

# Crisisworks User Guide

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# Your user account

This section covers your user account, as well as managing positions and duty.

## Signing In

This section describes how to access and sign into Crisisworks.

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## Accessing Crisisworks

Your organisation will have it's own unique web address to access Crisisworks. It is generally in the format of:

```
http://yourorganisation.crisisworks.com
```

where "yourorganisation" is the name of your organisation. There is no "www" at the start of the web address.

## Supported web browsers

Crisisworks can be accessed via most Internet and web enabled devices including:

- Desktop computers
- Laptops (notebooks) and netbooks
- Tablet computers, and;
- Smart phones

Crisisworks supports all supported browsers from Microsoft, Firefox, Apple and Google. This includes Microsoft Internet Explorer 11 or greater, or any fully updated version of Safari, Chrome or Firefox. This list is updated as technology evolves, and you can [read more on our Web Browser Compatibility page](#).

## Using mobile devices

Crisisworks can be used via the mobile web browser on the device, however you should also consider downloading the native iOS app for Apple iPhone and iPad, the native Android app from the Google Play store, or the Microsoft Windows 10 app from the Microsoft Store. Follow the links or type "crisisworks" into those app stores to find the app.

## Signing in

To sign into Crisisworks you will need to be an active user in the system.

Accounts are activated by a coordinator or administrator, and an automatic invitation is sent to you via email. New users should contact their administrators to setup a user account for them.

**Video (click to play)**



logging in.mp4

### Step by Step

1. Type in your Username & Password into the boxes on the left and click the *Login* button.
2. Scroll down and click on the I agree button to accept the Terms & Conditions
3. Select one or more of your positions to go on duty, and click *Go On Duty*.
4. You are now logged in.

### Selecting positions and going on duty

Crisisworks integrates duty management as part of the login process. The available positions that are listed are based on the open events in Crisisworks and what positions these events have.

You can only go on-duty for your positions that are part of any open events. Based on your user's profile settings and the open events at the time, you can go on duty for multiple positions within the one event, as well as across multiple events. If no events are active with your positions, you can still log into Crisisworks but your functionality will be limited.

### Default event selection after logging in

Crisisworks supports multiple, simultaneous events. If, when you log in, you decide to go on duty across multiple events, you will default to viewing "All Participating Events". If on the other hand, you select positions in only one event, that event will be selected as the current event. You can change this after logging in if this is not suitable.

## First time users

The first time you log in, a message will appear at the bottom of the page asking you to complete your profile. This message will appear until you update your profile. See [Edit your Profile](#) for more information.

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## Recovering your password

If you have lost or do not know your password, you can reset it using the following steps.

### Video (click to play)



recovering your password.mp4

## Step By Step

1. Click on the **Forgot your password** link underneath the **Log In** heading.
2. Enter your email address and click on the **Reset Password** button.
3. Without closing your browser, check your email for a reset code, and enter it into the **Reset Code** field and click **Reset Password**.
4. Now enter a new password

Once your password has been updated successfully you will see a confirmation message, and you can login with your username and your new password.

## Notes

- The email sent by the system contains a reset code, not a password.
  - If you don't receive an email, you may not have an account on the system that uses that email address.
  - If you have multiple accounts that share the same email address, then the email will list each account with a separate reset code. Be sure to use the correct reset code for the account you are trying to reset.
  - Passwords need to be at least 8 characters long, with a mix of upper & lowercase letters and numbers.
-



## Signing Out

It is a good idea to *Sign Out* of Crisisworks once you have finished working with it for security reasons.

Closing your Crisisworks browser tab or window does not automatically log you out of Crisisworks.

### Step by Step

1. Pull down the far right menu which displays your name.
2. Choose the **Sign-Out** option at the bottom of the menu

## Editing your user account

Every user has a user account which details your information and preferences.

Accounts are created by *Coordinators* and *Administrators*, and an automatic invitation is sent to the new user via email. New users should contact their *Administrators* to set up a user account for them.

## On this page

- [Viewing your user profile](#)
  - [Editing your profile](#)
  - [Changing your password](#)
  - [Viewing your current permissions](#)
- 

## Viewing your user profile

You can view your user profile by clicking on your name in the top right corner or choosing the **User Profile** option from the menu under your name.

**Video (click to play)**



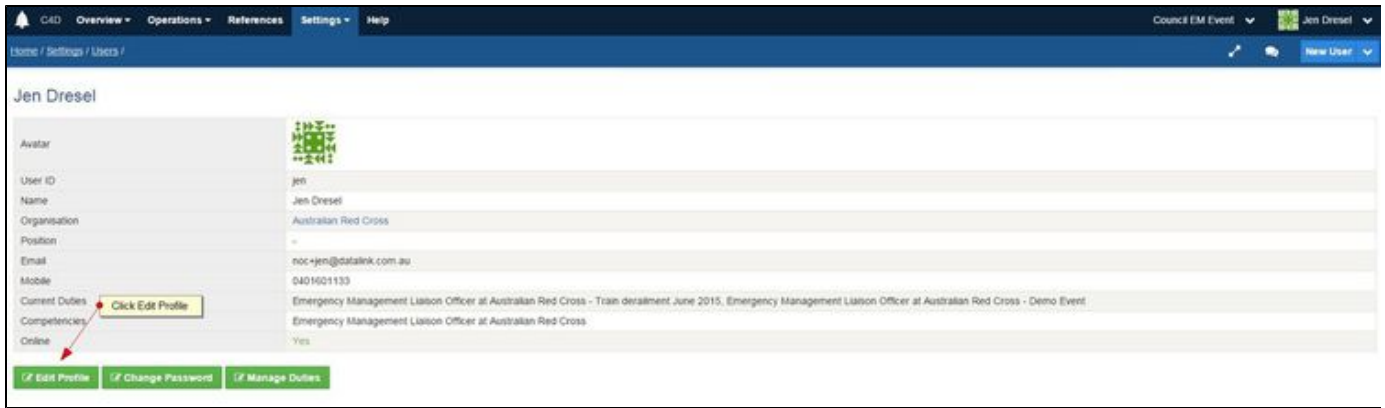


The user profile page allows you to view your basic information and see what your current duties are for all current open events. You can also view your current competencies which are all the positions you are competent in.

Avatar	Krusty Clown
User ID	kclown
Name	Krusty Clown
Organisation	ACME
Position	-
Email	none@datalink.com.au
Mobile	
Current Duties	None
Competencies	Municipal Recovery Manager at Council, IT Dept at Council, Deputy Municipal Emergency Resource Officer at Council, Deputy Municipal Recovery Manager at Council
Online	No

## Editing your profile

Each user has their own *User Profile* in Crisisworks. Your *User Profile* contains general information about you as well as your competencies, current duties and the organisation you work for. Your profile also contains your alert preferences.



### Step By Step Instructions

1. To edit your profile, click on your name in the top right corner of the screen.
2. Then click the *Edit Profile* button on your profile page.

Your user profile is broken up into the following sections.

Change your profile and press Save when finished editing.

<b>Contact Details</b>	<p>Contains contact information for your account.</p> <ul style="list-style-type: none"> <li>• The <b>Username</b> field cannot be changed</li> <li>• The <b>First Name</b> and <b>Last Name</b> fields should contain your real name.</li> <li>• The <b>Mobile</b> and <b>Email</b> fields contains your mobile number and email address, and are used for delivering notifications.</li> <li>• The <b>Organisation</b> field can only be changed by administrators.</li> <li>• The <b>Position</b> field is your regular position at your employer.</li> <li>• The <b>Avatar</b> is used as an icon throughout the system.</li> </ul>
<b>Alert Modes</b>	<p>Controls the way Crisisworks sends alerts and notifications.</p> <ul style="list-style-type: none"> <li>• <b>General Alert Options</b> control how the system sends SMS and email alerts based on content added into the system</li> <li>• <b>Email Subscriptions</b> allow you to opt in or opt out of email communications from Datalink about Crisisworks.</li> <li>• Select <b>On Call</b> if you are available to go on duty for new events. You may receive notifications if a coordinator needs to create a new event.</li> <li>• Select <b>Receive alerts via SMS</b> if you want to receive alerts via SMS to the mobile number provided in your user profile</li> <li>• Select <b>Receive alerts via Email</b> if you want to receive alerts via Email to the email address provided in your user profile.</li> </ul> <p>Note - if you tick both the SMS and Email checkboxes, you will receive both an Email and an SMS.</p>
<b>Account Information</b>	<p>Manages access control on the account</p> <ul style="list-style-type: none"> <li>• <b>Active</b> controls whether a user can log in</li> <li>• <b>Password</b> allows a user to reset their password</li> <li>• <b>Competencies</b> control which positions the user can go on duty</li> <li>• <b>Tags</b> can be used to manage user accounts.</li> </ul>

## Changing your password

Your password is stored against your user profile and is used to login to *Crisisworks* via the web and mobile devices. You can change your password in Crisisworks via your *User Profile* page.

### Step by step

1. Visit your **profile page** by clicking your name at the top-right of the website
2. Click the **Change Password** button on your user profile.
3. Now, enter your new password, enter it again to verify, and press the **Update** button.

Note - passwords need to be at least 8 characters long, contain at least one uppercase letter, one lowercase letter and one number.

If you cannot log in, you can **reset your password** by following the instructions under [Signing In](#).

## Viewing your current permissions

It can be useful to view what your current Permissions are in the Current Event which determines what you can see and do in Crisisworks. Your permissions are based on your Positions within an Event.

### Step By Step Instructions

1. Login to Crisisworks
2. Click on your name in the top right menu to view your profile
3. Click on the View Effective Permissions button located under the table of information.

A table of permissions for each register within the Current Event will be displayed and what you have access to do and see within that register. All Crisisworks functionality is also displayed along with you authority to perform these tasks.

View Participating Events (ID 129)	
Event: View Participating Events	Yes
Register Permission (ID 130)	
Applies to register	contact
Can see register	Yes
Can edit items	Items that I created
Can annotate items	None
Can view items	Items that I created
Can create items	Yes
Can assign items	No
Can see unassigned counter	No
Can see invisible items	No
Can bypass workflow	No
Register Permission (ID 131)	
Applies to register	logz
Can see register	Yes
Can edit items	None
Can annotate items	None

Security is based on your current on-duty positions.

If you think you should be able to perform tasks that you are unable to do, first ensure that you have gone on duty for the position that grants the required functionality.

Speak to your Coordinator or Administrator about updating your competencies if you cannot go on duty for the desired position, or if the position is not present in the event you are trying to go on duty for.

## Managing your Duty Status

Crisisworks allows you to be on or off-duty for multiple positions in multiple events at the same time. "On Duty" means that you are available to accept assignments and receive notifications.

There are a number of ways you can go on and off duty for positions in Crisisworks.

- [Selecting your duty when logging in](#)
- [Quickly going on or off duty for the current event](#)

- [Going off duty and signing out](#)

## Selecting your duty when logging in

When you first login, the system shows the your available positions are displayed allowing you to go on-duty for these positions.

- If you wish to go on duty to any available positions, check their checkboxes and click Update Duty Status
- If you are already on duty in all the positions you require, you can skip this screen and navigate directly to any other menu item within the system

## Manage Duty Status

Select the position for each event that you wish to go on duty.

**Fire Prevention 2017**

User Administrator

**Zombie Invasion**

Municipal Emergency Resource Officer

**Update Duty Status**

Crisisworks tries to intelligently determine which event you wish to work in.

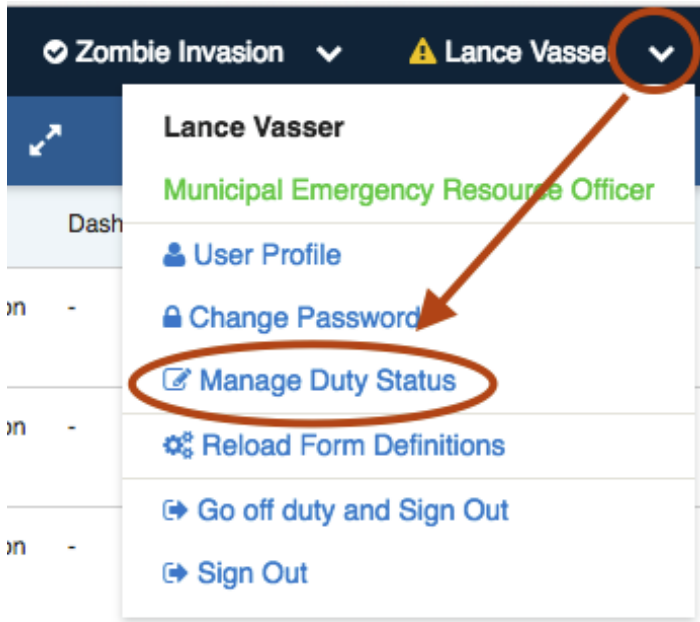
- If you are going on duty only to positions within one event, Crisisworks will switch you automatically to that event.
- If you select multiple positions across multiple events, Crisisworks assumes you will be working across multiple events and places you into All Participating Events mode. You can then select an individual event by clicking the event menu (next to your user profile menu at the top right of screen)

If you logging in but not modifying your duty status, then Crisisworks will stay in your last selected event.

## Managing duty status after login

At any time, you can manage your duty status.

1. Click your user profile menu
2. Click **Manage Duty Status**
3. Select the positions you wish to be on duty
4. Click Update Duty Status



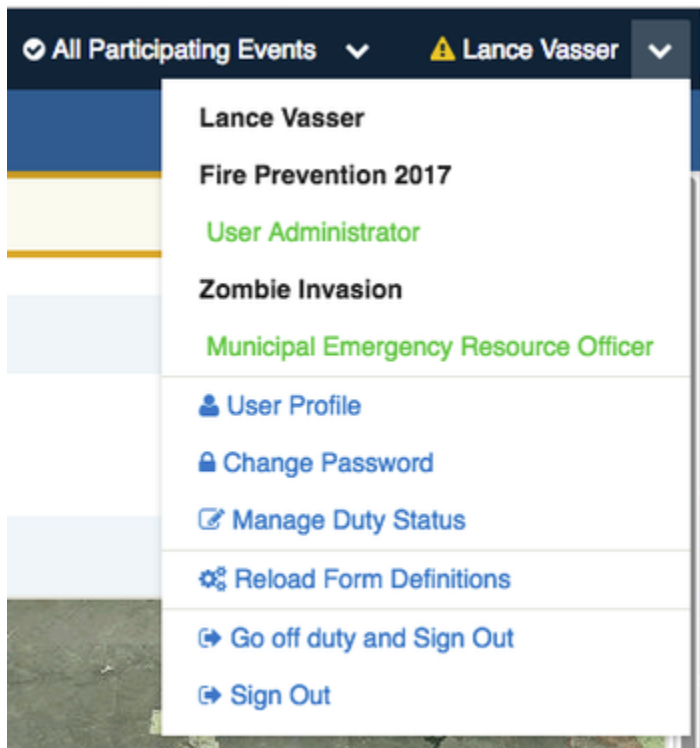
The positions displayed are only the positions that are part of any currently open events. If a position or event is not listed, this means that either the event is not open, or the event does not contain any positions to which you are competent — speak with your event coordinator or administrator to resolve this.

### Quickly going on or off duty for the current event

The quickest way to go on and off duty for the currently selected event is to click on the position title in the menu.

1. Click on the top right menu which displays your name to show your current positions
2. If you are on duty, it will show green; if you are off duty, it will show red.
3. Click on the desired position to toggle your duty status

Tip: If you are in All Participating Events mode, the list will show you positions across all events.



## Going off duty and signing out

At the end of your shift, you can go off duty for all events and sign out in one step.

1. Click your user profile menu
2. Select **Go off duty and Sign Out**

The system will log you out and finalise your duty and participating records for all open events.

# Working with Crisisworks

In this section

## Conceptual Overview

Crisisworks supports a highly flexible module configuration, yet provides a consistent and easy-to-use way of managing data within the system that works the same across all modules. By learning the basics of Crisisworks, you will be able to quickly and confidently understand how to manage all modules.

Crisisworks provides a unified, end-to-end workflow to provide end-to-end management across the entire lifecycle of the collected data.

### Inspect & Capture

Collect information and capture evidence from operations centres and in the field using flexible forms, geospatial data and media.

### Evaluate & Organise

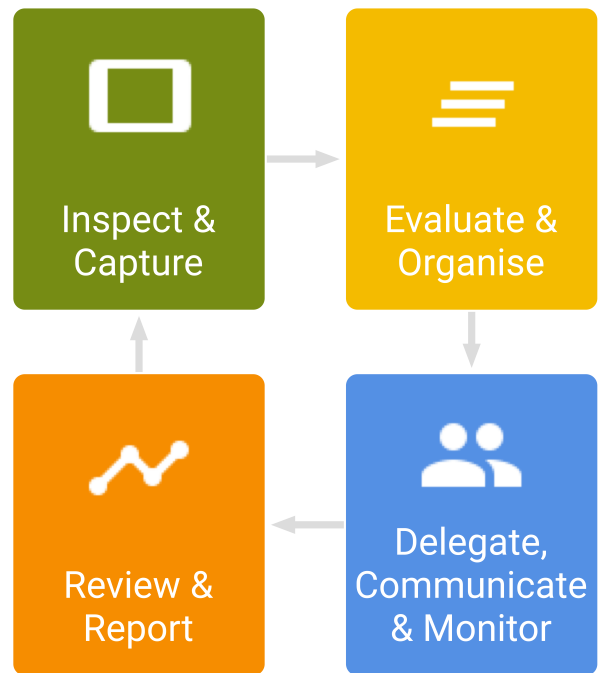
Information can be managed by setting priority, status, assignments and tags.

### Delegate, Communicate & Monitor

Tasks can be created and assigned to officers and contractors. Information can be published via email, SMS and to the dashboard to communicate to officers both on duty and on call. Each class of record supports its own lifecycle to track the status of the record, and this data is aggregated via counters to provide real-time monitoring of cases, impacts, messages, requests, tasks and other data.

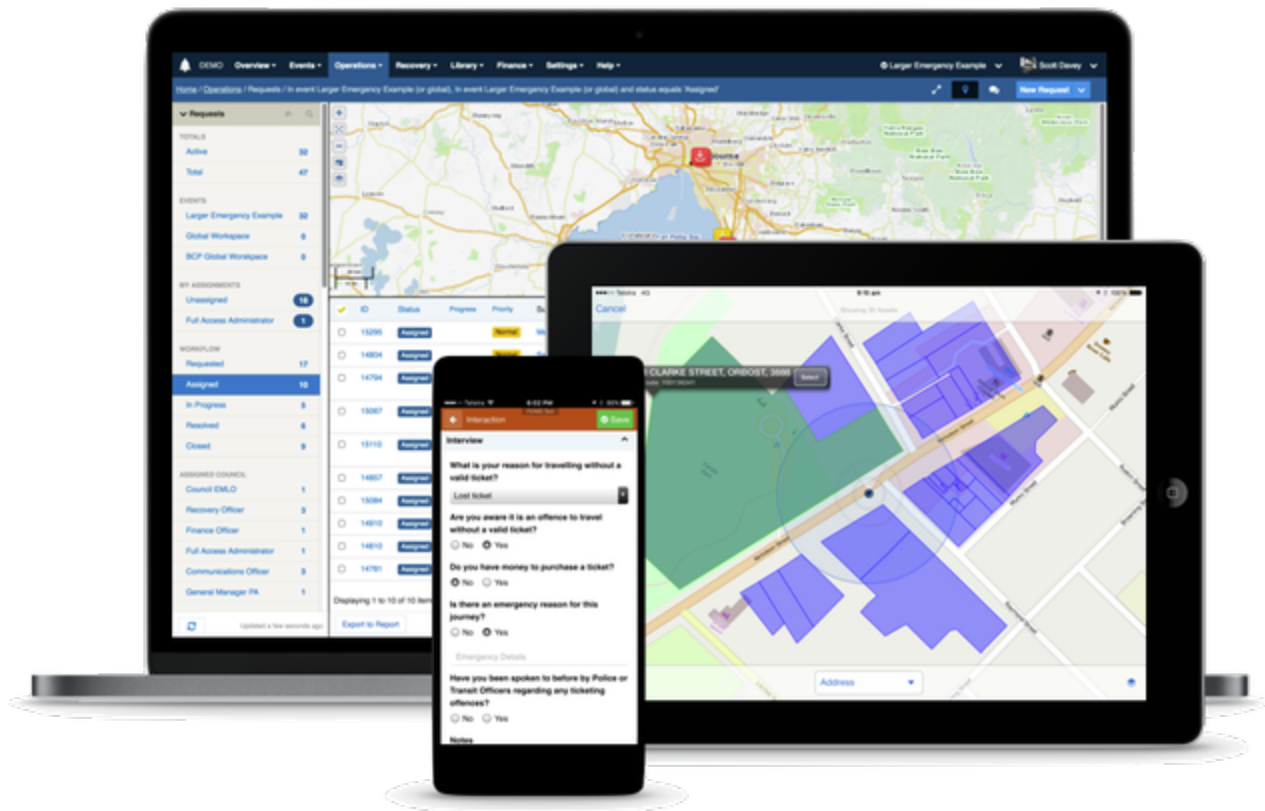
### Review & Report

Detailed reporting analyses your data and provides snapshot reporting of your event. This data can then be shared with others, who may import the data into their own systems to continue their own work.



## Web, Mobile & Offline

Crisisworks provides a cloud-based portal for web management, along with a native app for iOS, Android and Windows devices which is specifically developed for field use, even when offline.



## Event Management

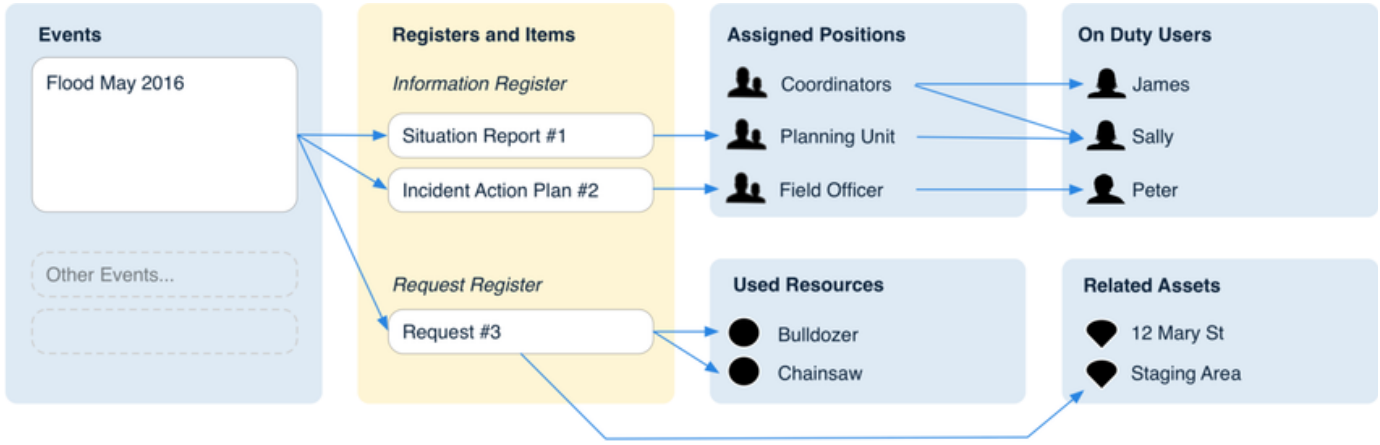
At the core of Crisisworks are **Events**, which provide a way to organise activity around themes, topics, incidents and planned activity.

An event is a secure container used to store register items. Events are created whenever you have a planned or unplanned activity requiring the use of Crisisworks. Events controls which registers are required, which positions and resources are used, and through the user competency system, which users can access the event. In order to access and work within the event, users must be **competent within a position** that has been added to the event, plus they must **go on duty**.

Each event is set up with a series of **Registers** which contain the data (**Items**) and define the structure and the workflow rules, as well as some **Positions and Resources**. Crisisworks users **go on duty** to their positions, which grants them access to manage items in the registers (e.g. adding requests, information, cases, documents).

Based on the configuration of each **module**, Register Items may be assigned to **users** and **positions**, and they may utilise **resources** and relate to **assets**. Additionally, Registers implement **workflows** using combinations of **status**, **priority**, **assignment**, **counters**, **escalations** and **notifications**, which help users to effectively manage the event.





## Registers

Registers store and manage the data in the system.

A register's configuration defines the shape of its data, the forms used to collect its data, the relationships between data, plus the overall functionality and capabilities of the records such as whether they have maps, can relate to assets, support status transitions, have priority, support assignment, can be tagged, have escalation rules, as well as other behaviours or workflows.

The data within each register is managed using a number of key screens and behaviours:

- The **Datagrid** allows for bulk management of items in a single register
- **Counters** allow for rapid reporting on key stats, as well as quick filtering to the live data
- The **search system** allows for more custom searching to occur across the set of items in the event
- The **form** allows for viewing and editing the data, and controls navigation between records via **relationships**
- Registers have inbuilt support for a full **audit log**

The following shows a datagrid, which is the key operational screen within Crisisworks for each register.

ID	Status	Priority	Property Type	Property	Applicant Name	Registered	Updated
15302	New	Low		4 JOHN STREET, FRANKSTON, 3199	Pollock, Jackson	Yesterday at 5:37 PM	Today at 8:17 AM
14785	Inspection Required	High	residentialSecondary	3 CATHERINE PARADE, FRANKSTON, 3199	Jackson, Mary	11 Nov 2016 at 4:06 PM	Yesterday at 5:36 PM
15251	Inspection Required	High	commercial	6 DAVEY STREET, FRANKSTON, 3199	Jackson, Mary	12 Apr 2017 at 1:44 PM	Yesterday at 5:33 PM
14966	New			3 FRANCIS STREET, FRANKSTON, 3199	No applicant recorded	2 Dec 2016 at 1:06 PM	Yesterday at 5:16 PM
14837	New		commercial	40 JOHNSTONE STREET, SEAFORD, 3198	Jones, Peter	15 Nov 2016 at 12:00 PM	Yesterday at 4:34 PM

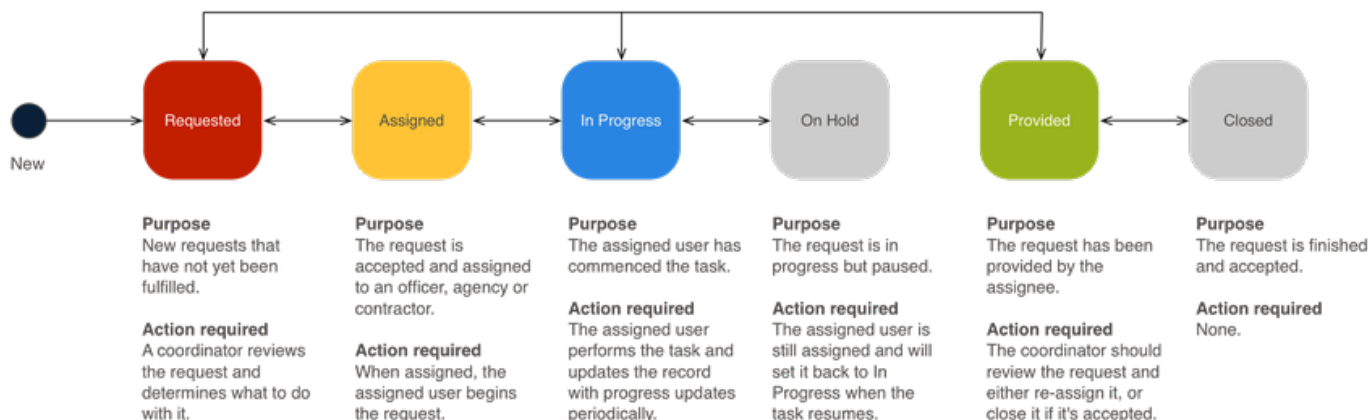
## Status, Priority & Progress

Most registers support the concept of **status**, which is controlled via strict rules known as a **state machine**. This ensures that only authorised users can set various statuses, and that register items must proceed through the status workflow in an agreed order. A core feature of Crisisworks is that each register can support its own state machine, allowing workflow to be tuned to the needs of each register independently. This means that in order to fully understand a register, you should understand the progression of statuses through the workflow.

Although each register implements its own workflow process, they all follow the overall convention:

- **RED** is unhandled and needs to be assessed and assigned,
- **YELLOW** is assigned but not underway,
- **BLUE** is in progress,
- **GREEN** is safe or completed, and
- **GREY** is inactive or completed.

The following diagram shows the workflow for a Request. Consult the module guide for details on specific registers.



**Priority** controls the order in which a task should be done. Simply set as a high priority to make it more important, or low priority to make it less important.

For some registers, when set to an **IN PROGRESS** state, the user can also set a **Progress** as the percentage through the task.

## Assignment & Delegation

At key parts of the workflow, coordinators may **assign** records to users, positions and resources.

Assignment allows coordinators to assign an item to one or more users or positions for action. When an item is assigned, Crisisworks sends a notification to the responsible user informing them of the assignment, and places a counter on their datagrid to give them quick access to their records. They are then expected to take ownership of that record.

For example, requests are assigned to those performing the task, recovery cases are assigned to both case managers and field inspectors, and risk records are assigned to those responsible for mitigating or monitoring the risk.

## Audit, Notification, Data Sharing & Reporting

At every step of the way each change within Crisisworks is audited, and data within each register item must conform to its workflow rules and schema constraints, meaning Crisisworks is a system where nothing can be lost or forgotten. Crisisworks also contains built-in reports to provide analysis, summarisation and data sharing with others.

## Summary

Crisisworks provides full lifecycle workflow for a wide variety of organisational workflows.

[Learn more.](#)

## Working with Datagrids

### On this page

- Overview
- View options
- Working with counters
  - Expanding a module to view its counters
  - Using a counter to filter for data
  - Viewing hidden counters
  - Refreshing counters
- Sorting data
- Searching and filtering data
  - Applying a search filter
  - Clearing a search filter
- Datagrid actions
  - Bulk editing items
  - Exporting data

## Overview

All modules have a grid view interface for viewing data, called a **datagrid**.

The grid view reads similarly to a spreadsheet. In addition to displaying records within a module, the datagrid enables sorting, filtering, searching and bulk management functions and in some modules, a map view.

The screenshot shows the Crisisworks interface with a datagrid for 'Requests'. The table has the following columns: ID, Status, Progress, Priority, Title, Assigned, Updated, and Next Action. The data rows include various requests such as 'Need 2 cases of bottled water to the staging area', 'Test', 'Traffic management Point Staff to Pearceedale Pde', and 'Morning Tea'. The interface also features a left sidebar with a 'Requests' menu and a top navigation bar with tabs like 'Operations' and 'Recovery'.

Generally, a datagrid can be viewed by clicking on a menu or an option within the menu, for example Operations or Operations > Requests. If a top menu is selected, the datagrid defaults to displaying the first module in the menu.

Datagrids are broken down into two main sections - the datagrid and the sidebar.

## View options

Many datagrids have additional views options:

	<p><b>Projector Mode</b></p> <p>This mode presents the data in a view that works well with projectors, and sets up an auto-refresh cycle.</p>
	<p><b>Map</b></p> <p>For registers that store geospatial content, this shows an integrated map that maintains a synchronised view of data in the datagrid.</p>
	<p><b>Activity Log</b></p> <p>Shows or hides the system's activity log sidebar, which keeps you up to date on changes made by others, and allows for quick log entries to be posted.</p>
	<p><b>Search Mode</b></p> <p>Click this to hide the counters and display the search form, allowing for more detailed searches and filtering of content.</p>
	<p><b>Show Hidden Counters</b></p> <p>The system normally only shows counters that are active. Click this to show inactive counters (e.g. counters that have a value of 0)</p>
	<p><b>Refresh</b></p> <p>Click to refresh the counters and datagrid with the latest content from the server</p>

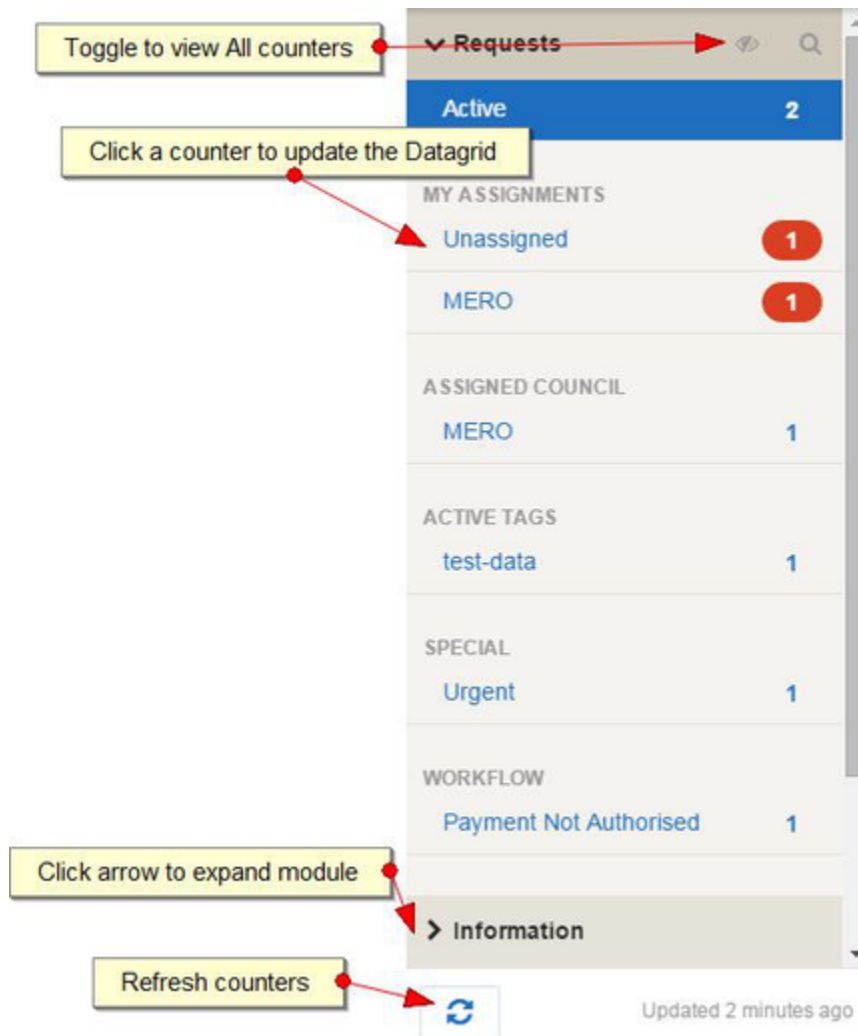
## Working with counters

A datagrid's sidebar contains counters that display the number of records for that filter.

These counters are pre-set filters that show the most relevant and important information for the data being displayed. Clicking on any of the counters will update the datagrid to match the counter filter displayed.


Each register has its own set of counters. The counters displayed in the sidebar are relevant to the data being viewed in the datagrid and to your position and organisation. For example the request counters display the number of requests assigned to your position(s), the number of unassigned requests, the number of active requests.

Register counters are grouped by modules which can be expanded to view that specific register's counters within that module. For example in the **Operations** section, the counters are grouped by the **Requests, Information, Offers, Logs** and **Contacts** registers.



### Expanding a module to view its counters

To view counters for a module:

1. Browse to a datagrid from the top menu (e.g. **Operations > Requests**)
2. The selected module's counters will automatically be displayed, but related modules will be collapsed.
3. Click on the arrow next to the related module (  ) to display its counters as well. You can expand multiple modules at once.

Please note, the datagrid will only be updated when you click on a counter, and not on a module name.


For example, clicking Information will expand the information counters, but the datagrid will only be refreshed to show information records once you click one of its counters (e.g. **Total**).

## Using a counter to filter for data

To use a counter to filter for its data:


1. Click on the counter name or the counter number
2. The data will be displayed in the datagrid

## Viewing hidden counters

Only active counters are displayed by default, but you can click the **Show Hidden Counters** button to show inactive counters (  ).

## Refreshing counters

Most counters normally refresh automatically as content is changed at the server, however, sometimes you may wish to manually refresh the list.

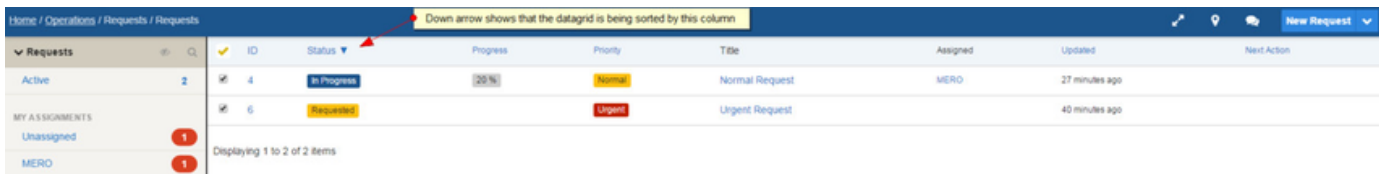
To refresh the counters, click the **Refresh** button (  ).

## Sorting data

Most columns displayed in the datagrid can be sorted in **ascending** or **descending** order. This means that all of the data in the datagrid will be sorted by that column. Any columns that are sortable are displayed in blue.

An arrow is displayed next to the current column that is being sorted. A down arrow is displayed if the column is being sorted in ascending order. An up arrow is displayed if the column is being displayed in descending order.

Only one column can be sorted at a time.



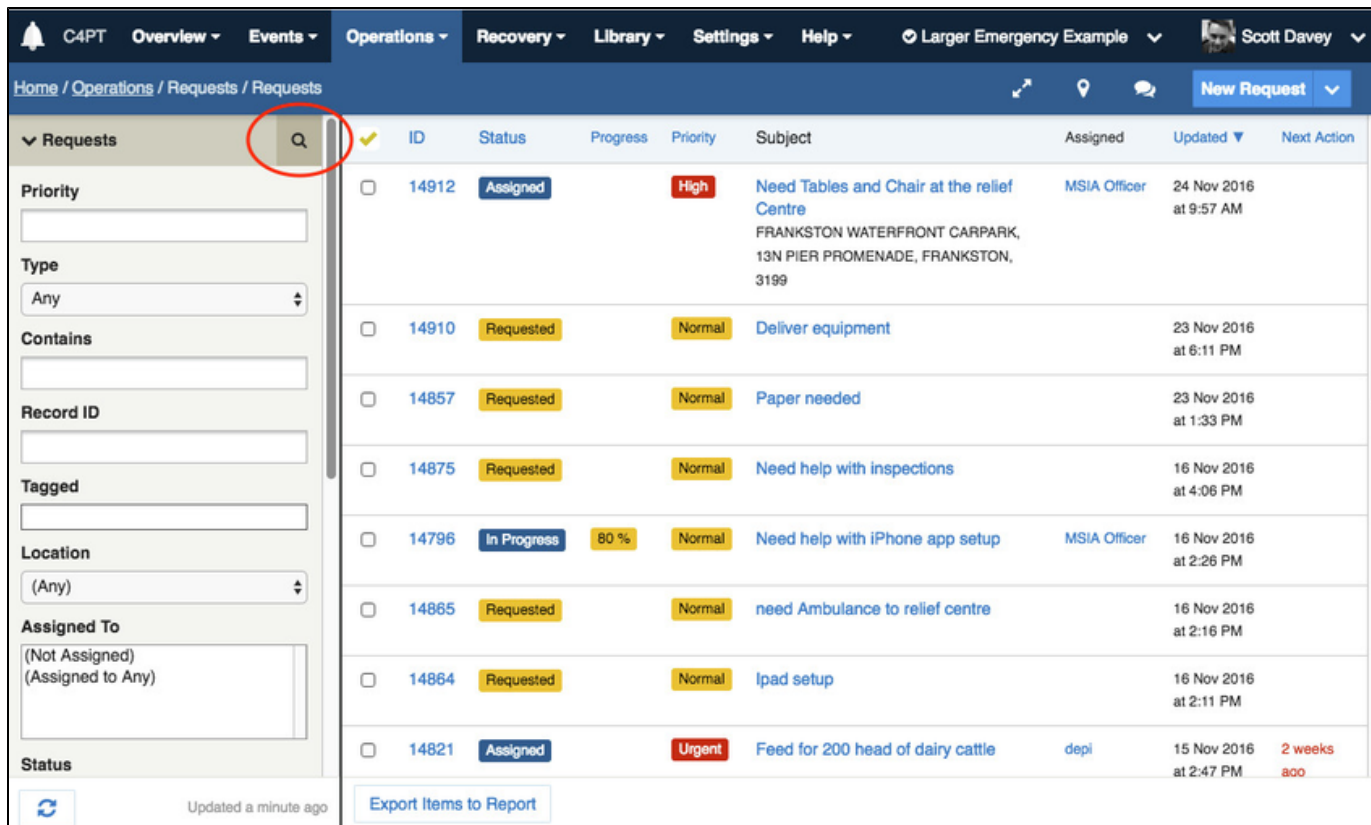
Requests	ID	Status	Progress	Priority	Title	Assigned	Updated	Next Action
Active 2	4	In Progress	25%	Normal	Normal Request	MERO	27 minutes ago	
MY ASSIGNMENTS	6	Requested		Urgent	Urgent Request		40 minutes ago	

To sort data:

1. While viewing a datagrid, click on the column heading that you wish to sort by. This will update the datagrid so that the data being displayed is sorted in ascending order by that column. A down arrow will appear next to the column heading.
2. To sort the same column in descending order, click on the same column heading. A down arrow will now appear next to the column heading
3. To change which column the datagrid is being sorted by, click on a different column heading

## Searching and filtering data

All Datagrids have a basic search feature to filter data in the datagrid, which is exposed by pressing the search icon (  ).



The filter form that displays is contextual and differs for each register.

Search filters persist until they are either cleared or another search filter is applied. The filter will remain when navigating to other modules or screens and will still be there when returning to the system.

The following types of filter are commonly configured:

<b>Text filters</b>	allow you to enter keywords
<b>The Contains filter</b>	performs a full-text search within records and their attachments
<b>Selection filters</b>	allow you to select an item from the select box. The default selection is "Any" which searches for all items in the list. Choose an item from the drop down list if you want to search by a particular selection in the list.
<b>Multi-selection filters</b>	allow you to choose more than one selection in the box. To choose multiple items, press Ctrl while clicking on the items you want to select in the box
<b>Date filters</b>	will allow a date (and sometimes a time) to be selected
<b>The Location filter</b>	exposes the datagrid map, and allows searching by radius around a point, and by a polygon drawn on screen. To use, select the type of geometric filter from the pull-down list, then draw on the map.

Tip: If a **Contains** filter is present, this provide a full-text search across all items in the current event.

## Applying a search filter

To apply a search filter:

1. Start in the datagrid you wish to search
2. Click the **search** icon to expose the search form
3. Select options as required to configure the filter
4. Click **Apply** at the bottom of the form to apply the filter. Alternatively, press enter in any of the form elements.

Note that the **Apply** button may be initially off screen and you will need to scroll the form to view it.



## Clearing a search filter

To clear a search filter, click **Clear Filter** at the bottom of the filter form.

## Datagrid actions

Some datagrids provide bulk management functionality, and this varies module to module.

✓	ID	Status	Progress	Priority	Title	Assigned	Updated ▲	Next Action
<input checked="" type="checkbox"/>	6	Requested		Urgent	Urgent Request		2 hours ago	
<input checked="" type="checkbox"/>	4	In Progress	20 %	Normal	Normal Request	MERO	an hour ago	

Displaying 1 to 2 of 2 items

Click on more than one item to display Bulk functionality

Bulk Edit function appears when more than one item in the Datagrid is selected

Export Bulk Edit

The datagrid will only show buttons that apply to the selection.

1. From the Datagrid, click the checkbox for one or more items.
2. Alternatively, you can click on the yellow tick column heading to select "All" items, which toggles between selecting all and selecting no items. Selecting all items includes all items in the current filter, which may include items that are not on the current page.
3. If any bulk functionality can be performed, a series of bulk buttons will appear at the bottom of the datagrid.

## Bulk editing items

A bulk edit utility is commonly included for most modules.

Bulk Edit

To bulk edit a number of items:

1. First, select two or more items in the datagrid.
2. Click the **Bulk Edit** button at the bottom of the datagrid
3. Only limited fields can be edited — this includes **Assign To**, **Status**, **Due Date** and **Tags**.
4. For any select boxes, a "Don't Change" option will be displayed. Choose this option if you do not wish to update this field. Alternatively, choose an item from the select box.
5. Change all of the necessary fields and click the Make Changes button



**Bulk Edit Selected Items**

You are about to edit 3 items. Please note that editing multiple items can take a few minutes.

**Assign To**

**Set Status**

**Due Date**

**Tags**

**Make Changes**

## Exporting data

An export utility is commonly included for most modules.

[Export Items to Report](#)

To export the data into a report:

1. First, select one or more items in the datagrid. You can also use the select all feature to export all records in the filter.
2. Next, click the **Export Items to Report** button at the bottom of the page
3. On the following screen you can
  - a. configure the columns to include in your export
  - b. group the data by a column
  - c. order the data by a column
4. Press **Run Report** to run the report
5. When the report has finished, it will show on screen. Scroll to the bottom of the report and click the **Export to Excel** or **Export to CSV** button to export the data.

