User Guide

Emergency Management Unit
Biosecurity and Food Safety
Email: emergency.preparedness@dpi.nsw.gov.au

WebEOC – Task / Resource Request

- Task / Resource requests entered and tracked electronically
- Financial summary for Logistics – Finance personnel
- Contacts

1. Introduction

Task / Resource Request boards in WebEOC consist of an input screen and display view boards that track tasks from request to completion. Importantly it enables the Department to track financial commitment and expenditure at all stages of the response. It is also an auditable system.

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

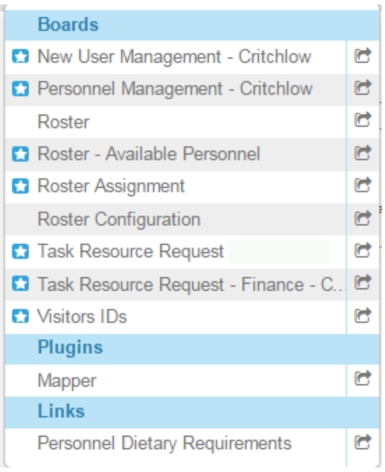
2. Access

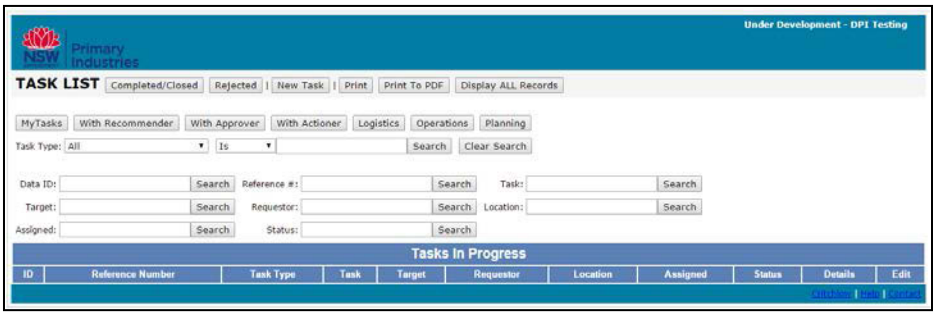
Refer to the WebEOC Introductory User Guide for information on access to and basic structure of WebEOC. The input screen varies with the user’s position. An additional section – headed Finance - is only available for Finance positions in Finance, Logistics, Planning and Control.

Display boards vary with the positions’ group, restricting views to tasks related to their region or area of responsibility. Users can be in more than one group.

3. Main Menu

Click on Task Resource Request on the Main Menu to access the Task List display view.





All other task resource request display views are accessible from this view.

Finance users may have two options on the Main Menu – one includes Finance views and the other displays views as seen by the non-finance users.

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4. Task Input Screen

Refer to the generic data input business rules for fields such as dates, names, phone/fax numbers, and comment text boxes in the WebEOC Introductory User Guide.

The Task Input Screen allows task requests to be:

