated, and the TR will appear in the Tasking List

### Edit a TR

TRs are edited to include extra information prior to approval, log progress/actions, add attachments, enter finance information, and update the status.

1. Click 'update' link on Tasking List
2. Check information is correct (as described below in Tasking Input)
3. Add additional information, comments or attachments (if required)
4. Update the 'action details' (i.e. change the status and assign to an appropriate role) or leave as current if step 3 is still being completed
5. Click 'save' – 'status' and 'assign to' changes will appear in the Tasking List

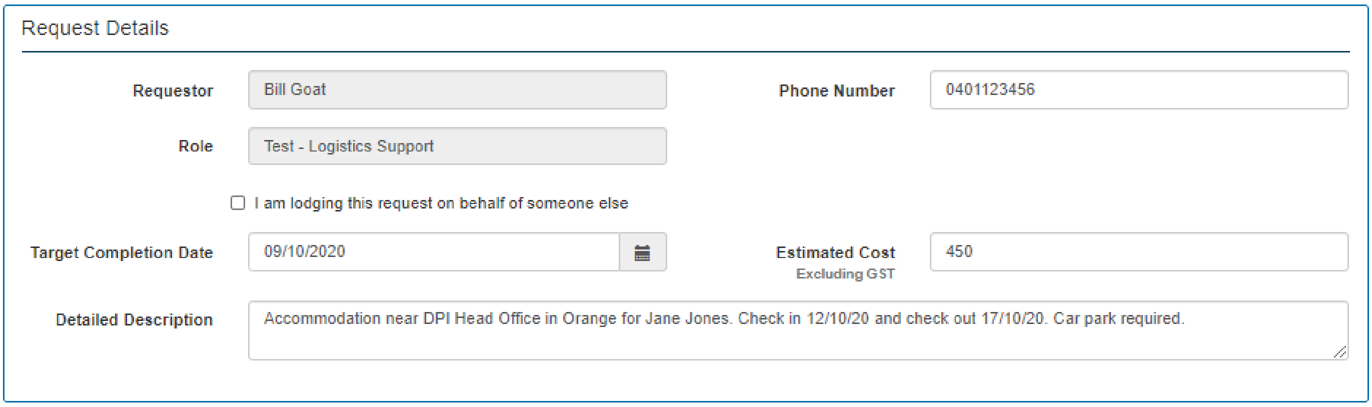
### Tasking Input




### Task

| Field name | Action or data |
|---|---|
| Incident WBS Element* | Select incident WBS (DPI WBS) |
| Task type | Select appropriate category for the task. Use 'other' only when no other task type is applicable. For TRs with multiple resources, select the category for the dominate or most costly resource. |
| Task (short description) * | Enter succinct description of task. This text appears on the 'Tasking List' |
| Paper based TR | Tick if you have a paper-based TR and enter its reference number |