## The Activity Log

### On this page

- [Overview](#)
- [The dashboard](#)
- [The activity log sidebar](#)
- [Activity logs for individual register records](#)

- Posting a log entry

## Overview

All changes and activities in Crisisworks get saved to an **activity log**.

The screenshot displays the Crisisworks dashboard interface. At the top, there is a navigation bar with tabs for 'Overview', 'Events', 'Operations', 'References', 'Settings', and 'Help'. Below this, a sidebar on the left lists various categories like 'OPERATION', 'RECOVERY', and 'INTERNAL' with sub-items and counts. The main content area shows a notification 'You have changed your duty status', a list of activity log entries for 'Peter Kakris', and an 'EVENT 12 - TEST EVENT' section. A callout box points to the 'Dashboard' option in the Overview menu, and another points to the 'Show Details' link for an event entry. On the right, there are sections for 'Announcements' and 'Event Overview' with a map.

During an event this can be useful to see what changes have recently been made for the Event. It also allows you to view the activities for a specific record.

The Activity Log displays the following:

1. The name, avatar and position of the user who made the change - you can click on the user's name to view their user profile,
2. A brief summary of important fields that were changed. If the change relates to an item, the item name is displayed with a link to that item,
3. An icon showing the current status of the item (if appropriate),
4. The date and time of the change, and
5. A **Show Details** link. When you click on the **Show Details** link, the box will expand to display the individual changes that were made.

Any activities that were made by you are highlighted in blue so you can easily identify them. Any activities that mention you are highlighted in yellow, and as they arrive, you will hear a soft ding sound to alert you to their presence.

The activity log can be found in four places within the system:

1. On the main Dashboard
2. In the sidebar on the right hand side of any datagrid
3. On individual records, where it displays only changes for that record as well as related records.

For changed data it will display who made the change, the time of change and what was changed. For most records a **Show Details** link is displayed, which you can click to show what specific information was changed.

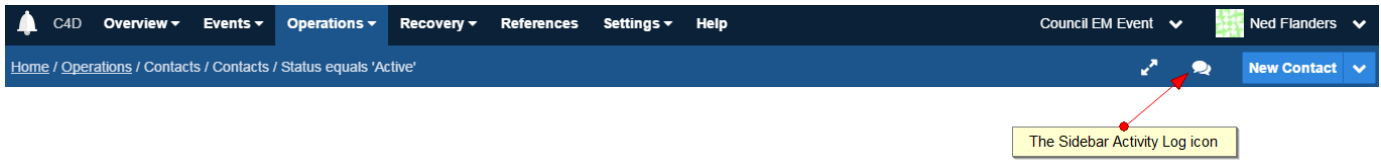
## The dashboard

The activity log appears whenever you view the dashboard, and it will update automatically as new content comes in.

## The activity log sidebar

The activity log sidebar displays the same information as the dashboard log. The advantage of the sidebar is that you can view the activity log without leaving the current page you are on.


Clicking on the activity log icon opens up a sidebar on the right hand side of the page.

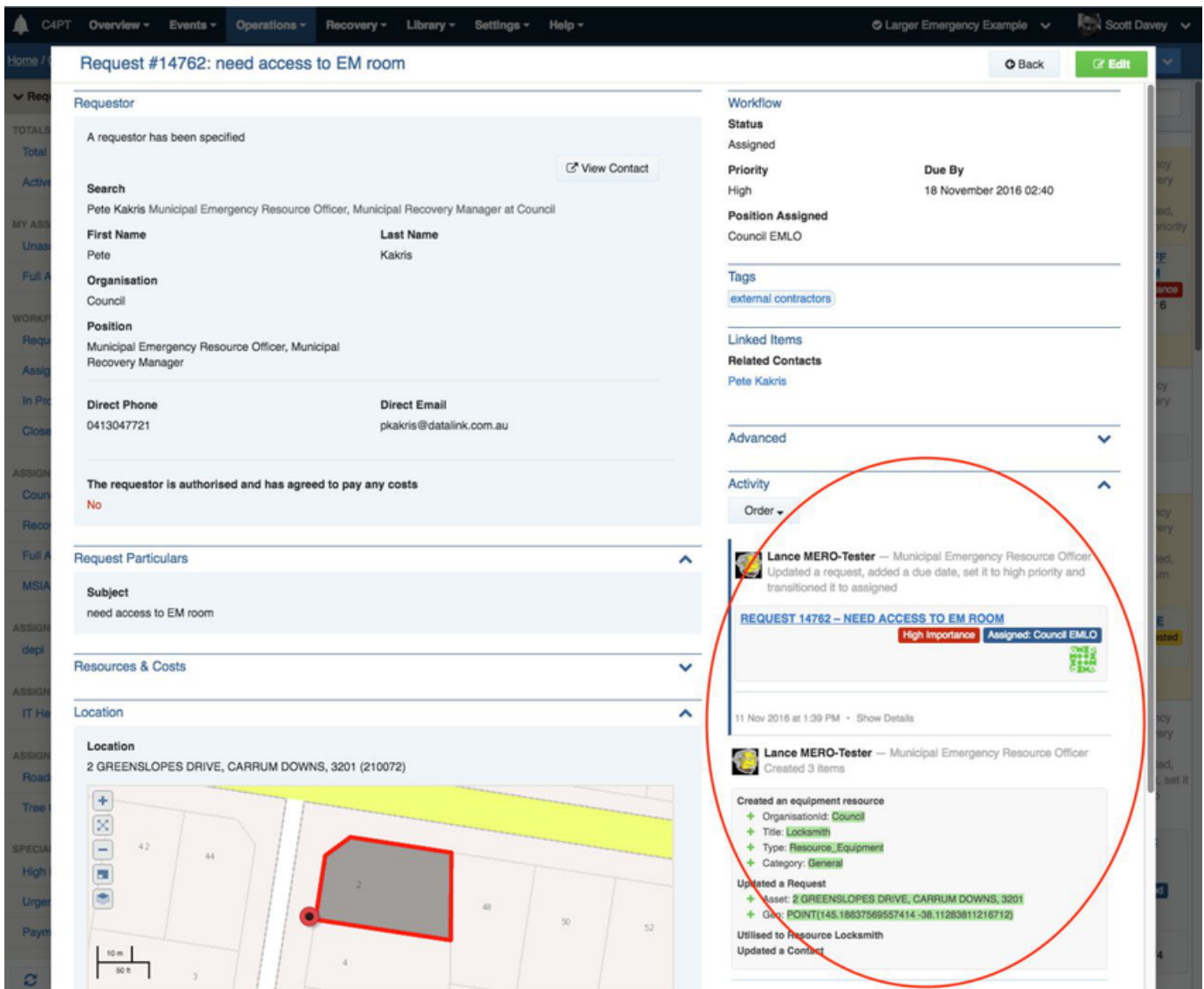


## Activity logs for individual register records

For most records an embedded activity log will be displayed within the record, which allows you to see the history of changes for that specific record.

It displays the same information as the main activity log but limits the information displayed to only activity related specifically to that item.

The location of the embedded activity log will vary based on the register, and sometimes it will be collapsed by default. If it's collapsed, click the expand button (  ) to expand it.



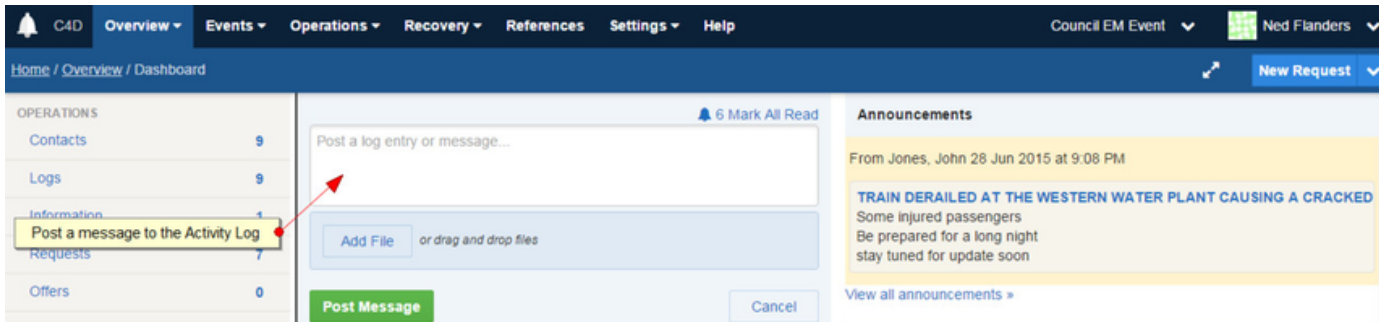
## Notes:

- To see more information on the change, click on the Show Details link. This will expand the box to display more information on what was changed.
- Some items may be linked to other records, for example a Contact. If a linked item appears in the Activity Log you can click on the linked item to view it.

## Posting a log entry

You may wish to post a message or log entry to the activity log.

This log entry will only be posted to the current event and will only be seen by participants in the current event. You can add this message from the main dashboard or the sidebar version of the activity log, and you also have the option of adding one or more files to your message.



To post a message into the activity log

1. If on a page other than the dashboard, first open the activity log sidebar.
2. Type into the box at the top of the Activity Log which says "Post a log entry or message..."
3. To add a file to your message you can either click on the **Add File** button displayed or drag files from your computer over the button.
4. To submit your log entry, click on the **Post Message** button.

Your message will now appear at the top of the Activity Log.

The file types supported are:

Images: PNG, GIF, JPEG  
 Audio: MP4, WAV, MPEG, 3GPP, 3GPP2, AAC, AMR  
 Video: MP4, Quicktime, 3GPP, 3GPP2  
 Documents: PDF, Word, Excel, Powerpoint

## Working with Events

### On this page

- Overview
- Selecting an event
  - Working in a single event
  - Joining other events
- Creating an event
- Managing events
  - Viewing an event
  - Viewing positions in an event
  - Managing positions in an event
  - Closing an event
- Creating a Global Event
- Creating an Event Template

## Overview

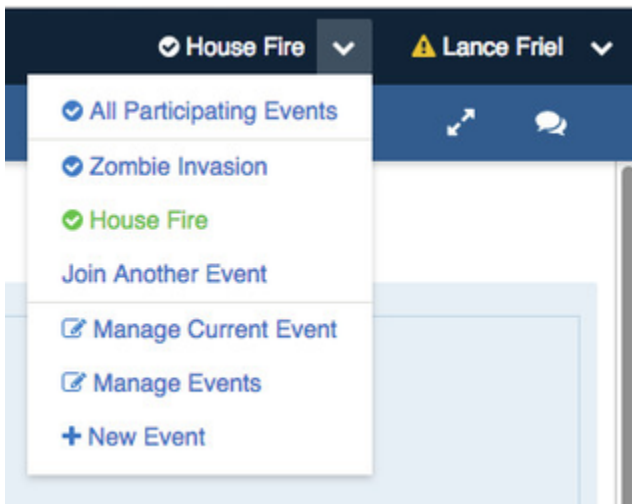
An event is an incident, project or context of work that groups together and secures all the records, people, positions and audit history associated with that work.

Events allow you to select positions to participate, and choose which registers, resources and assets will be part of the event. When an event has been completed, you can close it and all its related information will be archived. Crisisworks allows multiple simultaneous events to be managed.

Examples of events include "Flood Feb 2017", "Wind Storm Sept 2016", "Compliance Inspections", "Weed Treatments", "After-hours call outs", "Single house fires", "Risk Assessment 2015".

## Selecting an event

The **event selector** is located at the top right of screen, and it allows users to switch between their participating events, or join a new event if there's a new event not listed.



## Working in a single event

The event selector displays the name of the currently selected event. Clicking the event's name will show detailed information on the event including current users, positions and in-use resources. Clicking the down arrow opens the menu and shows a list of all participating events, where users can select:

- **A specific event** — to select that event and begin working within it
- **All Participating Events** — (if available) to view records across all participating events
- **Join Another Event** — to join an event not listed

Administrators and coordinators will get additional options (shown below) to manage the current event, manage all events, and even create a new event.

**All Participating Events** mode is useful for viewing records across multiple events at once, but it is not possible to add records, nor assign records to users or positions, when in this mode. Users are recommended to select a specific event and work within it as much as possible.

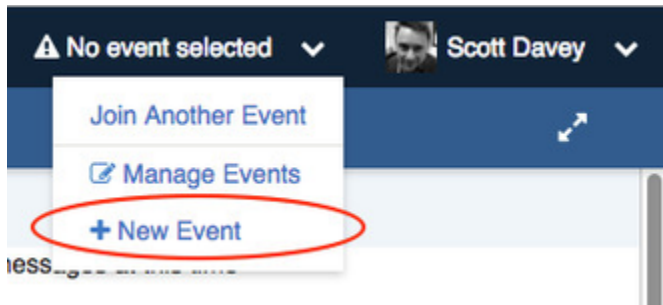
## Joining other events

If an event exists that is not displayed in the user's **event selector**, the user can click **Join Another Event** to go to their Manage Duties screen where they join new events by going on duty for the first time.

See [Managing Your Duty Status](#) for more information.

## Creating an event

Authorised users can quickly create an event by selecting **New Event** from the **event selector**.



The event creation process follows a wizard process:

1. Provide basic details and click **Next**
2. Confirm details
3. If configuring advanced options, customise
  - a. Registers included in the event
  - b. Positions included in the event
  - c. Resources included in the event
4. Click **Finish**

### Step 1: Configure basic event details

For most events, the basic events are all you'll need to configure.

Fill in the following fields then press **Next**.

<b>Event Title</b>	Describe the event with a short name
<b>Title Format</b>	Customise the title with common formats — for example, automatically add the month and year to the event
<b>Start Date/Time</b>	This is pre-filled, but you can back-date or forward date an event. If forward dating an event, it will automatically set its status to <b>Open</b> at that time.
<b>End Date/Time</b>	The date it typically left blank for emergency events and incidents. For events that represent fixed shifts, this allows the event to automatically have its status set to <b>Closed</b> at the end date/time.
<b>Code</b>	A short code, if required, to facilitate data sharing between sites and systems. Leave blank if unused by your organisation.
<b>Event Description</b>	A short description of the event. This is not a detailed description, which is better left to an Information record within the event, but is used when reviewing events in aggregate at a later time.
<b>Template</b>	Select a template that best suits your event.  Templates pre-select the positions, registers and resources, and pre-create key requests, information and other data to kick-start events. You can create your own templates.
<b>Event Status</b>	Set to <b>Open</b> (default), or if your organisation has customised this list, select the status most appropriate to the event.
<b>Category</b>	By default the category list contains an event risk level, but this can be customised per site so your site may have different categories.  Note that the <b>Test Only</b> category is useful for tests and drills, as all communication from the system will be labelled clearly with the words TEST ONLY.

### Step 2: Confirm details

The system shows a summary of the positions, registers, resources and data to set up when the event is created.



- If you selected a template and the settings are correct, then you can press **Finish** to create the event straight away.
- If you wish to modify these additional settings, check the checkbox labelled **Configure Advanced Options** then click **Next**.

**RECOMMENDED** If the event contains one or more positions that you are competent to fill, then you can check the checkbox labelled **Automatically go on duty for this event**, and after the event is created, the system will put you on duty for the event and switch you to that event automatically.

## Optional Steps

If configuring advanced options, the system will provide three additional screens which will allow you to:

- Select additional registers to add to the event
- Select additional positions to add to the event
- Select additional resources to add to the event

These screens are reached in turn, and for each screen, place a check into the checkbox beside the item to add to the event, and click **Next** to continue to the next screen. The event is created after clicking **Next** from the resources screen.

## After an event has been created

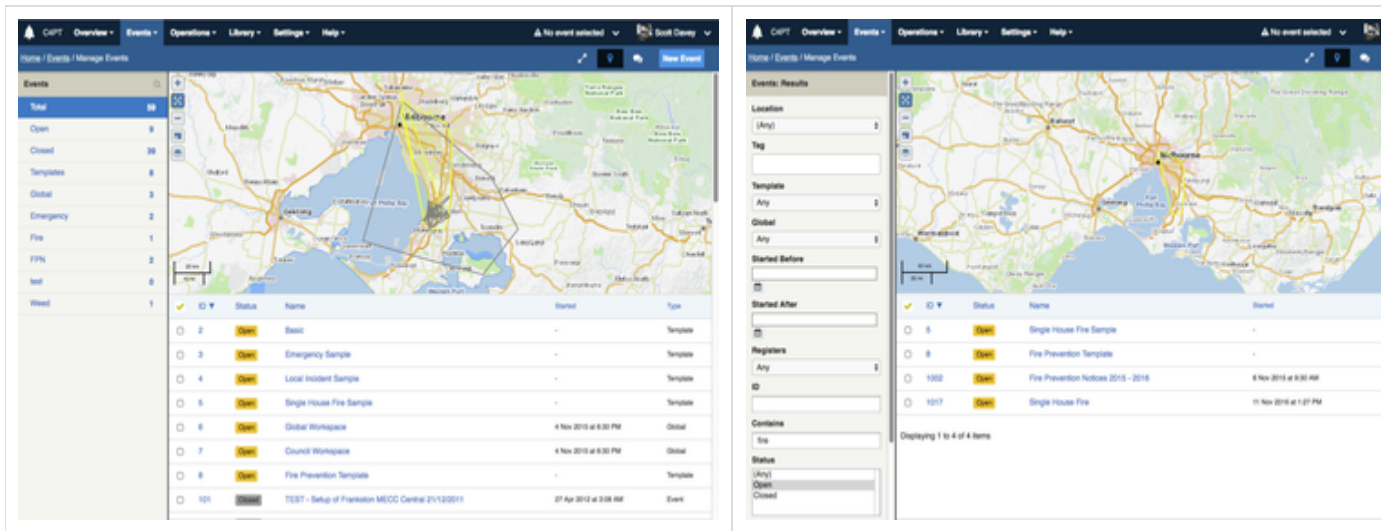
After an event has been created, you would typically:

1. Go on duty for the event, if you didn't do so during the event creation process
2. Switch to the event by using the **event selector**
3. Add your first Information record with details of the event, and use the announcement feature to let others know that the event was created.

## Managing events

### COORDINATORS ONLY

Selecting **Manage Events** allows coordinators to view all open and closed events in the system.



These are displayed in a searchable datagrid.

1. To navigate the list, click the counters to show just the events for that counter.
2. Switch to search mode by clicking the **search button** (  ) in the sidebar to expose and use the search filters.

Click an event to view specific details about the event, and to manage the event.

## Viewing an event

From the datagrid, click an event title to view the event summary.

The screenshot displays the Crisisworks interface for viewing an event. The top navigation bar includes 'CAPT Overview', 'Events', 'Operations', 'Library', 'Settings', and 'Help'. The user is logged in as 'Scott Davey'. The event title is 'Larger Emergency Example'. The left sidebar contains navigation options: 'General', 'Positions', 'Registers', 'Resources', and 'Activity Summary'. The main content area is divided into three sections:

- General Information:** A table with the following data:
 

Title	Larger Emergency Example
Description	
Code	
Status	Open
ID	1016
Parent Event	Top-level Event
Category	Test Only
Started	11/11/2016 12:54:00 PM
Tags	-
- Location Summary:** A map showing the event location in Melbourne, Australia, with a blue polygon indicating the event area.
- Key Statistics:** A table summarizing activity across registers:
 

Operations	
Requests	18
Information	19
Offers	3
Logs	13
Contacts	6
Recovery	
Cases	3
Persons	3
Agriculture	2
Environmental Health	2
Services Required	3
Livestock	2
Infrastructure	3

This shows a map summarising all event activity, along with statistics of all the recorded information across all the registers within the system.

Additional views are:

1. **Positions** — a list of positions most recently involved in the event, along with current on duty users for each position.
2. **Registers** — a list of all activated registers, along with a summary count of the number of records
3. **Resources** — a list of resources most recently involved in the event, along with usage statistics
4. **Activity Summary** — the activity feed for the event

These views show summary data only. To view event data, you can:

1. Edit the event, set the status to an active status (e.g. **Open**) and click **Save**
2. Go on duty for the event (in the event selector, select Join Another Event)
3. Select the event in the event selector to view its data

## Viewing positions in an event

After viewing an event, click **Positions** to view the positions roster, which shows all active positions along with all the users currently on duty in those positions.



Position	Available	On Duty	Phone	Email	Location	Since
<b>Coordinators</b>						
Municipal Emergency Resource Officer / Council	5	[Redacted]	[Redacted]	[Redacted]	-	Nov 11, 2016
		Lance MERO-Tester, Head of Division	0451223	None@datalink.com.au	-	Nov 15, 2016
		Pete Kakris	[Redacted]	[Redacted]	-	Nov 23, 2016
Deputy MERO / Council	1	Donna Demero	-	none@datalink.com.au	-	Nov 29, 2016
Municipal Recovery Manager / Council	52	[Redacted]	[Redacted]	[Redacted]	-	Nov 11, 2016
		Pete Kakris	[Redacted]	[Redacted]	-	Nov 13, 2016
		Gordon MRM-Tester	-	none@datalink.com.au	-	Nov 29, 2016
Deputy MRM / Council	2	Debbie Murner	-	none@datalink.com.au	-	Nov 29, 2016
Municipal Emergency Response Coordinator / Police	1	Andrew MERO-Tester	-	none@datalink.com.au	-	Nov 11, 2016
<b>Council</b>						
User Administrator / Council	34	Sarah UserAdmin - Tester	-	none@datalink.com.au	-	Nov 24, 2016
MRM/MERO Assistant / Council	47	Amelaw Jones	321523456	none@datalink.com.au	-	Nov 29, 2016
Council EMLD / Council	55	Ben CouncilEMLD-Tester	-	Non@datalink.com.au	-	Nov 11, 2016
Recovery Officer / Council	54	Emily RecOfficer-Tester	-	None@dataqbnk.com.au	-	Nov 11, 2016

From this screen, authorised users can manage positions by clicking the button labelled **Add or Remove Positions** at the bottom of the list.



### Managing positions in an event

From the **positions roster**, click **Add or Remove Positions** to manage positions.

The screenshot shows a web application interface for Crisisworks. At the top, there is a navigation bar with tabs for 'CIEPT', 'Overview', 'Events', 'Operations', 'Library', 'Settings', and 'Help'. The user's name 'Scott Davy' is visible in the top right. Below the navigation bar, the page title is '/ Events / Larger Emergency Example'. On the left side, there is a sidebar with menu items: 'General', 'Positions', 'Registers', 'Resources', and 'Activity Summary'. The main content area displays a table with the following columns: 'Position', 'Organisation', 'On Duty', '# Competent', and '# On Call'. The table lists various roles such as 'Datalink Administrator', 'Municipal Emergency Resource Officer', 'Deputy MERO', 'Municipal Recovery Manager', 'Deputy MRM', 'Municipal Emergency Response Coordinator', and 'Council' roles. Each row includes a checkbox for selection, the role name, the organization (e.g., 'Council', 'Police', 'Datalink'), the names of users currently on duty, the number of competent users, and the number of users on call.

Position	Organisation	On Duty	# Competent	# On Call
<input checked="" type="checkbox"/> Datalink				
<input type="checkbox"/> Datalink Administrator	Datalink	-	0	3
<input type="checkbox"/> Datalink Developer	Datalink	-	2	3
<input type="checkbox"/> Data Admin - Bypass workflow References,FPH	Datalink	-	0	3
<input checked="" type="checkbox"/> Coordinators				
<input checked="" type="checkbox"/> Municipal Emergency Resource Officer	Council	Jance MERO-Tester, Pete Kakris	5	3
<input checked="" type="checkbox"/> Deputy MERO	Council	Donna Demero	1	3
<input checked="" type="checkbox"/> Municipal Recovery Manager	Council	Pete Kakris, Gordon MRM/Tester	52	3
<input checked="" type="checkbox"/> Deputy MRM	Council	Debbie Murner	2	3
<input checked="" type="checkbox"/> Municipal Emergency Response Coordinator	Police	Andrew MERC-Tester	1	3
<input checked="" type="checkbox"/> Council				
<input checked="" type="checkbox"/> User Administrator	Council	Sarah UserAdmin - Tester	34	3
<input checked="" type="checkbox"/> MRM/MERO Assistant	Council	Amenow Jones	47	3
<input checked="" type="checkbox"/> Council EMLO	Council	Ben CouncilEMLO-Tester	55	3
<input checked="" type="checkbox"/> Recovery Officer	Council	Emily RecOfficer-Tester	54	3
<input type="checkbox"/> VPR Coordinator	Council	-	6	3
<input type="checkbox"/> VPR User	Council	-	5	3
<input type="checkbox"/> Administrator	Council	-	14	3
<input type="checkbox"/> Redundant FCC EMLO (Resources)	Council	-	7	3
<input type="checkbox"/> MECC Manager	Council	-	5	3
<input type="checkbox"/> Media & Communication Coordinator	Council	-	3	3
<input type="checkbox"/> Recovery Read Only	Council	-	1	3
<input checked="" type="checkbox"/> Finance Officer	Council	Finly Fider	1	3
<input checked="" type="checkbox"/> Full Access Administrator	Council	Fran Fine, Glen Tarrant	3	3
<input checked="" type="checkbox"/> ERC Support Officer	Council	Ercle Edson	1	3
<input checked="" type="checkbox"/> MSIA Officer	Council	Melissa MSIA-Tester	1	3
<input checked="" type="checkbox"/> Migrated Agency	Council	Mac Bean	1	3
<input checked="" type="checkbox"/> Agencies				

This screen summarises the available positions, and lists any users that are currently on duty for that position. It also lists the number of users that are competent for the position, along with the number of people that are on call for that position.

## Adding a position

To add a position to the event, place a check into the checkbox next to the position you wish to add, and then press the **Update** button at the bottom of the form.

## Removing a position

To remove a position, remove the check from the position's checkbox.

The system will not allow positions to be removed if they are currently assigned active records.

## Closing an event

Once an event has been completed you can close the event and add an end date for the event. No further changes can be made to the event once it has been closed.

To close an event:

1. Edit the event you wish to close
2. Set the status to **Closed**
3. Click **Update**

When an event is closed, all user participations are marked as complete, users are forced off duty for any event positions that they are working in, and the end date is set into the event if it was not entered manually.

You can re-open an event by changing the status back to **Open**.

## Creating a Global Event

Global events are workspaces that are used to store information to be accessed across multiple events.

More information on global events can be found in [Crisisworks Concepts / Using global events to manage permanent information](#)

To create a global event:

1. First, create a regular event.
2. Now edit the event and check the Global Event checkbox, then re-save the event.

### Advanced

**This is a global event**

Global events are active in the user interface irrespective of which event you select. Consult the documentation before use.

**This is a template.**

Check this box if you'd like to use this event as a template to create future events from.

## Creating an Event Template

An event template provides a way to set up a pre-defined configuration of registers, positions, resources and record data to be created when the event is created, and is a great time-saver if you use similar registers, positions and resources for many events, or if you have standard ways to respond to key incidents. Templates save time when adding new events in future as it pre-selects the registers, positions and resources based on the template.

Your site will be configured with some pre-existing templates, but you can create additional event templates.

To create an event template:

1. Create a normal event and configure it with the positions, resources, registers and instance data you would like created automatically with new events.
2. When ready to make the event into a template, edit the event you just created and check the box labelled **This is a template**
3. Click **Update**

Once an event becomes a template, it can no longer be used like a regular event. Do not select this option for events that are currently in progress as live events.

## Working with Resources

Resources are a key component of cost tracking and cost recovery for events.

Logging resource utilisation against requests allows reporting of commitments and costs for that resource or across an entire event. Resources are typically physical equipment (such as bulldozers) however there are other types of resources (such as human resources) that can be accounted for.

There are 3 different types of Resources:

- Equipment - physical equipment such as bulldozers, chainsaws
- Service - a service provided generally by a person, team or organisation such as Tree Crew
- Consumable - resources that get used up such as water, sandbags

When you first create an event, you have the option of choosing which resources will be needed for the event. During the event you can add further resources if necessary.

## On this page

- Viewing All Resources
- Adding/Removing Resources from an Event
- Editing a Resource
- Adding a Resource
  - Adding a resource via the resource datagrid
  - Adding an ad-hoc resource while creating a new request
- Deleting a Resource
- Resource Form Fields

## Viewing All Resources

Co-ordinators and System Administrators can view all of the available resources in the system. This is different to viewing which resources are part of an event. See [Event Management](#) for viewing an event's resources.

Resources	ID	Title	Organisation	Type
Total	R-1	Bulldozer	Council	Equipment
Consumable	R-2	Red Cross	Red Cross	Service
Equipment	R-3	Repair	ACME	Service
Service	R-4	Centre Link	Centre Link	Service
	R-7	DHHS	DHHS	Service
	R-8	Snake Catcher	ACME	Service
	R-9	Ute Toyota WLL 387	Council	Equipment
	R-10	Road Block	ACME	Equipment
	R-11	Tree Crew	Council	Service
	R-12	Projector	Datalink	Equipment
	R-13	Bulldozer	Council	Equipment
	R-14	Chainsaw	Council	Equipment
	R-15	Sandbags	Council	Equipment

### Step By Step Instructions

1. Go to the Settings menu and choose *Resources*. The Resources Datagrid will be displayed. This shows all resources currently in the system.
2. You can filter resources by using the [counters and search interface](#)
3. Click on the Title of a resource to view further details.
4. Click **New Resource** to add a new resource record

## Adding/Removing Resources from an Event

Only Co-ordinators can add or remove resources to an event. Resources are a key component of cost tracking for events and resources can be assigned to Requests.

The screenshot shows the Crisisworks interface for managing resources for an event. The top navigation bar includes 'Overview', 'Events', 'Operations', 'Recovery', 'References', 'Settings', and 'Help'. The current page is 'Events / Council EM Event'. The left-hand menu has 'Resources' highlighted. The main content area is a table with the following columns: Resource, In Use?, Cumulative Qty, and Cumulative Cost. The table lists various resources under 'Equipment' and 'Services' categories.

Resource	In Use?	Cumulative Qty	Cumulative Cost
<b>Equipment</b>			
Council » Bulldozer	No		
Council » Chainsaw	No	1 units	\$0.00
Council » Sandbags	No		
Council » Witches Hats	No		
<b>Services</b>			
Council » CentreLink	No		
Council » Counselling Service	No		
Council » Emergency Catering	No		
Council » Disabled	No		
Council » Aged	No		
Council » Interpreter	No		
Council » Medical	No		
Council » Fodder	No		
Council » Water (Livestock)	No		
Council » DHS	No		

### Step By Step Instructions

1. To add or remove a resource to your event, you firstly need to [view the event record](#). To do this, click on the name of the event in the **Event Selector** at the top-right of screen.
2. Next, click on the *Resources* link in the left hand menu. This will display a table of available resources for the selected event.
  - The "Resource" column displays the organisation and the resource name
  - The "In Use?" column displays whether the resource is being used in any of the events in the system
  - The "Cumulative Qty" column displays the unit of measure for the resource. This defaults to 1 unit.
  - The "Cumulative Cost" column displays the cost of the resource. This defaults to \$1.
3. Click on the **Edit** button
4. Check or uncheck the resource's checkboxes to add or remove them from the event.
5. Optionally add a comment about your resource change to appear on the [Activity Log](#)
6. Click the **Update** button to save your changes

The resources have now been added to your current event and they can now be assigned to items.

### Editing a Resource

Co-ordinators and System Administrators can edit existing resources.

The screenshot shows the Crisisworks interface for editing a resource. The top navigation bar includes 'STAGING', 'Overview', 'Events', 'Operations', 'References', 'Settings', and 'Help'. The current page is 'Home / Settings / Resources / Bulldozer'. The left-hand menu has 'Resources' highlighted. The main content area is a form with the following sections: General and Units.

General		Units	
Resource ID	1	Unit Name	each
Type	Equipment	Unit Prefix	\$
Name	Bulldozer	Unit Suffix	day
Description	-	Rate Per Unit	500
Organisation	Council		
Category	General		
Contact	-		

## Step By Step Instructions

1. Go to the **Settings** menu and choose **Resources**. The Resources **Datagrid** will be displayed. This shows all resources currently in the system.
2. Click on the title of the Resource you wish to edit. A read-only view of the resource will be displayed.
3. Click on the green **Edit Resource** button
4. Update the necessary information. See the section on this page called *Resource Form Fields* for description of each field.
5. Click the **Save** button to save your changes.

## Adding a Resource

Co-ordinators and System Administrators can add new resources. When a new resource is added, it is then available to be added to any Event.

There are two ways to add a resource into the system:

1. When administering the system, and
2. When creating a new request (known as "ad-hoc resources")

### Adding a resource via the resource datagrid

1. Click **Settings** then **Resources** to load the Resources **Datagrid**
2. Click **New Resource** to add a new resource
3. Fill in the resource form as per the *Resource Form Fields* section below.
4. Click **Save** to finish

ID	Title	Organisation	Type
R-1	Bulldozer	Council	Equipment
R-2	Red Cross	Red Cross	Service
R-3	Repair's R Us	ACME	Service
R-4	Centrelink	Centre Link	Service
R-7	DHHS	DHHS	Service
R-8	Snake Catcher	ACME	Service
R-9	Ute Toyota WLL 387	Council	Equipment
R-10	Road Block	ACME	Equipment
R-11	Tree Crew	Council	Service
R-12	Projector	Datalink	Equipment
R-13	Bulldozer	Council	Equipment
R-14	Chainsaw	Council	Equipment
R-15	Sandbags	Council	Equipment
R-16	Witches Hats	Council	Equipment
R-17	Datalink	Datalink	Equipment

### Adding an ad-hoc resource while creating a new request

Modules that support resources can support the addition of ad-hoc resources.

In brief:

1. When selecting a resource inside the item record (e.g. a request), enter a new name rather than selecting an existing resource, and a new resource will be created.

2. The resource units will be "dollars", so the quantity is restricted to only entering in dollar amounts.
3. The new resource is created when the item record is saved.

See the section on [Adding Resources to a Request](#) for full details.

## Deleting a Resource

Co-ordinators and Administrators can delete a Resource from the system.

When deleting a resource from the system there is no way to undo the deletion, so be careful when deleting a resource.

This is different to removing a resource from an event, see [Adding/Removing Resources from Events](#) (above on this page) if you wish to remove a resource from an event.

This is different to marking a resource as *inactive*. If you would prefer to mark the resource as inactive, edit the record and uncheck the "active" checkbox instead. This will keep the resource in the system but will remove it from all active lists.

### Step By Step Instructions

1. Go to the **Settings** menu and choose **Resources**. The Resources [Datagrid](#) will be displayed. This shows all resources currently in the system.
2. Click on the title of the resource you wish to edit. A read-only view of the resource will be displayed.
3. Click on the green **Edit Resource** button
4. Click the red **Delete** button at the bottom of the page. A message will appear asking if you are sure you want to delete the item. Click **OK** to confirm

## Resource Form Fields

The following fields apply to resource records.

<b>ID</b>	The unique ID for the resource. This cannot be changed.
<b>Type</b>	The type of resource. Choose one of the following options: <ul style="list-style-type: none"> <li>• Equipment - physical equipment such as a bulldozer</li> <li>• Service - a service provided generally by a team or organisation</li> <li>• Consumable - a resource that gets used up such as water, sandbags</li> </ul>
<b>Name</b>	The name of the resource. This appears throughout the system where the resource is used.
<b>Description</b>	A brief description describing what the resource is.
<b>Unit Name</b>	The name of the unit of measurement for the resource. For example each, hours
<b>Unit Prefix</b>	An optional unit prefix for the resources value. If the value is a dollar value, enter \$ to appear before the value
<b>Unit Suffix</b>	An optional unit suffix to appear after the resources value. If the resource is measured in hours, then enter "hours".
<b>Rate per Unit</b>	The cost of each unit for the resource. If the resource is \$10 per hour, then enter 10.
<b>Organisation</b>	Choose which organisation owns the resource. This is a required field.

<b>Category</b>	<p>An optional category for the resource. This is useful for filtering or searching for resources. Choose one of the following options:</p> <ul style="list-style-type: none"> <li>• General (this is the default category).</li> <li>• Services - the resource is a service provided by someone</li> <li>• Fire Prevention - the resource is used for fire prevention</li> <li>• Equipment - the resource is a physical piece of equipment</li> </ul> <p>Note that other categories may exist as part of optional modules. You should consult the relevant module guide for details before selecting any unfamiliar categories.</p>
<b>Tags</b>	Tags can be useful to group or filter similar resources

## Working with Maps and Assets

Maps form a key part of the common operating picture during an event. Crisisworks mapping enables users to interact with the maps without the need to learn to use complex Geographical Information Systems (GIS) software. A GIS can still be used in conjunction with the system for more detailed information if such technical resources are available.

There are two components of Crisisworks mapping:

- Mapping User Interface (UI) - used to navigate using the map
- Asset databases - used for storing, maintaining and resolving addresses and locality information

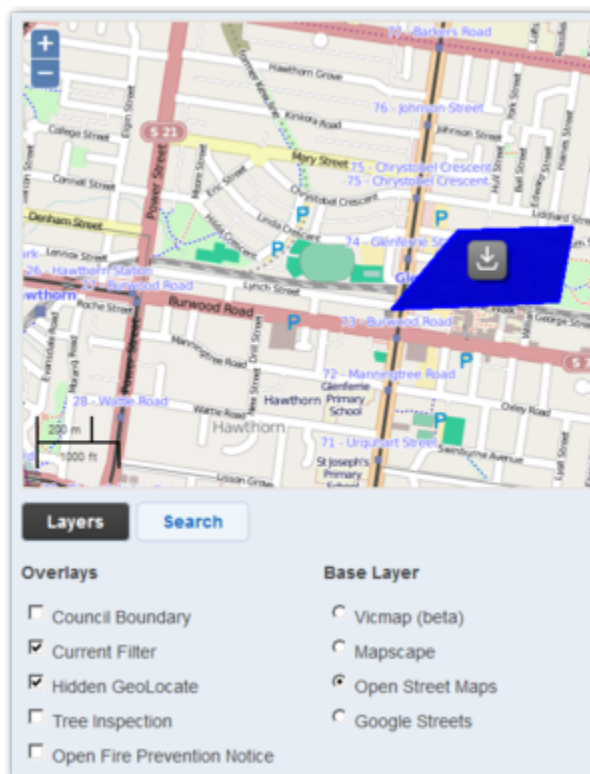
Maps are used throughout Crisisworks. However different features are used in different screens including:

- Registers - Requests, Recovery (People & Property), etc
- Dashboards & projector views

Maps provide key information relevant to the event. In register views, the maps only show records from the currently selected filter. Maps are also used to capture optional geographical information when Requests, Cases and other register records are added or edited.

### On this page

- The mapping user interface
  - Panning the Map
    - Desktop Computers
    - Mobile Devices
  - Zooming the Map
  - Centring the Map
- Map Layers
- Drawing geospatial data within a record
  - Markers / Points
  - Lines
  - Areas / Regions
- The Property and Assets database
  - Searching assets by name
  - Find nearest assets
- Supplying your own asset data to Crisisworks
- Adding external layers to Crisisworks
  - KML file format
  - GeoRSS feed
  - A note on files and images
  - Importing a layer from a KML file
  - Importing a layer from a GeoRSS feed





## The mapping user interface

The map user interface (UI) provides an easy way to locate records by their address/location and get an overview of affected areas. The default map view is called the **base layer**. The base layer comprises a set of map tiles and defines what is viewed in terms of cartography - streets, landmarks and terrain.

Crisisworks supports switching base layers and each has their own look and benefits, though they all share the same navigation interface.

The following section explains how to navigate and use the map.

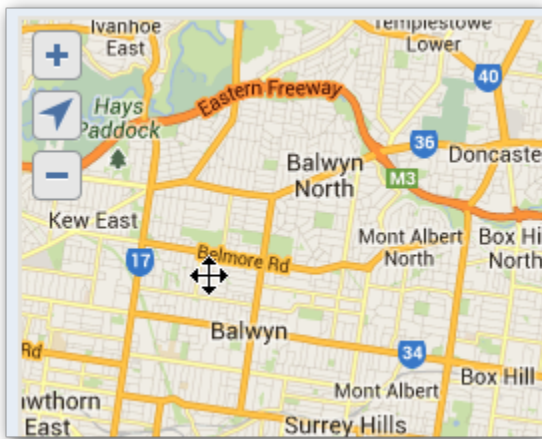
The Windows Surface Pro has a touch screen and behaves like a mobile device. Use touch gestures such as drag and pinch by directly touching the screen to manipulate the map, just like mobile devices.

## Panning the Map

To move the map around, use the hand tool to click and drag the map across the view window in any direction you desire.

### Desktop Computers

On desktops, hold the mouse button in the map view window and a hand icon will appear. Drag the map across the view window in any direction you desire.

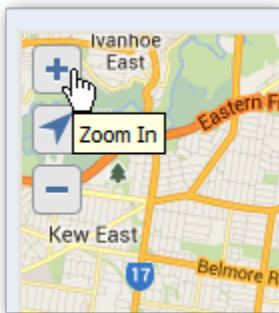


### Mobile Devices

On mobile devices, simply drag the map view with your finger.

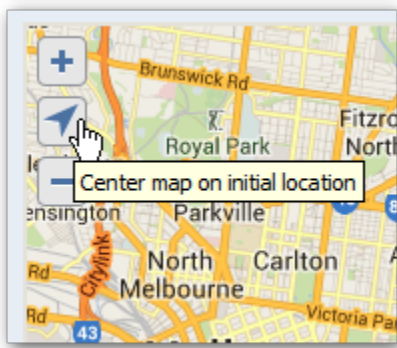
## Zooming the Map

Use the plus and minus symbols to zoom in and out. The plus symbol will zoom the map in and the minus symbol will zoom the map out.



## Centring the Map

To centre the map on your default map centre, click the arrow icon.



## Map Layers

Layers control what is viewable in the map area.

There are two types of layers:

- Base Layers — provide the base tile data such as roads, topographical data and satellite imagery
- Register Layers — provides data based on other data within the system, such as "Open Requests"
- External Overlays — sourced from external systems

The default map view is called the *base layer* and the default overlay is the *current filter*.

Crisisworks supports switching on multiple overlays. It also supports switching third party base layers and each has their own features and benefits, though they all share the same navigation interface.

1. Click on the Active Layers link - this is the icon at the bottom of the left hand side of the map
2. A pop-up box will appear. Tick the overlays you want to view. Note that you can only select one base layer.

Click the "Layer" icon	Enable and disable layers																																
	<div data-bbox="860 1249 1485 1921"> <h3>Select Map Layers</h3> <table border="0"> <thead> <tr> <th>Overlays</th> <th>Base Layer</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/> Council Boundary</td> <td><input type="radio"/> Google Satellite</td> </tr> <tr> <td><input type="checkbox"/> Phoenix Potential Impact Zone</td> <td><input type="radio"/> Google Terrain</td> </tr> <tr> <td><input type="checkbox"/> State Control Centre Points of Interest</td> <td><input type="radio"/> Google Hybrid</td> </tr> <tr> <td><input type="checkbox"/> State Control Centre Observations</td> <td><input type="radio"/> Google Streets</td> </tr> <tr> <td><input type="checkbox"/> Sentinal Hot Spots</td> <td><input type="radio"/> MapQuest Open Aerial</td> </tr> <tr> <td><input checked="" type="checkbox"/> CFA Live incidents</td> <td><input checked="" type="radio"/> MapQuest OpenStreetMap</td> </tr> <tr> <td><input type="checkbox"/> Geospatial Reference Features</td> <td><input type="radio"/> Vicmap Aerial</td> </tr> <tr> <td><input type="checkbox"/> Open Requests</td> <td><input type="radio"/> Vicmap</td> </tr> <tr> <td><input type="checkbox"/> Open Infrastructure Assessments</td> <td></td> </tr> <tr> <td><input type="checkbox"/> Open Environmental Health Assessments</td> <td></td> </tr> <tr> <td><input type="checkbox"/> Open Services Required</td> <td></td> </tr> <tr> <td><input type="checkbox"/> Open Recovery Cases</td> <td></td> </tr> <tr> <td><input type="checkbox"/> Open Building Inspections</td> <td></td> </tr> <tr> <td><input type="checkbox"/> Open Affected Persons</td> <td></td> </tr> <tr> <td><input type="checkbox"/> Open Affected Livestock</td> <td></td> </tr> </tbody> </table> </div>	Overlays	Base Layer	<input type="checkbox"/> Council Boundary	<input type="radio"/> Google Satellite	<input type="checkbox"/> Phoenix Potential Impact Zone	<input type="radio"/> Google Terrain	<input type="checkbox"/> State Control Centre Points of Interest	<input type="radio"/> Google Hybrid	<input type="checkbox"/> State Control Centre Observations	<input type="radio"/> Google Streets	<input type="checkbox"/> Sentinal Hot Spots	<input type="radio"/> MapQuest Open Aerial	<input checked="" type="checkbox"/> CFA Live incidents	<input checked="" type="radio"/> MapQuest OpenStreetMap	<input type="checkbox"/> Geospatial Reference Features	<input type="radio"/> Vicmap Aerial	<input type="checkbox"/> Open Requests	<input type="radio"/> Vicmap	<input type="checkbox"/> Open Infrastructure Assessments		<input type="checkbox"/> Open Environmental Health Assessments		<input type="checkbox"/> Open Services Required		<input type="checkbox"/> Open Recovery Cases		<input type="checkbox"/> Open Building Inspections		<input type="checkbox"/> Open Affected Persons		<input type="checkbox"/> Open Affected Livestock	
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<input type="checkbox"/> Open Affected Livestock																																	

## Drawing geospatial data within a record

Overlays are drawn on top of the base layer and correspond to a specific theme. Overlays can be added to Crisisworks by an administrator. The can display information from third party feeds that change in real-time (for example, a fire front updated as it moves). The default overlay is 'Current Filter' which means that the records selected in the current filter will be displayed as an overlay on the map.