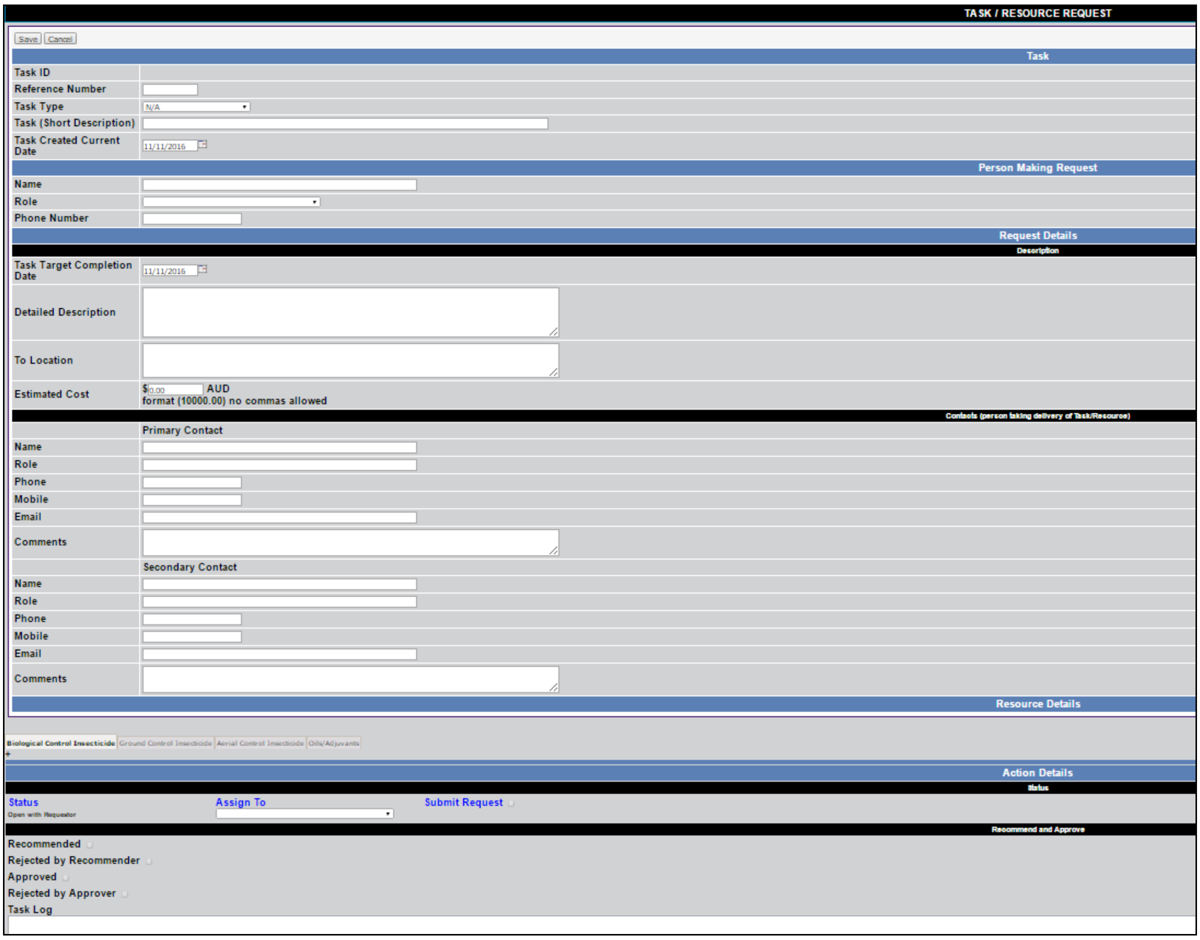
1. Initiated and submitted by any person
2. Recommended by a person different to the person submitting (where possible) and approving (mandatory) the task request
3. Approved by a different person and who is in a role with Emergency Management financial delegation (where tasks have a monetary costs). This person must NOT be the same person as either the person who submits or recommends the task. This is required for financial transparency.
4. Actioned and completed
5. Finance details and closing (where financial records are listed/attached) by Finance/Logistics personnel.

4.1. Initiate and Submit

Click the ‘New Task’ button on the Task List display view to create a new task request.

Each different task or resource requires a separate task request. Use the task type list as a guide on categories or groupings of tasks.

Task / resource requests must support the operational objectives.



Field Name	Field Type	Expected / Available Response	Comment
Task	Sub Heading		
Task ID	*Automated*		Upon save the Task Request ID number will display. These numbers are NOT sequential.
Reference Number	Text	Task request reference number or code eg Dub001 The RFS Tasking Number for aviation will be recorded here e.g. DPI-yy-xxxxxxx	Number not required as tasks tracked using Task ID. Allows use of temporary hard copy task requests if WebEOC is unavailable. Only add data if original task request was created using another system.
Task Type	Drop down list	Categories of tasks as listed. Use ‘other’ only when no other task type is applicable.	Only the tasks/resources that apply to the category should be entered e.g. ‘Personnel’ to be used to request people to fill roles. ‘Accommodation’ and ‘travel & motor vehicles’ (e.g. flights and car hire) are separate task requests.

Field Name	Field Type	Expected / Available Response	Comment
Task (short description)	Text	Succinct description of task.	E.g. Surveillance at X location by X number of personnel.
Task created current date	Date	dd/mm/yyyy	Usually current date (the default). Edit if required.
Person Making Request	Sub Heading		
Name	Text	Requester name	WebEOC Introductory user guide – generic data input business rules Note: the task request will not save without a requester name
Role	Drop down list	Requesting role	Role list will vary based on user login position (see Access above)
Phone number	Text	xxxx xxx xxx	Usually mobile number. Use response number where available; do not enter personal or usual work contact number. Note: the task request will not save without a phone number
Request Details - Description	Sub Heading		
Task Target Completion Date	Date	dd/mm/yyyy	Estimated target completion date for Actioner. Allows for prioritisation of tasks.
Detailed Description	Text box	Description of task which will vary with task types.	
To Location	Text box	Label (e.g. Gosford LCC or IP54) and STREET address - not postal address. Accommodation or travel details sent to an email address.	Where the task is to be conducted, initiated or delivered.
Estimated Cost	Numerical, no commas, $	10000.00 Estimate cost. Do not include GST.	WebEOC Introductory user guide – generic data input business rules.
Request Details - Contacts	Sub Heading		
Primary Contact - Name	Text	Name of person that takes delivery of the resource or manages the task at expected time of delivery (which may be the next shift).	Mandatory.
Role	Text	Role of primary contact person eg Site Supervisor.	Sentence case.
Phone, Mobile	Text	xxxx xxx xxx	Mandatory. WebEOC Introductory user guide – generic data input business rules.
Email	Text	john@internet.com.au	
Comments	Text	Further details of contact person eg availability – between 8-10am.	
Secondary Contact		Details for alternate contact.	Refer to Primary Contact information.
Resource Details	Sub Heading with multiple fields		If Locust chemicals are required use the Resource Details modules to calculate quantities.