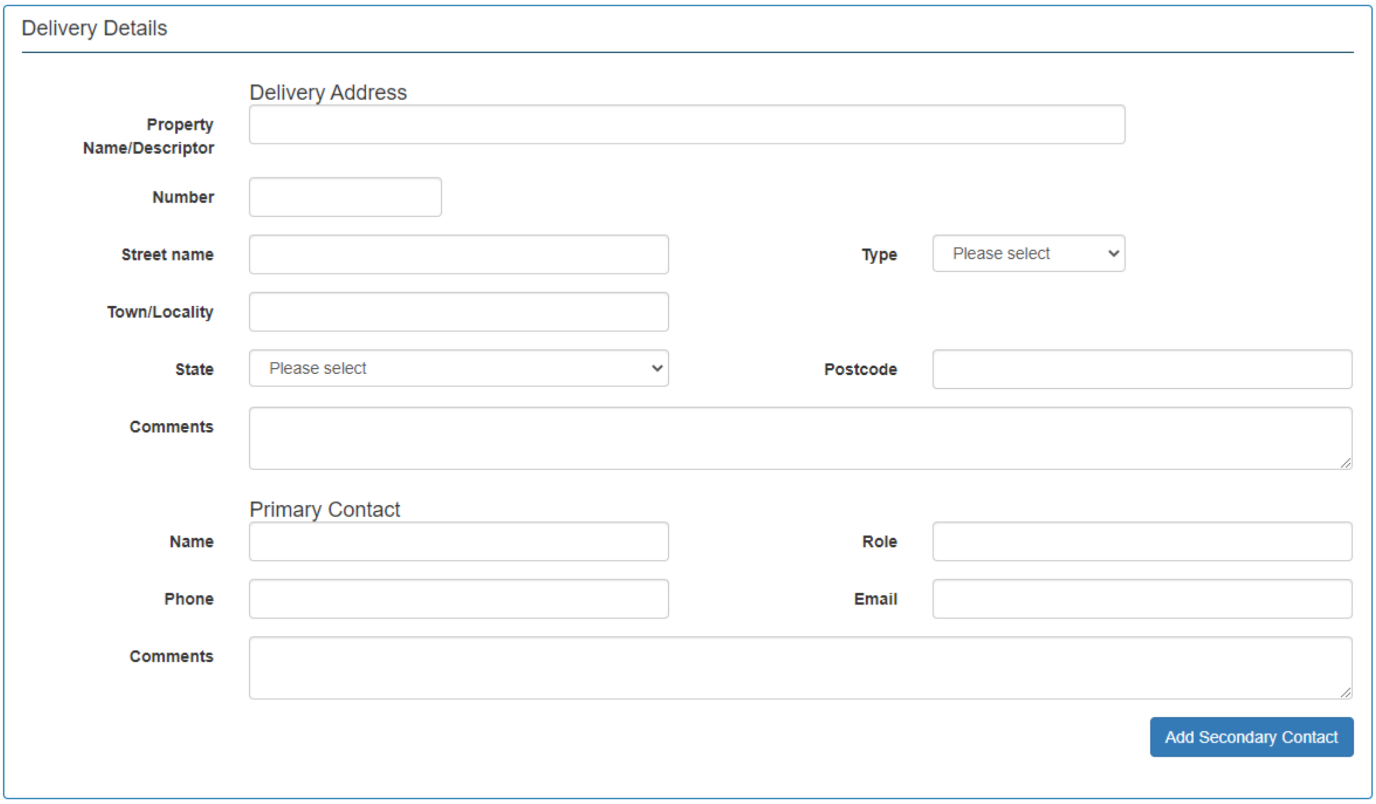
## Request details


Request Details

Requestor: Bill Goat
Phone Number: 0401123456
Role: Test - Logistics Support
I am lodging this request on behalf of someone else
Target Completion Date: 09/10/2020
Estimated Cost Excluding GST: 450
Detailed Description: Accommodation near DPI Head Office in Orange for Jane Jones. Check in 12/10/20 and check out 17/10/20. Car park required.

| Field name | Action or data |
|---|---|
| Requestor | Automatically enters name of person logged in |
| Phone number | Enter your response phone number |
| Role | Automatically enters role of person logged in |
| Lodging for someone else | Tick if entering a request for someone else, then enter their name and phone number, and select their role from the list |
| Target completion date | Select date the task is expected to be completed. This enables prioritisation of tasks. Default is tomorrow's date. |
| Estimated cost (excluding GST) * | Enter estimated cost excluding GST. The TR will be approved based on this estimation and may impact on the approver. |
| Detailed description | Enter a detailed description of task including all required information to purchase / attain the resource. This will vary with task type. |