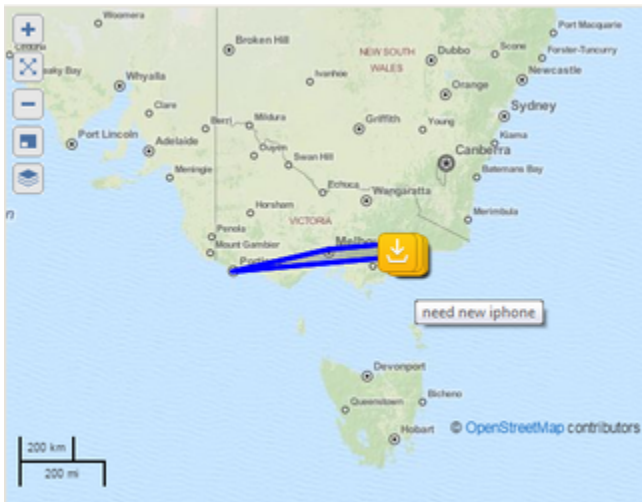
Overlays can include:

- Markers (point)
- Lines (linetring)
- Areas and regions (polygon and radius)

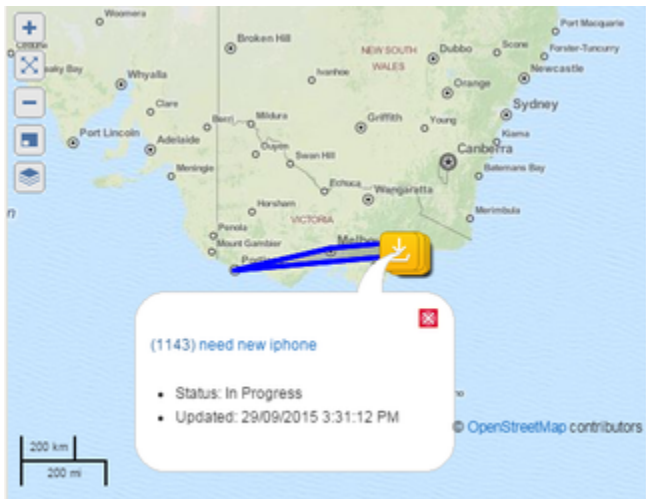
## Markers / Points

Overlays of markers and points may indicate individual locations (for example spot fires). Where markers indicate a type of records (such as a Request), they are are indicated with the relevant icons to represent the different types of records in the system.

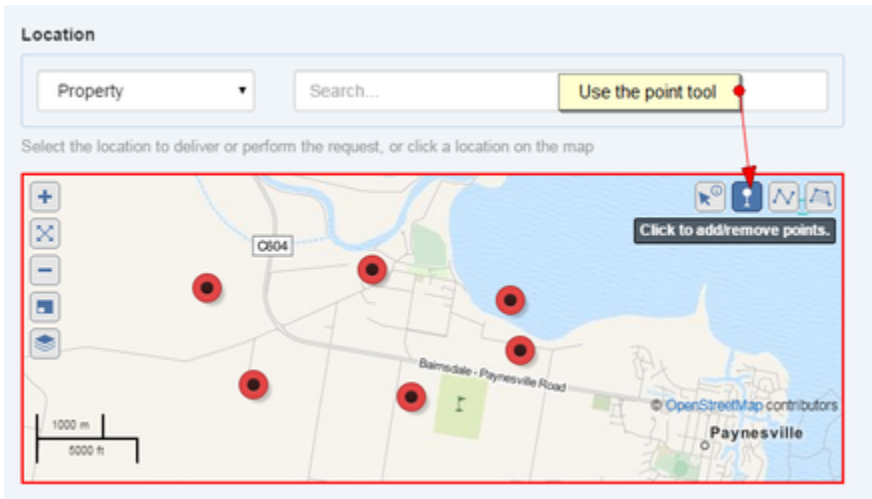
Hovering on the markers provides more information, while clicking on the marker opens info-box with relevant information from the corresponding record. enables viewing of the record.



To view the related record, click on the title in the infobox.



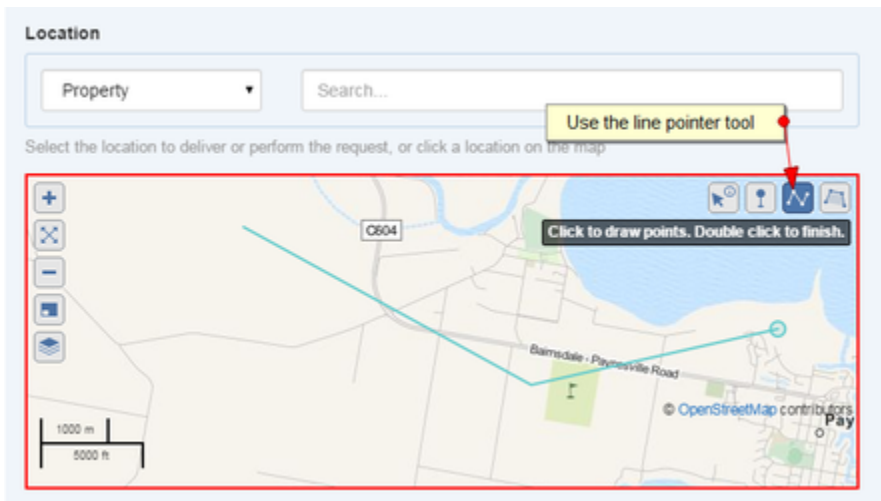
You can also mark your own points with the Point tool. Click the point tool and mark any affected areas on the map.



## Lines

This type of overlay could be used to, for example, indicate an area or region (for example a fire front or a route).

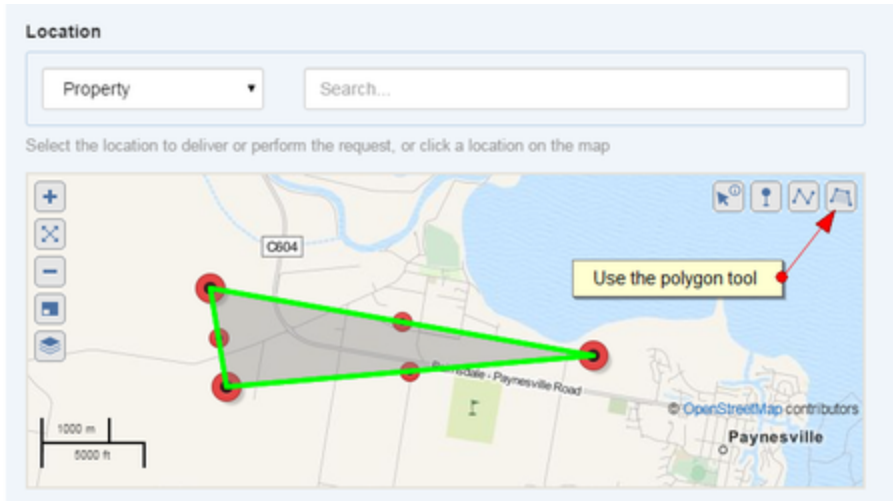
They are indicated by a series of lines connected by points.



## Areas / Regions

This type of overlay could be used to, for example, indicate an area or region (for example a burned area).

They are indicated by polygons consisting of a collection of lines connected by points. The overlay itself is indicated by the coloured area.



## The Property and Assets database

The Crisisworks Assets Manager stores location information on different types of assets.

The Asset Manager supports bulk upload of assets as well as sourcing data directly from a range of geolocation services. A secondary data source, such as Google Streets, can be configured.

### Searching assets by name

To search assets by name

1. Type an asset name into the asset search box
2. Assets are displayed in a pulldown list
3. If a map is also configured for that view, the assets are also drawn onto the map
4. You can refine your results by selecting a type (type such as Property, Parcel and Point of Interest are common for governmental users)
5. If a type is selected with a configured just-in-time lookup, then that external lookup will be performed. This is typically the case for "Point of Interest" searches.

### Find nearest assets

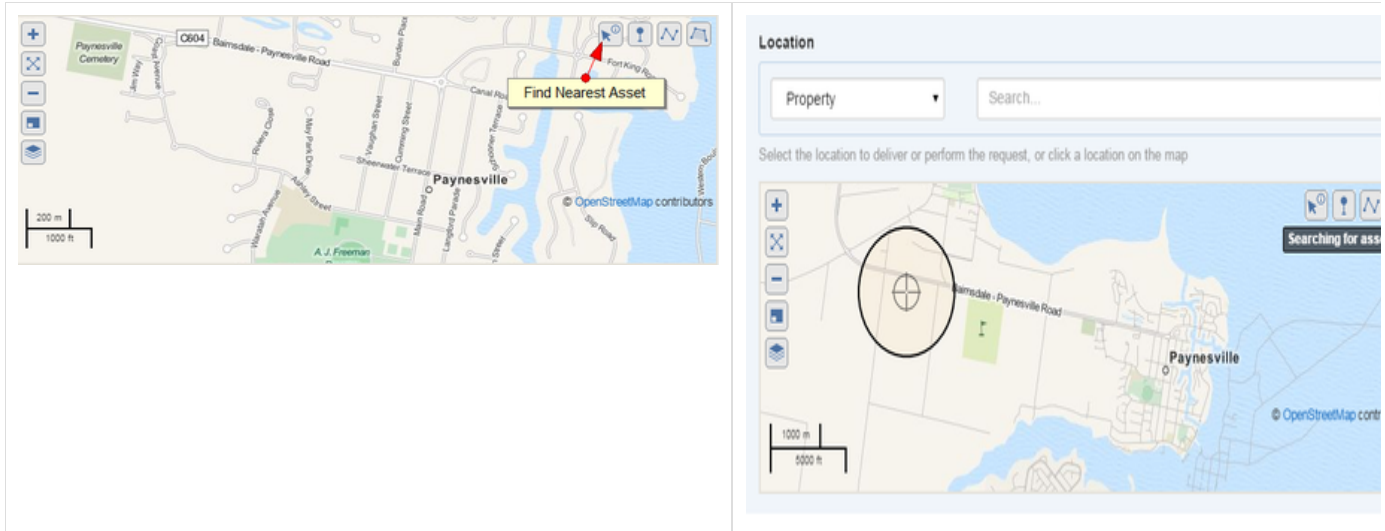
The Find Nearest Assets feature provide a quick way to list nearby assets without setting a filter (see also Assets; Filters).

The feature's default search radius is 5 kilometres.

1. Click the Arrow and Information icon on the top right of the map view window.
2. Click the map view area to centre the query.
3. Results will automatically be returned in the data grid below.

1

2



## Supplying your own asset data to Crisisworks

It is possible (and indeed common) for customers to supply their own asset data for Crisisworks asset lookups. To do this, lodge a support request and speak with our service desk.

The system can support a flexible range of geospatial asset types including shapefile, TAB file and open formats, and the system can transform between projections. The process involves an initial assessment of the data along with the creation of an import parser rule, and following that, the data can be automatically imported at regular intervals.

## Adding external layers to Crisisworks

As an alternative to importing data into Crisisworks, external layers can be configured for live external overlays onto Crisisworks maps.

### KML file format

Keyhole Markup Language (KML) is an interoperable international standard notation for Internet mapping which is based on XML and is compatible with Google maps used in Crisisworks. Use this format for adding layers representing information that change infrequently (ie. Municipal boundaries, 1-in-100 year flood extent etc). The latest versions of MapInfo and ArcGIS are capable of exporting to this format. Shapefiles can be converted using tools such as [shape2ge](#). [Google Earth Pro](#) can also be used for editing and managing KML files. Note: use of these third party tools are not supported

Crisisworks accepts only valid KML files with a .kml extension and does not accept KMZ (.kmz) archives or any other variant of KML. It can only process the one KML file and although it is possible to upload an archive, the map layer will not display.

### GeoRSS feed

GeoRSS is an emerging standard for encoding locations into web feeds and is also in XML, however can be accessed via a simple URL. The advantage of GeoRSS is that it can be read and updated in near real-time and can be provided by third parties. Use this format for adding layers representing information that changes (ie. Weather data, current fire boundaries etc).

The RSS parser complies with the RSS 2.0 standard. It is important that your feed validates to this standard in order to function properly as a map layer.

### A note on files and images

If you wish to reference images and files (such as icons) they need to be hosted on the web (outside of Crisisworks) and correctly referenced by

absolute URI. Failure to do this correctly will result in the icons not displaying. As some GIS have their own export format, the KML files may need to be edited. Note that icons and layers work best if they have transparent or semi-transparent backgrounds as opaque images obscure the map beneath.

## Importing a layer from a KML file

To import a map KML file:

1. Sign in as an *Administrator*
2. Click on the '**Settings**' option in the top menu and then select '**Internals**'
3. Select '**Map Layers**' from the left hand menu
4. Push the '**New Layer**' button
5. Give the Layer a title using the '**Name**' field
6. Select the KML file using the '**Local source File**' '**Select File**' button and upload the file, the system will reject any file in an incorrect format. Note: The Import process may take some time, do not leave/save until the "Loading" message has disappeared and the file icon appears to indicate that the file has been successfully loaded.
7. Ensure that the '**Active**' box is ticked
8. Click the '**Save**' button

Once imported, the layer will be available for uses from the Map Layers menu.

## Importing a layer from a GeorSS feed

To import a map GeorSS feed:

1. Sign in as an *Administrator*
2. Click on the '**Settings**' option in the top menu and then select '**Internals**'
3. Select '**Map Layers**' from the left hand menu
4. Push the '**New Layer**' button
5. Give the Layer a name using the '**Name**' field
6. Enter the URL for the feed in the '**Remote source URL**' field
7. Ensure that the '**Active**' box is ticked
8. Click the '**Save**' button

# Working with Forms

## On this page

- [Overview](#)
  - [Form Layout](#)
  - [Common Field Types](#)
    - [Standard Fields](#)
    - [Rich Text Fields](#)
    - [Date Fields](#)
    - [Geospatial fields](#)
    - [Asset lookups](#)
    - [Attachment fields](#)
      - [On the web](#)
      - [On mobile devices](#)
  - [Subforms](#)
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    - [Status](#)
    - [Assignment](#)
    - [Publishing](#)
    - [Tags](#)
  - [Advanced settings](#)
    - [Event Selection](#)
    - [Templates](#)
-



## Overview

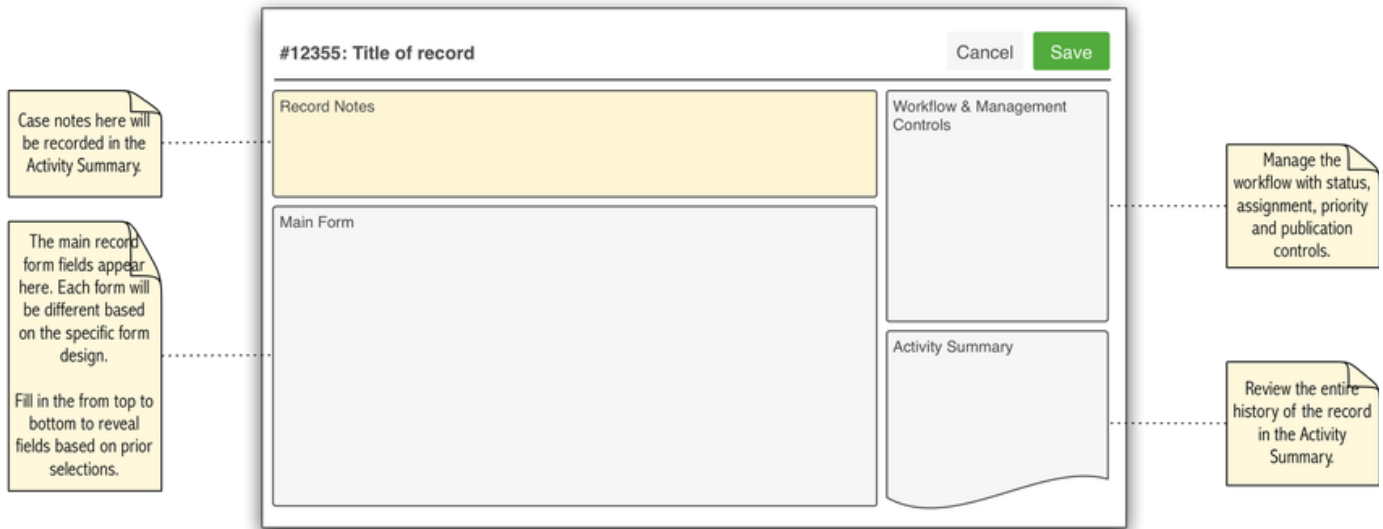
Forms lie at the heart of Crisisworks powerful data management capability.

Crisisworks forms are the main interface for managing data, and they provide a tailored mix of flexible fields including geospatial data, media attachments and relations, which is combined with the advanced workflow capabilities such as assignment, prioritisation, tagging and publishing to provide an end-to-end lifecycle for data.

## Form Layout

Crisisworks forms are tailored to each customer, industry and need, and are designed to be intuitive and consistent with other forms within Crisisworks.

The main form contains the core data being managed. Users should fill out the form from top to bottom, and answers to some fields may expose additional fields lower in the form flow. The right-hand sidebar is used for metadata, such as workflow and management instructions.

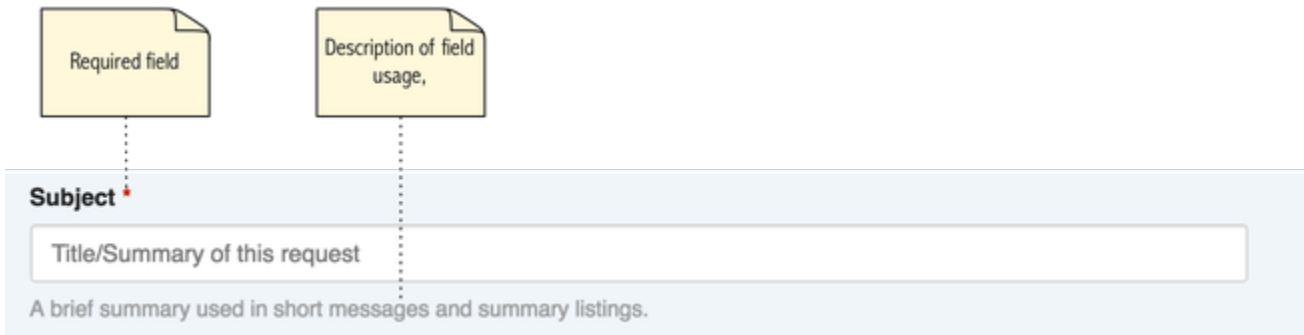


When editing a form, a yellow **Record Notes** text box allows users to enter notes which will be stored into the **Activity Feed**, along with any changes made to other data at the time of saving.

## Common Field Types

### Standard Fields

A series of familiar fields are available including text boxes, select boxes, radio buttons and check boxes.





## Rich Text Fields



Rich text fields allow for formatting such as bold and italics, as well as table and hyperlink support.



## Date Fields

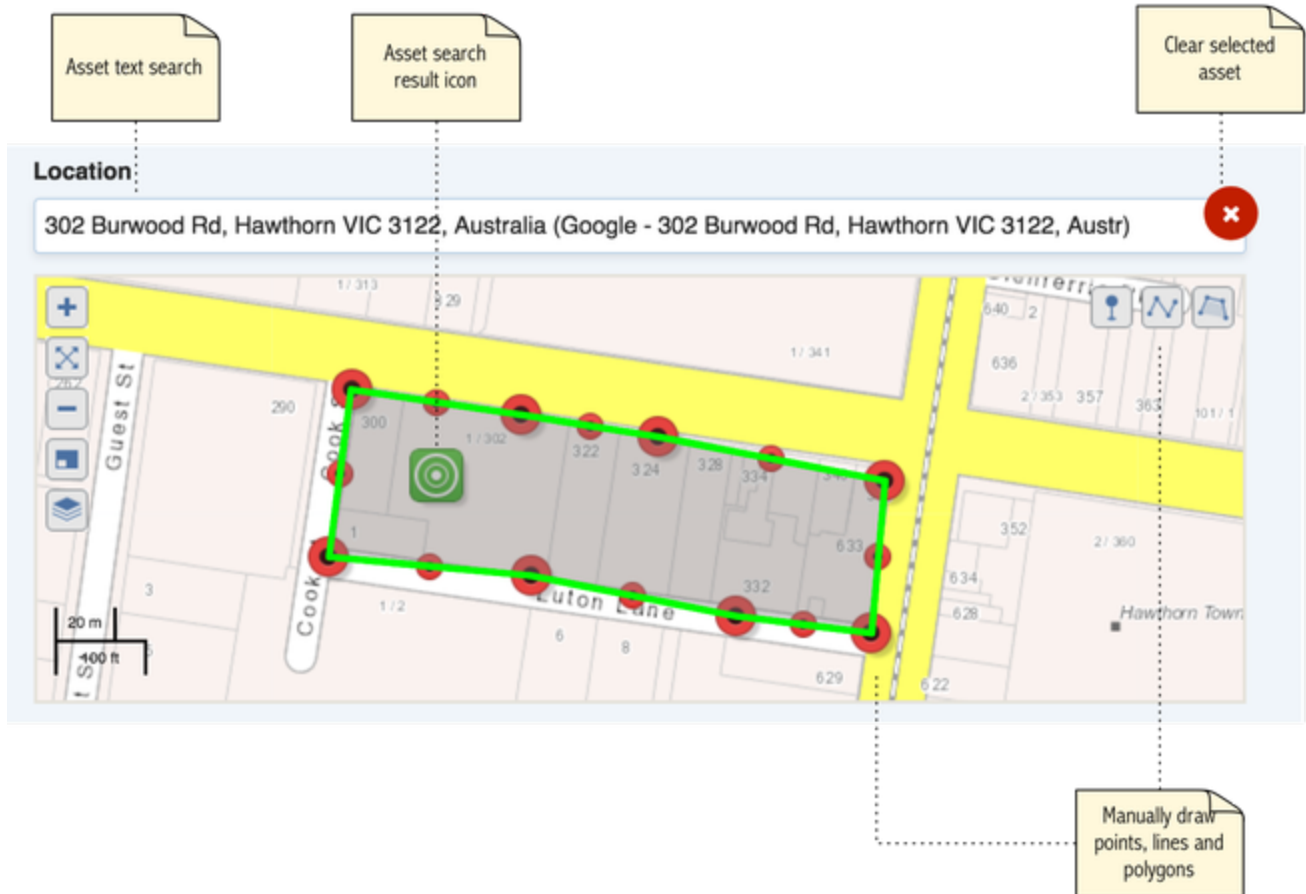
Date fields come in three variants — Date, Date & Time, and Time only — and have a flexible and human-friendly data entry structure. Simply type a date into the text field as you normally would (e.g. 21/2/2017), or include relative expressions such as "now", "tomorrow", "+ 3 hours" ([read the full range of expressions here](#)).

When you exit the field, the system will read your date and display a properly formatted date and/or time.

Enter a date in a variety of formats	The field the system sets the date automatically
<p><b>Due By</b></p> <input data-bbox="152 821 521 884" type="text" value="tomorrow"/> <p>Enter due date and time. </p>	<p><b>Due By</b></p> <input data-bbox="576 821 945 884" type="text" value="20/05/2017 09:00"/> <p>Enter due date and time. </p>

## Geospatial fields

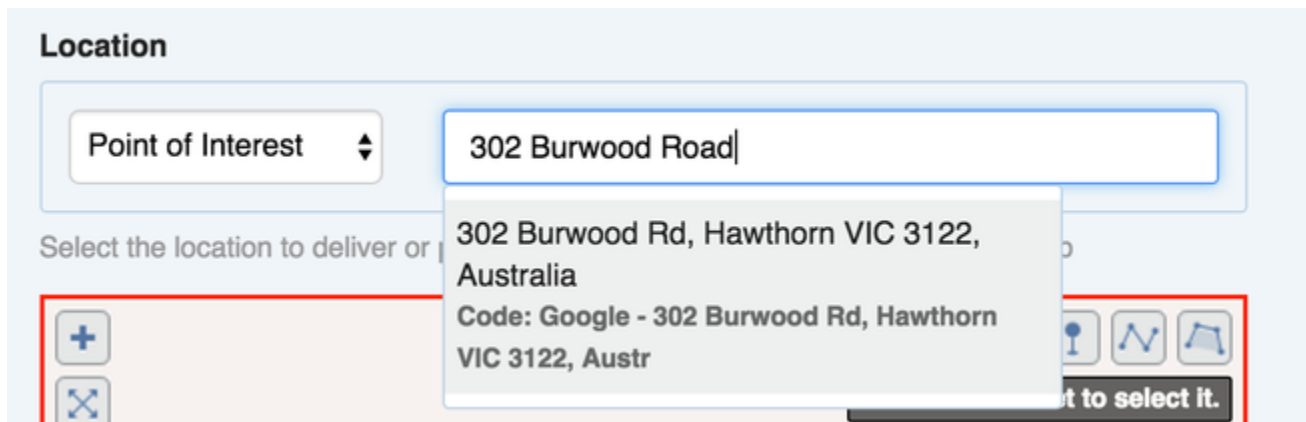
Forms with geospatial support show an inline map interface, allowing users to draw points, polygons and line strings. If geospatial assets are also supported, this becomes integrated with asset search capabilities as well.



## Asset lookups

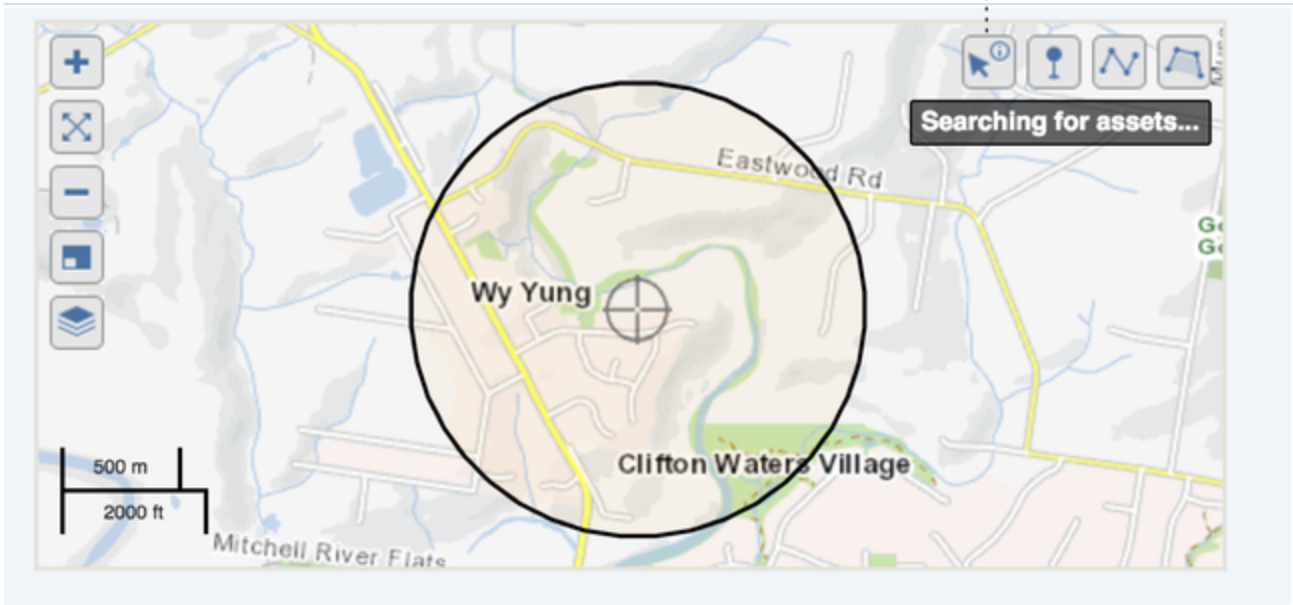
Asset lookups allow for searching by name, asset code or geospatial lookup.

When searching by name or code, select the class of asset then type the desired name or code. Matching assets are displayed in a pulldown list.

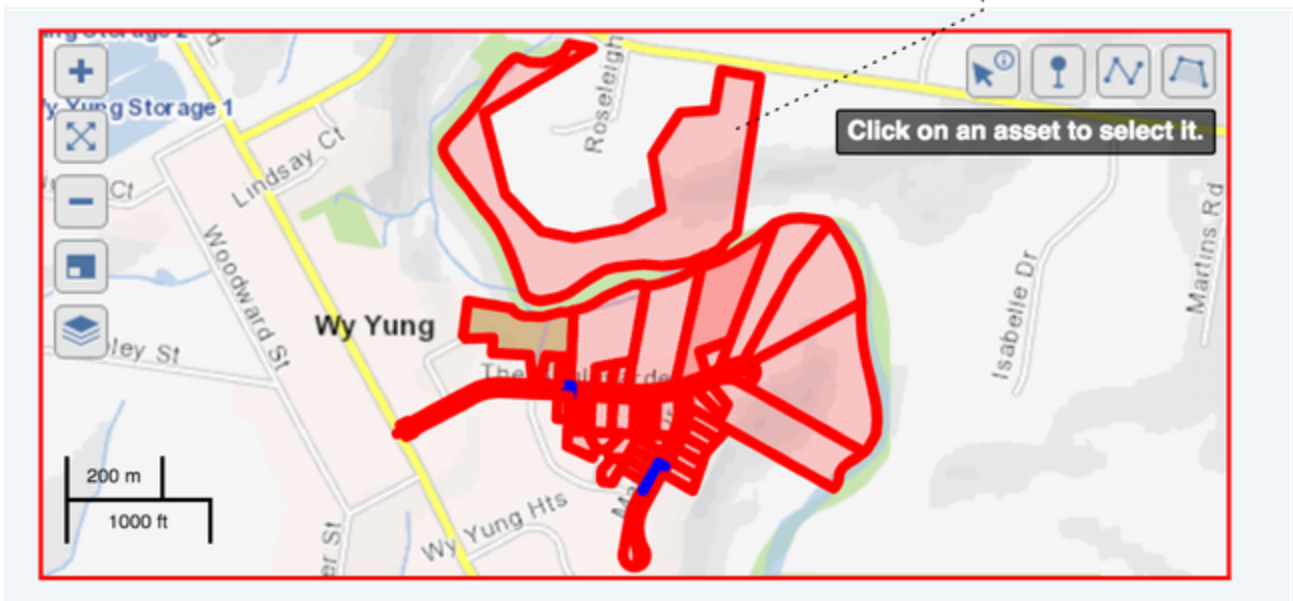


When searching by map, select the asset class, click the map search icon then click onto the map to find nearby assets.

Click to search by map, then click the map



When results are displayed, click an asset to select it.



### Attachment fields

Attachment fields allow for multiple files and media to be attached to the record.

## On the web

Drag and drop files from your computer over the **Add File** button to attach files, or click the Add File button to select a file for upload.

To remove an existing attachment, click the red cross.

**Attachments**

smiley 1  
Type: Image  
Size: 9 KB

Attached

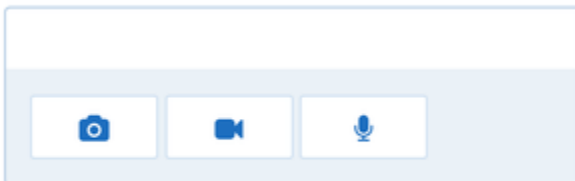
[Add File](#) *or drag and drop files* 1 attachment

Attach any supporting documentation

## On mobile devices

Mobile devices provide access to device camera, video and audio devices. To use, click the supported icon.

### Attachments



Upload files or media

When capturing audio, audio capture is handled in the background so you can continue to fill out the form while you record.

## Subforms

Some forms contain subforms that allow one or many sub-records to be created or linked.

The screenshot shows a subform titled "Resources" with a list of items starting with "1.". Each item has a "Resource" field with a search bar, a "Quantity" field with a unit of "Dollars (\$)", a "Reference" field, and a "Details" field. A "Completed" checkbox is located at the bottom of the subform. A "Add New" button is positioned below the subform. Three callout boxes provide additional information: "Add multiple items" points to the subform header, "Some forms allow existing records to be searched." points to the search bar, and "Clear a sub-record by clicking the red cross" points to a red 'x' icon in the top right corner of the subform.

## Workflow Controls

Over on the right-hand side of the form, common workflow controls include status, assignment, prioritisation and due date support.

The screenshot shows a form with four callout boxes at the top:
 

- Change the status based on the workflow rules**: points to the Status dropdown.
- Prioritise or deprioritise**: points to the Priority dropdown.
- Set a due date by typing in a freeform date**: points to the Due By text input.
- Assign the record to a user or position**: points to the Position Assigned dropdown.

 The form fields are:
 

- Workflow Status**: A dropdown menu currently showing 'Requested'.
- Priority**: A dropdown menu currently showing 'Normal'.
- Due By**: A text input field containing 'e.g. 28/6/2017 10:45, 4pm, to...' with a help icon and the text 'Enter due date and time.' below it.
- Position Assigned**: A dropdown menu currently showing '(Unassigned)'.

## Status

The **status** field controls the record's overall workflow status, and it following the item's specific workflow rules and restrictions.

The workflow status options vary based on:

- The workflow rules governing allowable next states from the current status, and
- The user's permissions to transition the record to specific states

To change a record's workflow status, simply select the new status from the selector.

A dropdown menu showing the following options:
 

- Resolved
- Assigned
- Requested
- ✓ Closed (highlighted in blue)

Each register has its own workflow state machine, which can be found in the [modules documentation](#).

## Progress

Some registers support the notion of progress, expressed as a percentage through a task. For these items, when a workflow status is set to an In Progress status, an additional Progress field is displayed. Users can set a number from 0% through to 90%.

100% is not an available progress value. To set a progress of 100%, instead transition the status to **Resolved**.

The screenshot shows a form with:
 

- Workflow**: A dropdown menu with 'Assigned', 'Requested', 'In Progress' (highlighted in blue with a checkmark), and 'Resolved'.
- Progress**: A text input field below the dropdown, currently showing '20 %'.

## Assignment

Registers supporting assignment will provide a selector to allow users to choose a position or a user to assign the record.

To assign a record, select the appropriate position or user from the list.

The screenshot shows a form with the following fields:

- Workflow**
  - Status \***: Requested
  - Priority**: Normal
  - Due By**: (empty date field)
- Position Assigned**: A dropdown menu is open, showing a list of roles:
  - ✓ (Unassigned)
  - Agencies
    - depi
    - epa
    - viceses
  - Bus Stop Management
    - Bus Stop Scheduling
    - Bus Stop administrator
  - Inspector
  - Network Planner
  - Coordinators
    - Deputy MERO
    - Deputy MRM
    - MERC
    - MERO
    - MRM

The assignment control is only available subject to specific user permissions, so this field will not be available in situations for some users. If you do not see assignment controls, check with your administrator.

## Publishing

For records that support publishing (e.g. [Information](#)), users can nominate multiple recipients, along with the style of content to receive (email, SMS).

Publishing is only available to authorised users, and this typically means coordinators and authorised administrators. If you do not see publishing controls, check with your administrator.

To publish the message onto the dashboard:

1. Check the box **Promote on Dashboard**

To send email and SMS content to users:

1. Check the box **Publish to participants by email and SMS**
2. Select the recipients. The options are:
  - a. **Send to on-duty users involved in this event** — this automatically publishes to all currently on-duty users
  - b. **Send to selected recipients** — This allows users to manually select positions and users to receive the communication

---

## Publishing

Promote on dashboard

Keeps this item on the dashboard

Publish to participants by email and SMS

When status is 'Current', sends a formatted copy of the record based on user communication preferences

### Recipients

Send to all on-duty users involved in this event

Send to selected recipients

<input type="text" value="x Inspector"/> bu
<b>Bus Stop Management</b>
Bus Sop Scheduling
Bus Stop administrator

## Tags

Most items also support tagging — enter tags separated by a comma, or press enter.

### Tags

<input type="text" value="tag with asset x"/> <input type="text" value="example x"/>
--

– (Start typing for suggestions, use comma to separate tags. New tags will automatically be created)

---

## Advanced settings

Register items support some advanced settings, as follows.

### Event Selection

To move an item from its current event to another event, expand the **Advanced** fieldset and select another accessible event.

When moving an existing item, if this item contains sub-items then only the parent item will be moved using this action. This allows requests to be moved without moving requestors, for example.

### Templates

To create a template item, expand the **Advanced** fieldset and check the box **Save this item as a template**, then enter a **Template Name**.



### Template name

Example Template

Save this item as a template

If checked, this item will be saved as a template which can be used to pre-fill the fields for future new items, and will not be treated as an active item itself.

Template items are removed from the workflow of the event and cannot be actioned. To view them, locate the **Templates** counter on the datagrid.

## Generating Reports

Crisisworks includes a Reporting system which displays your data in a table format that supports filtering, grouping and ordering. Crisisworks reports are available for all modules and registers and allows export to formats such as Excel or CSV.

### On this page

- How to generate a report
  - [Generating a quick report from a Datagrid](#)
  - [Generating a report via the Reports system](#)
- Available Reports
  - [Operations Reports](#)
  - [Recovery Reports](#)
  - [Resource Reports](#)
  - [System Administration Reports](#)
  - [User Reports](#)
- [Export to CSV for Bulk Updates and Imports](#)

### How to generate a report

Reports can be generated from 2 locations:

1. By clicking the **Export to Report** action from supported [Datagrids](#)
2. By navigating to the **Reports** system

### Generating a quick report from a Datagrid

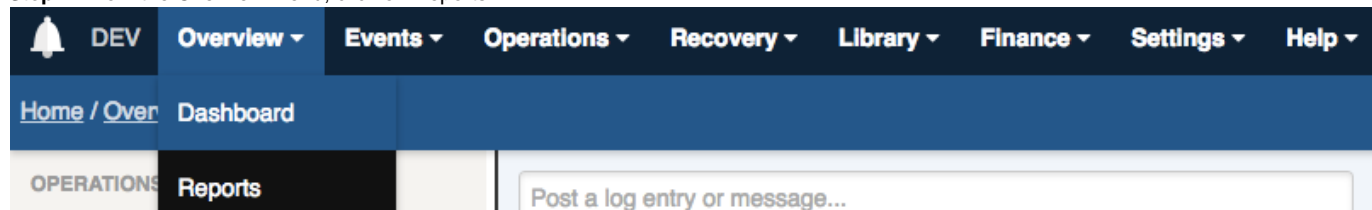
You can generate a quick report from any supported Datagrid.

1. Navigate to a datagrid and select one or more items in the datagrid. You can also use the **select all** feature to export all records in the filter.
2. Next, click the **Export Items to Report** button at the bottom of the page. On the following screen you can
  - a. configure the columns to include in your export
  - b. group the data by a column
  - c. order the data by a column
3. Press **Run Report** to run the report
4. When the report has finished, it will show on screen. Scroll to the bottom of the report and click the **Export to Excel** or **Export to CSV** button to export the data.

### Generating a report via the Reports system

In addition to the quick reports available from the Datagrid, Crisisworks also contains a number of additional reports.

**Step 1:** From the Overview menu, click on Reports



**Step 2:** On the Left Hand side you will see a breakdown of report folders. Depending on your security level, you will only see folders for reports that you have permission to run. On the right hand side you will see the report list. To filter for certain reports, you can click on the folders to only display these type of reports.

Reports	ID	Name	Description	Format	Last Run
View Report	RPT-17	Information Report	A report listing information records.	summary	an hour ago
All Reports 22	RPT-2	Audit Report	A report providing audit action details recorded by the system for a specified time period.	summary	1 Dec 2018 at 11:15 AM
Operations Reports 4	RPT-16	Contacts Report	A report listing contacts.	summary	-
Recovery Reports 14	RPT-27	Finance - Cost Per Event Summary	A report detailing the cost estimates and actuals for events. The actual cost is derived from the Finance Module.	summary	Last Thursday at 2:12 PM
Resource Reports 1	RPT-22	Finance - Recovery Cost Per Asset Class Summary	A report summarising costs per asset class. Please note - these costs are derived from Infrastructure Assessments only.	summary	6 Feb 2017 at 4:41 PM
System Administration Reports 2	RPT-23	Finance - Recovery Cost Per Asset Summary	A report summarising costs per asset. Please note - these costs are derived from Infrastructure Assessments only. The actual cost is derived from the Finance Module.	summary	6 Feb 2017 at 4:25 PM
User Reports 1	RPT-24	Finance - Recovery Cost Per Infrastructure Resource Assignment	A report detailing the costs per resource assignment for Infrastructure Assessments. The actual cost is derived from the Finance Module.	summary	4 Jan 2017 at 3:27 PM
	RPT-3	Monthly Statistics of Emails & SMS's sent	Displays the monthly totals of Emails & SMS's sent for a nominated period.	summary	-
	RPT-9	Recovery Affected Contacts	A report detailing affected contacts and their related recovery case information.	summary	-

**Step 3:** To generate a report, click on the name of a report in the right hand side. The next screen will display some general information about the report.

1. Click on the **Generate Report** button
2. Each report has different filters that are relevant to the report.
3. Configure the appropriate options for your report.
  - a. Scroll down and choose which fields you would like to see on your report. The default fields have already been selected but you can remove any fields or add fields that are not selected by default.
  - b. If you wish to group your report by a field, you can choose this in the Group By area by selecting the appropriate field. When you group by a field, it creates a heading for this field on the report and lists the items below it. It may be useful to group your report by Event or Tags.
  - c. You can choose to order your report by a field by selecting a field under the Order By heading.
4. Press **Run Report** to run the report.
5. When the report has finished, it will show on screen. Scroll to the bottom of the report and click the **Export to Excel** or **Export to CSV** button to export the data.

## Available Reports

The following reports are available for the modules below. You will only see these reports if you have permission to view them.

### Operations Reports

These reports are for the registers found in the Operations menu.

Name	Description
Information Report	A report listing information records.
Contacts Report	A report listing the contacts in your system

Request Items Report	A report listing request items
Request Resource Assignment Report	A report listing requests and their resource assignments, including any associate costs

## Recovery Reports

Name	Description
Recovery Case Report	a report listing recovery cases including applicant and property details for the case.
Recovery Affected Contacts	a report detailing affected contacts and their related recovery case information.
Recovery Agriculture	a report detailing affected agriculture and it's related case information.
Recovery Environmental Health Assessments	a report detailing affected agriculture and it's related case information.
Recovery Infrastructure Assessments	a report detailing infrastructure assessments.
Recovery Livestock	a report detailing affected livestock and it's related recovery case information.
Recovery Private Assets	a report detailing private assets and it's related case information.
Recovery Services Required	a report detailing services required and their related recovery case information.
Services Required Summary	report providing counters for services required for a nominated event and period
Summary of Damages by Asset Type	displays the damage amounts for each asset type
Cost Per Event Summary	a report detailing the cost estimates and actuals for events.
Recovery Cost Per Asset Class Summary	a report summarising costs per asset class for Infrastructure Assessments
Recovery Cost Per Asset Summary	a report summarising costs per asset for Infrastructure Assessments.

## Resource Reports

Name	Description
Resources Report	a report listing all resources along with their type, status and organisation.

## System Administration Reports

Name	Description
Audit Report	a report providing audit action details recorded by the system for a specified time period.
Monthly Statistics of Emails & SMS's sent	displays the monthly totals of Emails & SMSs sent for a nominated period

## User Reports

Name	Description
Users Report	a report detailing all Crisisworks Users.

## Export to CSV for Bulk Updates and Imports

For supported modules, Crisisworks allows you to run a base report, export it to CSV, make changes to the data and then import these changes to bulk update records.

Please note - currently only users are supported. Support for additional import schemas is planned, but you can contact our service desk for assistance in the meantime.

To import users:

- Run your report (ie Users Report)
- Press **Export to CSV**. This will create a CSV file of the report.
- Open the CSV file in Excel and make any necessary changes and save the file (ensuring it is still in CSV format).
- Go to the Settings Menu and choose Internals
- On the left hand side, choose Import Data. The available import types will be listed in the **What do you want to import?** drop down list.
- For importing users, select **User Import from CSV**
- Upload your amended CSV file
- Press **Import**

See [Importing and exporting users to and from Crisisworks](#) for more information on importing users.

## Using Dashboards & Projectors

The Crisisworks Dashboard is a near real-time feed of activity.

### On this page

- [The Dashboard](#)
- [Projector mode](#)
- [The Activity Log](#)

---

## The Dashboard

The screen is refreshed at regular intervals as configured in the system (typically every 30 seconds).

Activity the dashboard displays includes:

- **Counters** - displayed on the left hand side. It displays counters for registers important to you with links allowing easy access to the common registers
- **Activity Feed** - including the following types of activity:
  - User - Sign ins and Duty Status reporting
  - Events - New, Open and Closed incidents
  - Activities - Requests, Information, Offers and Cases
  - Log Messages - brief messages entered from the dashboard
- **Announcements** - important information from the Event Coordination team or Administrator

Each item contains the following specific information.