Field Name	Field Type	Expected / Available Response	Comment
Action Details	Sub Heading		
Submit Request	Check box	Tick box when ready to 'send' to recommender. Status will change to 'Open with Recommender'.	Leave unchecked to have status as 'open with requester' and assign to requester's role (ie your role) to save a draft task request.
Status	*Automated*	Open with Requester Open with Recommender Open with Approver Open with Actioner Rejected Completed Closed	Status will change based on checkboxes below.
Assign to	Drop down list	'_Not_Assigned' is default. Roles based on user group.	Role must be assigned to save data. Any change in checkboxes will change field to 'not assigned' and not permit data to be saved. Check 'submit request' before assigning role.
Note: Assign request to recommender role in 'assign to' after tagging 'Submit Request' and before SAVE.			
Recommended	Check box	Leave blank.	
Rejected by Recommender	Check box	Leave blank.	
Approved	Check box	Leave blank.	
Rejected by Approver	Check box	Leave blank.	
Task Log	*Automated*	Lists action, date, time position, name of user and position task assigned to for further action.	Displays full history of saved changes to check boxes for processing of task request. Any boxes subsequently un-ticked will result in action listed in red text.
Task Complete	Check box	Leave blank.	
Comments	Text box	Enter additional details e.g. more information required	Comments must be prefixed by name and date.

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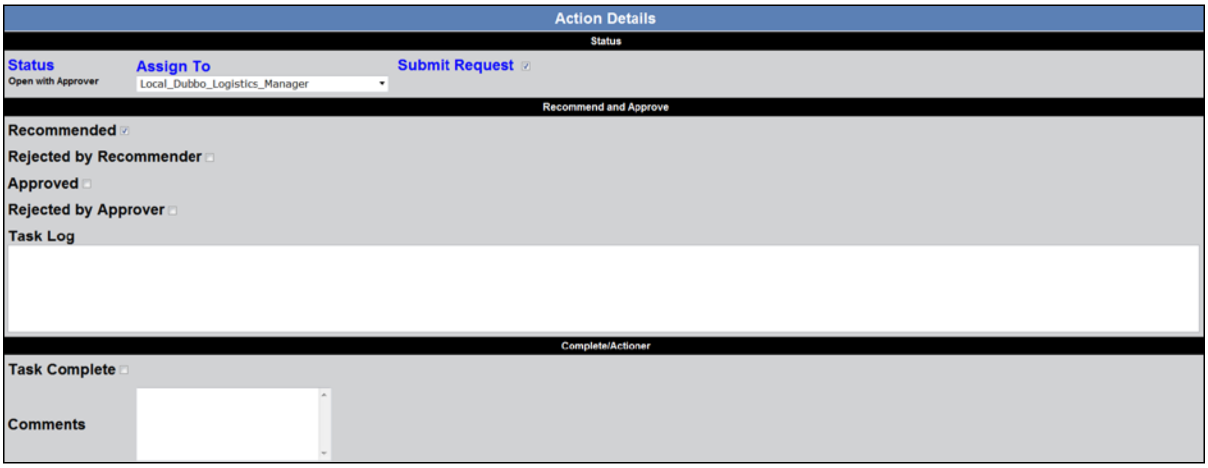
4.2. Recommend

The person recommending a task/resource request should review the request for completion and ensure it supports the operational objectives. To review the task request click 'Edit' on the Task List. The request initiator of the task/resource should preferably not be the same as the Recommender, although in small incidents, this may be unavoidable.

The Recommender has three options:

1. If the information supplied is satisfactory, tick the 'Recommended' tick box and assign to the approver role.
2. If the information is insufficient, the task request can be updated by the Recommender or assigned to the Requester for completion. In the Comments box, add your name and date with the instructions for the requester.
3. If the task request is unsatisfactory and even with further information, will not be recommended, it can be rejected. This is permanent. Insert the reason for rejection in the Comments box, tick the 'rejected by recommender box' and assign to the requester.