## Delivery details


Delivery Details

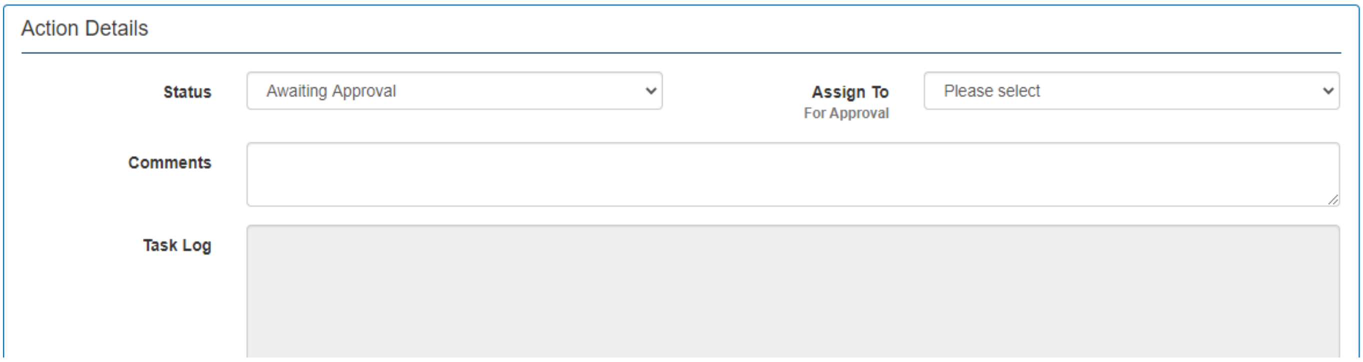
Delivery Address
Property Name/Descriptor
Number
Street name
Type: Please select
Town/Locality
State: Please select
Postcode
Comments

Primary Contact
Name
Role
Phone
Email
Comments
Add Secondary Contact

**Emergency Operations Unit**
Email: emergency.preparedness@dpi.nsw.gov.au

| Field name | Action or data |
|---|---|
| Property name/descriptor | Enter name of building, property or case number (if relevant) |
| Address: Number, street name, type, town/locality, state, postcode | Enter address of where the task is to be conducted, initiated or delivered |
| Comments | Enter specific site issues or instructions |
| Primary contact: name | Name of person that takes delivery of the resource or manages the task at expected time of delivery (which may be the next shift). |
| Role | Role of primary contact person e.g. Site Supervisor |
| Phone & email | Enter contact details |
| Comments | Further details of contact person e.g. available between 8-10am. |
| Add secondary contact | Details for alternate contact (if required) |

## Action details



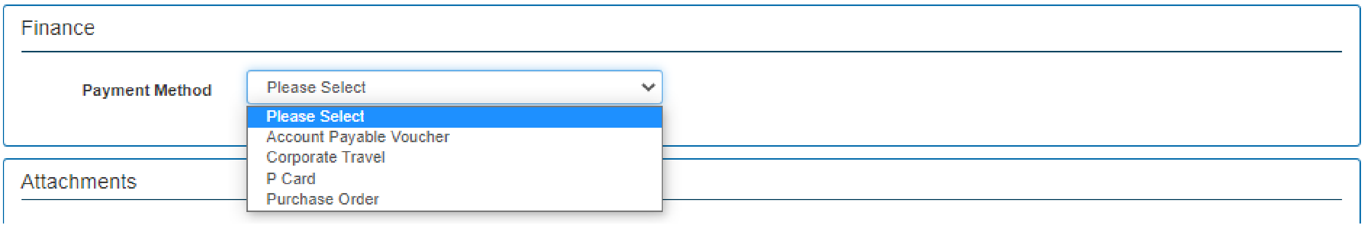

| Field name | Expected response |
|---|---|
| Status | Select appropriate status. List is dependent on previous selections. See options below in 'Status of TR' table. |
| Assigned to* | Select role to address status. Approval for tasks with a 'cost' must be performed by a role with appropriate EM financial delegation. |
| Comments | Details of more information required, actions completed, supplier details, invoices attached, reason for rejection, etc. Added comments must be prefixed by name and date. |
| Task log | Auto-populated list of action taken, date, time, position & name of user and position task assigned to for further action. Displays full history of saved changes of task request. |