- **Date** - in both relative time and 24 hour clock format
- **User** - including links to relevant user profiles
- **Icons** - user friendly icons indicating the type of activity
- **Status indicators** - indicating the workflow status

A *Show Details* link is provided allowing you to view more details on what was changed.


## Projector mode

The dashboard can be viewed in either **Screen mode** (default) or **Projector mode**.

Screen mode is intended for general use, whereas Projector mode is great for displaying on a larger screen viewed by multiple people (such as in an Emergency Operations Centre).

### To switch between screen mode and projector mode



1. While viewing the Dashboard, click on the **Projector Mode** button in the blue toolbar (  ). This will remove the menus from being displayed allowing you to view the dashboard on larger screens
2. To revert back to Screen Mode, click on the Projector Mode button again.

The Projector Mode button is available on most screens. Some great ideas for using Projector Mode include:

1. Projecting the Dashboard (the above example)
2. Projecting the Request Datagrid while filtered on the "Active" counter
3. Projecting any other datagrid or filter of interest — these will auto-refresh when in projector mode.

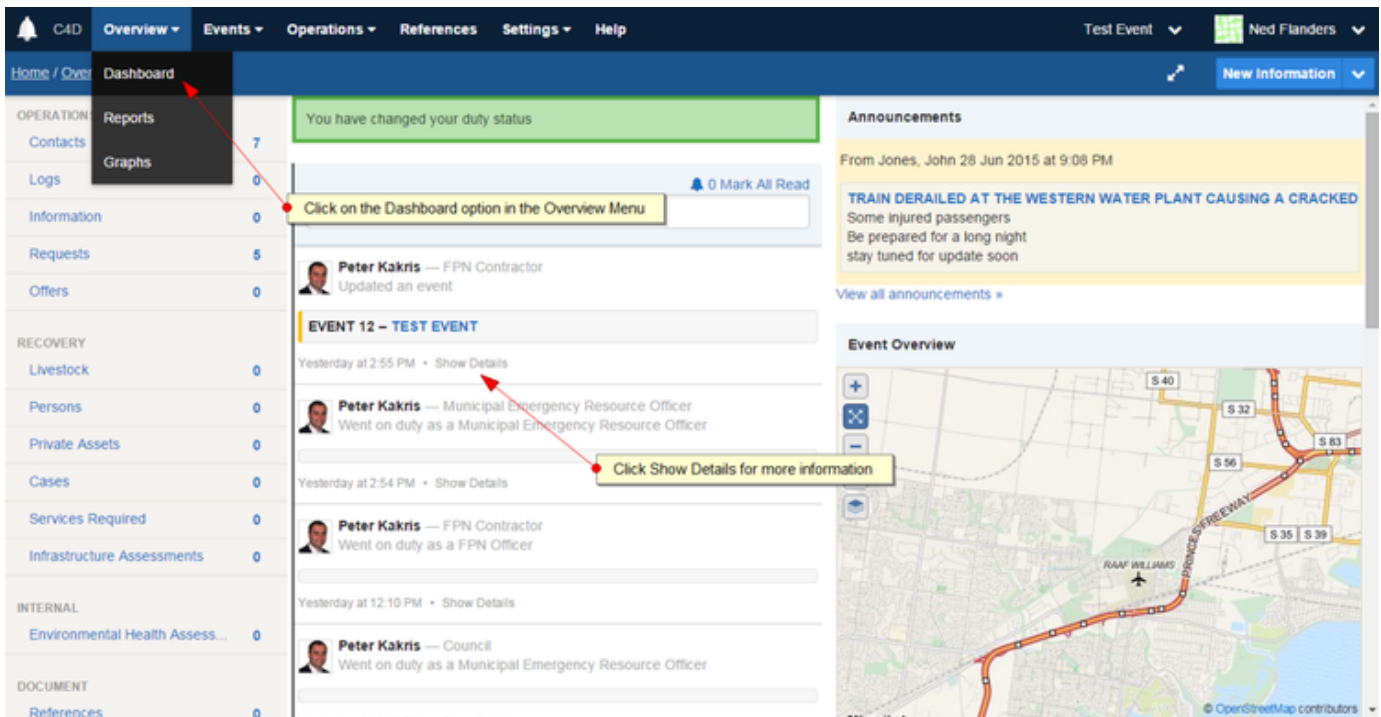
## The Activity Log

All changes and activities in Crisisworks get saved to an *Activity Log*. During an *Event* this can be useful to see what changes have recently been made for the *Event*. It also allows you to view the activities for a specific record.

There are 3 areas where you can view the *Activity Log*:

1. On the main Dashboard
2. In the sidebar on the right hand side of most pages (not on the dashboard).
3. On individual records - an *Activity Log* showing the history for the individual record is displayed at the bottom of the page

For changed data it will display who made the change, the time of change and what was changed. For most records a *Show Details* link is displayed which you can click to show what specific information was changed.



## Crisisworks Modules

This section contains information on Crisisworks modules.

Core Modules	
Requests	Provides request management for EOCs, including assignment to resources and contractors, resource cost tracking and inter-agency workflow and assignment.
Information	Provides a register of messages and information such as incident action plans, situation reports, announcements and information
Offers	Manage offers of assistance and volunteering
Logs	Quickly add position logs
Contacts	Manage global and per-event contacts
Recovery (People & Property)	Contains Recovery Case (People & Property), Recovery Contact (Affected Person), Affected Private Assets, Environmental Health Assessment, Affected Livestock, Affected Agriculture and Recovery Task.
Recovery (Infrastructure)	Provides a full management system to report and assess impacted municipal assets, and the manage costs and tasks in recovery.
Library	A document wiki to store global and per-event documentation and geographical features of interest.
Optional Modules	
Fire Prevention	Provides a full lifecycle management system for municipal fire risk reduction, including onsite property inspections, fire prevention notices and contractor assignment.
Fire Permit	Provides a public form and back-end workflow to allow residents to submit fire permit applications
Financial Reconciliation	Provides financial reconciliation capabilities for Crisisworks to manage post-impact cost recovery
Weed & Pest	Provides a full lifecycle management system for weed and pest infestation, complete with contractor management

The list above omits specialist modules that have been deployed for enterprise customers or specialist markets. If you cannot find your

module listed above, please consult the [Solutions](#) section instead.

## Requests

<b>Type</b>	Register
<b>Location</b>	Operations / Request
<b>Licence</b>	Included in all editions

### On this page

- [Overview](#)
- [Using Requests](#)
  - [Adding a new request](#)
  - [Assigning a request](#)
  - [Tracking progress](#)
  - [Completing a request](#)
  - [Adding resources to a request](#)
  - [Tracking the cost recovery method](#)
- [Managing Workflow](#)
  - [Status](#)
  - [Priority](#)
  - [Assignment](#)
  - [Progress](#)
  - [Cost Recovery](#)
- [Bulk Actions](#)
- [Notifications](#)
- [Reporting](#)
  - [Standard reporting](#)
  - [Ad-hoc reporting and exporting](#)
- [Technical Reference](#)
  - [Request schema](#)
  - [Contact schema](#)
  - [Workflow](#)
  - [Import](#)

## Overview

Requests are a type of activity that is requested by someone, needs to be actioned and may utilise resources. In an emergency context, "Request for sandbags" is an example of a request that may have been requested by an EMLO at the SES, and assigned to a council officer at the depot for fulfilment.

Requests provide the following features:

- Users adding requests can **nominate a requestor** by searching existing requestors, entering a new requestor or nominating themselves
- Task details are captured simply using free-text **subject**, **description** and **attachment** fields
- An **address** can be looked up and attached to the request
- A **map can be annotated** to show the location of the request
- Various workflow fields allow for **prioritising**, **assigning**, setting of **due dates** and **tagging** to aid in management.
- Requests capture **resource utilisation** in the fulfilment of the request, and ad-hoc resources can be added if required. This data feeds into the finance module for full financial reconciliation.
- Requests are assigned to **positions** to aid in tracking between shift changeovers
- Assignment and management of requests are handled by **coordinators**



The Request Datagrid

ID	Status	Progress	Priority	Subject	Assigned	Updated	Next Action
14912	Assigned		High	Need Tables and Chair at the relief Centre FRANKSTON WATERFRONT CARPARK, 13th PIER PROMENADE, FRANKSTON, 3199	MSIA Officer	24 Nov 2016 at 9:57 AM	
14910	Requested		Normal	Deliver equipment		23 Nov 2016 at 6:11 PM	
14857	Requested		Normal	Paper needed		23 Nov 2016 at 1:33 PM	
14875	Requested		Normal	Need help with inspections		16 Nov 2016 at 4:06 PM	
14796	In Progress	80 %	Normal	Need help with iPhone app setup	MSIA Officer	16 Nov 2016 at 2:26 PM	
14865	Requested		Normal	need Ambulance to relief centre		16 Nov 2016 at 2:16 PM	
14864	Requested		Normal	load setup		16 Nov 2016 at 2:11 PM	
14821	Assigned		Urgent	Feed for 200 head of dairy cattle	depi	15 Nov 2016 at 2:47 PM	2 weeks ago

The Request Form

**New Request**

Requestor

I am the requestor  
 A requestor has been specified  
 The requestor is authorised and has agreed to pay any costs

Request Particulars

Subject \*

Title/Summary of this request  
 A brief summary used in short messages and summary settings.

Details

Format [dropdown] [bold] [italic] [underline] [link] [unlink] [list] [ul] [table] [table] [table] [table] [table]

Enter the details of the request

Attachments

Add File or drag and drop file

Attach any supporting documentation

Resources & Costs

Location

Location

Property [dropdown] Search...

Select the location to deliver or perform the request, or click a location on the map

## Using Requests

The request register is located under **Operations > Requests** in the menu. As with any register, it will only appear when enabled within the current event, and for users that have access to that register for positions that they are on duty.

## Adding a new request

To add a new request:

- From any screen, press **New Request**
- Specify the **requestor**
  - If you are the requestor, leave it as-is
  - If you know the requestor (for example, you are entering the request from a phone call), then select **A requestor has been specified** and then search or enter the requestor details.
  - If there are likely costs involved and the requestor has agreed to pay costs, check the checkbox under the requestor form. This will help in emergency cost recovery.
- Specify the **request particulars** by entering a **subject, details** and **attachments** just like you may write an email
- Enter a location
  - You can search by **Property**, by **Point Of Interest**, or by any other configured asset class. When a property is selected, it will appear on the map.
  - You can also annotate the map to add points, a polygon or a linestring to provide more context to the request.
- Set the **priority** field if the request is high priority.
- Save the request

The request will then appear in the datagrid as **unassigned**, meaning a coordinator will need to assess the request and assign it to a position for action. The unassigned counter can be thought of as an inbox for new requests.

## Assigning a request

Coordinators can assign requests as follows:

1. Click **Edit** to edit the request
2. On the edit screen, pull down the **assignment** field and select the position within the event that will handle the assignment.
3. Add any additional notes into the yellow **notes** field
4. Click Save

Users on duty for the assigned position will be notified of the assignment.

Requests can only be assigned to positions that are involved in the event. This prevents problems with lost or missing requests during shift changeovers.

## Tracking progress

The assignee can edit the request as often as required in order to update progress on the request.

There are two main parts to this:

1. Notes can be added to the yellow notes field through multiple edits, to maintain a case history
2. The **status** field, when set to **In Progress**, reveals a **% Complete** field that can estimate the progress through the job.

To update these fields, the assignee simply edits the request to update these fields as required.

## Completing a request

When the request has been completed, the assignee can set the status to indicate the job is complete.

Setting the status to **Resolved** will complete the job and return it back to the coordinator for review. Setting the status to **On Hold** will mark the job as being paused, and will retain the request with the assignee.

## Adding resources to a request

### COORDINATORS ONLY

Authorised users can add resources to a request, to track costs and utilisation.

To add a resource to a request:

1. Click **Edit** to edit the request
2. Expand the **Resources & Costs** fieldset
3. Click **Add New** to add the **resource assignment**. You can add multiple resource assignments to a single request.
4. A subform is added to the request form for each resource assignment. For each assignment:
  - a. Search the resource by name, and select it from the list to use it. Its unit rate is loaded into the form. If it is a new resource then you can add it as an **ad-hoc resource** by simply typing the name of the new resource. A warning appears to tell you it will be added as a new resource.
  - b. Enter the quantity of utilisation of the resource. For ad-hoc resources, this is dollars, but other resources may specify another unit (e.g. hours, litres, etc)
  - c. Enter a reference such as a Purchase Order Number, if applicable
  - d. Enter details for the resource assignment if needed
5. Click save

To complete a resource assignment, edit the resource assignment and click the **Completed** checkbox.

## Tracking the cost recovery method

### COORDINATORS ONLY

A large part of resource assignment is tracking the expected costs. For this, there are fields in the request form.

1. In the **Requestor** fieldset, a leading question exists as to whether or not the requestor has agreed to pay all costs
2. In the **Resource Costs** fieldset, a cost recovery method allows tracking of the following options:
  - a. No authorisation obtained
  - b. MERC — Authorised as part of the incident cost
  - c. MERO — Council will pay
  - d. Requestor — The requestor will pay (this is selected automatically if the requestor has agreed to pay the costs)
  - e. Other — Allows entry of another cost recovery method
3. If the Crisisworks installation contains the [Financial Reconciliation](#) module, a **Financial Payments** fieldset appears in the right hand side to list all reconciled payments against the request.

It is possible for administrators to change the list of cost recovery options from within [Settings > Lookups](#).

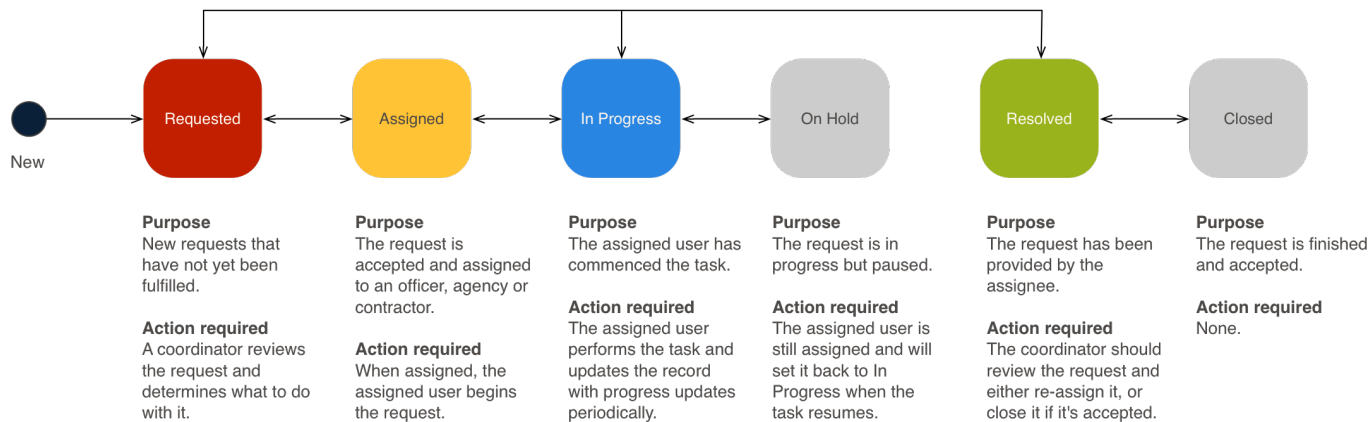
## Managing Workflow

Requests support a full lifecycle workflow model, using a combination of status, assignment, prioritisation and progress. It also tracks the cost recovery method along with estimated costs of any attached resources, for later cost recovery reporting.

### Status

The basic workflow for a request is **REQUESTED** > **ASSIGNED** > **IN PROGRESS** > **RESOLVED** > **CLOSED**. Users set the status of the request by editing the request and changing the value in the **status** field.

The following diagram shows this in more detail.



## Priority

If the priority of a request is set to HIGH or URGENT priority, then a special counter will appear to track these while they are in an active state.

## Assignment

There are two types of assignment available for requests.

1. Requests are assigned to a **single position** to indicate a responsible position. This allows requests to be managed by teams across multiple shifts. A request can only be assigned to one position at a time, meaning there is one point of responsibility to handle and resolve the request. Whenever an active request is unassigned, it reverts to the **REQUESTED** state and it is the job of coordinators to assign (or close) the request.
2. Requests can also be assigned to **multiple resources**. Resources are used to track utilisation and costs, plus allows resource managers to access the request record while they are actively assigned. Each resource assignment contains additional information such as quantity and descriptive information about the job.

A counter will appear for each assigned entity, to allow tracking of assignments by each position or resource. An unassigned counter appears whenever there are unassigned requests that require assignment by coordinators. Coordinators should ensure all requests are assigned for action, or are resolved and then closed.

## Progress

When the request is in a **IN PROGRESS** status, the assignee or the coordinator can update the status of the request with a progress indicator, which is a percentage from 0% through to 90%. To set 100%, change the status to **RESOLVED**.

## Cost Recovery

As described in the section "*Tracking the cost recovery method*" (above), cost recovery indicators are built into the request form to support identification of the payer of the request.

From a workflow perspective, it is important to identify the payer for all requests. A **Payment Not Authorised** counter appears to assist coordinators in following up with any requests without an agreement for payment.

## Bulk Actions

Requests support the following bulk actions.

Name	Applies	Description and Usage
------	---------	-----------------------

Export to Report	Always shown	Provides an ad-hoc report and export of selected records. If no records are selected, it exports all records.  To use: <ol style="list-style-type: none"> <li>1. Optionally select one or more records to begin</li> <li>2. Click <b>Export to Report</b> from the Datagrid</li> <li>3. Configure the report, then click <b>Generate Report</b> to build the report</li> </ol>
Bulk Edit	One or more records selected	Users can change the status, assignment, due date and tags of selected records  To use: <ol style="list-style-type: none"> <li>1. Select one or more records</li> <li>2. Click <b>Bulk Edit</b></li> <li>3. Set the fields you wish to bulk apply, and add a bulk update comment for the audit log.</li> <li>4. Click <b>Make Changes</b> to perform the changes</li> </ol>
Create a Copy	One or more records selected	Users can copy one or more requests to a new request(s). The new request(s) are set with a system status of <b>DRAFT</b> , requiring the user to edit each copied record to make appropriate changes and set the status accordingly.  To use: <ol style="list-style-type: none"> <li>1. Select one or more records</li> <li>2. Click <b>Create a Copy</b> — the items are copied immediately</li> <li>3. Click the resulting <b>Drafts</b> counter to view the created copies, then edit each record as required.</li> </ol> <p>If templates are copied, the resulting records <b>will not</b> be templates.</p>

## Notifications

Any updates to a request will **send notifications to all users assigned to the request according to their notification preferences**. If the request is unassigned, coordinators receive these notifications.

## Reporting

### Standard reporting

The following [reports](#) are useful in reporting and managing requests.

Folder	Name	Description
Operations	Requests	Generates a comprehensive listing of all requests and their requestor details.
Operations	Contacts	Generates a listing of all contacts for the event, which includes requestors.
Operations	Request Resource Assignment	Generates a list of all resource assignments for the event with extended details on the resource, the assignment and the request to provide a basis for financial recovery.

All reports can be grouped, ordered and filtered by a range of fields, and the results can be printed, exported to Excel and saved into Crisisworks as a snapshot.

Read [Generating Reports](#) for more details.

### Ad-hoc reporting and exporting

It is possible to export a custom selection of requests using the standard Requests report.

To export a custom selection:

1. Start on the Request Datagrid
2. Select one or more records. You can use counters and filters to find the records you need, and build up your custom selection over a few

queries.

3. When one or more records are selected, click the **Export to Report** button that appears at the bottom of the screen.
4. This will load the base report with the selected IDs, where you can configure the report as required — add/remove columns, select custom ordering and group by a field.
5. Click **Generate Report** to build the report

If you wish to export the generated report, scroll to the bottom of the report and click **Export to Excel**

## Technical Reference

The following information allows system integrators or technologists to work with the [Crisisworks API](#).

### Request schema

Field ID	Label	Form Type	Data Type	Values	Notes
requestorIsMe		radio	enum	me, external	Defaults to me
requestor		singleSubForm	relation	<a href="#">contact</a>	Only available if 'requestorIsMe:external'
requestorHr	<hr />	info			Read only
requestorAuthorisedPayment	The requestor is authorised and has agreed to pay any costs	checkbox	boolean		
title	Subject	text	string(255)		Required; a brief summary used in short messages and summary listings.
details	Details	rte	clob		Enter the details of the request
media	Attachments	media			Attach any supporting documentation
requiredResources	Resources	resourceList			
payer	Cost Recovery Method	select	enum	noauth, requestor, council, incident, other	Required; only available if 'requestorAuthorisedPayment:false'; defaults to noauth; if costs are incurred, who will pay?
payerOther	Other Payer (specify)	text	string(255)		Only available if 'payer:other'
payerRequestorLabel		info			Only available if 'requestorAuthorisedPayment:true'; read only; the requestor is authorised and has agreed to pay any costs
progress	Progress	select	enum	0, 10, 20, 30, 40, 50, 60, 70, 80, 90, 100	Only available if 'status:/^3
priority	Priority	select	enum	1, 2, 3, 4	Defaults to 2
assignee	Position Assigned	assignment			Single assignment to Positions
related	Related Contacts	related			
activity		auditLog			

### Contact schema

The requestor field is a link to a Contact record, and the details can be found in the [Contacts module technical reference](#).

## Non-schema fields

Field ID	Label	Form Type	Data Type	Values	Notes
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hasAsset	Location	asset			Supports Property and Point of Interest; MDA94 projection used for geospatial assets; select the location to deliver or perform the request, or click a location on the map
hasDueDate	Due By	duedate			
hasMap		geo			Uses MDA94 projection
hasSchemaSelection	Type	schemaselection			
hasStatus		status			
hasTags		tags			

## Workflow

Workflow ID	Label	Value	Next States	Initial State
UNASSIGNED	Requested	1	UNASSIGNED, ASSIGNED, RESOLVED	
ASSIGNED	Assigned	2	ASSIGNED, UNASSIGNED, IN_PROGRESS, RESOLVED	
IN_PROGRESS	In Progress	3	IN_PROGRESS, ON_HOLD, UNASSIGNED, RESOLVED	
ON_HOLD	On Hold	4	ON_HOLD, IN_PROGRESS, UNASSIGNED, RESOLVED	
RESOLVED	Resolved	-1	RESOLVED, ASSIGNED, UNASSIGNED, CLOSED	
CLOSED	Closed	-2	CLOSED	

## Import

The import user interface does not currently support importing requests. However, the [Crisisworks API](#) allows integrators to manage and extract all data.

## Information

An *Information* record is a place to record information you have received that you want to share with the coordination centre.

## On this page

- [Overview](#)
- [Usage](#)
  - [Editing an existing information item](#)
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## Overview

The *Information* module provides a way to store and publish a variety of information including messages, reports and assessments. Information can be stored in Crisisworks, published onto the dashboard, and explicitly published by email and SMS to users.

*Information* records store and publish intelligence, and are not directly actionable. If actions are required resulting from the information, [requests can be added](#) to assign and track specific work.

Examples of *Information* may include:

- Bureau of Meteorology weather warnings and updates
- Reports from the field (for example "Tree over Road")
- Road blocks, Relief centre locations
- Map annotations and features of interest
- Announcements and updates to the EOC

The Information module offers different types of information schemas that can be added. You will have the option of choosing what type of information you are creating when adding a new *Information* record.

Name	Description	Summary of use
Information	General information	This is the most general and flexible information schema, and most commonly used for general messages and information sharing.
Feature of interest	Share important locations	This focusses on the map field, and allows a feature to be identified on the map and named. A <a href="#">map layer</a> for features of interest can be enabled on any map within Crisisworks, plus a counter allows for listing all features of interest.
Situation Report	An operational update from a business unit	Used for regular operations updates, situation reports have their own counter and are thus easy to find among other messages in the register.
Incident Action Plan	A SMEACS briefing template	The Incident Action Plan uses the <a href="#">SMEACS</a> format to summarise the plan for operations. It has its own counter to allow it to be easily found within the register.
Route	A tracked route	Field users can track their routes while working. Uploaded routes are uploaded as this information type.

**Enterprise customers:** you may have additional schemas as part of your custom deployment. Consult your [enterprise solution guide](#) for details.

## Usage

To access the Information register, navigate to **Operations > Information** using the top menu.

Users must have a positions with access to the Operations section of Crisisworks in order to access and create Information records. The *Information* register also needs to be added to the currently selected event to access it.

## Adding a new information item

To add information to Crisisworks:

1. From any screen, click the **New Information** button. If you wish to use a specific schema, select it now, otherwise leave it to the default *Information*.
2. Specify the **Source & Validity** of the information
  - a. If you are the information source, leave it as-is.



- b. If you know the source of information (for example, you are entering the message from a phone call), then select "A source has been specified", and then search or enter the contact details.
- c. Now enter the validity dates. By default it is valid now and never expires, but certain types of information have more specific dates.
3. Enter all relevant **Information** in the form
  - a. Enter a subject — this is a short message that will be used for short-form publishing, such as SMS messages
  - b. Optionally enter additional details — this will be treated like body text of an email
  - c. Optionally upload any attachments you have by dragging and dropping them into the **Attachments** box, or clicking "**Add File**" to select from a file dialog.
  - d. Optionally search for **assets** (e.g. a property address), or mark a **location** on the map. If marking a position on the map, you can select a **Display Icon** to draw the information on maps using that icon.
4. Configure the **Publishing** settings if you wish to publish this information to specific users, otherwise leave as-is
  - a. If you would like this to appear on the dashboard, click the **Promote on dashboard** checkbox.
  - b. If you would like to send the information as an announcement to other users, click on the **Publish to participants by email and SMS** checkbox. See *Publishing by email and SMS* below for more details.
5. If needed, alter the other fields on the right-hand side
  - a. If the item is a high priority item, select the appropriate **priority**
  - b. Set the **status** to Current (default, meaning the information is currently accurate) or Not Current (the information is not currently accurate)
  - c. You can **tag** your record to make it easier to find
6. Click **Save** to save your changes

## Editing an existing information item

To edit an existing information record:

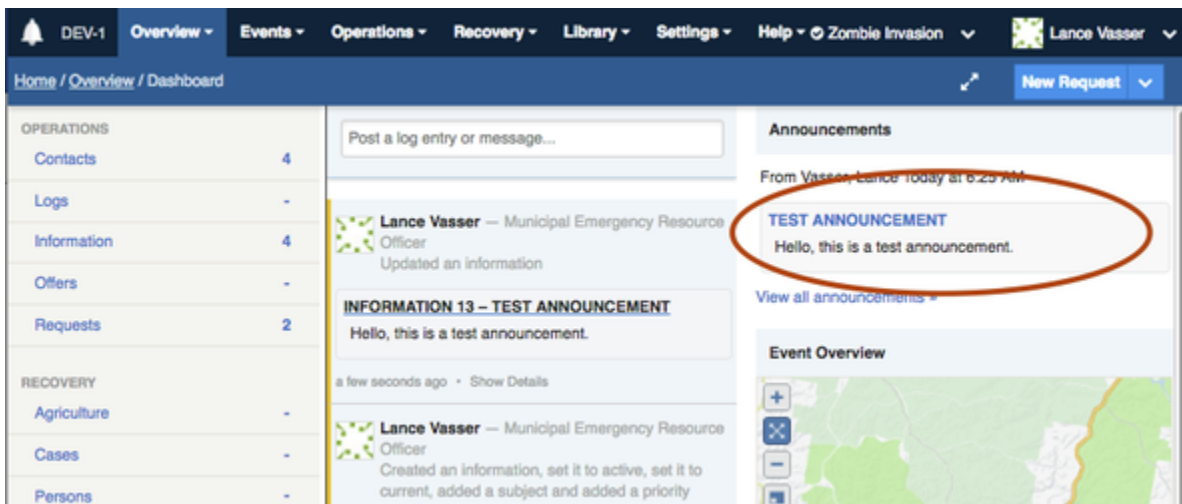
1. Browse to **Operations > Information** to view the Information [Datagrid](#).
2. Use the counters or search system to view the available information records
3. Click the link in the datagrid to view the record
4. Click **Edit** (if available based on your security) to edit the record

You cannot change the *type* field when editing a record. The form works the same as adding new records otherwise.

## Promoting an item to the dashboard

To promote an item to the dashboard, check the box **Promote to dashboard** located under the **Publishing** heading in the right-hand section of the form.

The item will appear on the dashboard in the **Announcements** section.



Only users with permission to publish messages can access the publishing controls. If you do not see any publishing controls then check that you are on duty in an authorised position.

## Publishing by email and SMS

To send a formatted copy of the information record to one or more recipients, use the option **Publish to participants by email and SMS** located under the **Publishing** heading in the right-hand side of the form.

1. Check "Publish to participants by email and SMS"	2. Select recipients, or send to all on duty users
<p><input checked="" type="checkbox"/> <b>Publish to participants by email and SMS</b></p> <p>When status is 'Current', sends a formatted copy of the record based on user communication preferences</p> <p><b>Recipients</b></p> <p><input checked="" type="radio"/> Send to all on duty users involved in this event</p> <p><input type="radio"/> Send to selected recipients</p> <p><b>Advanced Publishing Options</b></p> <p><input type="checkbox"/> Send to off-duty personnel that are on call</p> <p>Additionally send to on-call users as well as on-duty users</p> <p><input type="checkbox"/> Force send as SMS</p> <p>Send the announcement by SMS regardless of user preferences</p> <p><input type="checkbox"/> Confidential</p> <p>Only sends the subject line, and requires users to log on to view the details</p>	<p><b>Recipients</b></p> <p><input type="radio"/> Send to all on duty users involved in this event</p> <p><input checked="" type="radio"/> Send to selected recipients</p> <p>Select one or more recipients</p> <p><b>Agencies</b></p> <ul style="list-style-type: none"> <li>Ambulance EMLO</li> <li>CFA EMLO</li> <li>Red Cross EMLO</li> <li>SES EMLO</li> </ul> <p><b>Coordinators</b></p> <ul style="list-style-type: none"> <li>MERC</li> </ul> <p>Send the announcement by SMS regardless of user preferences</p>

Selecting recipients:

- Participants can be any participating position or user. If you do not find expected items in the list, please [add them as event participants](#) first.
- Check the advanced option **Send to off-duty personnel that are on call** if you wish to send to users that have not yet gone on duty. This is useful for an initial event announcement to set up your EOC.
- Check the advanced option **Force send as SMS** to override user preferences and force an SMS to be sent, irrespective of user communications preferences. This is a good idea for urgent messages.
- Check the advanced option **Confidential** to ensure the body of the message will not be sent, and only users that can log in and access the event can see the details

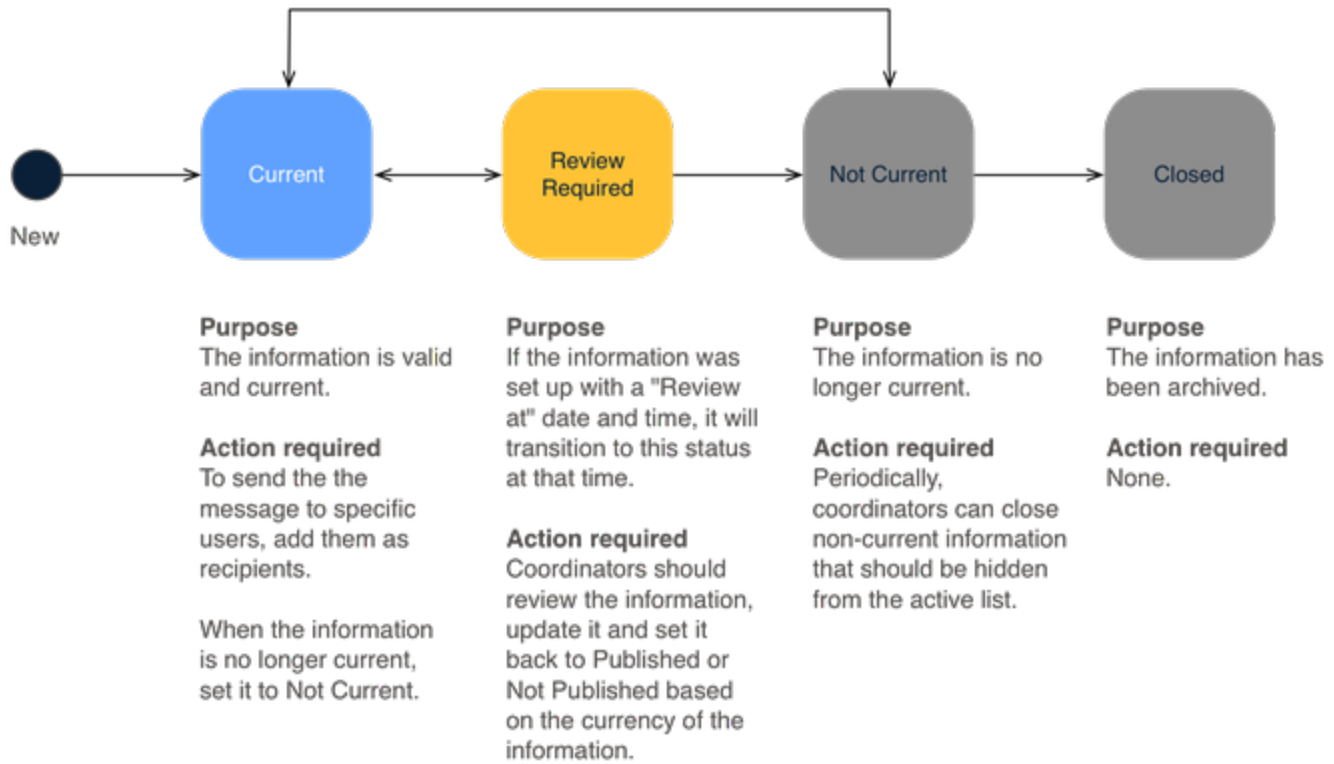
Messages will only be sent when in the **CURRENT** status. This means that you can set up an information record by using a **NOT CURRENT** status, and then transition the status later to send the record to the preconfigured recipients.

## Workflow

The following workflow applies to the information register.

## Status

The status field controls the overall validity for information items, as follows.



## Priority

If the priority of a request is set to HIGH or URGENT priority, then a special counter will appear to track these while they are in an active state.

## Setting validity dates

The **Valid From** and **Valid To** dates specify when the information is current. Note that these dates are informational in nature, and the status of the record **does not** automatically transition when these dates are reached.

## Setting a review date


If you wish to review the record at a pre-set time, you can set a review date.

1. Expand the **Advanced** fieldset
2. Check the box **Schedule a review**
3. Enter a date and time for the review

When the review time is reached, if the record is in a **CURRENT** status, it will transition to a **REVIEW REQUIRED** status, and a counter will appear on the datagrid.

Schedule a review

### Next review



## Bulk Actions

Information items support the following bulk actions.

Name	Applies	Description and Usage
Export to Report	Always shown	Provides an ad-hoc report and export of selected records. If no records are selected, it exports all records.  To use: <ol style="list-style-type: none"> <li>Optionally select one or more records to begin</li> <li>Click <b>Export to Report</b> from the Datagrid</li> <li>Configure the report, then click <b>Generate Report</b> to build the report</li> </ol>
Bulk Edit	One or more records selected	Users can change the status, assignment, due date and tags of selected records  To use: <ol style="list-style-type: none"> <li>Select one or more records</li> <li>Click <b>Bulk Edit</b></li> <li>Set the fields you wish to bulk apply, and add a bulk update comment for the audit log.</li> <li>Click <b>Make Changes</b> to perform the changes</li> </ol>
Create a Copy	One or more records selected	Users can copy one or more requests to a new information item(s). The new item(s) are set with a system status of <b>DRAFT</b> , requiring the user to edit each copied record to make appropriate changes and set the status accordingly.  To use: <ol style="list-style-type: none"> <li>Select one or more records</li> <li>Click <b>Create a Copy</b> — the items are copied immediately</li> <li>Click the resulting <b>Drafts</b> counter to view the created copies, then edit each record as required.</li> </ol> <p>If templates are copied, the resulting records <b>will not</b> be templates.</p>

## Reporting

### Standard reporting

The following [reports](#) are useful in reporting and managing requests.

Folder	Name	Description
Operations	Information	Generates a comprehensive listing of all information items and their requestor details.
Operations	Contacts	Generates a listing of all contacts for the event, which includes information sources.
System Administration	Audit Report	A report providing audit action details recorded by the system for a specified time period.
System Administration	Monthly Statistics of Emails & SMSs sent	Displays the monthly totals of Emails & SMSs sent for a nominated period

All reports can be grouped, ordered and filtered by a range of fields, and the results can be printed, exported to Excel and saved into Crisisworks as a snapshot.

Read [Generating Reports](#) for more details.

### Ad-hoc reporting and exporting

It is possible to export a custom selection of information items using the standard Information report.

To export a custom selection:

1. Start on the Request Datagrid

2. Select one or more records. You can use counters and filters to find the records you need, and build up your custom selection over a few queries.
3. When one or more records are selected, click the **Export to Report** button that appears at the bottom of the screen.
4. This will load the base report with the selected IDs, where you can configure the report as required — add/remove columns, select custom ordering and group by a field.
5. Click **Generate Report** to build the report

If you wish to export the generated report, scroll to the bottom of the report and click **Export to Excel**

## Technical Reference

A message containing intelligence or information to be shared with the team

### Contact schema

The "source" field is a related Contact record, and the details can be found in the [Contacts module technical reference](#).

### Feature schema

Field ID	Label	Form Type	Data Type	Values	Notes
sourceIsMe		radio	enum	me, external	Defaults to me
source	Source	singleSubForm	relation	<a href="#">contact</a> :	Only available if 'sourceIsMe:external'
hr1	_____	info			Read only
validFrom	Valid From	dateTimePicker	timestamp		Defaults to now
validUntil	Expires at	dateTimePicker	timestamp		
subject	Subject	textarea	clob		Required; a brief summary used in short messages, summary listings and the content of SMS and email notification sent in announcements
body	Details	rte	clob		
media	Attachments	media			Upload files or media
icon	Display Icon	select	string(255)		If specified, this will override the default map icon for this record
priority	Priority	select	enum	3, 2, 1	Required; defaults to 2
promoteOnDashboard	Promote on dashboard	checkbox	boolean		Keeps this item on the dashboard
isAnnouncement	Publish to participants by email and SMS	checkbox	boolean		When status is 'Current', sends a formatted copy of the record based on user communication preferences
sendMode	Recipients	radio	enum	all, selected	Only available if 'isAnnouncement:true'; defaults to all
to		assignment			Only available if 'isAnnouncement:true&sendMode:selected'; multiple assignment to Arrays; a message will be sent to the selected recipients that are on duty
sendOptionSeparator	Advanced Publishing Options	info			Only available if 'isAnnouncement:true'; read only
sendToOffDuty	Send to off-duty personnel that are on call	checkbox	boolean		Only available if 'isAnnouncement:true'; additionally send to on-call users as well as on-duty users
sendAsSMS	Force send as SMS	checkbox	boolean		Only available if 'isAnnouncement:true'; send the announcement by SMS regardless of user preferences

remind	Schedule a review	checkbox	boolean		
remindAt	Next review	stateTransitionDatePicker	timestamp		Only available if 'remind:true'
activity		auditLog			

## Information schema

Field ID	Label	Form Type	Data Type	Values	Notes
sourcelsMe		radio	enum	me, external	Defaults to me
source	Source	singleSubForm	relation	contact:	Only available if 'sourcelsMe:external'
hr1	_____	info			Read only
validFrom	Valid From	dateTimePicker	timestamp		Defaults to now
validUntil	Expires at	dateTimePicker	timestamp		
subject	Subject	textarea	clob		Required; a brief summary used in short messages, summary listings and the content of SMS and email notification sent in announcements
body	Details	rte	clob		
media	Attachments	media			Upload files or media
icon	Display Icon	select	string(255)		If specified, this will override the default map icon for this record
priority	Priority	select	enum	3, 2, 1	Required; defaults to 2
promoteOnDashboard	Promote on dashboard	checkbox	boolean		Keeps this item on the dashboard
isAnnouncement	Publish to participants by email and SMS	checkbox	boolean		When status is 'Current', sends a formatted copy of the record based on user communication preferences
sendMode	Recipients	radio	enum	all, selected	Only available if 'isAnnouncement:true'; defaults to all
to		assignment			Only available if 'isAnnouncement:true&sendMode:selected'; multiple assignment to Arrays; a message will be sent to the selected recipients that are on duty
sendOptionSeparator	Advanced Publishing Options	info			Only available if 'isAnnouncement:true'; read only
sendToOffDuty	Send to off-duty personnel that are on call	checkbox	boolean		Only available if 'isAnnouncement:true'; additionally send to on-call users as well as on-duty users
sendAsSMS	Force send as SMS	checkbox	boolean		Only available if 'isAnnouncement:true'; send the announcement by SMS regardless of user preferences
remind	Schedule a review	checkbox	boolean		
remindAt	Next review	stateTransitionDatePicker	timestamp		Only available if 'remind:true'
activity		auditLog			

## Sitrep schema

Field ID	Label	Form Type	Data Type	Values	Notes
sourcelsMe		radio	enum	me, external	Defaults to me
source	Source	singleSubForm	relation	contact	Only available if 'sourcelsMe:external'
hr1	_____	info			Read only

validFrom	Valid From	dateTimePicker	timestamp		Defaults to now
validUntil	Expires at	dateTimePicker	timestamp		
subject	Subject	textarea	clob		Required; a brief summary used in short messages, summary listings and the content of SMS and email notification sent in announcements
body	Details	rte	clob		
media	Attachments	media			Upload files or media
icon	Display Icon	select	string(255)		If specified, this will override the default map icon for this record
priority	Priority	select	enum	3, 2, 1	Required; defaults to 2
promoteOnDashboard	Promote on dashboard	checkbox	boolean		Keeps this item on the dashboard
isAnnouncement	Publish to participants by email and SMS	checkbox	boolean		When status is 'Current', sends a formatted copy of the record based on user communication preferences
sendMode	Recipients	radio	enum	all, selected	Only available if 'isAnnouncement:true'; defaults to all
to		assignment			Only available if 'isAnnouncement:true&sendMode:selected'; multiple assignment to Arrays; a message will be sent to the selected recipients that are on duty
sendOptionSeparator	Advanced Publishing Options	info			Only available if 'isAnnouncement:true'; read only
sendToOffDuty	Send to off-duty personnel that are on call	checkbox	boolean		Only available if 'isAnnouncement:true'; additionally send to on-call users as well as on-duty users
sendAsSMS	Force send as SMS	checkbox	boolean		Only available if 'isAnnouncement:true'; send the announcement by SMS regardless of user preferences
remind	Schedule a review	checkbox	boolean		
remindAt	Next review	stateTransitionDatePicker	timestamp		Only available if 'remind:true'
activity		auditLog			

## Smeacs schema

Field ID	Label	Form Type	Data Type	Values	Notes
sourcelsMe		radio	enum	me, external	Defaults to me
source	Source	singleSubForm	relation	<a href="#">contact:</a>	Only available if 'sourcelsMe:external'
hr1	_____	info			Read only
validFrom	Valid From	dateTimePicker	timestamp		Defaults to now
validUntil	Expires at	dateTimePicker	timestamp		
subject	Subject	textarea	clob		Required; a brief summary used in short messages, summary listings and the content of SMS and email notification sent in announcements
body	Situation	rte	clob		E.g. Uncontained fire on the north east of Mt Dandenong, ERC opened in Lilydale
media	Attachments	media			Upload files or media
icon	Display Icon	select	string(255)		If specified, this will override the default map icon for this record
priority	Priority	select	enum	3, 2, 1	Required; defaults to 2
promoteOnDashboard	Promote on dashboard	checkbox	boolean		Keeps this item on the dashboard

isAnnouncement	Publish to participants by email and SMS	checkbox	boolean		When status is 'Current', sends a formatted copy of the record based on user communication preferences
sendMode	Recipients	radio	enum	all, selected	Only available if 'isAnnouncement:true'; defaults to all
to		assignment			Only available if 'isAnnouncement:true&sendMode:selected'; multiple assignment to Arrays; a message will be sent to the selected recipients that are on duty
sendOptionSeparator	Advanced Publishing Options	info			Only available if 'isAnnouncement:true'; read only
sendToOffDuty	Send to off-duty personnel that are on call	checkbox	boolean		Only available if 'isAnnouncement:true'; additionally send to on-call users as well as on-duty users
sendAsSMS	Force send as SMS	checkbox	boolean		Only available if 'isAnnouncement:true'; send the announcement by SMS regardless of user preferences
remind	Schedule a review	checkbox	boolean		
remindAt	Next review	stateTransitionDatePicker	timestamp		Only available if 'remind:true'
activity		auditLog			
mission	Mission	rte	clob		Describe the current mission. e.g. To facilitate the shelter of residents in the ERC, and where possible forward them on to other accommodation options.
execution	Execution	rte	clob		Describe how you will execute the mission.
administration	Administration	rte	clob		Describe any administrative instructions such as shift times, worker instructions, etc.
communications	Communications	rte	clob		Describe any communications protocols, procedures or expectations.
safety	Safety	rte	clob		Explain any safety concerns, risks and issues. e.g. Outdoor floodlighting is yet to arrive for when it gets dark, If outside ERC please ensure you are wearing a high visibility vest.