Field Name	Field Type	Expected / Available Response	Comment
Status	*Automated*	Open with Requester Open with Recommender Open with Approver Open with Actioner Rejected Completed Closed	Status will change based on checkboxes below.
Assign to	Drop down list	'_Not_Assigned' is default. Roles based on user group.	Role must be assigned to save data. Any change in checkboxes will change field to 'not assigned' and not permit data to be saved.
Submit Request	Check box	Box already ticked.	See Submit request (above).
Recommended	Check box	Tick box to recommend task/resource. Changes status to 'Open with Approver'.	If request information is incomplete, re-assign request by un-ticking 'submit request' and assign to appropriate role. Insert required information in comments box below.
Note: Assign request to approver in 'assign to' after tagging Recommended and before SAVE. The approver must have the appropriate emergency financial delegation. Rejected requests are assigned to the requester's role.			
Rejected by Recommender	Check box	Tick box to reject task/resource. Changes status to 'Rejected' Note: This is permanent and may not be reversed.	Only use if task/resource request will not be recommended even with improved information. Reason for rejection should be inserted in the comments box below.
Approved	Check box	Leave blank.	
Rejected by Approver	Check box	Leave blank.	
Task Log	*Automated*	Lists action, date, time position, name of user and position task assigned to for further action.	Displays full history of saved changes to check boxes for processing of task request. Any boxes subsequently un-ticked will result in action listed in red text.
Task Complete	Check box	Leave blank.	
Comments	Text box	Details on more information required	Added comments must be prefixed by name and date.

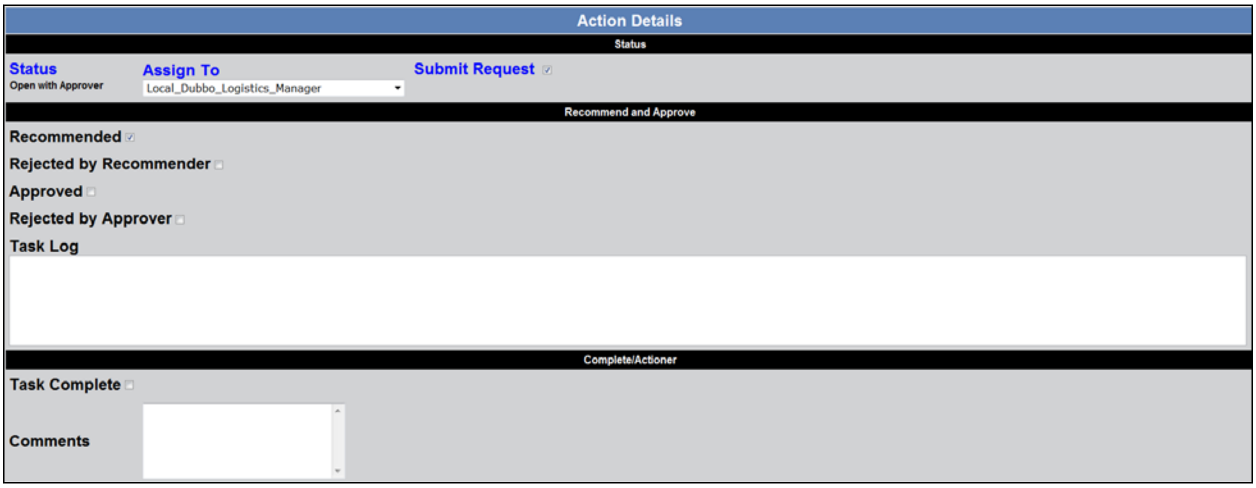
4.3. Approve

The person approving a task/resource request should review the request for completion and ensure it supports the operational objectives. To review the task request click 'Edit' on the Task List.

Approval of task/resource requests must be completed by a person with the appropriate emergency financial delegation (where relevant) or authority and **not** be the person or role who either initially requested or recommended the task/resource.

The Approver has three options:

1. If the information supplied is satisfactory, tick the 'Approved' tick box and assign to the role that will action the task.
2. If the information is insufficient, the task request can be updated by the Approver or assigned to the Recommender or Requester for completion. In the Comments box, add your name and date with the instructions.
3. If the task request is unsatisfactory and even with further information, will not be approved, it can be rejected. This is permanent. Insert the reason for rejection in the Comments box, tick the 'rejected by approver box' and assign to the Requester.



Field Name	Field Type	Expected / Available Response	Comment
Status	*Automated*	Open with Requester Open with Recommender Open with Approver Open with Actioner Rejected Completed Closed	Status will change based on checkboxes below.
Assign to	Drop down list	'_Not_Assigned' is default. Roles based on user group.	Role must be assigned to save data. Any change in checkboxes will change field to 'not assigned' and not permit data to be saved.
Note: The approver must have the appropriate emergency financial delegation. Rejected requests are assigned to the requester's role. Assign request to actioner in 'assign to' after tagging Approved and before SAVE.			
Submit Request	Check box	Box ticked.	See Submit request above.
Recommended	Check box	Box ticked.	See Recommend request above.
Rejected by Recommender	Check box	Box un-ticked.	See Recommend request above
Approved	Check box	Tick box to approve task/resource. Changes status to 'Open with	If request information is incomplete, re-assign request to requestor or recommender by un-