### *Status of TR*

| Status | Definition | Options for next step |
|---|---|---|
| Awaiting approval | Default status for new TRs. TR is initiated and assigned to approver who must have EM financial delegation for TRs with costs AND be different to the requestor. | Awaiting approval<br>Approved for action<br>Rejected |
| Draft | Requestor can save a TR to seek further information (e.g. quotes), prior to sending it for approval or rejecting it. | Draft<br>Awaiting approval<br>Rejected |
| Approved for action | Approver, by selecting 'approved for action', approves the TR which includes expenditure funds up to the limit of 'estimated cost' and alignment of task with operational objectives. The TR is then assigned to a role to action or completed. | Approved for action<br>With Actioner<br>Task Complete |
| With Actioner | Can be selected by 'actioner' when actions are in progress e.g. resources ordered and awaiting delivery | With Actioner<br>Task Complete |

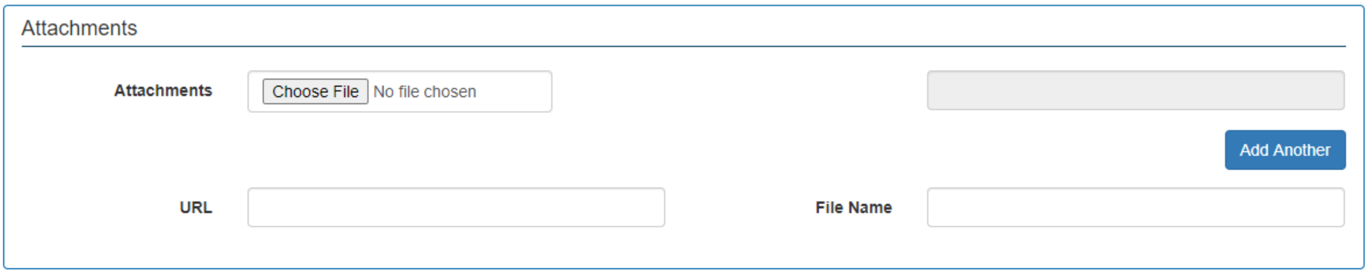
| Status | Definition | Options for next step |
|---|---|---|
| Task Complete | Actioner completes a task when a resource is delivered or ‘primary contact’ is notified of service delivery.<br>Generates a ‘task completion date/time’ field – edit as required. | Task Complete<br>Task Closed |
| Rejected | TR is not to proceed or is no longer required. It must not have any associated costs. Requires a reason in the comments box. Automatically assigns TR to requestor. | Nil |
| Task Closed | Finance payments details are entered, and invoices are attached, prior to closing. TRs with multiple invoices (e.g. catering for a period of time) remain as ‘task complete’ until all invoices are received. Cannot be assigned when closed. | Nil |

## Finance




| Field name | Action or data | Comment |
|---|---|---|
| Payment method | Select the appropriate payment method to reveal fields below | Use APV for AP upload |
| Final Cost | Total cost of TR which maybe on multiple invoices/receipts | Must be less than the approved estimated cost |
| GL code | Select appropriate GL code | |
| CSP# | Enter CSP reference number/s | Relevant to APV and AP Uploads |
| Cardholder name | Enter name on department P-card | Relevant to P-cards |
| Purchase order # | Enter purchase order number/s | Relevant to purchase order |

## Attachments




| Field name | Expected response |
|---|---|
| Attachments | Click ‘choose file’ to select required file to attach and click ‘open’.<br>File name appears in grey box. Log attachment in Action details - Comments box. |
| Add another | Generates another attachment field. Unlimited attachments can be added. |
| URL | Add web link. Limited to one. |
| Filename | Name of web link i.e. shortcut. Appears on the ‘view’ of the TR. |