## Route schema

Field ID	Label	Form Type	Data Type	Values	Notes
subject	Subject	textarea	clob		Required; the name of the route
dateCreated	Date of Route	date	timestamp		The date of the route
userId	User	text	string(255)		The user that recorded the route
icon	Display Icon	select	string(255)		If specified, this will override the default map icon for this record
priority	Priority	select	enum	3, 2, 1	Required; defaults to 2
activity		auditLog			

## Non-schema fields

Field ID	Label	Form Type	Data Type	Values	Notes
hasAsset		asset			Supports Property and Point Of Interest; MDA94 projection used for geospatial assets; select a location for the information, or click a location on the map
hasMap	Location	geo			Uses MDA94 projection
hasSchemaSelection	Type	schemaselection			
hasSensitiveData	Confidential	sensitivedata			Only available if 'isAnnouncement:true'; only sends the subject line, and requires users to log on to view the details
hasStatus	Status	status			
hasTags		tags			



## Workflow

Workflow ID	Label	Value	Next States	Initial State
PUBLISHED	Current	1	UNPUBLISHED, PUBLISHED, REVIEW	
REVIEW	Review Required	2	REVIEW, PUBLISHED, UNPUBLISHED	
UNPUBLISHED	Not Current	-3	UNPUBLISHED, PUBLISHED	
CLOSED	Closed	-2	CLOSED, UNPUBLISHED	

## Offers

<b>Type</b>	Register
<b>Location</b>	Operations / Offers
<b>Licence</b>	Included in all editions

## On this page

- [Overview](#)
- [The Offer Form](#)
- - [Adding a new offer](#)
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  - [Workflow and completing an offer](#)
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  - [Security Policies](#)
- [Technical Reference](#)
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  - [Contact schema](#)
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  - [Workflow](#)

## Overview

An *offer* is a record of a person or organisation offering material or in-kind assistance.

Some examples:

- People offering to help clean up damage
- People offering to help with cooking or administration for the other staff and volunteers
- People offering temporary accommodation for displaced families.
- People offering temporary accommodation for animals
- Donations of food, blankets and other materials
- A storage company offering discounted storage to affected residents

An offer can have an optional **Valid Until** date set which means the offer is only being made until a certain date. Adding location data is helpful in trying to match closer temporary accommodation for families and animals.

This [datagrid](#) view below gives an overview of the management of the active offers. Counters indicate how many active offers have been assigned to the different positions as well as the tag counters, to help you quickly find offers that match your need, such as "Cat accommodation"

ID	Status	Subject	Assigned	Updated	Valid Until
15275	Available	Free Clothes at ACME clothes company		a few seconds ago	
15076	Available	Unit for a couple available		2 minutes ago	
14770	In Use	Housing for cats	Recovery Officer	3 minutes ago	In 26 days
14835	Available	Accom at xxx 9 ROSS SMITH AVENUE, FRANKSTON, 3199		4 minutes ago	
14964	Under Review	Accommodation for family	Deputy MRM	7 minutes ago	In a month
14819	Available	5 x self contained mobile coffee vans and operators	MRM	14 minutes ago	In 8 days
15078	Available	Large house available	Deputy MRM	15 minutes ago	In a month

The Offers register is located under **Operations > Offers** in the menu. As with any register, it will only appear when enabled within the current event.

Offers provide the following features:

- Users adding offers can nominate an offerer by searching existing offerers, entering a new offerer or nominating themselves
- Multiple offers can be linked to the same offerer
- Offer details are captured simply using free-text **subject**, **description** and **attachment** fields
- An **address** can be looked up and attached to the offer
- A map can be annotated to show the location of the offer
- Various workflow fields allow for **prioritising**, **assigning**, setting of **due** and **value until dates** and **tagging** to aid in management.
- Offers are assigned to **positions** to aid in tracking between shift changeovers
- Assignment and management of offers are handled by users with the [Offer Coordinator policy](#)

## The Offer Form

## Offer #15275: Free Clothes at ACME clothes company

Back

Edit

## Offerer

An offerer has been specified

## Offerer

jones, max		<a href="#">View Contact</a>
<b>First Name</b>	<b>Last Name</b>	
max	jones	
<b>Direct Phone</b>		
555 1234		

## Workflow

## Status

Available

## Priority

Normal

## Valid Until

30 May 2017

## Tags

clothes new clothes

## Advanced



## Activity



## Offer Particulars

## Subject

Free Clothes at ACME clothes company

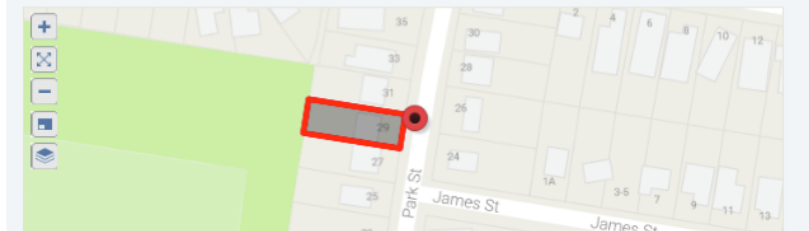
## Details

- previous seasons given for free

## Location

## Location

29 PARK STREET, SEAFORD, 3198 (180422)

[Directions](#)

## Adding a new offer

To add a new offer:

1. From any screen, press **New Offer**
2. Specify the **offerer**
  - a. If you know the offerer (for example, you are entering the offerer from a phone call), then select **An offerer has been specified** and then search or enter the offerer details.
  - b. If you are the offerer, select "I am the offerer"
3. Specify the **offer particulars** by entering a **subject, details** and **attachments** just like you may write an email
4. Enter a location
  - a. You can search by **Property**, by **Point Of Interest**, or by any other configured asset class. When a property is selected, it will appear on the map.
  - b. You can also annotate the map to add points, a polygon or a line-string to provide more context to the offer.
5. Set the **priority** field if the offer is high priority.
6. Set the **Valid Until** date for the offer
7. Save the offer

The offer will then appear in the datagrid as **unassigned**, meaning a coordinator will need to assess the offer and assign it to a position for action. The unassigned counter can be thought of as an inbox for new offers.

## Tracking progress

The offer can be edited as often as required in order to update its progress.

- Record notes can be used to keep track of conversations, thoughts and actions when editing the offer.
- The **status** field is used to manage the offer through its life cycle

The image below shows the yellow record notes section and the Status field

## Workflow and completing an offer

After the offer has been filled, the **status** can be set to "closed" when this offer is completed.

In this example the offer has lots clothes so many people can be directed to the shop, however many offers only have a single use, such as accommodation or labour for one person.

The status of "In Use" can be used to show that this offer is now being filled, it may not mean that they can not accept any more 'customers', you can choose how you would like to use the status in this example where one offer can have many 'customers'.

"Under review" can be used if you need to inspect the site or interview a person, before allowing them to be used

## Assigning an offer

Offer Coordinators can assign offers as follows:

1. Click **Edit** to edit the offer
2. On the edit screen, pull down the **assignment** field and select the position within the event that will handle the assignment.
3. Add any additional notes into the yellow **notes** field
4. Click Save

Users on duty for the assigned position will be notified of the assignment, based on their notification preferences.

Offers can only be assigned to positions [that are involved in the event](#). This prevents problems with lost or missing offers during shift changeovers.

## Security Policies

You can [create your own positions](#) to work with and manage offers. The following [security policies](#) are available for use when creating or editing positions:

Offers			
Offers Coordination	Full read/write access to offers within involved events, with the ability to manage assignments and move records between events.	Council	offerCoordination
Offers Officer	Full read access to offers within involved events, with the ability to edit. Can't assign.	Council	offerOfficer
Offers Limited	Limited read/write access to offers within involved events only where the data is assigned	Council	offerBasic
Offers Read Only Assigned	Can view offers they have been assigned	Council	offerBasicReadOnly

## Technical Reference

### Default schema

Field ID	Label	Form Type	Data Type	Values	Notes
offererIsMe		radio	enum	me, external	Defaults to external
offerer	Offerer	singleSubForm	relation	<a href="#">contact</a>	Only available if 'offererIsMe:external'
title	Subject	text	string(255)		Required; a brief summary used in short messages and summary listings.
details	Details	rte	clob		Enter the details of the offer
media	Attachments	media			Attach any supporting documentation
priority	Priority	select	enum	1, 2, 3, 4	
assignee	Position Assigned	assignment			Single assignment to Positions
activity		auditLog			

## Contact schema

The offerer field is a link to a Contact record, and the details can be found in the [Contacts module technical reference](#).

## Non-schema fields

Field ID	Label	Form Type	Data Type	Values	Notes
hasAsset	Location	asset			Supports Property; MDA94 projection used for geospatial assets; select the location of the goods or services, or click a location on the map
hasDueDate	Valid Until	duedate			
hasFulltextSearch		fulltextsearch			
hasGeoSearch		geosearch			
hasMap		geo			Uses MDA94 projection
hasSchemaSelection	Type	schemaselection			
hasStatus		status			
hasTags		tags			

## Workflow

Workflow ID	Label	Value	Next States	Initial State
AVAILABLE	Available	1	AVAILABLE, UNAVAILABLE, IN_USE, REVIEW, CLOSED	
UNAVAILABLE	Unavailable	2	AVAILABLE, UNAVAILABLE, IN_USE, REVIEW, CLOSED	
IN_USE	In Use	4	AVAILABLE, UNAVAILABLE, IN_USE, REVIEW, CLOSED	
REVIEW	Under Review	3	AVAILABLE, UNAVAILABLE, IN_USE, REVIEW, CLOSED	
CLOSED	Closed	-2	CLOSED, AVAILABLE	

## Documentation Library

### On this page

- [Overview](#)
- [Usage](#)
  - [Viewing documentation](#)

- Adding a new library document
  - Editing a document
  - Tagging documents
  - Adding geospatial features
  - Deleting a document
  - Workflow
    - Status
    - Review
    - Featured
  - Technical Reference
    - Document schema
    - Geofeature schema
    - Meeting schema
    - Non-schema fields
    - Workflow
- 

## Overview

The *Library* is where documents and wikis are securely stored for access all year round and during emergencies. Library records can be for a specific event, or accessible across all events.

Store procedures, policies, job descriptions, minutes of meetings, plans, references guides, and anything else that you need to share with your users.

Library items are known as *documents*, and can be one of the following schemas. You will have the option of choosing what type of document you are creating when you add a new *Library Document*.

Name	Summary of use
Document	This is the most general library schema, and most commonly used for general documentation and information sharing.
Geospatial Feature	A flexible information storage record with geospatial (map-based) information, which allows storage of data such as affected area extents, location of key facilities, etc.
Meeting	An agenda and minutes of a meeting, including audio recording and attachments such as photos of whiteboards.

**Enterprise customers:** you may have additional schemas as part of your custom deployment. Consult your [enterprise solution guide](#) for details.

---

## Usage

To access the library, navigate to **Library** from the top menu.

All Crisisworks items are saved into events, and items are normally archived when the event is closed.

When working with the library, you may prefer to have standing documentation which is accessible across *all* events (including future events).

To do this, you can save them into a [global event](#) rather than a specific event. Learn more about [Global Events](#).

## Viewing documentation


To view documentation in the library, use the [datagrid](#).

The screenshot shows the Crisisworks Library interface. The top navigation bar includes 'DEMO', 'Overview', 'Events', 'Operations', 'Recovery', 'Library', 'Settings', and 'Help'. The current event is 'Larger Emergency Example' and the user is 'Ned Flanders'. The breadcrumb trail is 'Home / Library / Library / In event Larger Emergency Example (or global) and is active'. A 'New Library Document' button is visible in the top right.

The left sidebar contains several sections with counters:

- TOTALS:** Active: 45, Total: 83
- EVENTS:** Larger Emergency Example: 2, Global Workspace: 39, Council Workspace: 4
- WORKFLOW:** Current: 45
- TYPES:** Document: 45
- ACTIVE TAGS:** checklist: 1, contacts: 1, dhhs: 1, emo: 1, emv: 3, fire management: 1, Fire Warden: 1, heatwave: 1, MECC: 1, MEMP: 7

The main table lists documents with columns: ID, Status, Title, Event, Type, Featured, Tags, and Updated. The 'Event' column contains values like 'Council Workspace', 'Global Workspace', and 'Larger Emergency Example'. The 'Updated' column shows timestamps like 'a few seconds ago', '8 minutes ago', etc.

() above the counters to reveal the search form.

## Adding a new library document

To add a library document:

1. From any screen, click the **New Library Document** button. If you wish to change the schema from the default Document type, select this now — available alternatives include Geospatial Feature and Meeting
2. Enter the **Title** and **Body** of the document as needed.
3. Upload any **Attachments** by dragging and dropping files from your computer into the attachment box, or by clicking **Add File**.
4. Optionally add some **Tags** to identify the document, and set **Is Featured** to add the document to the **Featured** counter.
5. Select the **Event** to save the document. By default this will be the currently-selected event at the top right of screen, however you may wish to save the document into a **global event** instead if the document is to be permanently accessible.
6. Click save to save the document.

The library record will then appear in the datagrid, you can then use the counters to filter the list.

## Library Document #14780: Fire Warden Position Description

Cancel

Save

**Record Notes**

This version includes feedback from the EM Committee during the October regional meeting

**Content**


**Title \***  
Fire Warden Position Description

**Body**

Format - B I [Rich Text Editor Icons]

- put you hat on
- High Vis Jacket
- Whistle
- ...

**Attachments**

 Fire Warden-HANDBOOK  
Type: Document  
Size: 1 MB  
Attached  
[Download](#)

[Add File](#) or drag and drop files 1 attachment

**Details**

**Reference type \*** Document **Status \*** Current

**Tags**  
Position Description \* Fire Warden \*

– (Start typing for suggestions, use comma to separate tags. New tags will automatically be created)

Is Featured

Set a review date


**Review at**  
1/11/2018

**Advanced**

**Event \***  
Global Workspace  
Select an event


**Activity**

Order ▾

 **Pete Kakris** — User Administrator, Municipal Emergency Resource Officer, Municipal Recovery Manager, MRM/MERO Assistant, FPN Coordinator, Datalink Developer, Full Access Administrator  
Updated a library document

**LIBRARY DOCUMENT 14780 – FIRE WARDEN POSITION DESCRIPTION**  
Updated Library Document #14780 "Fire Warden Position Description"  
+ Review at: 2018-11-01 00:00:00  
+ Tags: Position Description

2 hours ago · Global Workspace · Hide Details

 **Pete Kakris** — User Administrator, Municipal Emergency Resource Officer, Municipal Recovery Manager, MRM/MERO Assistant, FPN Coordinator, Datalink Developer, Full Access Administrator  
Updated a library document and attached media

## Editing a document

To edit an existing document:

1. Browse to **Library** to view the library [Datagrid](#).
2. Use the counters or search system to view the available documents
3. Click the link in the datagrid to view the document
4. Click **Edit** (if available based on your security) to edit the record

You cannot change the *type* field when editing a record. The form works the same as adding new records otherwise. You can expand to

full-screen mode by pressing the expand icon  in the rich text area.

The yellow **Record Notes** textbox is used for general notes which are not core details for the library record its self, e.g. 'This version includes feedback from the EM committee'. Record notes appear in the audit history.

## Tagging documents

Tags are a great way to file a organise one record into multiple 'folders' at the same time.



ACTIVE TAGS	
animal management	1
checklist	1
contacts	1
dhhs	1
emo	1
emv	3

The counter indicates how many active records match, and a single click filters the list to show you the items that match the tag.

To add one or more tags:

1. Navigate to the Library document
2. Edit the record
3. Type one or more tag name into the **Tags** box.
  - a. Previously used tags will appear in a select box — select a tag will auto-complete it.
  - b. Tags can contain spaces
  - c. Add a comma or press Enter as a separator between multiple tags
4. Save the record when done

## Adding geospatial features

IF adding a Geospatial Feature, then a map will additionally appear on the edit form. You can add map annotations by following the instructions on the [Working with Maps and Assets](#) page.

## Deleting a document

It is not possible to directly delete a document, however you may move the document to an archive event to completely remove it from view.

## Workflow

The following workflow applies to library document.

### Status

The library document has a simple status code to determine the overall status of the document.

Status	Usage
<b>CURRENT</b>	The document contains current information
<b>EXPIRED</b>	The document has expired and is no longer current
<b>REVIEW</b>	The document should be reviewed for currency.
<b>DELETED</b>	The library item is marked as deleted and is no longer current.  Note there is no way to physically delete items in Crisisworks, however you can <a href="#">move the item to an archive event</a> to remove it completely from view.

## Review

Users can check the **Set a Review Date** checkbox, then enter a review date. When that date is reached, the record will automatically be set to the **REVIEW** status.

## Featured

Users can check the **Featured** checkbox to include the document in the "Featured" counter.

## Technical Reference

### Document schema

Field ID	Label	Form Type	Data Type	Values	Notes
title	Title	text	string(255)		Required
body	Body	rte	clob		
attachments	Attachments	media			
isFeatured	Is Featured	checkbox	boolean		
setReviewDate	Set a review date	checkbox	boolean		
reviewDate	Review at	stateTransitionDatePicker	timestamp		Only available if 'setReviewDate:true'
activity		auditLog			

### Geofeature schema

Field ID	Label	Form Type	Data Type	Values	Notes
title	Title	text	string(255)		Required
body	Body	rte	clob		
attachments	Attachments	media			
isFeatured	Is Featured	checkbox	boolean		
setReviewDate	Set a review date	checkbox	boolean		
reviewDate	Review at	stateTransitionDatePicker	timestamp		Only available if 'setReviewDate:true'
activity		auditLog			

### Meeting schema

Field ID	Label	Form Type	Data Type	Values	Notes
title	Topic	text	string(255)		Required
meetingStartDate	Meeting Start Date and Time	dateTimePicker	timestamp		Required
agenda	Agenda	rte	clob		
attachments	Business Papers	media			
present	Present	textarea	clob		
absent	Absent	textarea	clob		
previousMinutesReview	Review of Previous Minutes	rte	clob		Review the previous minutes and note down any inaccuracies

notes	Meeting Notes	rte	clob		Add discussion topics and notes here
resolutions	Resolutions and Action Items	rte	clob		
nextMeeting	Date and time of next meeting	dateTimePicker	timestamp		
meetingClosedTime	Meeting closed time	dateTimePicker	timestamp		
isFeatured	Is Featured	checkbox	boolean		
activity		auditLog			

## Non-schema fields

Field ID	Label	Form Type	Data Type	Values	Notes
hasAsset	Related Asset	asset			Only available if 'itemSchemaName:geofeature'
hasEvent		event			Select an event
hasMap	Geospatial Information	geo			Only available if 'itemSchemaName:geofeature'; uses MDA94 projection
hasSchemaSelection	Reference type	schemaselection			
hasStatus	Status	status			
hasTags		tags			

## Workflow

Workflow ID	Label	Value	Next States	Initial State
NEW	New	0	CURRENT, DRAFT	
DRAFT	Draft	1	DRAFT, CURRENT, EXPIRED, DELETED	
CURRENT	Current	2	CURRENT, REVIEW, EXPIRED, DELETED	
REVIEW	Review	3	REVIEW, CURRENT, EXPIRED, DELETED	
EXPIRED	Expired	-2	EXPIRED, CURRENT, DRAFT, DELETED	
DELETED	Deleted	-3	DELETED	

## Logs

### On this page

- [Overview](#)
- [Usage](#)
  - [Using the log sidebar](#)
  - [Quick log entry using the Activity Log sidebar or dashboard feed](#)
  - [Full entry using the New Log button](#)
  - [To edit a log](#)
- [Technical Reference](#)
  - [Decision schema](#)
  - [Log schema](#)
  - [Non-schema fields](#)
  - [Workflow](#)

## Overview

A log is a record of a person's observations, intentions, actions and decisions, typically a position log in an emergency context. Logs are accessible by other users with the same position, as well as coordinators.

There are a number of ways to publish information in Crisisworks. Logs are typically shared only with others in your position.

If you wish to share information with others, consider using an [Information](#) record instead.

If you wish to add notes to an existing record such as a case note on a recovery record, then browse to that record, click edit, then add a record note instead.

## Usage

The *Logs* register is located under **Operations > Logs** in the menu.

### Using the log sidebar

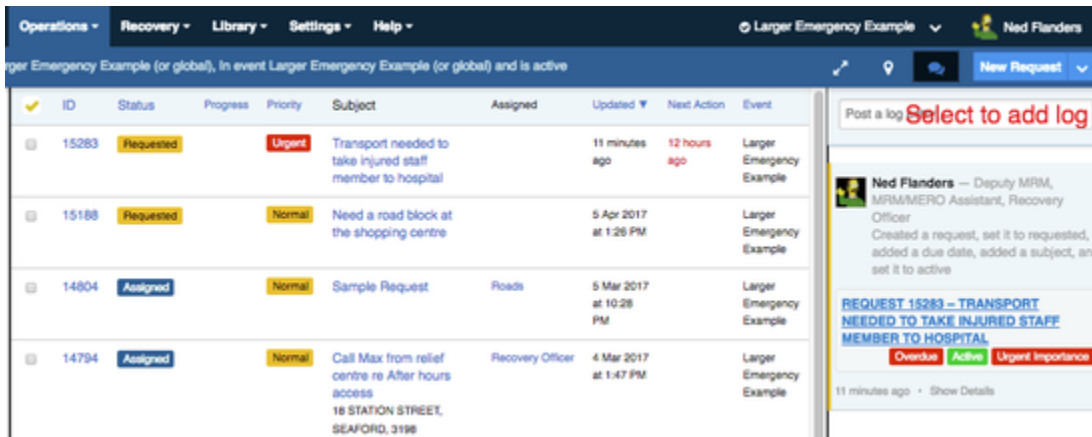
The *Activity Log* sidebar shows a running log of all activity within Crisisworks, including log items. It also provides a quick way to post new log entries from any screen.

[Read more on using the Activity Log.](#)

### Quick log entry using the Activity Log sidebar or dashboard feed

To quickly post a message into the activity log

1. If on a page other than the dashboard, first open the activity log sidebar.
2. Type into the text box at the top of the Activity Log which says "Post a log entry or message...".
3. To add a file to your message you can either click on the **Add File** button displayed or drag files from your computer over the button.
4. To submit your log entry, click on the **Post Message** button.



### Full entry using the New Log button

The log register can be used just like any other register. Unlike the faster method, this allows different schema to be selected based on the type of log being entered.

Name	Summary of use
Log Entry	A general log entry that records textual information. This is used for the quick entry method.
Decision	A record of a decision, with the decision, the reason for the decision, and a section to upload supporting evidence.

To enter a log item:

1. Click the **New Log** button from any screen.
2. Select the type of log record — Log Entry (default) or Decision
3. Enter the text of the log entry, and upload any attachments.
4. Click Save

## New Log

Cancel Save

**Log Message**

Format B I ☰ ☰ ☰ ☰ ☰ ☰ ☰ ☰ ☰

**Attachments**

Add File *or drag and drop files*

Upload files or media

**Options**

**Type \***

Decision

**Tags**

– (Start typing for suggestions, use comma to separate tags. New tags will automatically be created)

**Advanced**

## New Log

Cancel Save

**Decision / Action taken \***

Format B I ☰ ☰ ☰ ☰ ☰ ☰ ☰ ☰ ☰

**Reason for decision \***

Format B I ☰ ☰ ☰ ☰ ☰ ☰ ☰ ☰

Enter the background information and reasons that led to the decision

**Attachments**

Add File *or drag and drop files*

Upload files or media

**Options**

**Type \***

Decision

**Tags**



– (Start typing for suggestions, use comma to separate tags. New tags will automatically be created)

**Advanced**

## To edit a log

Logs can be edited from the Log [Datagrid](#).

1. Navigate to **Operations > Logs**
2. Locate the log you wish to edit by using the [datagrid](#) and click **Edit**
3. Make the necessary changes and click **Save**

You can expand to full-screen mode by pressing the expand icon  in the rich text area. You can use the bullets or numbered lists, bold, italics and insert tables using the table icon .

## Technical Reference

### Decision schema

Field ID	Label	Form Type	Data Type	Values	Notes
body	Decision / Action taken	rte	clob		Required
reason	Reason for decision	rte	clob		Required; enter the background information and reasons that led to the decision
media	Attachments	media			Upload files or media
activity		auditLog			

### Log schema

Field ID	Label	Form Type	Data Type	Values	Notes
body	Log Message	rte	clob		
media	Attachments	media			Upload files or media
activity		auditLog			

### Non-schema fields

Field ID	Label	Form Type	Data Type	Values	Notes
hasSchemaSelection	Type	schemaselection			
hasTags		tags			

### Workflow

Workflow ID	Label	Value	Next States	Initial State
LOGGED	Logged	1	LOGGED	

## Contacts

This page contains only partial information. For more information on the usage of this module, please contact [Datalink Service Desk](#).

## Technical Reference

An external person or organisation related to requests, messages and offers.

### Contact schema

Field ID	Label	Form Type	Data Type	Values	Notes
firstName	First Name	text	string(255)		
lastName	Last Name	text	string(255)		

organisationName	Organisation	text	string(255)		
position	Position	text	string(255)		
rank	Rank	text	string(255)		
hr1	_____	info			Read only
phone	Direct Phone	tel	string(255)		
email	Direct Email	text	string(255)		
notes	Notes	rte	clob		
related	Related Requests	related			
name	Canonical name	hidden	string(255)		
activity		auditLog			

## User schema

Field ID	Label	Form Type	Data Type	Values	Notes
firstName	First Name	text	string(255)		Required
lastName	Last Name	text	string(255)		
organisationName	Organisation	text	string(255)		
position	Position	text	string(255)		
rank	Rank	text	string(255)		
hr1	_____	info			Read only
phone	Direct Phone	text	string(255)		
email	Direct Email	text	string(255)		
notes	Notes	rte	clob		
related	Related Requests	related			
name	Canonical name	hidden	string(255)		
relatedUserId	Linked User	info			Read only
activity		auditLog			

## Non-schema fields

Field ID	Label	Form Type	Data Type	Values	Notes
hasEvent		event			
hasLookup		lookup			Enter a person's name or organisation to search, or enter the details below
hasStatus		status			
hasTags		tags			

## Workflow

Workflow ID	Label	Value	Next States	Initial State
ACTIVE	Active	1	ACTIVE, ARCHIVED	
ARCHIVED	Archived	-2	ARCHIVED, ACTIVE	

## Recovery (People & Property)

<b>Type</b>	Register
-------------	----------

<b>Location</b>	<b>Recovery / Case</b>
<b>Licence</b>	Included in all editions

## Overview

The recovery module contains a series of registers to capture impact details of people, property and infrastructure, and to then manage the recovery via tasks and financial tracking.

---

## On this page

- [Overview](#)
  - [Adding a Recovery Case](#)
    - [Navigate to the Recovery module](#)
    - [Add a new case](#)
    - [Enter the applicant details \(if known\)](#)
    - [Enter any related persons and organisations \(if any\)](#)
    - [Enter details on the affected property](#)
    - [Enter Damage particulars](#)
      - [Enter any affected private assets](#)
      - [Enter details on any impacted agriculture](#)
      - [Enter details on any affected livestock](#)
    - [Specify any follow-up services and tasks required for this case.](#)
    - [Specify sharing consent](#)
  - [Performing Environmental Health Assessments](#)
  - [Recovery Workflow](#)
    - [Recovery Case](#)
    - [Recovery Task \(Services Required\)](#)
  - [Entering Case Notes](#)
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    - [Recovery Case](#)
    - [Recovery Contact](#)
    - [Recovery Private Asset](#)
    - [Recovery Environmental Health Assessment](#)
    - [Recovery Livestock](#)
    - [Recovery Agriculture](#)
    - [Recovery Task](#)
- 

## Adding a Recovery Case

The main record of the recovery module is the Recovery Case, which encapsulates all the other records into a single, managed record. Although it appears complex, there are very few required fields within this form, meaning users can simply collect the information they know, and leave the rest unfilled.

At a high level, the recovery case contains the following sections:

1. Applicant details
2. Affected person details
3. An affected property address
4. Damage details, including:
  - a. Affected private assets
  - b. Affected agriculture
  - c. Affected livestock
5. An Environmental Health Assessment
6. A list of services required
7. Consent

To add a new recovery case, follow the steps below.

## Navigate to the Recovery module



To do this, click Recovery at the top of screen. If you do not see a Recovery menu option, see your system administrator to get access.



## Add a new case

1. Click **New Case**
2. Select the **Applicant Registration** type, which determines whether the **applicant details are provided**, or alternatively whether the applicant is **unknown**.
3. Select whether **there is an interest in a property**. In other words, is a property to be recorded against this case? This determines whether the property and property damage sub-forms appear lower down the form

### Primary Contact Details

**Applicant registration**

Applicant is unknown

Applicant details provided

**Is there an interest in a property within the municipality?**

No  Yes

For residents, this is their fixed home address. For businesses, this is the business location. Multiple properties require multiple recovery cases.

## Enter the applicant details (if known)

The applicant subform appears if you specified that applicant details are to be provided in the question above.

1. You may search Crisisworks for existing applicants — this searches only the current event, and allows you to avoid duplicates.
2. Applicants can be individuals or businesses
3. If they are living in a temporary address as a result of displacement, check the **Has been displaced to a temporary address** checkbox
4. If they are attending a relief centre, check the **Attending Relief Centre** box and select the relief centre
5. Nominate their preferred postal address.
  - a. Use address of property in this case — this will use the case's primary property address which will be entered later
  - b. Use temporary address — if the applicant is using a temporary address, this will use the temporary address
  - c. Specify other address — allows another address to be specified
6. Nominate their preferred method of contact

**Search**

Enter a person's name or organisation to search, or enter the details below

✕

**Contact type**

Individual  Organisation

<p><b>Family name</b></p> <input type="text" value="Davey"/>	<p><b>Given names</b></p> <input type="text" value="Scott"/>
<p><b>Age</b></p> <input type="text" value="42"/>	<p><b>Gender</b></p> <input type="text" value="Male"/>
<p><b>Primary Phone</b></p> <input type="text" value="12345"/> <p><small>Include international dialing codes if needed</small></p>	<p><b>Mobile Phone</b></p> <input type="text" value="67890"/> <p><small>Add a mobile phone if possible</small></p>
<p><b>Email</b></p> <input type="text"/>	<p><b>Language (if a translator is required)</b></p> <input type="text"/>

Attending Relief Centre

Has been displaced to a temporary address

**Where can we send postal correspondence?**

Use address of property in this case  Use temporary address  Specify other address

**Preferred method of contact**

Phone  Email  Post  I do not wish to be contacted

### Enter any related persons and organisations (if any)

If the applicant represents a family, then affected family members can be entered here. If the applicant is a business owner, their affected staff or customers can be entered.

1. Press **Add New** for each affected contact
2. You can search existing affected persons to minimise duplication, or add new data
3. You do not need to re-enter the applicant here
4. If the affected person is attending a relief centre at the time of entry, check Attending Relief Centre and select the relief centre.
5. If the affected person has been displaced, you can specify their temporary address. Note that for families, it is usual to assume the family is living at the applicant's temporary address.

## Related Persons and Organisations

**Persons (in addition to the applicant)**

1. **Search**

Davey

Enter a person's name or organisation to search, or enter the details below

**Family name** [View Person](#)

Davey

**Given names**

Fiona

**Age** **Gender**

40 Female

**Primary Phone** **Mobile Phone**

Include international dialing codes if needed Add a mobile phone if possible

**Email** **Relationship to primary contact**

Attending Relief Centre

Has been displaced to a temporary address

[Add New](#)

Register companions or additional affected persons to this case, in addition to the applicant above.

If registering companions (other persons that may be with the person registering) and they have different personal and contact information (such as home address or contact numbers), please complete another registration form.

### Enter details on the affected property

If you answered Yes to the question in step one about an interest in a property, then an Affected Property subform will appear.

1. Select the **Property Use**
2. Specify the **Applicant's Relationship** to the property
3. Specify if there is **any damage caused by the current event** — if No is selected, the **Damage Assessment** subforms will be hidden lower in the form.
4. Enter the property's **Address**. This will look up your local property database and will match the address to council records, and confirm the location of the property on a map.
5. If required, enter any additional **Property Details** to aid in identifying the property and its purpose. This is useful for farming and business cases.

**Affected Property** ↑

**Property Use** **Applicant's relationship to property**

Commercial/Industrial Other

**Is there any damage to the applicant's assets at this property, caused by the current event?**

No

Yes

Unsure


**Address**

- 6 DAVEY STREET, FRANKSTON, 3199
- Code: 201820

[Directions](#)

Specify the property by looking up the council property database

**Location of Property**



Add any map annotations where appropriate to describe the scene

**Property Details (if required)**

Format B I [Link] [List] [Table] [Check] [Undo]

## Enter Damage particulars

If damage is known, enter details about the damage in the **Damage Assessment** section of the form.

1. Enter a summary of the damage
2. If required, draw a sketch and upload any available photos. This is typically done during an onsite secondary assessment process, and not at the initial time of entry.
3. Enter insurance details

## Damage Assessment

### Damage Summary

Normal B I 🔗 🗨️ ☰ ☰ ☰ ☰ ☰ ABC ↺

Extensive flooding of the residence, shed and vehicles.

1

### Sketch

[New Sketch](#)

Add a sketch of the scene if applicable

### Photo(s) of property

[Add File](#) *or drag and drop files*

Non-structural photos only. Attach photos specific to affected private assets below

### Insurance Details

### Enter any affected private assets

1. Click **Add New** to enter any affected private assets such as homes, vehicles, fencing, etc.
2. For each private asset:
  - a. Select the asset type
  - b. Enter the quantity list
  - c. Specify the damage level
  - d. Enter a description of the asset and its damage
  - e. Upload any photos
  - f. Enter an approximate damage value
3. Some assets have additional fields. For example, **fencing** offers fields for the internal and external fencing length, in kilometres.

### Affected Private Assets

1.

**Asset type** View Private Asset

Caravans

**Number units damaged or lost** **Damage Level**

1 Partially Destroyed

**Description**

**Approximate damage value**

e.g. Enter '1000' for \$1,000.00

Provide an estimate of the damage value as a whole number

**Photo(s) of structure**

Add File or drag and drop files


[Add New](#)

Add a record for each private asset affected by this event - include buildings, structures, fencing as well as any other impact to a privately-owned asset on the property. If the assets are not owned by the applicant of this record, then a new recovery record should be created instead.

### Enter details on any impacted agriculture

1. Click Add New to enter each impacted agriculture crop
2. For each crop:
  - a. Select the agriculture type
  - b. Specify the damage level
  - c. Enter a description and a damage level

### Affected Agriculture

1. [View Agriculture](#) 

**Agriculture type \***

**Damaged area in hectares**  **Damage Level \***

**Description**

**Approximate damage value**  
  
 Provide an estimate of the damage value as a whole number


**Photo(s) of damage**  
 or drag and drop files

Add a record for each agriculture asset affected by this event - e.g. crops and farming.

### Enter details on any affected livestock

For each type of livestock, click **Add New** to record the details

### Affected Livestock

1. [View Livestock](#) 

**Category \***  **Prior**  **Dead**

**Missing**  **Require Assessment**

1 record attached

Add details of affected livestock, including details about missing or deceased stock. Disposal services can be found in the services section below.

### Specify any follow-up services and tasks required for this case.

The list of service categories are maintained in a lookup table that can be managed by Crisisworks administrators.

1. For each service that is required, click **Add New**
2. Select the **Category** of service to be performed (e.g. Counselling, Emergency Shelter)

3. Specify the **Provisioning Status** — typically this is **Requested** in the initial entry of a case.
4. Specify a Priority
5. Enter some details to summarise the service requirement

You can assign a service provider at the time of record creation if this is known. Otherwise, leave the **Assigned Service Provider** field blank.

- The list of service providers are managed as **Resources** within Crisisworks, and they must be a) participating in the event, and b) set up with a category of **Recovery Service Tasks**.
- **Recovery Tasks** can be managed independently of the case record via the **Services Required** datagrid (navigate via **Recovery > Services Required**)

**Services and Tasks**

1. [View Service Required](#)

**Category \***  **Provisioning Status \***

**Priority**

**Details \***

Normal **B** *I* ABC

Entire family needs counselling

**Reference**

Enter invoice number or any other reference numbers here

**Assigned Service Provider**  **Cost Estimate (\$)**

Enter a cost estimate

[Add New](#)

## Specify sharing consent

The final part of this form records the applicant's consent to share data with other agencies.



---

## Consent

### Permission

- Share my details with other agencies
- Do not share my details

Allow people looking for me to know that I have registered, my phone number and my destination address

## Performing Environmental Health Assessments

It is common to perform Environmental Health Assessments (EHA) of affected properties.

1. If performing an EHA on an existing case, find the case in the **Recovery Case** datagrid, and click the case to load the view form, then click **Edit**. If the case cannot be found, click **New Case** to add a new case, and fill in the basic particulars as above.
2. In the Environmental Health Assessment section, click **Add New**
3. Complete the form
4. Click **Save** to save the form

The Environmental Health Assessment is a long questionnaire suited to specialists. The top part of the form looks as follows:

**Environmental Health Assessment**

1. **Is the property accessible for inspection?**  
 Yes  No  Unknown

**Details and duration of disruption(s)**

**Electricity functional?**  
 Yes  No  Unknown

**Gas available?**  
 Yes  No  Unknown

**Telephone functional?**  
 Yes  No  Unknown

**Water available?**  
 Yes  No  Unknown

**Is there extensive flood damage?**  
 Yes  No  Unknown

**Have the outbuildings been damaged?**  
 Yes  No  Unknown

**Has the dwelling been damaged?**  
 Yes  No  Unknown

**Are there potential hazards onsite?**  
 Yes  No  Unknown

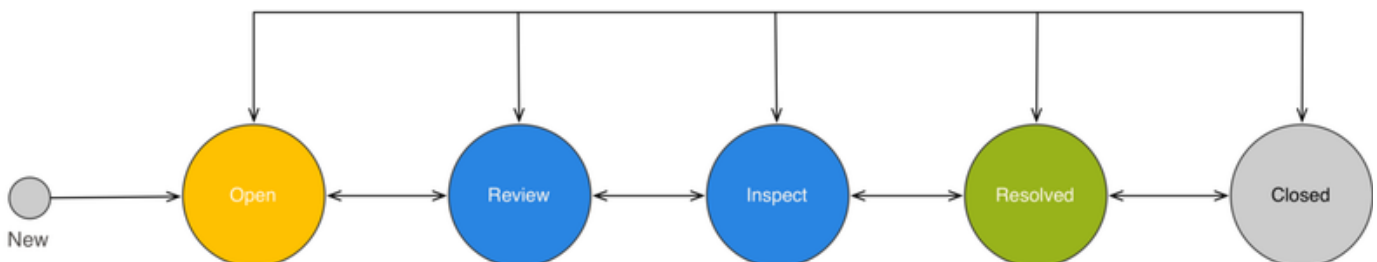
For example: hazardous chemicals, Gas cylinders, swimming pool

**Are there any additional health or sanitation problems?**

## Recovery Workflow

Workflow is handled differently for Recovery Cases and Recovery Tasks (Services Required).

### Recovery Case

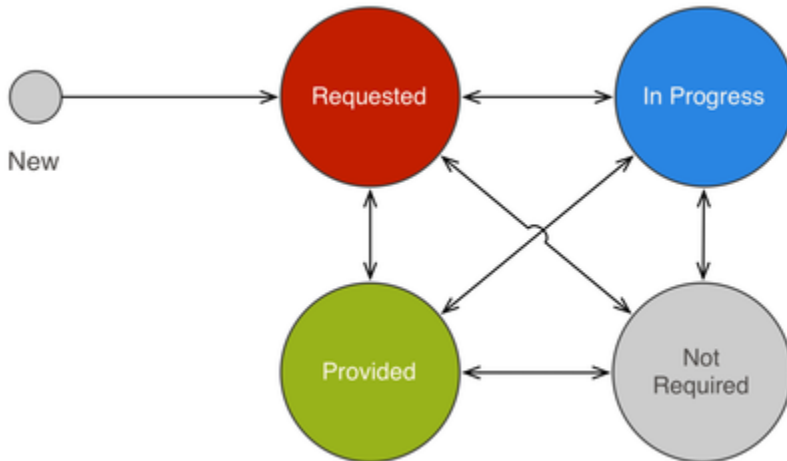


Typical usage is as follows:

1. New cases entered from relief centres would be set as **Open**
2. When a Case Officer is assigned, the status would transition to **Review**
3. When a Field Officer is assigned and tasked to perform an inspection, the status would transition to **Inspect**. When that field officer has finished inspecting the property, the status would be set back to **Review**.
4. When all related case activity has concluded the status would become **Resolved**
5. **Closed** would be used after all final reviews have been conducted.

## Recovery Task (Services Required)

1. The task workflow originates with the creation of a **Recovery Task** record from within the **Recovery Case**, under the **Services Required** subform. This is explained above.
2. From here, users can manage the recovery tasks independently to the case record, by navigating to the **Services Required** datagrid (**Recovery > Services Required**).
3. Tasks have a status to manage the overall progress of a task
4. Tasks can be assigned to service providers, which are managed as resources within Crisisworks.



## Entering Case Notes

As the case progresses, you may wish to enter case notes. To do this:

1. Find and view the record
2. Click **Edit**
3. Add the case note into the yellow box at the top of the form, and click **Save**

### Record Notes

Spoke to John and offered council assistance to deal with a difficult insurance company.



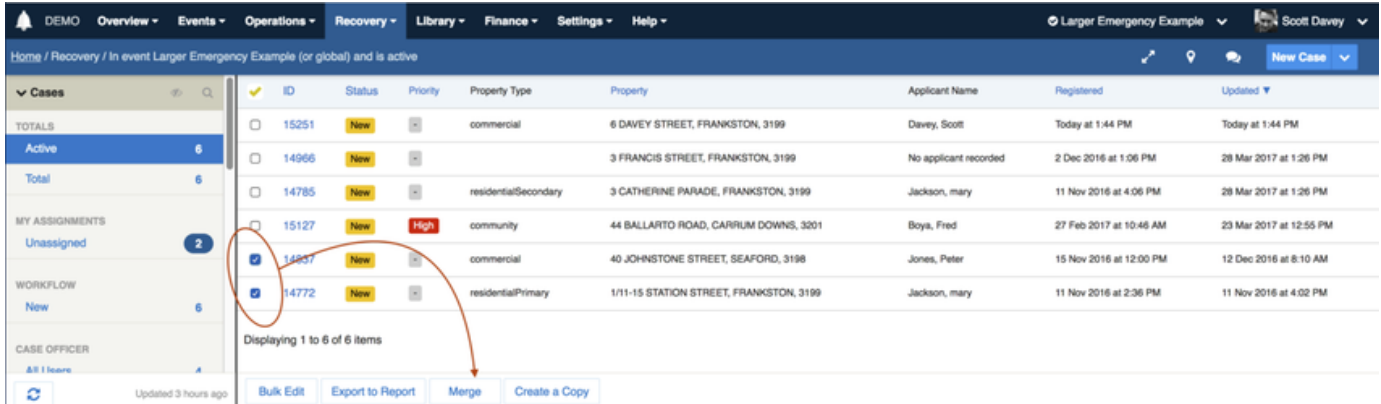
## Merging Cases

It is possible to merge cases that are duplicates of one another. To do this:

1. Start at the **Recovery Case** datagrid
2. Ensure all datagrid records are deselected, by clicking the checkbox icon at the top left of the datagrid until the checkboxes for individual records are clear.
3. Select two or more cases that are duplicates, by checking their select boxes. A Merge **Items** button will appear at the bottom of the screen.
4. Click the **Merge** button

The result of this operation is a new case record containing all the data from all selected items, merged in a way that reflects the entry process of each record over time. The result will be as if all data entry was conducted on the same record, with any conflicts being resolved as if the user overwrite the previous value. This way, all prior values are available in the audit log. The original records will be set as Closed (Duplicate), and all related data will be removed.

It is not possible to reverse this function, use with care.