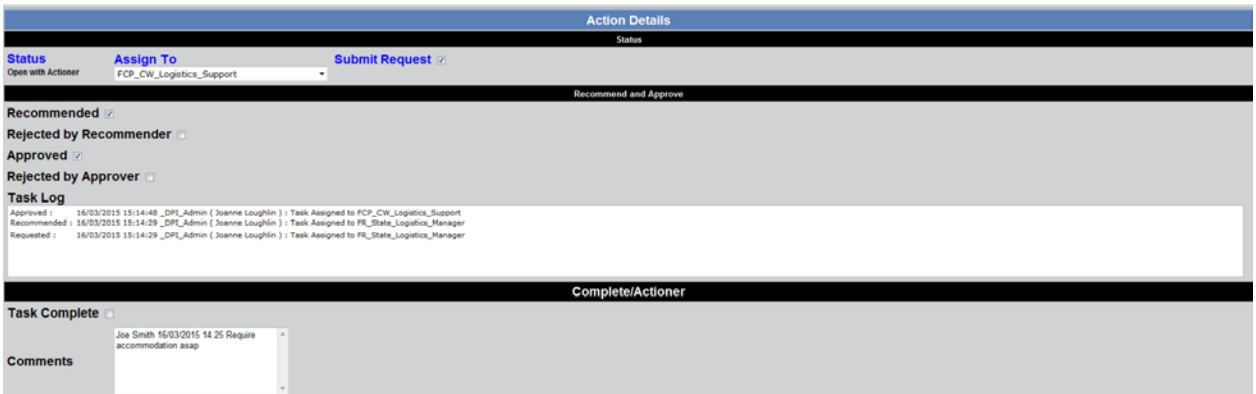
Field Name	Field Type	Expected / Available Response	Comment
		Actioner'. Requires appropriate emergency financial delegation to approve requests with any cost.	ticking 'submit request' or 'recommended' and assign to appropriate role. Insert required information in comments box below.
Rejected by Approver	Check box	Tick box to reject task/resource. Changes status to 'Rejected'. Note: This is permanent and may not be reversed.	Only use if task/resource request will not be approved even with improved information. Reason for rejection should be inserted in the comments box below.
Task Log	*Automated*	Lists action, date, time position, name of user and position task assigned to for further action.	Displays full history of saved changes to check boxes for processing of task request. Any boxes subsequently un-ticked will result in action listed in red text.
Note: Assign request to actioner in 'assign to' before SAVE. Rejected requests are assigned to the requester's role.			
Comments	Text box	Details on more information required	Added comments must be prefixed by name and date.

4.4. Action and complete

The person who actions the task/resource request (eg organises accommodation, produces a map) completes the request. Completing a request does NOT include the financial details however this may be entered by the same person if all details are available and the actioner has access to the financial component of the task request.

The Actioner is required to:

- Read the task request, clarify any details with the Requester (if required) and complete the task as described using the details in the input board
- Enter any details that may be useful to the Requester, e.g. delivery time, in the Comments box
- Tick the 'task complete' box
- Assign to the Logistics or Finance role that will enter the finance details



Field Name	Field Type	Expected / Available Response	Comment
Status	*Automated*	Open with Requester Open with Recommender Open with Approver Open with Actioner Rejected Completed Closed	Status will change based on checkboxes below.

Field Name	Field Type	Expected / Available Response	Comment
Assign to	Drop down list	'_Not_Assigned' is default. Roles based on user group.	Role must be assigned to save data. Any change in checkboxes will change field to 'not assigned' and not permit data to be saved.
Submit Request	Check box	Box ticked.	See Submit request above.
Recommended	Check box	Box ticked.	See Recommend request above
Rejected by Recommender	Check box	Box un-ticked.	See Recommend request above
Approved	Check box	Box ticked.	See Approve request above.
Rejected by Approver	Check box	Box un-ticked.	See Approve request above.
Task Log	*Automated*	Lists action, date, time position, name of user and position task assigned to for further action.	Displays full history of saved changes to check boxes for processing of task request. Any boxes subsequently un-ticked will result in action listed in red text.
Task Complete	Check box	Tick box when task complete. Changes status to 'Completed'.	Assign to Logistics role for task to be closed (entering financial information).
Comments	Text box	Details on more information required.	Added comments must be prefixed by name and date.

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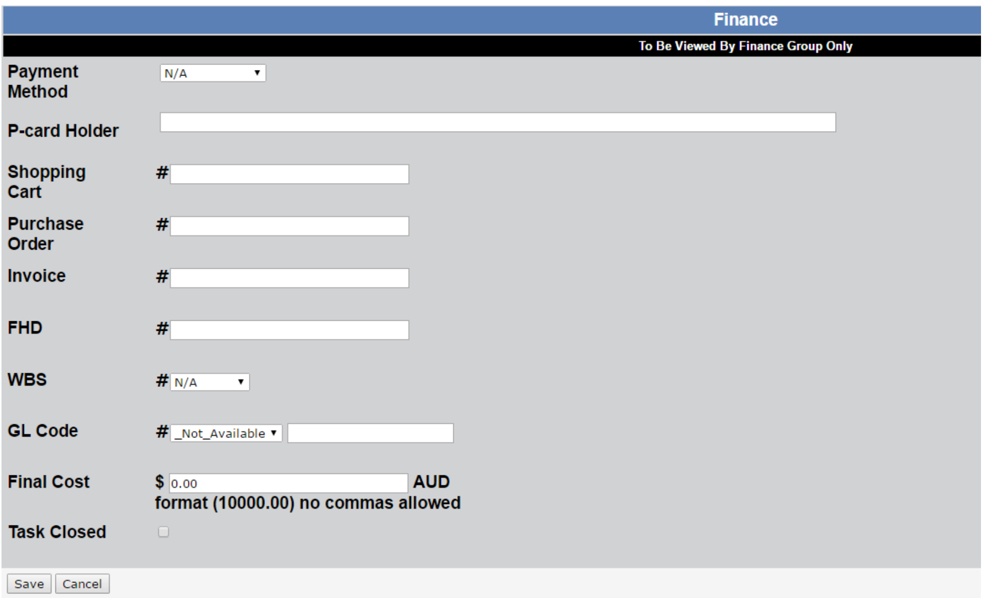
4.5. Finance details and closing

The Finance component is only available to Users logged in to specific Financial Positions.

To close a task request:

- Scan the finance records related to the task request
- Enter the payment method for the task request
- Assign a WBS and GL code
- Enter the final cost
- Tick 'task closed', assign to the Requestor, then 'save'
- Add attachments

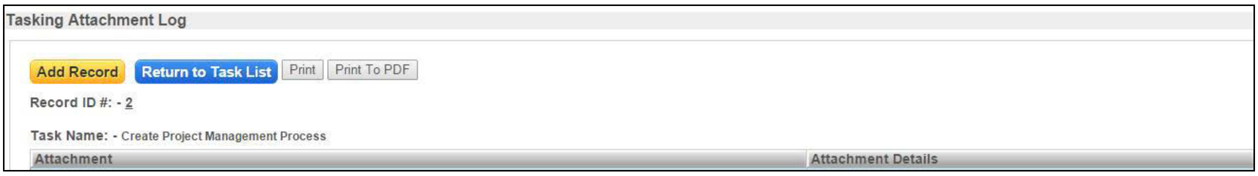


Field Name	Field Type	Expected / Available Response	Comment
Payment method	Drop down list	N/A Cash P-Card Purreq SAP ByDesign	Select appropriate method.
P-card holder	Text	Name on P-card.	Only if P-Card is the payment method.
Shopping Cart #	Text	Department cart number	Only if SAP ByDesign is the payment method.
Purchase Order #	Text	Department purchase order number from SAP ByDesign.	Only if SAP ByDesign is the payment method.
Invoice #	Text		Number from suppliers invoice.
WBS #	Drop down list	Varies with response and expenditure type.	Defined in Finance section's information.
GL Code #	Multiple drop down list	GL Code + Description	Select the GL Code appropriate for the purchase. When Code is selected the description will automatically display.
Final Cost	Numerical, no commas, $	10000.00 Final cost from invoice or receipt excluding GST.	WebEOC Introductory user guide – generic data input business rules.
Task Closed	Check box	Tick box to close when financial details entered. Changes status to 'Closed'.	Assign to the Requestor. All relevant attachments must be added to the record prior to closing the task. Refer to Attachments below.

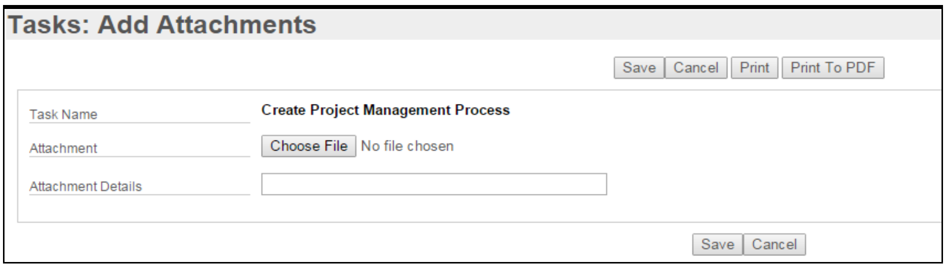
5. Attachments

Attachments are added to individual task requests using the 'Attachment' button on the display view.

Clicking the 'Attachment' button on the display view provides access to the Tasking Attachment Log.



Click 'Add Record' to attach a new file.



Field Name	Field Type	Expected / Available Response	Comment
Task Name	*Automated*	Task Short description.	
Attachment	Button + file selection		Click ‘Choose File’ to select required file.
Attachment Details	Text	Brief description of file. E.g. Safety suppliers quote 123 12/02/2016	Both file name and attachment details are able to be viewed.

Attachment is recorded to the Task Request when ‘Save’ is clicked. Repeat if necessary.