## Technical Specifications

### Recovery Case

#### recoveryCase: Case register

The master record for community recovery

#### Default schema

Field ID	Label	Form Type	Data Type	Values	Notes
isApplicantKnown	Applicant registration	radio	enum	unknown, known	Defaults to known
fixedHomeAddress	Is there an interest in a property within the municipality?	radio	enum	no, yes	Defaults to yes; for residents, this is their fixed home address. For businesses, this is the business location. Multiple properties require multiple recovery cases.
applicant		singleSubForm	relation	recoveryContact:	Only available if 'isApplicantKnown:known'
details	Special Case Notes	rte	clob		Special case handling instructions and additional information not found elsewhere on form.
caseDocuments	Case Documents	media			Add general case documemnts here. Any photos specifically related to Damaged Property should be added to the Damaged Property section of this form.

relatedContacts	Persons (in addition to the applicant)	multiSubForm	relation	recoveryContact:	Register companions or additional affected persons to this case, in addition to the applicant above.  If registering companions (other persons that may be with the person registering) and they have different personal and contact information (such as home address or contact numbers), please complete another registration form.
propertyType	Property Use	select	string(255)		
relationshipToProperty	Applicant's relationship to property	select	string(255)		
otherType	Specify 'other' property use	text	string(255)		Only available if 'propertyType:other'
propertyDamage	Is there any damage to the applicant's assets at this property, caused by the current event?	radio	enum	no, yes, unsure	Defaults to unsure
additionalInfo	Property Details (if required)	rte	clob		E.g. Name of property, brief description of business activity.
damageInfo	Damage Summary	rte	clob		Only available if 'propertyDamage:yes unsure'
sketch	Sketch	canvas			Add a sketch of the scene if applicable
photos	Photo(s) of property	media			Non-structural photos only. Attach photos specific to affected private assets below
insurance	Insurance Details	textarea	clob		
privateAssets	Affected Private Assets	multiSubForm	relation	recoveryPrivateAsset:	Add a record for each private asset affected by this event - include buildings, structures, fencing as well as any other impact to a privately-owned asset on the property. If the assets are not owned by the applicant of this record, then a new recovery record should be created instead.
agriculture	Affected Agriculture	multiSubForm	relation	recoveryAgriculture:	Add a record for each agriculture asset affected by this event - e.g. crops and farming.
recoveryEnvironmentalHealth	Environmental Health Assessment	multiSubForm	relation	recoveryEnvironmentalHealth:	Add a detailed environmental health assessment
livestock	Affected Livestock	multiSubForm	relation	recoveryLivestock:	Add details of affected livestock, including details about missing or deceased stock. Disposal services can be found in the services section below.
tasks		multiSubForm	relation	recoveryTask:	
sharingLevel	Permission	radio	enum	full, none	Defaults to none
fullSharingInfo		info			Only available if 'sharingLevel:full'; read only; defaults to Allow people looking for me to know that I have registered, my phone number and my destination address
infoOnlyInfo		info			Only available if 'sharingLevel:infoOnly'; read only; defaults to Allow people looking for me to only know that I have registered

noneInfo		info			Only available if 'sharingLevel:none'; read only; defaults to Do not allow people looking for me to know I have registered, or any other information.  <b>Note:</b> Your information may be used if required by police/welfare and emergency services, only relevant to the emergency
priority	Priority	select	enum	1, 2, 3, 4	
assignee	Case Officer	assignment			Single assignment to Users
fieldOfficer	Field Officer	assignment			Single assignment to Users
importData	Data from import (if any)	hidden	string(255)		Used to store import data to appear in audit logs (not displayed on form)
activity		auditLog			
title	Title	text	string(255)		If specified, this will be the case title

### Non-schema fields

Field ID	Label	Form Type	Data Type	Values	Notes
hasAsset	Address	asset			Private data; supports Property and Parcel; MDA94 projection used for geospatial assets; specify the property by looking up the council property database
hasEvent		event			
hasMap	Location of Property	geo			Uses MDA94 projection; add any map annotations where appropriate to describe the scene
hasStatus	Status	status			
hasTags	Tags	tags			

### Workflow

Workflow ID	Label	Value	Next States	Initial State
NEW	New	1	NEW, OPEN, INSPECT, REVIEW, RESOLVED, CLOSED	
OPEN	Open	2	NEW, OPEN, INSPECT, REVIEW, RESOLVED, CLOSED	
REVIEW	Review	3	NEW, OPEN, INSPECT, REVIEW, RESOLVED, CLOSED	
INSPECT	Inspection Required	4	NEW, OPEN, INSPECT, REVIEW, RESOLVED, CLOSED	
RESOLVED	Resolved	-1	NEW, OPEN, INSPECT, REVIEW, RESOLVED, CLOSED	
CLOSED	Closed	-2	NEW, OPEN, INSPECT, REVIEW, RESOLVED, CLOSED	
DUPLICATE	Duplicate	-200	DUPLICATE	
MERGED	Merged	-100	MERGED	

## Recovery Contact

### recoveryContact: Person register

Part of community recovery record, this tracks affected persons and organisations in relief and recovery

### Default schema

Field ID	Label	Form Type	Data Type	Values	Notes
name	Canonical name	hidden	string(255)		
contactType	Contact type	radio	enum	individual, organisation	Defaults to individual

organisationName	Organisation Name	text	string(255)		Only available if 'contactType:organisation'; the organisation's legal name
position	Position	text	string(255)		Only available if 'contactType:organisation'; the contact person's position within the organisation (e.g. Owner)
familyName	Family name	text	string(255)		
givenNames	Given names	text	string(255)		
age	Age	number	integer		
gender	Gender	select	enum	m, f, o	
phone	Primary Phone	tel	string(255)		Include international dialing codes if needed
mobilePhone	Mobile Phone	tel	string(255)		Add a mobile phone if possible
email	Email	text	string(255)		
language	Language (if a translator is required)	select	string(255)		
otherLanguage	Other language	text	string(255)		Only available if 'language:other'; specify other language
relationship	Relationship to primary contact	select	string(255)		
relationshipOther	Relationship details (if required)	text	string(255)		Only available if 'relationship:/^+\$/'
attendingReliefCentre	Attending Relief Centre	checkbox	boolean		
reliefCentre	Relief Centre	select	string(255)		Only available if 'attendingReliefCentre:true'
hasTemporaryAddress	Has been displaced to a temporary address	checkbox	boolean		Only available if 'fixedHomeAddress:yes'
temporaryAddressStreet	Temporary Address	text	string(255)		Only available if 'hasTemporaryAddress:true'
temporaryAddressTown	Town / Suburb	text	string(255)		Only available if 'hasTemporaryAddress:true'
temporaryAddressState	State	select	enum	act, nsw, nt, qld, sa, tas, vic, wa, other	Only available if 'hasTemporaryAddress:true'
temporaryAddressPostcode	Postcode	text	string(255)		Only available if 'hasTemporaryAddress:true'
temporaryAddressCountry	Country	text	string(255)		Only available if 'temporaryAddressState:other'; enter a country, or select a valid state above
temporaryAddressNotes	Notes	textarea	clob		Only available if 'hasTemporaryAddress:true'; for any additional notes required relating to the temporary address.
postalType	Where can we send postal correspondence?	radio	enum	case, temporary, other	Defaults to case
postalStreet	Address	text	string(255)		Only available if 'postalType:other'
postalTown	Town / Suburb	text	string(255)		Only available if 'postalType:other'
postalState	State	select	enum	act, nsw, nt, qld, sa, tas, vic, wa, other	Only available if 'postalType:other'
postalPostcode	Postcode	text	string(255)		Only available if 'postalType:other'
postalCountry	Destination country	text	string(255)		Only available if 'postalState:other'; enter a country, or select a valid state above
preferredMethod	Preferred method of contact	radio	enum	phone, email, post, none	Defaults to phone
related	Cases As Applicant	related			
related2	Cases As Affected Person	related			
activity		auditLog			

**Non-schema fields**

Field ID	Label	Form Type	Data Type	Values	Notes
----------	-------	-----------	-----------	--------	-------

hasLookup	Search	lookup			Enter a person's name or organisation to search, or enter the details below
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### Workflow

Workflow ID	Label	Value	Next States	Initial State
NEW	New	1	NEW	
DUPLICATE	Duplicate	-200	DUPLICATE	
MERGED	Merged	-100	MERGED	

## Recovery Private Asset

### recoveryPrivateAsset: Private Asset register

Part of a Community Recovery record, this tracks damage to an individual structure

#### Default schema

Field ID	Label	Form Type	Data Type	Values	Notes
buildingType	Asset type	select	string(255)		
otherType	For 'Other' structures, specify type	text	string(255)		Only available if 'buildingType:other'
shedContents1	Shed contents	select	enum	dairy, wool, machinery, hay, other	Only available if 'buildingType:shed'
quantity	Number units damaged or lost	number	integer		Defaults to 1
buildingDamage	Damage Level	select	enum	1, 2, 3, 4, 5	
fencingDestroyedInternal	Internal Fencing Destroyed (kms)	number	integer		Only available if 'buildingType:fencing'
fencingDestroyedExternal	External Fencing Destroyed (kms)	number	integer		Only available if 'buildingType:fencing'
additionalInfo	Description	textarea	clob		
value	Approximate damage value	text	string(255)		Provide an estimate of the damage value as a whole number
photos	Photo(s) of structure	media			
activity		auditLog			

#### Non-schema fields

Field ID	Label	Form Type	Data Type	Values	Notes
hasAsset	Address	asset			Supports Property and Parcel; MDA94 projection used for geospatial assets
hasEvent		event			
hasMap	Precise Geographical Location	geo			Uses MDA94 projection
hasStatus		status			
hasTags	Tags	tags			

### Workflow

Workflow ID	Label	Value	Next States	Initial State
DAMAGED	Damaged	2	DAMAGED, INPROGRESS, CLOSED	
INPROGRESS	In Progress	3	DAMAGED, INPROGRESS, CLOSED	
CLOSED	Recovered	-2	CLOSED, INPROGRESS, DAMAGED	
DUPLICATE	Duplicate	-200	DUPLICATE	



## Recovery Environmental Health Assessment

### recoveryEnvironmentalHealth: EHA register

Part of a Community Recovery case, this record tracks an environmental health assessment for the property

#### Default schema

Field ID	Label	Form Type	Data Type	Values	Notes
inspectionAccessibility	Is the property accessible for inspection?	radio	enum	yes, no, na	Defaults to na
utilitiesDisruption	Details and duration of disruption(s)	textarea	clob		
electricityOnsite	Electricity functional?	radio	enum	yes, no, na	
gasOnsite	Gas available?	radio	enum	yes, no, na	
telephoneOnsite	Telephone functional?	radio	enum	yes, no, na	
waterOnsite	Water available?	radio	enum	yes, no, na	
isFloodDamagePresent	Is there extensive flood damage?	radio	enum	yes, no, na	
floodAffectedItems	List items and areas affected	textarea	clob		Only available if 'isFloodDamagePresent:yes'
isOutbuildingsDamaged	Have the outbuildings been damaged?	radio	enum	yes, no, na	
isDwellingDamaged	Has the dwelling been damaged?	radio	enum	yes, no, na	
isPotentialHazardsPresent	Are there potential hazards onsite?	radio	enum	yes, no, na	For example: hazardous chemicals, Gas cylinders, swimming pool
treatedPine	Treated pine	radio	enum	yes, no, na	Only available if 'isPotentialHazardsPresent:yes'
treatedPineComments	Additional Comments (Treated Pine)	textarea	clob		Only available if 'treatedPine:yes'
roofCladding	Roof Cladding	radio	enum	yes, no, na	Only available if 'isPotentialHazardsPresent:yes'
roofCladdingComments	Additional Comments (Roof Cladding)	textarea	clob		Only available if 'roofCladding:yes'
chimney	Chimney	radio	enum	yes, no, na	Only available if 'isPotentialHazardsPresent:yes'
chimneyComments	Additional Comments (Chimney)	textarea	clob		Only available if 'chimney:yes'
frame	Frame	radio	enum	yes, no, na	Only available if 'isPotentialHazardsPresent:yes'
frameComments	Additional Comments (Frame)	textarea	clob		Only available if 'frame:yes'
wall	Wall	radio	enum	yes, no, na	Only available if 'isPotentialHazardsPresent:yes'
wallComments	Additional Comments (Wall)	textarea	clob		Only available if 'wall:yes'
waterTank	Water Tank	radio	enum	yes, no, na	Only available if 'isPotentialHazardsPresent:yes'
waterTankComments	Additional Comments (Water Tank)	textarea	clob		Only available if 'waterTank:yes'
gasCylinders	Gas Cylinders	radio	enum	yes, no, na	Only available if 'isPotentialHazardsPresent:yes'

gasCylindersComments	Additional Comments (Gas Cylinders)	textarea	clob			Only available if 'gasCylinders:yes'
isAsbestosPresent	Asbestos	radio	enum	yes, no, na		Only available if 'isPotentialHazardsPresent:yes'
asbestosComments	Additional Comments (Asbestos)	textarea	clob			Only available if 'isAsbestosPresent:yes'
overhangingTrees	Overhanging Trees	radio	enum	yes, no, na		Only available if 'isPotentialHazardsPresent:yes'
overhangingTreesComments	Additional Comments (Overhanging Trees)	textarea	clob			Only available if 'overhangingTrees:yes'
swimmingPool	Swimming Pool	radio	enum	yes, no, na		Only available if 'isPotentialHazardsPresent:yes'
swimmingPoolComments	Additional Comments (Swimming Pool)	textarea	clob			Only available if 'swimmingPool:yes'
hazardousChemicals	Hazardous Chemicals	radio	enum	yes, no, na		Only available if 'isPotentialHazardsPresent:yes'
hazardousChemicalsComments	Additional Comments (Hazardous Chemicals)	textarea	clob			Only available if 'hazardousChemicals:yes'
otherRisks	Other Structural Issues	radio	enum	yes, no, na		Only available if 'isPotentialHazardsPresent:yes'
otherRisksComments	Additional Comments (Other Structural Issues)	textarea	clob			Only available if 'otherRisks:yes'
isAdditionalSafetyProblemsPresent	Are there any additional health or sanitation problems?	textarea	clob			
toiletPresent	Is there an operational toilet onsite?	radio	enum	yes, no, na		
sewerOperational	Is the sewer operational?	radio	enum	yes, no, na		
septicSystemOperational	Is the septic system operational?	radio	enum	yes, no, na		
septicSystemDetails	Septic system details	text	string(255)			Only available if 'septicSystemOperational:no'
septicSystemRepairsRequired	What is required for the septic system to function?	radio	enum	electricity, pumpReplacement, irrigationMaintenance, treatmentPlantService, reconstructionsNewInstall, other		Only available if 'septicSystemOperational:no'
isSepticAndEffluentLinesOperational	Are the septic and effluent lines operational?	radio	enum	yes, no, na		
typeOfWastewaterIrrigationInUse	What type of waste water system and irrigation is used?	radio	enum	primary, secondary, splitSystem, ags, irrigation, offsite, trenches, subsurface, other		
isPotableWaterSupplyPresent	Is there an operational potable water supply to the property?	radio	enum	yes, no, na		
mainPotableWaterSource	Main potable water source	radio	enum	mains, tank, bore, surface, other		Only available if 'isPotableWaterSupplyPresent:yes'
otherPotableWaterSource	Specify 'other' potable water source	text	string(255)			Only available if 'mainPotableWaterSource:other'
isWaterTestingRequired	Is water testing required?	radio	enum	yes, no, na		

isTankOrSurfaceWaterUsedForIrrigation	Are tank or surface waters used for stock or crop irrigation?	radio	enum	yes, no, na	
cleanupDeadAnimals	Is there a requirement for removal of dead stock/domestic animals/wildlife?	radio	enum	yes, no, na	
cleanupPutrescibleMaterials	Is there a requirement for removal of putrescible materials?	radio	enum	yes, no, na	
cleanupRefridgeratedFood	Is there a requirement for removal of food from refridgerators/freezers?	radio	enum	yes, no, na	
isTempAccommodationRequired	Is temporary onsite accommodation required?	radio	enum	yes, no, na	
caravanAlreadyOnsite	Is there a caravan already onsite?	radio	enum	yes, no, na	Only available if 'isTempAccommodationRequired:yes'
caravanPowerAvailable	Power connected?	radio	enum	yes, no	Only available if 'caravanAlreadyOnsite:yes'
caravanToiletAvailable	Toilet operational?	radio	enum	yes, no	Only available if 'caravanAlreadyOnsite:yes'
suitableAreaForCaravan	Is there a suitable area for a caravan?	radio	enum	yes, no, na	Only available if 'caravanAlreadyOnsite:no'
clearingRequiredForCaravan	Clearing required for caravan?	radio	enum	yes, no, na	Only available if 'suitableAreaForCaravan:yes'
clearingSizeForCaravan	Approximate clearing quantity (square metres)	number	integer		Only available if 'clearingRequiredForCaravan:yes'
sanitaryContractorRequired	Sanitary contractor required?	radio	enum	yes, no, na	
additionalComments		rte	clob		
media	Photos and Videos	media			
fieldOfficer	Field Officer	assignment			Single assignment to Users
activity		auditLog			

### Non-schema fields

Field ID	Label	Form Type	Data Type	Values	Notes
hasAsset	Location	asset			Supports Property and Parcel; MDA94 projection used for geospatial assets
hasDueDate	Next Action Due	duedate			
hasEvent	Event	event			
hasMap	Location	geo			Uses MDA94 projection
hasStatus	Status	status			
hasTags	Tags	tags			

### Workflow

Workflow ID	Label	Value	Next States	Initial State
INSPECT	Inspection Required	2	INSPECT, COMPLETE	
COMPLETE	Inspection Completed	3	INSPECT, COMPLETE	
DUPLICATE	Duplicate	-200	DUPLICATE	
MERGED	Merged	-100	MERGED	

## Recovery Livestock

### recoveryLivestock: Livestock register

An affected animal at a property (part of a Community Recovery record)

#### Default schema

Field ID	Label	Form Type	Data Type	Values	Notes
category	Category	select	string(255)		Required
livestockOther	'Other' type	text	string(255)		Only available if 'category:other'
priorCount	Prior	number	integer		
deadCount	Dead	number	integer		
missingCount	Missing	number	integer		
assessmentCount	Require Assessment	number	integer		
activity		auditLog			

#### Workflow

Workflow ID	Label	Value	Next States	Initial State
NEW	New	1	NEW, OPEN	
OPEN	Open	2	OPEN, REVIEW, NEW	
REVIEW	Under Review	3	NEW, CLOSED	
CLOSED	Closed	-2	CLOSED, OPEN	
DUPLICATE	Duplicate	-200	DUPLICATE	

## Recovery Agriculture

### recoveryAgriculture: Agriculture register

Part of a Community Recovery record, this tracks damage to agriculture

#### Default schema

Field ID	Label	Form Type	Data Type	Values	Notes
agricultureType	Agriculture type	select	string(255)		Required
otherType	For 'Other' types, specify type	text	string(255)		Only available if 'agricultureType:other'
quantity	Damaged area in hectares	text	string(255)		Defaults to 0
agricultureDamage	Damage Level	select	enum	unknown, 10, 20, 25, 30, 40, 50, 60, 70, 75, 80, 90, 100	Required
additionalInfo	Description	textarea	clob		
value	Approximate damage value	number	integer		Provide an estimate of the damage value as a whole number
photos	Photo(s) of damage	media			

#### Non-schema fields

Field ID	Label	Form Type	Data Type	Values	Notes
hasAsset	Address	asset			Supports Property and Parcel; MDA94 projection used for geospatial assets
hasEvent		event			
hasMap	Precise Geographical Location	geo			Uses MDA94 projection

hasStatus		status			
hasTags	Tags	tags			

**Workflow**

Workflow ID	Label	Value	Next States	Initial State
DAMAGED	Damaged	2	DAMAGED, INPROGRESS, CLOSED	
INPROGRESS	In Progress	3	DAMAGED, INPROGRESS, CLOSED	
CLOSED	Recovered	-2	CLOSED, INPROGRESS, DAMAGED	
DUPLICATE	Duplicate	-200	DUPLICATE	

**Recovery Task****recoveryTask: Service Required register**

Part of a Community Recovery and Infrastructure records, this tracks immediate services to be provided

**\_core schema**

Field ID	Label	Form Type	Data Type	Values	Notes
category	Category	select	string(255)		Required
grantType	Grant Type	text	string(255)		Only available if 'category:grant'; use consistent naming of grants to aid in reporting
grantValue	Grant Value (\$)	number	integer		Only available if 'category:grant'; if known, enter the grant amount
details	Details	rte	clob		Required
priority	Priority	select	enum	1, 2, 3, 4	
reference	Reference	text	string(255)		Enter invoice number or any other reference numbers here
assignee	Assigned Service Provider	assignment			Single assignment to Resources
costEstimate	Cost Estimate (\$)	text	string(255)		Enter a cost estimate
activity		auditLog			

**Case schema**

Field ID	Label	Form Type	Data Type	Values	Notes
category	Category	select	string(255)		Required
grantType	Grant Type	text	string(255)		Only available if 'category:grant'; use consistent naming of grants to aid in reporting
grantValue	Grant Value (\$)	number	integer		Only available if 'category:grant'; if known, enter the grant amount
details	Details	rte	clob		Required
priority	Priority	select	enum	1, 2, 3, 4	
reference	Reference	text	string(255)		Enter invoice number or any other reference numbers here
assignee	Assigned Service Provider	assignment			Single assignment to Resources
costEstimate	Cost Estimate (\$)	text	string(255)		Enter a cost estimate
activity		auditLog			

**Infrastructure schema**

Field ID	Label	Form Type	Data Type	Values	Notes
category	Category	select	string(255)		Required
grantType	Grant Type	text	string(255)		Only available if 'category:grant'; use consistent naming of grants to aid in reporting
grantValue	Grant Value (\$)	number	integer		Only available if 'category:grant'; if known, enter the grant amount
details	Details	rte	clob		Required
priority	Priority	select	enum	1, 2, 3, 4	
reference	Reference	text	string(255)		Enter invoice number or any other reference numbers here
assignee	Assigned Service Provider	assignment			Single assignment to Resources
costEstimate	Cost Estimate (\$)	text	string(255)		Enter a cost estimate
activity		auditLog			

#### Non-schema fields

Field ID	Label	Form Type	Data Type	Values	Notes
hasAsset	Address	asset			Supports Property and Parcel; MDA94 projection used for geospatial assets
hasDueDate	Due	duedate			
hasEvent	Event	event			
hasMap	Precise Geographical Location	geo			Uses MDA94 projection
hasStatus	Provisioning Status	status			

#### Workflow

Workflow ID	Label	Value	Next States	Initial State
REQUESTED	Requested	1	REQUESTED, INPROGRESS, PROVIDED, NOTREQUIRED	
INPROGRESS	In Progress	2	INPROGRESS, PROVIDED, REQUESTED, NOTREQUIRED	
PROVIDED	Provided	-2	PROVIDED, REQUESTED, INPROGRESS	
NOTREQUIRED	Not Required	-3	NOTREQUIRED, INPROGRESS, REQUESTED	

## Recovery (Infrastructure Assessment)

<b>Type</b>	Register
<b>Location</b>	Recovery / Infrastructure
<b>Licence</b>	Included in all editions

#### On this page

- [Overview](#)
- [The Infrastructure Assessment Record](#)
  - [Adding a new infrastructure assessment](#)
  - [Workflow](#)

- Scoping the repair works
- Managing Recovery Tasks
- Technical Reference
  - Infrastructure Assessment
  - Recovery Task (Services Required)

## Overview

Infrastructure Assessments track and manage infrastructure such as roads, culverts, signs and facilities that have been affected by disasters.

The screenshot displays the Crisisworks software interface for Infrastructure Assessments. The top navigation bar includes 'EGSC Overview', 'Events', 'Operations', 'Recovery', 'Library', 'Finance', 'Settings', and 'Help'. The user is logged in as 'Scott Davy'. The main content area is divided into a left sidebar, a central map, and a right-hand table.

**Left Sidebar (Infrastructure Section):**

- TOTALS: Active 140
- Total: 141
- WORKFLOW: Reported 106, Assessed 33, Audited 1
- ACTIVE TAGS: missing\_code 1, po 836419 1

**Map:** Shows a geographical area with numerous circular markers representing infrastructure assessment locations.

**Table of Infrastructure Assessments:**

ID	Status	Summary	Priority	Risk	Amount	Updated	Asset Type
11320	Reported	Test 81332910 / Bulmeaal Road BULLMEAL, From 27189 to 27995m	Normal	Low	\$0	12 Dec 2016 at 1:41 PM	Road
5190	Reported	Power Station Road HILLSIDE, From 730 to 1165m 60486602 / Power Station Road HILLSIDE, From 730 to 1165m	None	Normal	\$1,000	10 Nov 2016 at 5:17 PM	Road
5102	Assessed	Shane, Works completed as requested. Please see attached photo for more detail 60586607 / Rupert Street BARNSDALE, From 18 To 227m (Grant to Lige)	None	Low	\$500	10 Nov 2016 at 5:17 PM	Road
5479	Reported	Notes Nows walk / Notes Nows walk	None	High	\$10,000	11 Oct 2016 at 1:38 AM	Trail
5431	Reported	Flaggy Creek Road FLAGGY CREEK, From 20 to 1470m 60586601 / Flaggy Creek Road FLAGGY CREEK, From 20 to 1470m	None	Normal	\$10,000	18 Jul 2016 at 10:56 PM	Road
5404	Reported	Yeates Drive BARNSDALE, From 0 To 1000m 60618601 / Yeates Drive BARNSDALE, From 0 To 1000m	None	Normal	\$2,000	13 Jul 2016 at 5:31 AM	Road

Buttons: 'Export to Report', 'Updated 4 hours ago'.

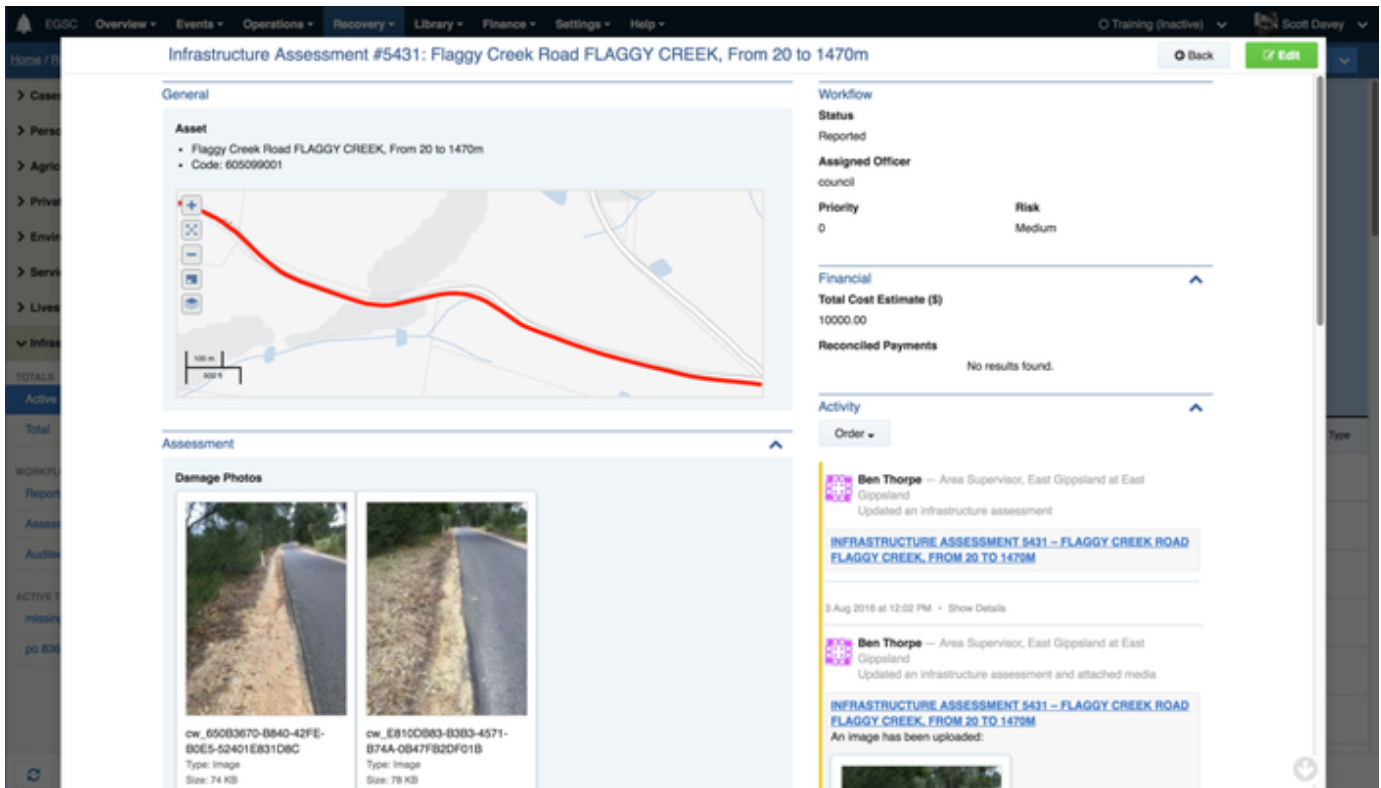
The request register is located under **Recovery > Infrastructure** in the menu. As with any register, it will only appear when enabled within the current event.

Infrastructure Assessments provide the following features:

- The Infrastructure Assessment record contains all the fields you need to track damage, track repair costs and track assignments of tasks to contractors and officers.
- Separate fields exist to track damage photos and repair photos
- Add multiple Recovery Task records to assign parts of the repair to internal or external resources, including contractors and staff.
- Track the estimated cost
- Track the actual cost based on financial reconciliation

## The Infrastructure Assessment Record

Infrastructure Assessments are managed via the Infrastructure Assessment form.



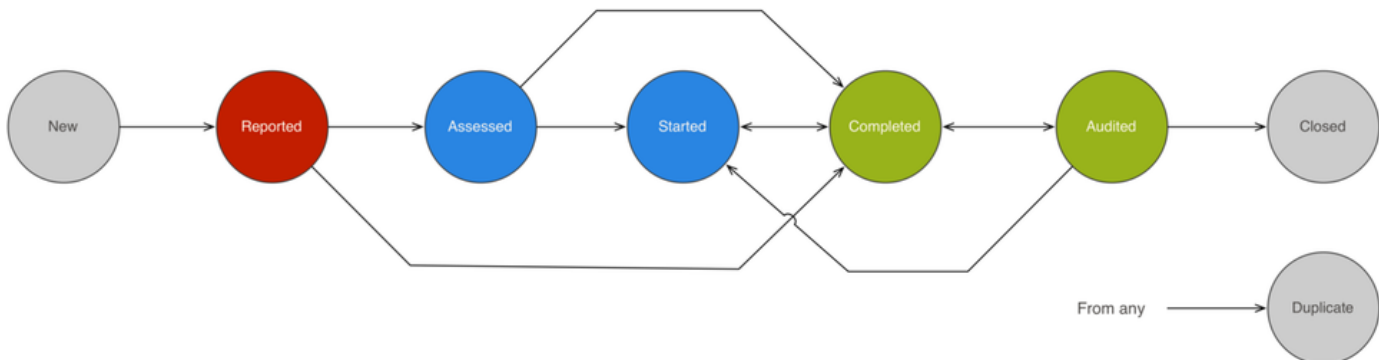
## Adding a new infrastructure assessment

To add a new infrastructure assessment:

1. From any screen, press **New Infrastructure Assessment**
2. Select the affected **Asset** by searching the map, by its name or its code
3. Enter a **Description of Damage**
4. Upload any **Damage Photos**. If on site, use the app to take photos from within the form.
5. (Optional) If you are scoping the repair works at the time of entry, enter the **Scope of Repairs**, and add one or more **Services Required** to assign to contractors. This can be done later.
6. Select the appropriate **Status, Priority, Risk** and **Next Action Due** from the Workflow sidebar. Use the **Reported** status if you haven't yet assessed the scope of repair works; use **Assessed** if the you have assessed the scope of works and it's ready to commence.
7. (Optional) assign the assessment record to a council officer.
8. Click **Save**

## Workflow

Infrastructure assessments are managed according to the following workflow



## Scoping the repair works



You can scope the repair works at the time of initial entry, or simply add damage data and assess the repair works later.

Repair Works Subform	Services Required Subform	Financial Subform
<p><b>Repair Works</b></p> <p>Scope of Repairs</p> <p>Format <b>B I</b> </p> <p>Shoulders washed out in a few sections</p> <p>Repair Progress Photos</p> <p><a href="#">Add File</a> or drag and drop files</p> <p>Services Required</p> <p><a href="#">Add New</a></p> <p>Assign tasks to contractors</p>	<p><b>Services Required</b></p> <p>1. <span style="float: right; color: red;">✕</span></p> <p>Category * <input type="text"/> Provisioning Status * <input type="text" value="Requested"/></p> <p>Priority <input type="text"/></p> <p>Details *</p> <p>Format <b>B I</b> </p> <p>Reference <input type="text"/></p> <p><small>Enter invoice number or any other reference numbers here</small></p> <p>Assigned Service Provider <input type="text" value="(Unavailable)"/> Cost Estimate (\$) <input type="text"/></p> <p><small>Enter a cost estimate</small></p>	<p><b>Financial</b></p> <p>Total Cost Estimate (\$) <input type="text" value="10000.00"/> Total Cost <input type="text"/></p> <p>The total estimated cost of all services to be provided. This will be updated automatically on save if the total cost of services exceeds the value entered.</p> <p>A calculate services pr</p>

To assess the scope of works separately to adding the assessment record, follow these steps:

1. First, create an infrastructure assessment record as described above, and set the status to **Reported**
2. To get a list of all assessments in a **Reported** status, click the **Reported** counter in the left-hand sidebar of the datagrid.
3. Click on an assessment, then click edit
4. In the **Repair Works** subform, enter a descriptive **Scope of Repairs**. This summarises all activities required, and is not visible to individual contractors.
5. Click **Add New** for each of the **Services Required** by contractors. For each:
  - a. Select a **Category** for the task — these categories align with NDRA claim reporting requirements
  - b. Select a **Provisioning Status** (the workflow is Requested In Progress Provided / Not Required)
  - c. Select a **Priority**
  - d. Enter the **Details** of the task. Contractors will see this detail in their app.
  - e. Enter a **Reference**, such as a purchase order number, that can be used for reconciliation later.
  - f. Enter a **Cost Estimate** if known
  - g. (Optional) Assign a service provider to the task at this time. If not done now, this can be done later, allowing you to separate the identification of tasks from the assignment to service providers.
6. Finally in the **Financial** subform (right hand side of form), enter a **Total Cost Estimate** if one is known. If not known, it will automatically calculate as the total of all cost estimates entered for the services required.
7. Click **Save**

The list of assignable service providers are derived from resources that are:

1. Categorized as "Infrastructure Assessment Tasks" (change this via **Settings > Resources** for each resource you require)
2. Participating in the event (manage participating resources via **Events > Manage Event > Resources**)

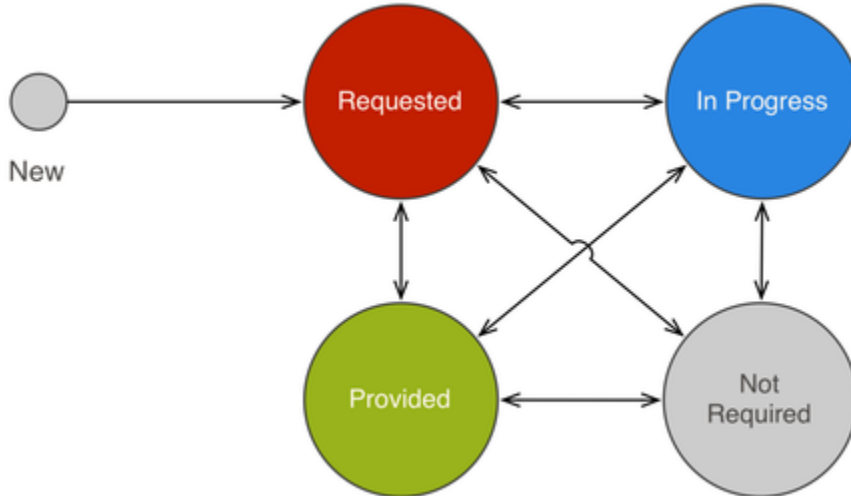
If you do not see the required resource in the Assigned Service Provider field, or if that field says "(Unavailable)", you will need to manage your resources as per the above rules. If, after changing resource settings, you still find the resource missing, you may need to refresh the list of resources in your form (click your user profile menu at the top right of screen, then click **Reload Form Definitions**)

## Managing Recovery Tasks

The services required subform creates individual task records that can be managed via a dedicated datagrid. To access this datagrid, navigate to **Recovery > Services Required**.

From this datagrid, tasks can be assigned to service providers, and their statuses managed.

Recovery Tasks have the following workflow:



## Technical Reference

### Infrastructure Assessment

An assessment of impacted municipal infrastructure

#### Default schema

Field ID	Label	Form Type	Data Type	Values	Notes
description	Description of Damage	rte	clob		Required
descriptionPhotos	Damage Photos	media			
scope	Scope of Repairs	rte	clob		
scopePhotos	Repair Progress Photos	media			
contractors	Services Required	multiSubForm	relation	<a href="#">recoveryTask:</a>	Assign tasks to contractors
costEstimate	Total Cost Estimate (\$)	text	string(255)		The total estimated cost of all services to be provided. This will be updated automatically on save if the total cost of services exceeds the value entered.
costActual	Total Cost To Date (\$)	text	string(255)		A calculated total cost of all services provided
financeDetails	Reconciled Payments	related			
assignee	Assigned Officer	assignment			Single assignment to Positions
priority	Priority	select	enum	1, 2, 3, 4	Required; defaults to 2
riskLevel	Risk	select	enum	1, 2, 3	

activity		auditLog			
----------	--	----------	--	--	--

**Non-schema fields**

Field ID	Label	Form Type	Data Type	Values	Notes
hasAsset	Asset	asset			Supports Road, Culvert, Bridge, Facility, Carpark, Stormwater Pipe, Stormwater Pit, Footpath, Reserve, Trail, Property, Parcel and Other; MDA94 projection used for geospatial assets
hasDueDate	Next Action Due	duedate			
hasEvent		event			
hasMap		geo			Uses MDA94 projection
hasStatus		status			
hasTags		tags			

**Workflow**

Workflow ID	Label	Value	Next States	Initial State
REPORTED	Reported	10	REPORTED, ASSESSED, COMPLETED	
ASSESSED	Assessed	20	ASSESSED, STARTED, COMPLETED	
STARTED	In Progress	30	STARTED, COMPLETED	
COMPLETED	Completed	40	COMPLETED, AUDITED, STARTED	
AUDITED	Audited	50	AUDITED, STARTED, CLOSED	
CLOSED	Closed	-1	CLOSED	
DUPLICATE	Duplicate	-200	DUPLICATE, REPORTED	

**Recovery Task (Services Required)**

Part of a Community Recovery and Infrastructure records, this tracks immediate services to be provided

**\_core schema**

Field ID	Label	Form Type	Data Type	Values	Notes
category	Category	select	string(255)		Required
grantType	Grant Type	text	string(255)		Only available if 'category:grant'; use consistent naming of grants to aid in reporting
grantValue	Grant Value (\$)	number	integer		Only available if 'category:grant'; if known, enter the grant amount
details	Details	rte	clob		Required
priority	Priority	select	enum	1, 2, 3, 4	
reference	Reference	text	string(255)		Enter invoice number or any other reference numbers here
assignee	Assigned Service Provider	assignment			Single assignment to Resources
costEstimate	Cost Estimate (\$)	text	string(255)		Enter a cost estimate
activity		auditLog			

**Case schema**

Field ID	Label	Form Type	Data Type	Values	Notes
category	Category	select	string(255)		Required
grantType	Grant Type	text	string(255)		Only available if 'category:grant'; use consistent naming of grants to aid in reporting

grantValue	Grant Value (\$)	number	integer		Only available if 'category:grant'; if known, enter the grant amount
details	Details	rte	clob		Required
priority	Priority	select	enum	1, 2, 3, 4	
reference	Reference	text	string(255)		Enter invoice number or any other reference numbers here
assignee	Assigned Service Provider	assignment			Single assignment to Resources
costEstimate	Cost Estimate (\$)	text	string(255)		Enter a cost estimate
activity		auditLog			

### Infrastructure schema

Field ID	Label	Form Type	Data Type	Values	Notes
category	Category	select	string(255)		Required
grantType	Grant Type	text	string(255)		Only available if 'category:grant'; use consistent naming of grants to aid in reporting
grantValue	Grant Value (\$)	number	integer		Only available if 'category:grant'; if known, enter the grant amount
details	Details	rte	clob		Required
priority	Priority	select	enum	1, 2, 3, 4	
reference	Reference	text	string(255)		Enter invoice number or any other reference numbers here
assignee	Assigned Service Provider	assignment			Single assignment to Resources
costEstimate	Cost Estimate (\$)	text	string(255)		Enter a cost estimate
activity		auditLog			

### Non-schema fields

Field ID	Label	Form Type	Data Type	Values	Notes
hasAsset	Address	asset			Supports Property and Parcel; MDA94 projection used for geospatial assets
hasDueDate	Due	duedate			
hasEvent	Event	event			
hasMap	Precise Geographical Location	geo			Uses MDA94 projection
hasStatus	Provisioning Status	status			

### Workflow

Workflow ID	Label	Value	Next States	Initial State
REQUESTED	Requested	1	REQUESTED, INPROGRESS, PROVIDED, NOTREQUIRED	
INPROGRESS	In Progress	2	INPROGRESS, PROVIDED, REQUESTED, NOTREQUIRED	
PROVIDED	Provided	-2	PROVIDED, REQUESTED, INPROGRESS	
NOTREQUIRED	Not Required	-3	NOTREQUIRED, INPROGRESS, REQUESTED	

## Fire Prevention

### Overview

The Crisisworks Fire Prevention Notice module provides a way to report and track Fire Prevention Infringements, both in the field and in the office.



## Contents

- Overview
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  - Tracking your Route
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  - System responsibilities
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    - Council CRM, DMS and Finance Systems
    - Manually mail merging outside of Council systems
  - Workflow
    - Workflow Overview
    - Inspection states
  - Security (Positions)
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    - FPN Coordinator
    - This role provides read/write access to the register via the web interface, along with the ability to manage property data.
    - FPN Contractor
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    - SHP & TAB
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- Appendices
  - File format

## Quick Start

### Getting started in 2 minutes

This manual contains details on how to use the entire system later on, however if you are eager to take a look now, follow these steps to get started.

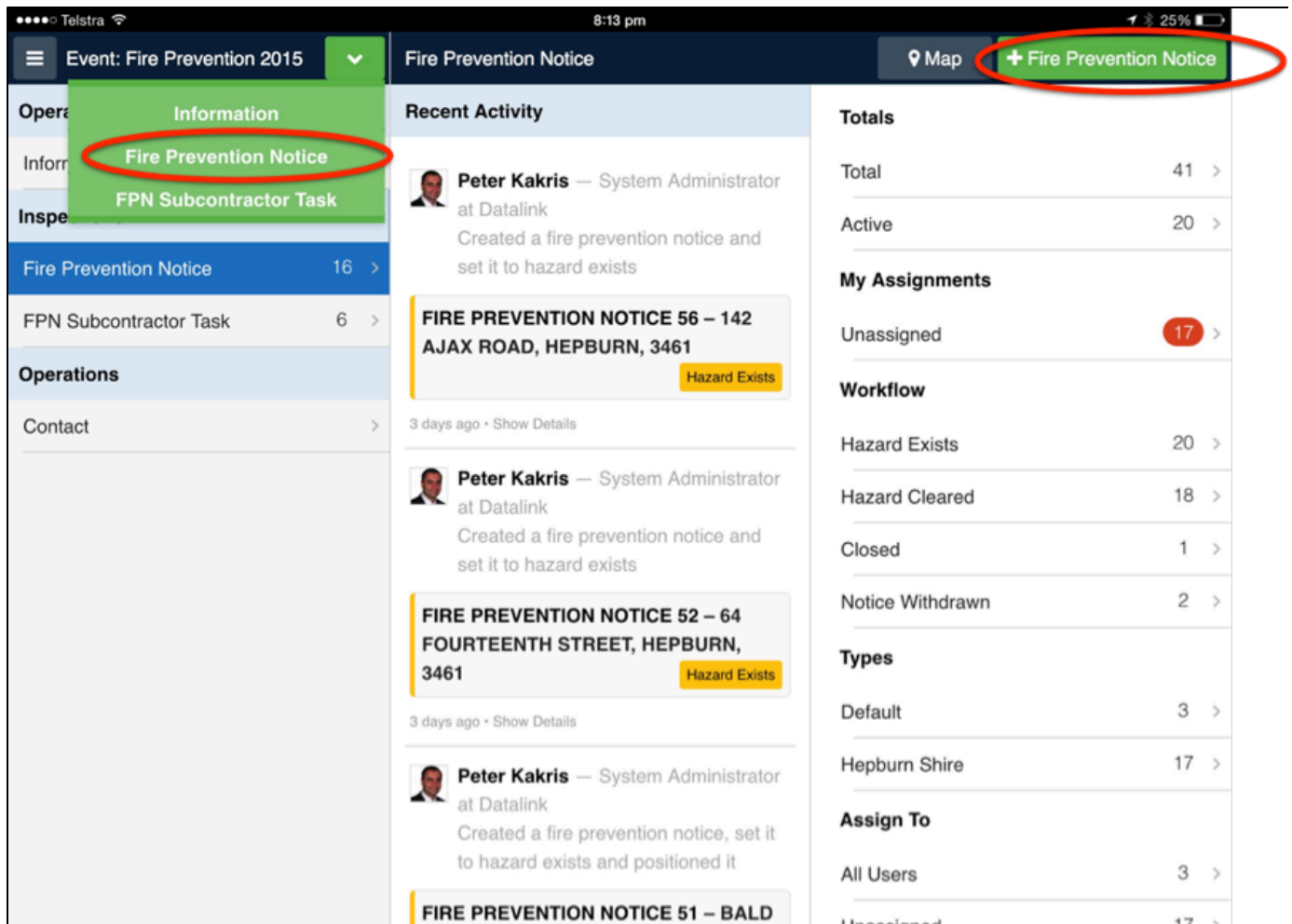
A Crisisworks Administrator must first give your account the correct permissions. For this quick start experience, ask them to add the *FPN Coordinator* and/or *FPN Officer* positions to your account. You will then need to login to your Crisisworks website with your username and password. The *FPN Coordinator* and *FPN Officer* positions will now be listed in your Available Positions. Tick both of these positions and click the Update Duty Status button which will place you on-duty in any events that have these positions.