Click ‘Return to Task List’.

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6. Display Views

There are four task resource request display views.

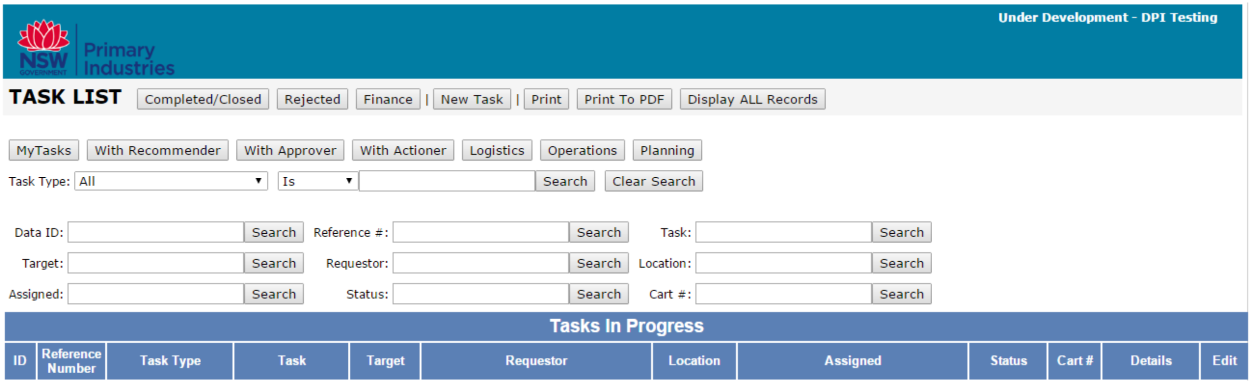
The four display views are:

- Task List – home display view, lists all ‘in progress’ tasks in your user group
- Completed/Closed Tasks – lists all tasks in your user group with a ‘completed’ or ‘closed’ status
- Rejected Tasks - lists all tasks in your user group with a ‘rejected’ status
- Finance - lists all tasks in the user group regardless of status

Each display may have links to details views. Refer to WebEOC Introductory User Guide.

Display views capture current data but **do NOT save it**. If a list is required at particular time and date, use the ‘print to PDF’ button and save the file with display view name, date and time. This may be useful for finance reports.

6.1. Task List



- Use this list to manage and determine the status of your tasks
- List your tasks by activating the ‘My Tasks’ filter button. Tasks are listed when your user position is the requestor or it is assigned to your user position. Selection will be determined by your current user login.
- Additional filters ‘With Recommender’, ‘With Approver’ and ‘With Actioner’ can be activated to determine the current status of tasks.
- Filters for ‘Logistics’, ‘Operations’ and ‘Planning’ will list tasks with user positions for the ‘requestor’ or ‘assigned’ in the relevant function. For example, the Operations Officer could display all ‘in progress’ tasks related to Operations positions.
- Use the ‘Edit’ button to update task requests.

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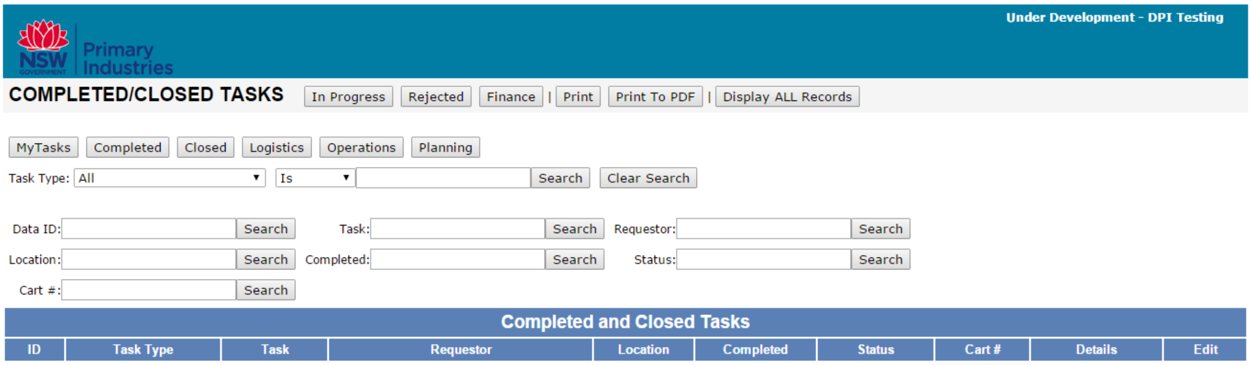
6.2. Completed/Closed Tasks



- ➢ All completed/closed tasks are listed for your user group
- ➢ Filters are the same as for Task List above.
- ➢ Only changes permitted for completed tasks – finance information and further details in the task request's comments box. Access using the edit button to view the input screen.

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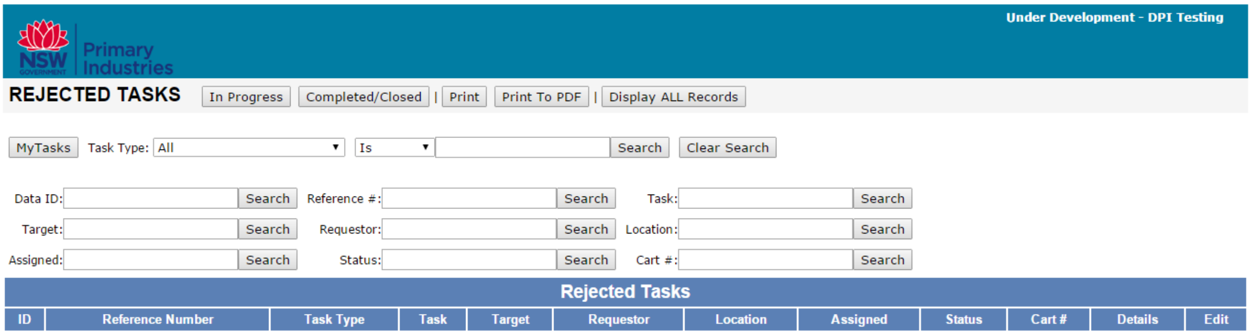
6.3. Rejected Tasks



- ➢ All rejected tasks are listed for your user group.
- ➢ Reasons for rejection should be written in the task request's comments box. Access using the edit button to view the input screen.
- ➢ Do not alter rejected tasks. If the reason for the rejection has been addressed, generate a new task request.

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6.4. Finance

The Finance Display View will only be available to Users logged in to specific Financial Positions.

- ➢ Lists all tasks in the user group with an estimated cost (where available) and final cost for each task and a sum of these costs
- ➢ Tasks can be filtered on status
  - o To be approved = open with requester, open with recommender, open with approver
  - o Approved – in progress = open with actioner
  - o Completed = completed
  - o Closed = closed
  - o Rejected = rejected

- ➢ Use the ‘Edit’ button to update task requests. Eg Completed tasks can be closed when finance details are entered.
- ➢ Use the ‘Attachment’ button to add or check attachments. See ‘Attachments’ above.

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7. Contacts

New user accounts and unlocking accounts – contact the designated administrator (eg Logistics Officer or support person in a response) or Emergency Management Unit (outside a response) contact emergency.preparedness@dpi.nsw.gov.au.

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User Guide Information

Authorised by	Manager Emergency Operations	**Authorised date**	21 Nov 2016

Revision History

Version	Date	Section	Details
1	17 Feb 2012		For approval
2	12 June 2012	All	
3	18 Oct 2012	All	
4	16 Mar 2015	All	Remove BioRMS; general review
5	12 Sept 2016	All	Update following enhancements & upgrade to Version 8.1.
6	15 Nov 2016	All	General review

8. Appendices

8.1. Manual task requests

In situations where WebEOC is unavailable due to catastrophic failures, implement the temporary hard copy system to track tasks by using either the pre-printed carbon copied books of task requests or a printed form (see next page). Information entered in each field is similar to the WebEOC version. The approval process is the same – the requestor and recommender is a different person (and role) to the approver. The approver must have emergency financial delegation, where required for the task.

Hard copy task requests are required to be entered into WebEOC as soon as systems come back on line. The ‘reference number’ field provides the link between the hard copy and the WebEOC version.

Completion of carbon copies of task requests:

- Yellow page – remains in the book
- White page – initially attached to the pink page for action, completed and filed by the actioner (stamped/labelled ‘completed’ and ‘filed’)
- Pink page - initially attached to the white page for action, completed (stamped/labelled ‘completed’) by the actioner and returned to the requestor

Completing a printed task request form:

- Actioner to complete, provide a copy to the requestor and file the original.

Task Request Number: ________

Department of Primary Industries

Task/Resource Request Form

Instructions: Complete form to request tasks or resources only when WebEOC task request system is unavailable.

1. PERSON MAKING REQUEST		
Name:	Position:	Phone No:
2. REQUEST DETAILS		
Detailed description of task / resource		
Location (destination – where the task/resource is to be completed/delivered)		
Target date & time (time for completion/delivery of task/resource)		
Date:	Time: am/pm	
Contact person (the person taking delivery of the task/resource)		
Name:	Position:	Phone No:
3. ACTION DETAILS		
Referred to (the person who will take action on the request)		
Name:	Position:	Phone No:
Referral date & time		
Date:	Time: am/pm	
Estimated Cost $		
Recommended – Section Manager		
Name:	Signature:	
Position:	ID No:	
Approved – Financial Delegate		
Name:	Signature:	
Position:	ID No:	
4. COMPLETION DETAILS		
Name:	ID No:	
Date:	Time:	am/pm
Final Cost: $		

Record: File with registry