## A typical day in the field

In typical use, Fire Prevention Officers will conduct area inspections, and upon finding fire hazards, they will use the Crisisworks Field Reporting App to log a new Fire Prevention Notice to the offending property, capturing photographic evidence and logging treatment options using a mobile tablet or smart phone.

Field officers will also be assigned follow-up inspections, to check whether properties that have previously received an infringement notice have remedied the hazard.

From the office, high risk properties can be added and proactive inspections scheduled. Also, new FPNs will be downloaded periodically to generate the notices/letters, and for processing in other Council systems. If a force clearing is required, Crisisworks can be used to track the tasks and costs of the sub-contractor.

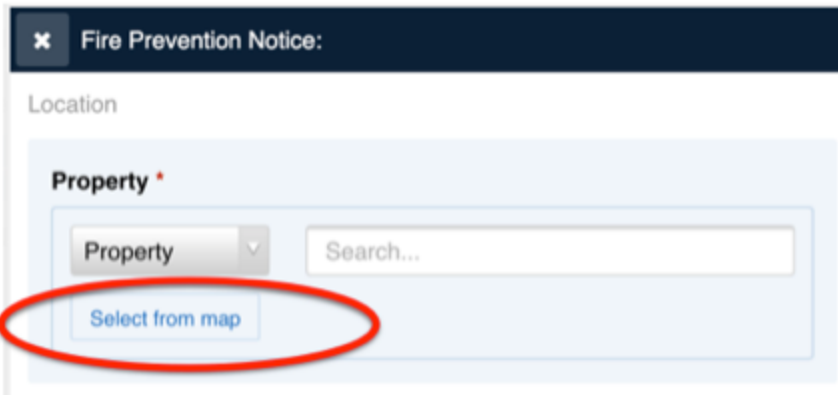


To begin entering inspections via the mobile app:

1. On your tablet, download the *Crisisworks 4* app. iOS users download it from the App Store, while Android users download it from the Google Play store.
2. Once downloaded, log in using your Crisisworks username and password and enter your Crisisworks Server (this is generally in the format of [myorganisation.crisisworks.com](http://myorganisation.crisisworks.com)).
3. Now, select which FPN event you want to work with from the Event Selector. For example “*Fire Prevention 2015*”. Select “*Fire Prevention Notice*” from the form list on the left hand side. This will show you a list of all FPNs (*Fire Prevention Notices*) that have been assigned to you. If you do not have an FPN event created, you will need to [create an event](#) on using the web interface first.
4. Press the green **+ Fire Prevention Notice** button to create a new inspection or select “Fire Prevention Notice” in the green menu in the first column.
5. You are now adding an assessment. In the Property section, press the “Select from map” button to find the property visually by showing you the closest properties to your current location (See the next two images below). Now enter in the assessment details, take some photos and press Save. You’ve just added your first assessment.

A few of tips:

- You can type the address or property ID in the search area for a text search.
  - You are automatically assigned the FPN notice (you can change this).
  - The status is automatically set to “Hazard exists” for new inspections from when in the field.
  - Leave the Next action date blank to use the default for the module, usually 14 or 21 days from the time the data is exported later on. Only put a date here when you are allowing an extension of time.
  - In the unlikely event a property is not showing on the map, Press “Mark current location” or “Annotate map” to put a point on the map of where you are, then complete the rest of the inspection.
- When you return to your office ask your GIS officer about this property and liaise with [support@datalink.com.au](mailto:support@datalink.com.au) to see why this property may not be in the property asset database. The property can be added later on via the web interface.



## Tracking your Route

When driving and doing inspections it is important to remember where you have previously been so you know where to go or where not to go next time!

To track your route, go to the Settings screen via the menu icon in the top left hand corner of the screen then select "Track my Route". Enter your route name and distance preference for each point before turning on the route tracking. You can then return to using your app as normal while the route is being tracked in the background while you complete your inspections.

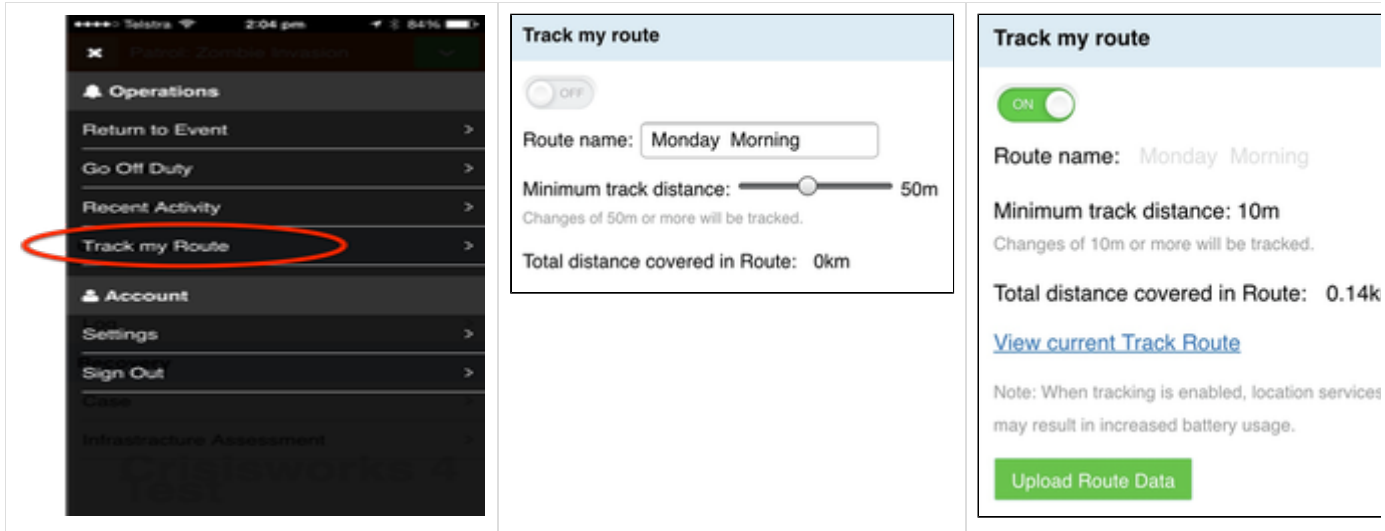
Once done you can upload your route from this same screen by pressing the "Upload Route Data" button seen below. This will save your route as an Information record.



*Press this to get to the menu from most screens.*

<b>Go to Track My Route</b>	<b>Turn feature on</b>	<b>Specify a route name</b>
-----------------------------	------------------------	-----------------------------





Your route is then tracked as you move, and you can view and upload it to Crisisworks.



### In the office with a web browser

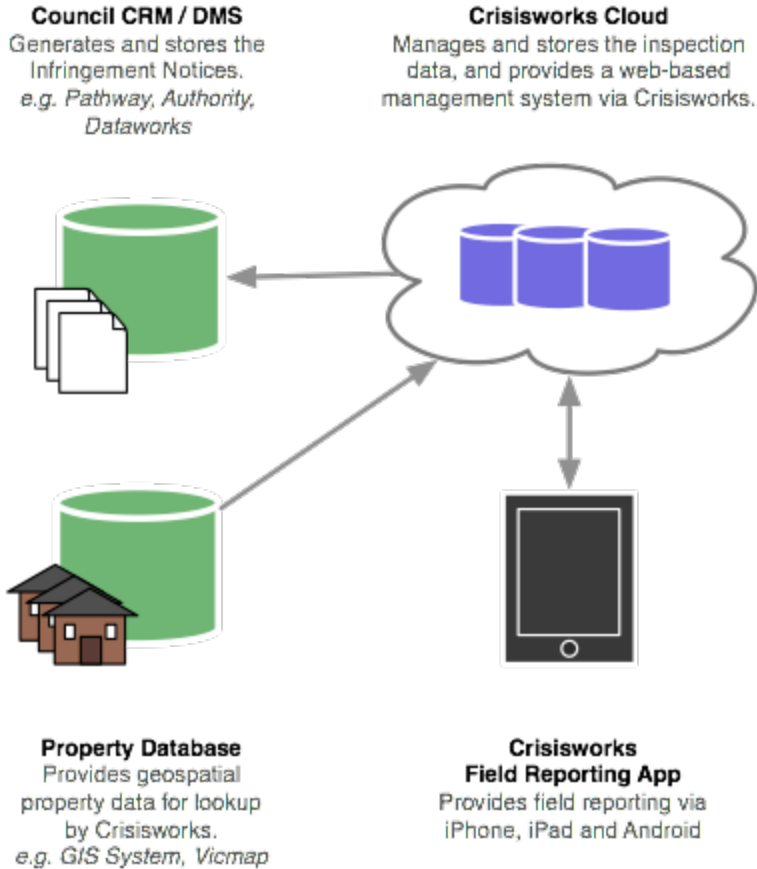
1. Use the Crisisworks web interface (e.g. [myorgansation.crisisworks.com](http://myorgansation.crisisworks.com)) to access additional coordination and administration functions.
2. First, [sign in](#) and [go on duty](#) as a FPN Coordinator or Officer. Then, select the correct Fire Prevention event from the event selector.
3. Select *Fire Prevention* from the "Inspections" menu to access the module, which will show all of the inspections. You will see a list of counters similar to the Left Hand Side image.
4. The new notice(s) will be awaiting export/print. A counter called "Notices to Print" appears showing how many inspections are ready to Print. Click this counter. The data grid will be updated to only display the Ready to Print items.
5. Select the items you want to print by ticking them individually or you can select all by clicking on the yellow tick in the heading.
6. Click either the "*Export CSV for Mail Merge*" or "*Generate Merged Documents*" buttons located at the bottom of the list. These two buttons export or generate the data and will progress their state by adding a printed date to these records. The records will now be found within the "Notices Sent" counter before they transition to "Compliance Inspection Required" in two to three weeks time. Notice that after downloading the file, the counter will now show '0' Notices To Print. This is normal, and it shows that printing is tracked within the system.

**This concludes the Quick Start experience. For a detailed understanding of the system, please read on.**

## Concepts

### System overview

Council systems should work together to implement a complete Fire Prevention Notice system. The following diagram shows the delineation of responsibilities between systems.



### System responsibilities

#### Crisisworks

*Crisisworks Cloud* and *Crisisworks Field Reporting* smartphone app work together to provide a set of tools for field reporting and lifecycle management of Fire Prevention Notices.

#### Property Database

Council may provide geospatial property data to Crisisworks from time to time. This can either come from Council's own GIS system, or Vicmap data can be used.

Alternatively, Datalink can perform a regular import of Vicmap data from the VicMap Property Simplified 1 dataset periodically.

#### Council CRM, DMS and Finance Systems

Councils have a varying number of systems that need to be made aware of the infringement notice, and this should be determined by each Council. Commonly, a Customer Relationship Management system will record the infringement, a Document Management System will record the generated letter, and Council's Finance system will record the debt.

Crisisworks integrates into this process by supplying a CSV file, which uses the Council-supplied Property ID as the key and which lists each infringement, its field observations, treatment requirements, key dates and current status of the infringement. This data can be downloaded from Crisisworks and manually uploaded into your Council system, or an automatic link can be established.

### Manually mail merging outside of Council systems

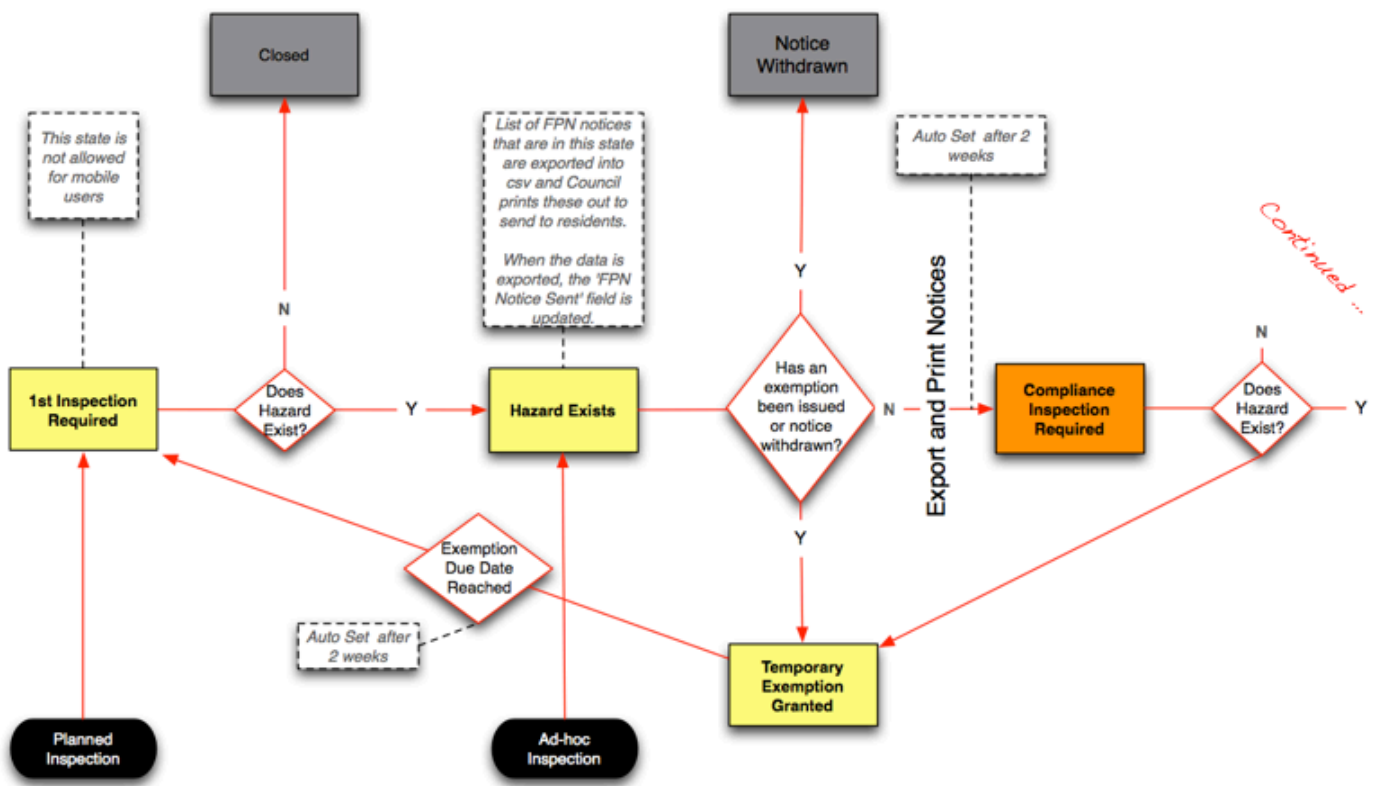
If you wish to mail merge outside of Council systems, you can do this by providing the rate payer's details as part of the asset database import, and then construct an MS Word mail merge template to generate the infringement notices from within Crisisworks.

You'll need to ask your IT department to create the property dataset with the ratepayer information included, and then Datalink can map the import data as a periodic service after setting up the system.

### Workflow

A workflow model applies to the selection of status fields for *Fire Prevention Notices*.

*FPN workflow Part 1*



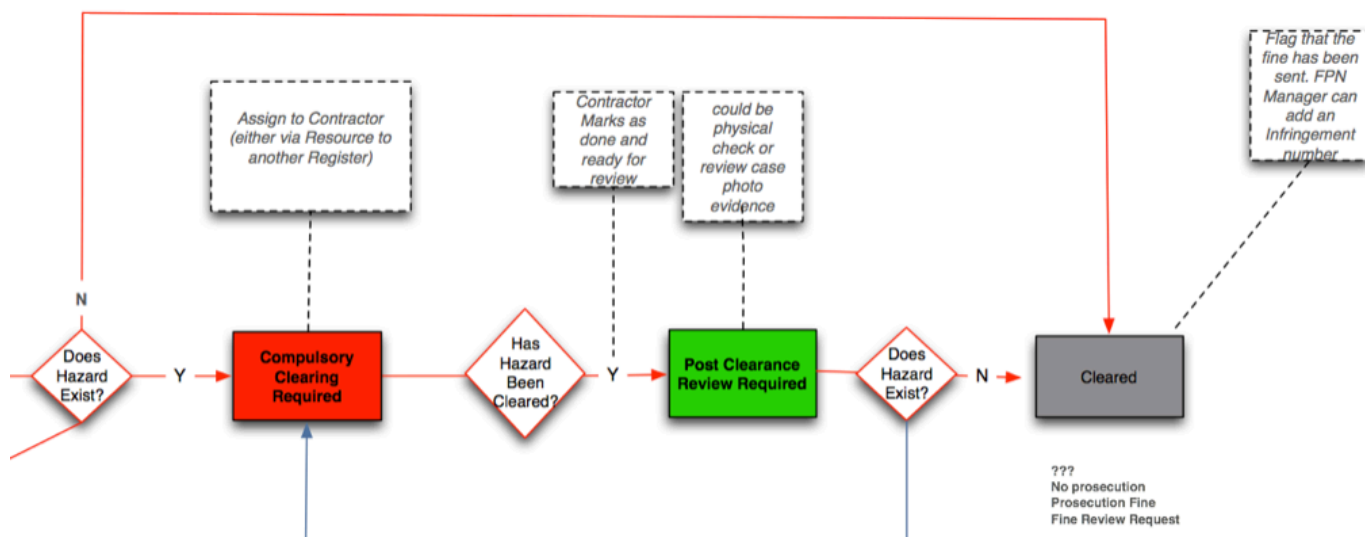
### Workflow Overview

The workflow model allows the combination of two approaches when adding inspection reports.

1. The first approach is to do just-in-time hazard reporting using the mobile App, where you only report hazards you have identified.
2. Secondly, properties of high risk can be proactively added for an initial inspection, using a web browser.

A description of each status type follows.

... FPN workflow Part 2



Inspection states

This workflow state informs the user that an inspection is required at the property.

There are a few statuses used:

WORKFLOW		
1st Inspection Required	0	<p><b>"1st inspection Required"</b> - used to proactively schedule inspections on known high-risk properties. This has its own counter (These can only be created in the web browser)</p> <p><b>"Hazard Exists"</b> – used for non-compliant properties that need to be issued an infringement notice or have been issued with a notice. Records that have been sent have a "date printed" and "follow-up action" date which will change to "Compliance Inspection Required" on the due date. Note - When a new notice is raised in the mobile app, the default status is "Hazard Exists"</p> <p><b>"Compliance Inspection Required"</b> – this is the Re-Inspection to see if the property has been "remedied" and is now compliant with fire safety regulations. This state is set by the system when the next action date is reached when "Hazard exists" and the notice was printed(or exported for printing)</p> <p><b>"Request Compulsory Clearing"</b> – this is set by the Inspector or the Coordinator when the Compliance inspection is a failure ie has not been remedied within the given timeframe.</p> <p><b>"Post Clearance Inspection Review"</b> – the property was cleared by Council or by a contractor. This happens automatically when the contractor completes the additional FPN Task assigned to them. The review can either be performed by an on-site inspection or from the photos and data entered by the contractor using the App while in the field.</p> <p><b>"Hazard Cleared"</b> – the force clearing process was successfully completed.</p>
Hazard Exists	17	
Compliance Inspection Requ...	0	
Request Compulsory Clearing	0	
Post Clearance Inspection R...	0	
Hazard Cleared	18	
Temporary Exemption Granted	0	
Closed	1	
Notice Withdrawn	2	

Special FPN Counters -

There are a few more counters based on states and dates

<b>SPECIAL</b>		
Ready to Inspect	0	<p><b>"Notices to Print"</b> – this counter changes based on the status "Hazard Exists" and the printed date being empty. The printed date is set when the data is exported for mail merge or mail merged within Crisisworks.</p> <p><b>"Notices Sent"</b> - this counter is based on the status "Hazard Exists" and when the print date is before the due date. ie the "Compliance Inspection" isn't due ye</p>
Notices To Print	3	
Notices Sent	16	

### Security (Positions)

The Fire Prevention Notice module has three levels of access.

#### FPN Field Officer

This role provides access to the Crisisworks Field Reporting App, and provides the ability to have inspection reports assigned to the user.

#### FPN Coordinator

**This role provides read/write access to the register via the web interface, along with the ability to manage property data.**

#### FPN Contractor

This allows contractors to log in to see FPN Tasks that have been assigned to them only.

Note - they can only see their **own** FPN tasks and cannot see any other contractor's records.

### Initial configuration

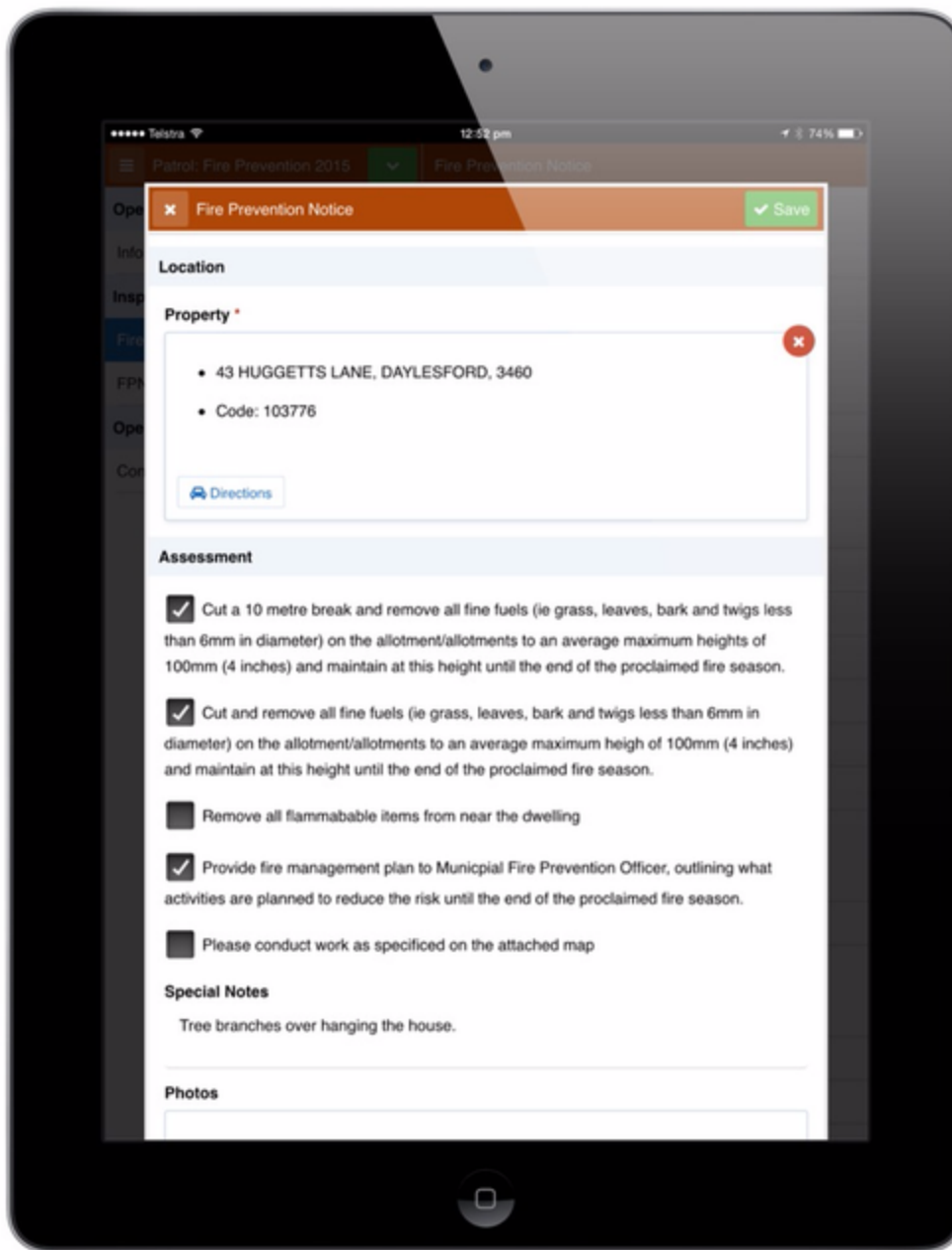
The initial set-up of the Fire Prevention Notice module involves the creation of the field survey form, the import of property data, and work to determine how to import data back into your Council business systems.

#### Define your inspection form

The inspection form is initially created by Datalink, customised to incorporate any treatment options and wording specific to your Council. This process typically takes a day.

An example form appears below.

Note: Treatment options can be configured to be grouped into categories, such as residential, commercial and farming, each with their own treatment options.



In addition to specifying your FPN form, you'll also need to tell Datalink the default time you require between inspections. The default is 2 weeks but this can be altered.

This Date is set relative to the Date you export or print merge the data, so if you entered a number of "Hazard Exists" properties throughout the week and export/print at the end of the week, all of the records processed in the batch will have the same Next Action Date..

This initial set-up of the form is included in the setup fee. However, if your needs change then don't worry, you can always ask Datalink to make changes to this form in future for a small hourly-rate service fee.

## Upload your property data

Property data is a critical component of the system, as each Fire Prevention Notice is related to a property.

Crisisworks has a common address database that is shared across all functions of the system, and this can be populated from a number of sources, including Council's own GIS database, or state government databases such as Vicmap Property.

Multiple asset types can be configured for use in the same form, for FPNs both Property and Parcel data could added as part of the initial setup by Datalink.

## Supported Formats

Crisisworks can support the following import formats:

- Council-supplied Comma-Separated Values (CSV)
- Council-supplied Keyhole Mark-up Language (KML)
- Council-supplied Shapefile (SHP)
- Council-supplied TAB file
- Datalink-supplied Vicmap

All geospatial references should be in Web Mercator format.

### CSV

The specification for the CSV file is available from the Crisisworks support documentation at [www.crisisworks.com/support](http://www.crisisworks.com/support). Note that CSV only allows the use of point data for properties.

### KML

It is usual for systems to place additional data in the <description> element, and if this is the case, you will need to identify the reference number to use for the Property ID when you supply the file.

Before using KML formats, Datalink will need to perform a once-off service to create a mapping rule to read the <description> data.

### SHP & TAB

Shape files can also be supplied, and like KML, an import rule specific to the file must be first set up by Datalink.

### Vicmap

Datalink imports Vicmap property data a few times a year which removes the need for Councils to provide property data, and the default reference used is PR\_PFI. Please check with your GIS officer before deciding on this option. This is only provided for councils that don't provide the combined rate payers and property data file.

## Considerations when selecting your property data source

Please read the appendix on Property, Parcel and Address data to understand the considerations in the choice of data, and how it affects field reporting.

## Upload your initial inspection data

If you have a list of properties that you would like to inspect, you can create them in the web browser one at a time or alternatively, you can perform a bulk import from a CSV file. The file only requires one column of data which is the property ID.

The import button is shown on the image below.

Once imported, records can be assigned to officers in bulk (see the next section).

The screenshot shows the 'Fire Prevention Notices' interface. At the top, there is a navigation bar with tabs for Overview, Events, Operations, Inspections, References, Settings, and Help. The current view is 'Inspections'. Below the navigation bar, there is a search bar and a 'New Fire Prevention Notice' button. The main content area is divided into two sections. On the left, there is a summary table:

Fire Prevention Notices	
TOTALS	
Total	4
Active	3

Below the summary table, there is a refresh button and the text 'Updated 2 minutes ago'. On the right, there is a table with columns: ID, Status, Address, Assigned, Updated, Notice Printed, and Next Action. The table is empty, displaying the message 'There are no records.' Below the table, there are three buttons: 'Export CSV Mail Merge', 'Export', and 'Import'.

## Bulk Actions

When working with many inspections and multiple inspectors it may be necessary to make changes to many records at the same time while still auditing each change made. This is done with the "Bulk Edit" button. Note that the bulk edit button only appears when at least one item is selected.

The screenshot shows the 'Fire Prevention Notices' interface with a list of records. The table has columns: ID, Status, Address, Assigned, Updated, Notice Printed, and Next Action. Several records are selected, indicated by a yellow tick in the 'ID' column. The records are:

ID	Status	Address	Assigned	Updated	Notice Printed	Next Action
1298	1st Inspection Required	7 WINDOOD STREET, FRANKSTON NORTH, 3200		5 Oct 2015 at 11:21 PM	-	-
1288	1st Inspection Required	18 THAMES STREET, FRANKSTON SOUTH, 3199		5 Oct 2015 at 11:21 PM	-	-
1289	1st Inspection Required	3 TH-TREE GROVE, SEAFORD, 3198		5 Oct 2015 at 11:21 PM	-	-
1290	1st Inspection Required	8 VIKING COURT, CAPRUM DOWNS, 3201		5 Oct 2015 at 11:21 PM	-	-
1291	1st Inspection Required	405 WARRANCYTE ROAD, LANGRARRN SOUTH, 3911		5 Oct 2015 at 11:21 PM	-	-
1281	1st Inspection Required	92 SANDMA DRIVE, SKYE, 3977		5 Oct 2015 at 11:21 PM	-	-
1282	1st Inspection Required	2 SANDMA DRIVE, SKYE, 3977		5 Oct 2015 at 11:21 PM	-	-
1283	1st Inspection Required	30 SHEPHERDS HUT ROAD, LANGRARRN SOUTH, 3911		5 Oct 2015 at 11:21 PM	-	-
1284	1st Inspection Required	42-62 STOTT'S LANE, FRANKSTON SOUTH, 3199		5 Oct 2015 at 11:21 PM	-	-
1285	1st Inspection Required	38 SUNBIRD CRESCENT, CAPRUM DOWNS, 3201		5 Oct 2015 at 11:21 PM	-	-

At the bottom of the table, there are buttons: 'Generate Merged Documents', 'Export CSV Mail Merge', 'Export', 'Import', and 'Bulk Edit'.

The image above shows the items that have been selected. If you wish to select every record in the filter this can be done by clicking on the yellow tick in the heading.

## Bulk edit!

You are about to edit 6 items. Please note that editing multiple items can take a few minutes.

The screenshot shows the 'Bulk Edit' form. It has the following fields:

- Assign To:** Maxwell Smart
- Set Status:** Don't Change
- Due Date:** 19/11/2015
- Tags:** Week 1

At the bottom of the form, there is a green button labeled 'Make Changes'.

Note: bulk actions on more than a few items may be done in the background to allow you to get on with your work. These actions not only change the data but they also add audit history to each record. If this is the case you will get a message such as "Your items have been flagged for processing. We will send an email to maxwell@datalink.com.au when the operation has finished"



## Filtering your lists

There are a few options that can be used to filter your lists, aside from using the left hand side counters.

1. You can filter any data grid (list) by clicking on the magnifying glass which will reveal the basic filter. The image below shows the fields that can be used in the basic filter.
2. You can do a geospatial query on its own or in combination with another parameter. The example image below will display items being selected within polygon that are also 1<sup>st</sup> Inspection Required.
3. You can perform an Advanced Search for more complex parameters.

The screenshot shows the Crisisworks interface for Fire Prevention Notices. The top navigation bar includes 'JEN TEST SITE', 'Overview', 'Events', 'Operations', 'Inspections', 'References', 'Settings', and 'Help'. The user is logged in as Peter Kakris. The main area is divided into a left sidebar, a map, and a data table.

**Left Sidebar (Fire Prevention Notices Filter):**

- Type:** Any
- Contains:** (Empty field)
- Record ID:** (Empty field)
- Tagged:** (Empty field)
- Location:** Within Polygon
- Status:** 1st Inspection Required
- Assign To:** Jarred Stevens, Peter Kakris, Rick Maters

**Map:** Shows a map of Frankston with several yellow fire icons. A red polygon is drawn around a cluster of icons. A tooltip says 'Click on map to draw polygon, Double click to finish.'

**Data Table:**

ID	Status	Address	Assigned	Updated	Notice Printed	Next Action
1298	1st Inspection Required	7 WINDOO STREET, FRANKSTON NORTH, 3200		5 Oct 2015 at 11:21 PM	-	-
1288	1st Inspection Required	18 THAMES STREET, FRANKSTON SOUTH, 3199		5 Oct 2015 at 11:21 PM	-	-
1289	1st Inspection Required	3 TI-TREE GROVE, SEAFORD, 3198		5 Oct 2015 at 11:21 PM	-	-
1290	1st Inspection Required	8 VIKING COURT, CARRUM DOWNS, 3201		5 Oct 2015 at 11:21 PM	-	-
1291	1st Inspection Required	435 WARRANDYTE ROAD, LANGWARRIN SOUTH, 3911		5 Oct 2015 at 11:21 PM	-	-

## Set up your officers

Each Fire Prevention Notice can be assigned to an individual that has the position of FPN officer. Sometimes, inspections may be unassigned, and just like Crisisworks Requests, these are effectively the responsibility of the Coordinator. A Crisisworks Administrator can create users and make them an "FPN Officer at Council" by adding this position to their user record.

Note - before going out in the field for the first time they will need to log into the Web system first and update their user profile and go on-duty for the first time.

## Set up your Coordinators

A Crisisworks Administrator can create users and make them an "FPN Coordinator at Council" by adding this position to their user record.

## Set up your Contractors

FPN Contractors are the external users that will be cutting the grass or completing other FPN tasks to make the property comply with fire safety legislation.

This is a more involved step for your Crisisworks Administrator and may require the assistance of Datalink.

There are a three prerequisites that need to be set up in this order in Crisisworks before you can assign tasks to contractors or create the Contractor users. These are:

1. Create an Organisation such as "Jims Mowing".
2. Create a Resource. When creating the resource, you must choose the Organisation you just created and **make sure the resource is set to the "Fire Prevention" Category** towards the bottom of the form. The resource will have the costs and type of service they offer such as "Jims – Large block clearing" and "Jims – Branch removal"
3. Setup the Contractor position for the new Organisation. A Crisisworks Administrator (or Datalink) will need to do this. For example "FPN Contractor" at Jim's Mowing. When setting up the new Contractor position, Administrators should choose the Security Policy " Fire Prevention Task Assigned-to-resource-only Access" to restrict access to tasks only assigned to them.

A Crisisworks Administrator can then create the Contractor user account. When creating the user, Administrators need to choose the Organisation just created (ie Jims Mowing). Administrators also need to choose the Position for this user. In the Position tab, a position should now appear called "FPN Contractor at Jim's Mowing".

After these prerequisites are completed you can then assign FPN tasks to the Contractors when the Fire Prevention notice is in the "Request Compulsory Clearing" State.

Visit [Managing Users, Positions & Organisations](#) to learn how to manage organisations, positions and resources.

## Use an event to track season each season

Crisisworks uses Events to track Fire Prevention Notices across seasons, and to keep this information separate from emergency events.

## Plan your integration with other systems

In order to generate letters to property owners, you must work out which system you plan on using. You will then need to consider the best way to download data from Crisisworks to supply to that system.

## Using the field reporting app

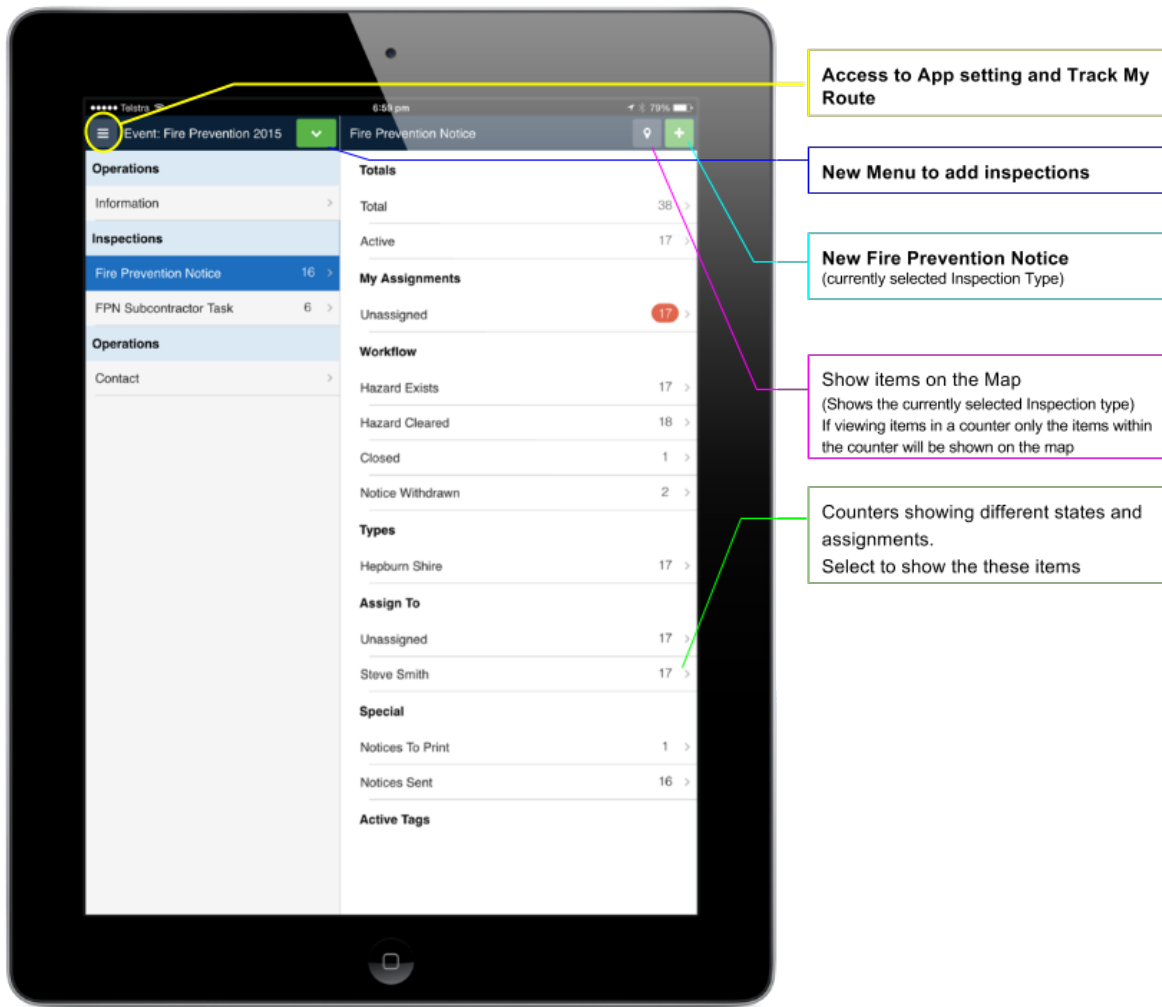
The Crisisworks Field Reporting App provides the field tool for reporting and following up Fire Prevention Notices.

## Get to know the user interface

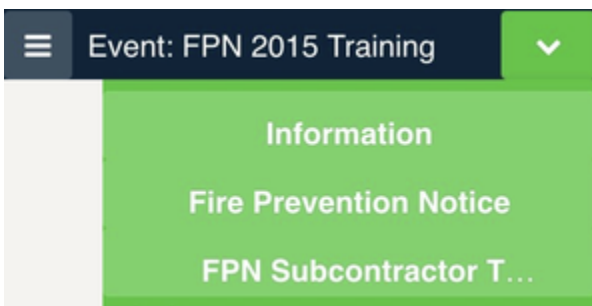
The mobile app is a native iOS and Android app that can be downloaded from the app store.

Once successfully authenticated, the dashboard view appears with data and forms based on your access permissions.

The following diagram explains the interface.

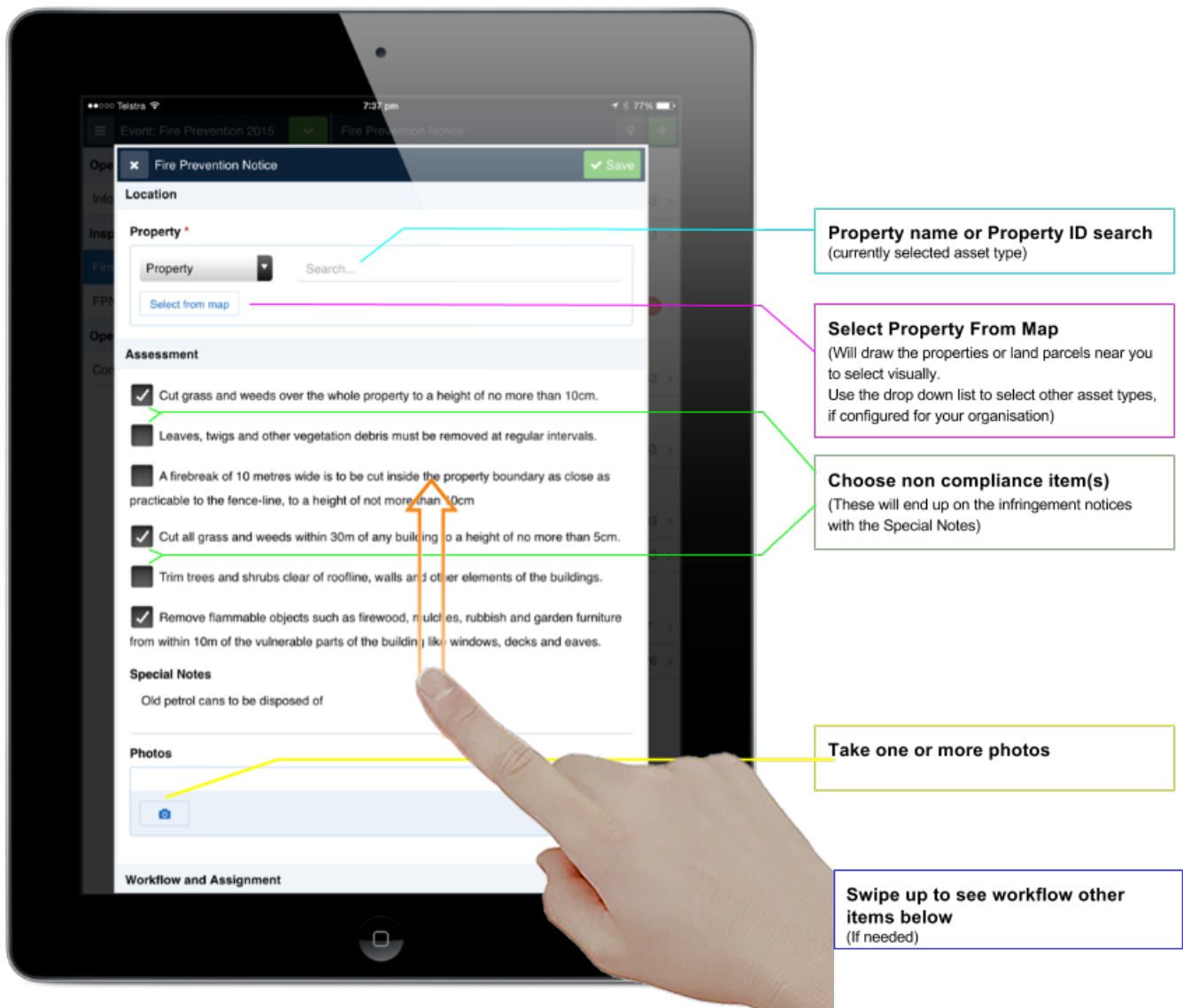


After Pressing the down arrow next to the Event name, a green dropdown list displays a list of all configured form types for the current event.



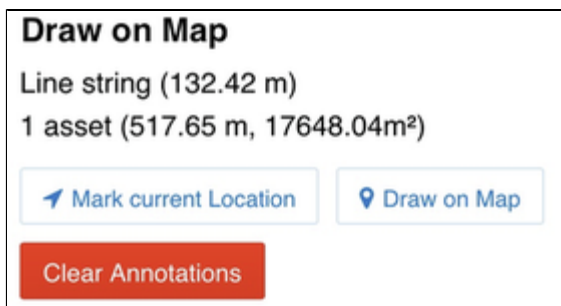
Select 'Fire Prevention Notice' from the list to add a new Fire Prevention Notice. Other types can also be added, making the field app versatile for many purposes.

When adding a new record, a form appears with form fields based on the type of record. Below is an example of a Fire Prevention Notice (note: your form may vary based on customisations made when the module was set up).



## Drawing on the map

To draw on the map, tap "Draw on Map". You can select to add points, a polygon or a line. You can drop a point where you are standing without going into the map. Select clear annotations to remove them.



The map screen allows you to draw on the map, and also provides a way to auto-drop points as you drive or walk the affected area.

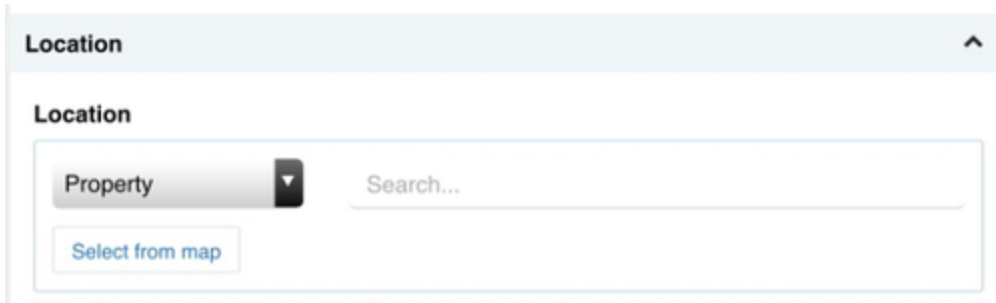


When you are finished, tap 'Save'.

For polygons, the total area inside the polygon on kilometres squared is displayed. If a line was drawn, the total length of the line in kilometres is displayed.

### Selecting properties via the map

When selecting a property, you can search by name or property ID. However the preferred option is normally to select the property visually from the map by pressing the "Select from map button".

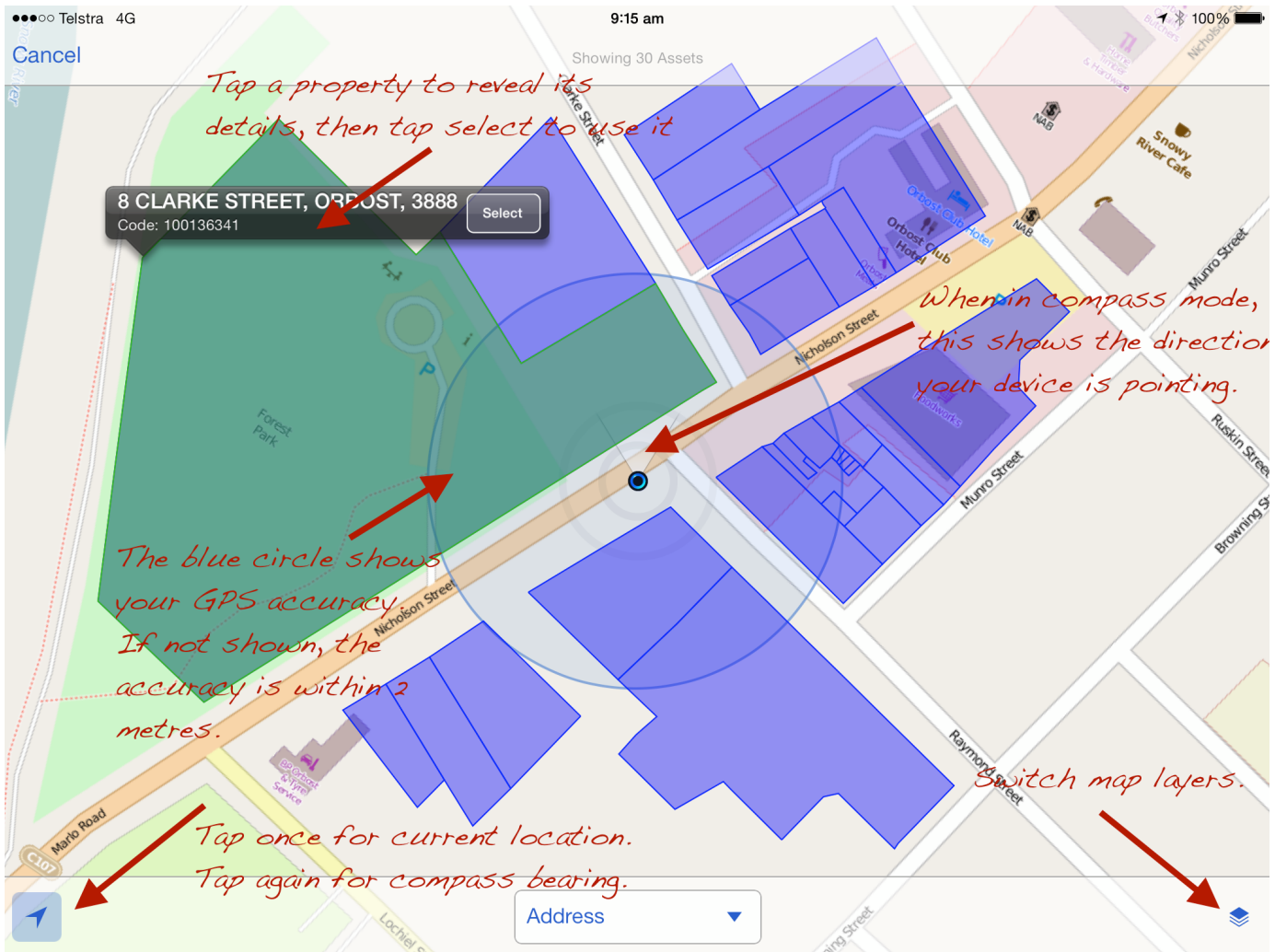


When the map appears, it will be centred on your current location. A few moments later, all nearby properties will be overlaid across the base map.

This system works both online and offline. If you are offline, the base tiles may not load, but the property cadastre (boundaries) will still appear allowing you to visualise and select the relevant property relative to where you are standing.

Tap the Compass button at located at the bottom left of the screen to turn on the compass. In this mode, the screen rotates to orientate the map in the direction that the device is facing.


Tap a property (blue polygon) to select it (polygon becomes green), and an information window appears. To use this address, tap Select, then tap Save to return to the form.

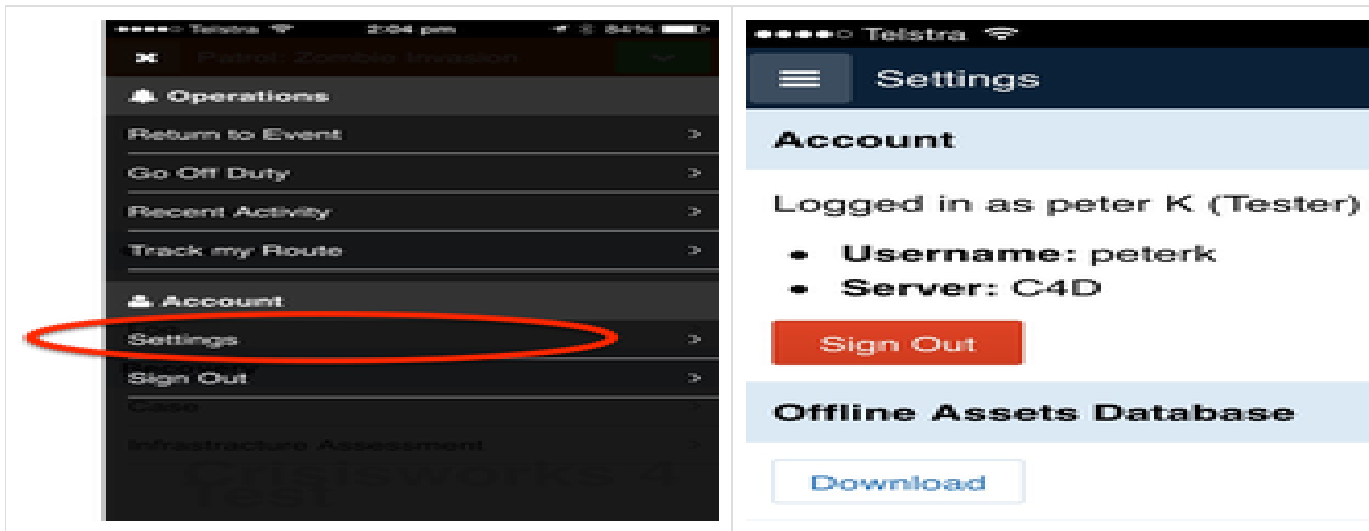


## Configuring user accounts

Field officers must first have a Crisisworks user account with the *FPN Officer* enabled. A Crisisworks Administrator must do this.

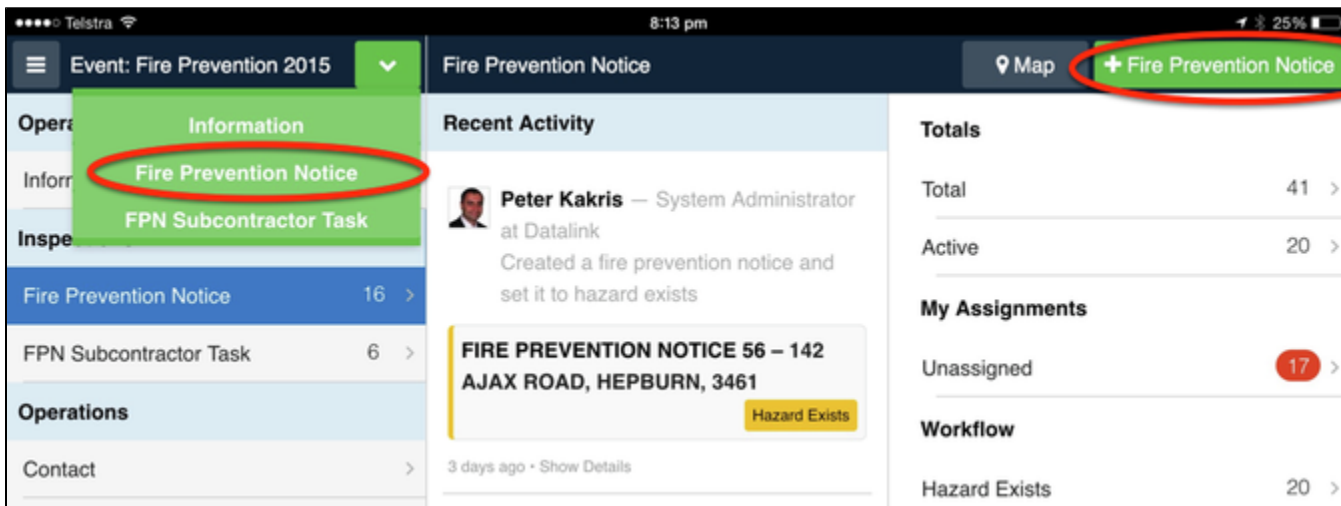
## Setting up the mobile device

1. To set up the device, download the app. For iOS users (iPad and iPhone), search for “Crisisworks 4” in the App Store. For Android users, search for “Crisisworks 4” in the Google Play store.
2. Once installed, run the app and log in, using your Crisisworks username and password. This only needs to be done once, and the device is then registered to that user.
3. After pressing “Sign In”, the device will register with the server, and take the user to the *Dashboard* page, ready for use.
4. If you require offline assets to be downloaded into the device, for use when you don't have an internet connection, select Settings after pressing the  icon, Then select “Download” the offline Asset Database.



You will need to do this whenever the assets are updated on Crisisworks Cloud.

## Reporting a new infringement



To report a new infringement, follow these steps.

1. a) Select “+ Fire Prevention Notice” after selecting the Fire Prevention Notice from the left hand side list of available forms with the counters on them.  
b) or select “Fire Prevention Notice” from the down green arrow icon next to the Event name on the top left of your screen. (this is available without selecting any of the forms or counters).
2. Select the property. If you are standing next to the property, you can tap the “select from map” and select to see the properties closest to your current location. The property should be where your current location is and identified by a blue dot. There are 2 other ways to identify the property.
  - a. You can enter a partial address to look up the property by a known address, or
  - b. entering the Council's property identifier, if known.
3. Evaluate the hazard and fill out the form



4. Take one or more photos of the risk. To do this, tap *Add Photo* to launch the camera. Photos are stored against the record, and are not added to the device's photo roll.
5. Press "*Save Fire Prevention Notice*" to save the record.

The record and all associated photos are automatically uploaded to Crisisworks immediately if connected to the internet, otherwise they will be saved until the internet is available .

## Updating an existing infringements on the mobile device

1. To update an existing infringement, you must first locate it. The easiest way to do this is to select it from the map or from one of the lists (via the counters).
  - a) the lists (or datagrid) can be filtered via the different counters located on the left hand side of the datagrid. These counters represent the different workflow states, or officers and other logical groupings to help you find the records.
  - b) when you select the map icon while viewing a list it will only show you the items in this category on the map. Such as "1<sup>st</sup> inspection required"
2. When you have located the infringement you wish to update, click *Edit* to edit the record.
3. You can make changes to the record, update its status, and add new photos. Press *Save* when completed.

The changes are uploaded to Crisisworks automatically. All changes are version controlled and time stamped with a full history within Crisisworks.

## Handling duplicate reports

You can prevent issuing more than one notice for the same property if you always use the "Select from map" feature to select the property.

While driving, keep the display on the map view. The map will update as you drive. This way you will see existing open FPN records as you approach them. Tap the map icon to view, then edit the existing record, or press the new button in the top right hand corner of the map to add a new one.

## Handling missing property records

There are some cases where a property may not exist in the property database. Your GIS officer can better advise on your Council's specific circumstances, but here are some general examples.

1. Vicmap reports that approximately 97% of properties are included in their database, and they base their data on Council data - this means you may find some unidentifiable properties due to data inaccuracy.
2. Sometimes properties are non-contiguous, and the registered address may be on another parcel of land. This can confuse asset databases, if you are using data that relies on address point data rather than property polygon data.
3. Sometimes land is not private land. It may be a parcel without an address, it may be crown land, or it may be other special use land.

In cases like this, you can add a point marker at your current location or draw on the map. If it is a vacant property you could choose to walk the perimeter of the property and have the lines drawn for you automatically and fill out the rest of the form normally.

When back in the office, you can resolve the problem in a number of ways:

1. You can view the map, use your Council GIS system or consult your GIS officer to determine the property, based on the location recorded against the inspection. Its co-ordinates are saved with the record (where you dropped the pin or drew on the map)
2. If you find the property, you can edit the *Fire Prevention Notice* record and enter in the correct property, either by entering in the PROPNUM, or its address.
3. If for some reason the property doesn't exist in Council systems, you will need to find the best approach with your GIS officer or with Datalink.

## Tracking your route

A very useful feature of the Crisisworks Field Reporting App is the ability to track your route as you perform field surveys. This is shown with images earlier in the overview section of this Manual

To use this feature:

1. When you begin your shift, select "*Track Route*" from the menu via the top left hand corner.
2. You will need to give it a name before turning on tracking, keep in mind that the date and time will be appended to the end of the name you provide when you upload it later.
3. You can return to the event and keep doing your work. The phone will track your movements every 10 metres (you can change the accuracy level) while you conduct your field surveys. This will continue even if the Crisisworks App is in the background, beware that this feature does drain your device's battery more quickly. An in car charger is recommended.
4. When you have finished, return to the Track route screen and upload your route data.
5. The route is uploaded to Crisisworks as an *Information* activity in the currently-selected event. You can view the route from the information register in the app or web browser.



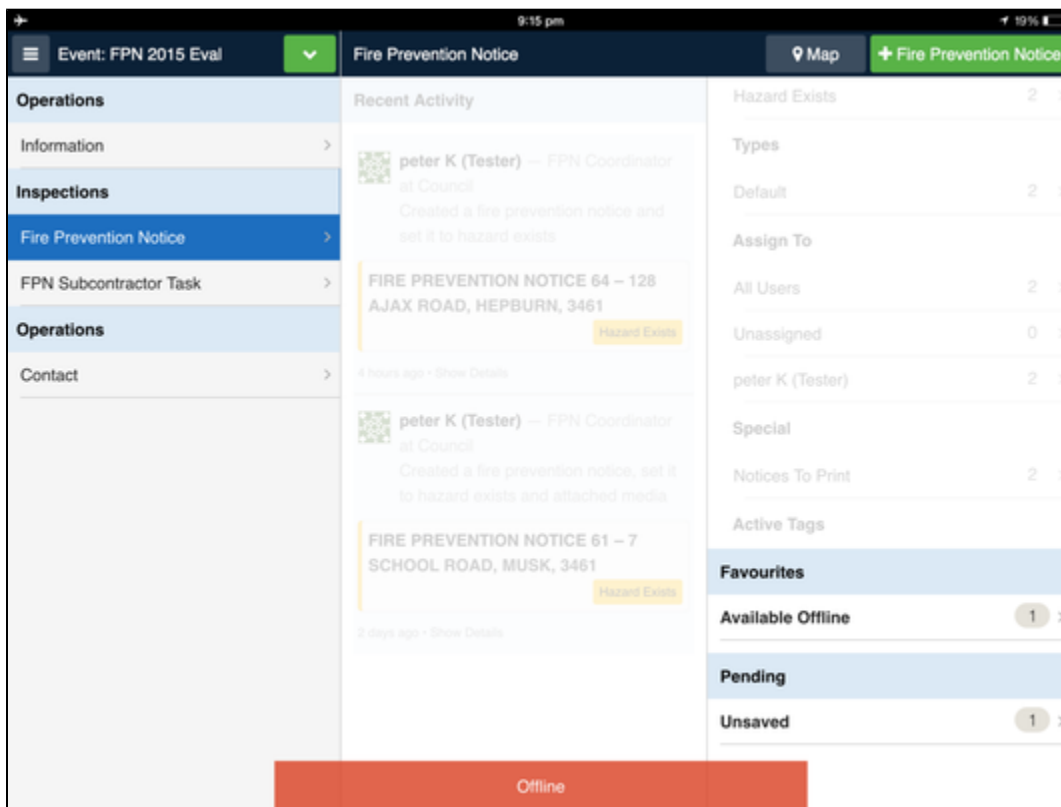
- To view the track, locate the activity on the Crisisworks website – click on the route counter when in the information register. The route(s) can be viewed on the map.

**A note on route recording:** Each recording contains the date and time of the route start and end, along with each point along your travel. Each point is accurate within the accuracy limits of the GPS, which is usually < 2 metres for iPads and iPhones. It is possible that a few data points could be placed in error. This can be edited in the web browser at a later time.

## Understanding offline mode

The *Crisisworks Field Reporting App* supports being used without network coverage. The following applies for offline mode:

- The GPS will still work with full accuracy.
- The system will not be able to send or receive updates from the Crisisworks server, and rather than send changes immediately, it will store user activity in the *Pending* area with an “unsaved” counter until the connection is re-established.
- The system will use the *Offline Asset Database* for geocoding. This database must be downloaded by the user prior to going offline.
- The map view will only display map tiles if they were previously viewed while online. In practice this means two things: first, it doesn't matter if you don't see a base map tile - all GPS use will still record accurate positions; and second, if you need to use the base map, you will need to pan and zoom around the area you plan on going to *before* you go there, to pre-load the images into the device.
- If you would like to save records for use in the field when offline you can mark them as favourites. To do this, while viewing a list of records, press the star at the end of the record's row or you can select the “Save All” button at the bottom of the page. A favourites area will now appear at the bottom of the counters list on the left hand side for you to easily find these records later.
- Periodic user position updates will not be able to be sent to the server while offline.
- The counters are not available offline.
- All other functionality works identically to when the device is online.



## Managing your Fire Prevention Notices

Management of Fire Prevention Notices is handled from the Crisisworks Cloud web interface.

### Starting your season

When starting each season, you need to create an Event. e.g. "Fire Prevention Notice 2015-2016".

Only Crisisworks Coordinators can set up events. To set up an event for Fire Prevention:

1. Select the "Events" drop down list at the top right of the system and chose "+ event".
2. Add an Event titled "Fire Prevention Notice 2015-2016"
3. Choose the Fire prevention notice template
4. Click next, then save.

Be sure to select this Event each time you work on fire prevention activity.

## Using the Dashboard to monitor activity

Crisisworks places all recent activity onto the Dashboard, so you can monitor activity from the office.

## Adding a property to inspect from the web browser

The workflow model allows for proactive inspections to be arranged for individually reported high-risk properties.

To add these properties, use the Crisisworks Cloud web interface.

1. Log in and select the correct Event
2. Click on the *Fire Prevention* Notices counter or select "*Fire Prevention* Notices" from the inspection menu.
3. Click + *Fire Prevention Notice* to add a new notice
4. Select the property. You can do this in these ways:
  - a. Enter a partial address, and the system will show you matching names. Select the correct address, and a point is dropped onto the map.
  - b. Enter a property identifier (e.g. PROPNUM) and the matching property is returned.
  - c. Click the *Geolocate* button on the map, and then click on the map where the property is located. A list of properties nearest to that point is returned, and the first result will typically be the property.
5. Notice the status *Initial Inspection Required*
6. Assign the record to an FPN officer.
7. Click Save.
8. If you have many notices to assign at once, you can perform a bulk action after applying a filter (This is shown with images earlier in the overview section of this Manual) .

## Adding a list of properties to inspect from the web browser before the season begins

The workflow model allows for proactive inspections to be arranged for high-risk properties based on previous years, or vacant blocks.

To add these properties, use the Crisisworks Cloud web interface.

1. Log in and select the correct Event
2. Click on the *Fire Prevention* Notices counter or select "*Fire Prevention* Notices" from the inspection menu.
3. Select the "Import" button at the bottom of the screen which will take you to the screen you see below.
4. Select a file with a list of the Property IDs in it. Comma separated values file (.csv) with a single column with the heading 'assetCode'.
5. Press "Import"
6. The process will take a while, it could take 15- 30 minutes depending on the number of records.  
You can return to this screen to see how it went and to get a list of any property IDs that had errors. In this example below the errors were caused by property IDs that did not match the current property IDs in the system.

## Import Information

Date:	Process Name:	Run By:	Status:	Tools
2015-11-05 07:03:48	FPN import - Frankston_FTP_Import_Propnum_List.csv	dl	COMPLETE 1017/1286 Items processed (269 Errors)	
2015-11-05 07:00:28	Scheduling FPN import	dl	COMPLETE	

## Bulk import FPN items

Please upload a list of property codes that you would like to create FPN items for.

**Please Note:**

- The file should be a comma separated values file (.csv) with a single column with the heading 'assetCode'.
- FPN Items will be created in the currently selected Event.
- The FPN register will need to be enabled for this Event.
- The FPN Items created will be automatically created with the status 1st Inspection Required.

**Upload \***

Select File...

Please enter a value into this field.

**Comment (for the audit log)**

**Import**

## Assigning Fire Prevention Notices to users

*Fire Prevention Notices* that are reported from the field are automatically assigned to the user that created them.

This default assignment can be modified by FPN Coordinators.

1. Find the Fire Prevention Notice and click *Edit*.
2. Select the new team, and/or the new user you wish to assign the case to. You can also select "unassigned", in which case it becomes the responsibility of the *FPN Coordinator*.

By assigning a *Fire Prevention Notice*, that user and his or her team can easily view their open cases from their Apps, using a special counter on the device labelled as the name of the person. Note that unlike *Crisisworks Requests*, assigning a notice does not prevent other users from accessing or editing the record.

If bulk assignment is required see the Bulk Action Section above.

## Querying the register

The Fire Prevention Notice register manages the list of all FPNs, and it can be queried in a number of ways. Existing users of Crisisworks will find these approaches immediately familiar.

### Query by counter

The workflow counters at the top can be clicked, to generate a filtered list of all cases matching that counter. This is the primary way of viewing the list.

WORKFLOW		SPECIAL	
1st Inspection Required	0	Ready to Inspect	0
Hazard Exists	17	Notices To Print	3
Compliance Inspection Requ...	0	Notices Sent	16
Request Compulsory Clearing	0		
Post Clearance Inspection R...	0		
Hazard Cleared	18		
Temporary Exemption Granted	0		
Closed	1		
Notice Withdrawn	2		

### Query by filter

The filter on the side of the datagrid allows for users to filter by any combination of the following fields:

▼ Fire Prevention Notices
🔍

**Type**

Any
⌵

**Contains**

Dales creek

**Record ID**

[Empty]

**Tagged**

[Empty]

**Location**

(Any)
⌵

**Status**

(Any)  
 1st Inspection Required  
 Hazard Exists  
 1st Inspection Required  
 Hazard Exists

**Assign To**

Peter Smith  
 Mary Jones  
 (None)  
 (Any)

Apply

Clear

[Advanced Search](#)

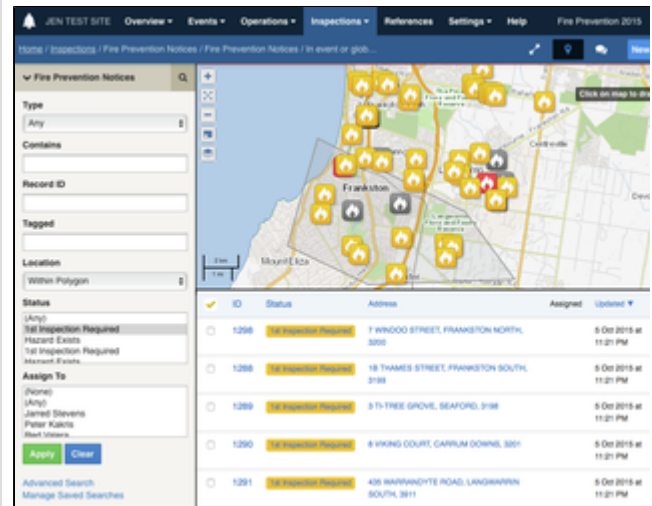
[Manage Saved Searches](#)

- **Contains:** This performs a word search of the text of all FPN records. You can use this to enter a road name, or to find based on text entered in a field assessment form.
- **Status:** Return all FPNs matching the selected states. This is a list, and you can select multiple states by holding down *Control* clicking.
- **Assigned To:** Return all FPNs assigned to a given team.

### Query by map

A filter option exists for *Filter by map*, which allows the following map options:

- **Polygon:** allows drawing a polygon on a map to find all FPNs within that polygon.
- **Radius:** allows the selection of a centre point and a distance to search within that range.
- **Map Layer:** if your Administrator has uploaded polygon-based layers, you can filter by a selected layer. You could, for example, define a polygon of a work area, and then use this feature to find FPNs within that area.



## Editing a Fire Prevention Notice

Records can be edited by finding them in the datagrid (see *querying* above), and clicking *Edit*.

When editing, all values can be changed, and an audit of prior values is kept.

The status field only shows a subset of possible status values, depending on the current status of the record. It follows the workflow model.

## Creating infringement letters

The system allows you to print your own letters or export a merge file:

- “Export CSV Mail Merge” – Contains all of the data in a Comma Separated Value (CSV) file.
- “Generate Merge Documents” - this will merge the data in Crisisworks with a pre-prepared Microsoft word template.
  - *The rate payer data must be supplied to Datalink with the property data for this feature to work.*

Both are tracked in the “Notices to Print” counter.

SPECIAL	
Ready to Inspect	0
Notices To Print	3
Notices Sent	16

You can access this file manually, or automatically.

## Manual

The manual approach is the easiest to get started quickly. When a letter is required, the *Notices to Print* counter at the top of the register will track

it. Click this to filter for all letters that require printing. Click *Export for Mail Merge* at the bottom of the datagrid to export the list.

After exporting the list, the *Notices To Print* counter will now show 0 records. This is normal, and indicates that system tracks whether or not the letters have been generated.

Your export has been triggered. Results will be emailed to: peterk@datalink.com.au as soon as they're ready!

These exports may be processed in the background, a message like the one above will be displayed when this occurs.

It will result in an email with a link similar to the example below.

▼ From: Crisisworks Support <no-reply@crisisworks.com>  
Subject: FPN Export Finished  
Date: 29 October 2015 at 10:21 PM  
To: peterk@datalink.com.au

Hi peter K (Tester),

Your FPN export has now finished. Please use the following link to download the file.

<http://demo4.crisisworks.com/core/file/download?filename=var/files/secure/files/e5b28b7207b2751f5a5bb9febad29a56.csv>

Please ensure you are logged into Crisisworks when trying to access this file.

Thanks,  
The Crisisworks System.

## Automatic

To automatically access this file, consult the *Crisisworks API*. The API allows your IT team to write a small program to automatically check and download the data at regular intervals.

This is the most convenient, but requires some technical set-up by your IT team.

## Configuring the letter Templates

Datalink will assist with your first letter template. The letter template is a standard Microsoft Word document containing your letterhead, signatures etc with variables inside which will be replaced with the data from the record, this is a sample snippet of a merge file.

Note - this is not using any of Microsoft's Mail Merge's technology.

**Sample Template Text**

*I direct {\$RATEPAYER\_NAME}*

*Of {\$RATEPAYER\_ADDRESS1} {\$RATEPAYER\_ADDRESS2} {\$RATEPAYER\_ADDRESS3}  
{\$RATEPAYER\_ADDRESS4}*

*The owner or occupier of:-*  
*{\$FRIENDLY}*

*To do the work specified below.*

***All work must be completed not later than: {\$IN\_FOUR\_WEEKS}***

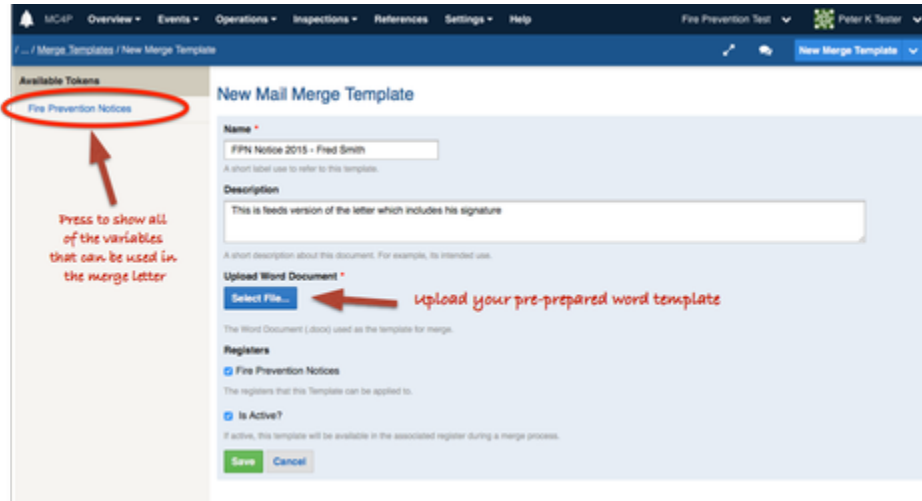
*Work to be completed:*

*{\$CONDITIONS\_ALL}*

*Please refer to explanatory notes on the reverse side of this notice.*

*Date of inspection: {\$DATE\_HAZARD\_EXISTS}*

A Crisisworks Administrator can add them into the system via the internal settings area



Once in the template area select “New Mail Merge Template”. As per the next image below.

And upload you template file, Datalink can help by providing you with a sample merge file if needed.



Token	Description
(MERGE_DATE)	The date which merge document has been generated.
(MERGE_DATETIME)	The date and time which merge document has been generated.
(M1_THRU_WEEKS)	The date 1 weeks from today.
(M2_THRU_WEEKS)	The date 2 weeks from today.
(M3_THRU_WEEKS)	The date 3 weeks from today.
(M4_THRU_WEEKS)	The date 4 weeks from today.
(ASSIGNEE_NAME)	The Crisisworks User who is assign to item.
(ASSIGNEE_POSITION)	The Position Title of the assignee.

Token	Description
(ID)	The Crisisworks unique item ID.
(DATE)	Item Issue Action (Start Date)
(CONDITIONS_ALL)	A formatted summary of all selected as relevant to the item.
(CUT_GRASS_WEEDS)	Cut grass and weeds over the whole property to a height of no more than 10cm.
(REMOVE_DEADWOOD)	Leaves, hedge and other vegetation debris must be removed at regular intervals.
(FIREBREAKING)	A firebreak of 10 metres width is to be cut inside the property boundaries as close as practicable to the fence-line, to a height of not more than 10cm.
(CUT_GRASS_WEEDS_BUILDING)	Cut all grass and weeds within 30m of any building to a height of no more than 10cm.
(TRIM_TREES)	Trim trees and shrubs clear of gutters, walls and other elements of the building.
(REMOVE_FLAMMABLE)	Remove flammable objects such as firewood, mulches, rubbish and garden furniture from within 10m of the vulnerable parts of the building (ie windows, doors and eaves).
(DATE_HAZARD_EXISTS)	The date that the item was set to the state Hazard Exists.
(DATE_REQUEST_COMPULSORY_CLEANING)	The date that the item was set to the state Request Compulsory Cleaning.
(CODE)	The asset code as used in the Crisisworks System for the asset attached, if any, to the FPN item.
(PROPERTY)	The address as the asset attached to this FPN item.
(REPORTER_NAME)	The reporter name associated with the attached asset, as provided from the council.
(REPORTER_ADDRESS1)	The reporter address as line 1 associated with the attached asset, as provided from the council.
(REPORTER_ADDRESS2)	The reporter address as line 2 associated with the attached asset, as provided from the council.
(REPORTER_ADDRESS3)	The reporter address as line 3 associated with the attached asset, as provided from the council.
(REPORTER_ADDRESS4)	The reporter address as line 4 associated with the attached asset, as provided from the council.

If you have created Microsoft Word templates before you will already know how to do this, if not there is a good chance someone in your organisation has done it before. The main thing you need are the field names/tokens to use inside your merge file, like <<this>>

## Appendices

### File format

The export file contains the following fields. Note the “*custom report fields*” will be different for each organisation,

Field	Type	Description
<b>id</b>	number	The notice ID. Note that these are not consecutively numbered.
<b>Type</b>	text	Inspection Type should be “Fpn_Inspection”
<b>address</b>	text	The full address of the property
<b>addressId</b>	number	The reference code of the property (if using Vicmap, this is usually PROP_PFI or PROPNUM)
<b>addressSource</b>	text	The source of the Asset eg “Vicmap using propnum”
<b>lat</b>	number	The latitude of the report
<b>lng</b>	number	The longitude of the report
<b>status</b>	text	The current status
<b>eventId</b>		
<b>due</b>	date	The next action date such as the next inspection due in this day
<b>assignee</b>	text	The FPN officer assigned to
<b>dateFpnSent</b>	date	The date the notice was “sent” ie exported or printed
<b>infringementNumber</b>	Number	Your organisation’s own infringement number for your billing payment system
<b>infringementSentDate</b>	date	The date the infringement notice was sent
<b>contractors</b>	text	The Id(s) of the contractor resource assigned the spawned FPN task
<b>assessmentType</b>	text	The schema used (in most cases this will be you organisation name)

<b>custom report fields 1</b>	<i>mixed</i>	<i>Custom fields as per your FPN requirements.</i>
<b>custom report fields 2</b>	<i>mixed</i>	<i>Custom fields as per your FPN requirements.</i>
<b>custom report fields 3 etc</b>	<i>mixed</i>	<i>Custom fields as per your FPN requirements.</i>
<b>Media</b>	text	URL to file attachments
<b>date1stInspectionRequired</b>	date	The date the status first changed to this state
<b>dateHazardExists</b>	date	The date the status first changed to this state
<b>dateComplianceInspectionRequired</b>	date	The date the status first changed to this state
<b>dateRequestCompulsoryClearing</b>	date	The date the status first changed to this state
<b>datePostClearanceInspectionReview</b>	date	The date the status first changed to this state
<b>dateHazardCleared</b>	date	The date the status first changed to this state
<b>dateTemporaryExemptionGranted</b>	date	The date the status first changed to this state
<b>dateClosed</b>	date	The date the status first changed to this state
<b>dateNoticeWithdrawn</b>	date	The date the status first changed to this state
<b>due</b>	date	The date that the next action is due**  - This is the main date to use in your letter as the deadline for the owner to clear the risk  - if left blank the date will be set to two or three weeks from the print date before this merge file is created. The delay of two or three weeks is configured by Datalink when the system is setup based on your needs.

## Financial Reconciliation

### Overview

Crisisworks provides tools to track costs and reconcile payments after emergencies. You can:

- Add cost estimates against resource assignments, recovery task assignments and damage estimates.
- Import payment data from your finance system and reconcile against Crisisworks data.
- Automatically match imported data based on matching rules, to streamline the reconciliation process
- Run reports to show estimate and actual spend, categories and broken down in ways to help manage cost recovery.

The Financial Reconciliation module is included as part of the Recovery system.

### On this page

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  - [For Infrastructure Assessments & Recovery Cases](#)
  - [Viewing verified payments for specific records](#)
- [Importing and Applying Payments](#)
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  - [Importing payment data from your finance system](#)
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- Finalising your reconciliation
- Aborting a reconciliation
- Reporting
  - Running a report
  - Report Snapshots
  - Downloading as a Excel spreadsheet
- Appendices
  - Import file formats
    - Crisisworks CSV
    - JD Edwards CSV
  - Auto-matching rules

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## How to access

To begin, check that you have the “Finance Officer” security policy applied to your position. You can verify this by viewing your user profile, then clicking **View Effective Permissions** and checking for “Access to Finance System” (this is done for you if you are using the built-in **Finance Officer** position). See your administrator if you need this policy applied to your position.

If you have the correct permissions, you should see a **Finance** menu item in the menu:




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## Managing Cost Estimates

Cost estimates are managed directly from the edit screen of the item being costed, and only selected Crisisworks record types support adding cost estimates.

### For Requests

Requests allow for the addition of resource assignments, via the **Resources & Costs** fieldset of the **Request** form.

1. To add a new request, click **New Request** from the **New** button at the top left of screen
2. On the new request form, expand the **Resources & Costs** fieldset, then click **Add New** to add a resource assignment
3. Enter the resource assignment particulars
  - a. Search for the resource you wish to assign and select it from the list. You can also add a new resource by typing its name.
  - b. Enter the quantity required. The units and unit rate are determined by the resource record and are displayed on screen if set. These can be managed for each resource via **Settings > Resources**.
  - c. Optionally add a reference, and any other details for the job that aren't present in the request details
  - d. When the resource assignment is completed, you can check the **Completed** box. This happens automatically when a request is resolved, but is useful to do in the event that an open request has multiple resources assignments and should remain open until all are complete.
4. You can add multiple resource assignments against the one request
5. Press **Save** to save the request

Resources & Costs ^

**Resources**

1. **Resource** ✕

D9 bulldozer and crew

**Quantity**

3      Quantity (\$350.00 per per hour)

**Reference**

**Details**

Completed

[Add New](#)

**Cost Recovery Method \***

None - no authorisation has been obtained ▾

If costs are incurred, who will pay?

The cost estimate for each resource assignment is automatically calculated based on the quantity x the unit rate, and a total cost for the request is calculated based on the sum of all resource assignments recorded against it. Note that the total cost estimate is not displayed on the request record.

## For Infrastructure Assessments & Recovery Cases

**Infrastructure Assessments** (for asset and infrastructure recovery) and **Recovery Cases** (for private property and recovery services for residents) support a unified **Services and Tasks** system, which allows for the tracking of services required in municipal recovery across all pillars of recovery.

1. To add an **Infrastructure Assessment** or **Recovery Case**, click **New Infrastructure Assessment** or **New Case** from the **New** button at the top right of screen.
2. For **Recovery Cases**, scroll down to the **Services & Tasks** fieldset. For **Infrastructure Assessments**, the scroll down to **Service Required**.
3. Click **Add New** to add a new service, then enter the particulars of the service
  - a. Select the category of the service (e.g. Repair and Reinstatement, Fencing, etc). These categories are managed in **Settings > Internals > Lookups**.
  - b. Change the Provisioning Status and Priority if required
  - c. Enter the details of the service required
  - d. Optionally enter a reference such as a purchase order number
  - e. If known, enter a cost estimate
  - f. If you are assigning directly to a service provider, select them here, otherwise this can be done later. Note: Only service providers that are both within the appropriate category (one of **Infrastructure Assessment Tasks** or **Recovery Service Tasks**) and are actively involved within the event (via the **Events > Manage Resources**) will show in this list.
4. Multiple services can be added to one case
5. Click **Save** to save the record

### Services Required

1. ✕

**Category \***

**Provisioning Status \***

**Priority**

**Details \***

Format ▾
**B**
*I*

**Reference**

Enter invoice number or any other reference numbers here

**Assigned Service Provider**

**Cost Estimate (\$)**

Enter a cost estimate

➕ Add New

Assign tasks to contractors

Within this form, each service has its own **Cost Estimate** field that supports a dollar figure for the estimated cost of the service. Unlike the resource assignment system used in requests, in recovery, services can be specified without nominating a contractor or service provider. This means you can enter a cost estimate ahead of nominating a service provider to do the work.

The total of each estimated cost is applied to the parent record's **Total Cost Estimate** field automatically, but this can also be overridden if a higher value is required. This override allows you to quickly add rough estimates of cost for damages without going to the detail of recording individual recovery tasks. It will be automatically replaced by the sum of the recovery task cost estimates if that value becomes higher.

#### Financial ⤴

**Total Cost Estimate (\$)**

The total estimated cost of all services to be provided. This will be updated automatically on save if the total cost of services exceeds the value entered.

**Total Cost To Date (\$)**


A calculated total cost of all services provided

## Viewing verified payments for specific records

When viewing a record that has linked and reconciled payments via the finance system, the list of **Reconciled Payments** will appear in the sidebar.

**Infrastructure Assessment #3544: Tulloch Ard Road (South) BUCHAN, From 0 to 3650m** Back Edit

**Directions**



**Financial**

Total Cost Estimate (\$)	Total Cost To Date (\$)
48300.00	22510.00

**Reconciled Payments**

Date	22/08/2014
Amount	22211.66
Account Ref	5511.7351
Ref 1	102596
Ref 2	
Ref 3	Resheeting Tulloch Ard Rd
Description	Whelans Group Investments Pty

Date	25/08/2014
Amount	298.34
Account Ref	5511.7351
Ref 1	175344
Ref 2	
Ref 3	Resheeting Tulloch Ard Rd
Description	Whelans Group Investments Pty

**Assessment**

**Description of Damage**  
Resheet road due to excessive use during fires

---

**Repair Works**

**Scope of Repairs**  
gravel and resheet road

## Importing and Applying Payments

The main purpose of the financial reconciliation system is to provide a way to import and apply payments to the damage infrastructure, recovery cases and requests made during an emergency.

The overall steps are:

1. Export a list of payments from your accounting software
2. Import the file into Crisisworks
3. Reconcile the payment records against Crisisworks records
  - a. Records need to be **attached** to a Register Item and assigned a **category**
  - b. Auto-matched records work by matching to asset number or item ID
  - c. Records can alternatively be marked as **Rejected**, which means Crisisworks ignores the payment
4. Finalise the payments when you have finished reconciling the payments

## Exporting financial payment data from your accounting system

Each system is different so this section cannot be prescriptive, however in general Crisisworks supports a CSV export where each row is a record of a payment that needs to be reconciled. In practice this is usually the "detail line" level of an approved invoice, rather than the invoice or payment itself. It is up to you whether you work in a cash or accrual perspective.

Crisisworks can support different import schemas to match the outputs of many different systems. Currently it supports two formats:

1. Crisisworks Finance CSV Format
2. JD Edwards CSV Format

Details can be found at the appendix to this guide.

When exporting, it is typical that you may export and import multiple periods (e.g. perform this process each month on the latest month's data). To support this approach, Crisisworks allows you to name each import so you can avoid overlapping time periods.

## Importing payment data from your finance system

To import the file you exported, follow these steps:

1. First, log into Crisisworks and select the appropriate event from the top right hand event selector.
2. Next, navigate to the Finance Reconciliation system (**Finance > Reconciliation** in the menu)
3. This screen shows a list of all "Reconciliations" (previous imports)
4. Click **Start a new reconciliation** to import a new file
5. Next, enter a summary of the import file, upload the file, and select the schema
6. Check the "Auto-Reconcile" option if you want Crisisworks to attempt to auto-match the payments to Crisisworks records. This alleviates the manual matching process for invoice data that contains matching asset codes or Crisisworks record IDs.
7. Click **Upload** to begin the process

**Ledger Summary \***

Please enter a summary for the ledger that will help you identify it.

**File \***

We need a file to import your ledger entries. This will usually be a .CSV file from your accounting package.

Auto-Reconcile

Check this box if you'd like the system to attempt to automatically reconcile the data.

**Select Schema**

Once the file has been uploaded, background processing will commence and this can take a few minutes. The Reconciliations data grid will show the current status of the import.

Your ledger is being initialised - this might take a little while. Go get a coffee and we'll send you an email when it's done.

## Reconciliations

The following reconciliations are in progress.

#	Status	Name	Date	Amount	Entries	Progress	
1	Error	test	7/3/2017	\$0.00	0	-	<a href="#">Remove</a>
2	Attempting automatic matching... (0 / 0)	test2	7/3/2017	\$0.00	0	-	

If the imported file contains errors, it will get a status of **Error**, and you will need to try again.

This process may take up to 15 minutes to complete, during which time you can go on with other work or close your browser window. Check back to this screen periodically until the status says **Ready for matching or finalising**.

## Reconciling payments

Once the reconciliation file has been processed it will be ready for you to work with, and the status will change to a hyperlink called **Ready For matching or finalising**. Click that link to commence reconciliation.

#	Status	Name	Date	Amount	Entries	Progress	
1	<a href="#">Ready for matching or finalising</a>	Flood 2016 Sept Import	8/3/2017	\$400.00	3	67%	<a href="#">Remove</a>

This will then load the reconciliation data grid as follows.

Reconciliations: Total	ID	Status	Amount	Account	Description	Date	Ref 1	Ref 2	Ref 3	Attached Item ID	Category
<b>Total</b> 3	1	Verified	100	5442.7351	Boola Views Pty Ltd	13/6/2027	REF1		Remove felled tree	15154	
New 1	2	Rejected	200	5511.7351	Boola Views Pty Ltd	13/6/2027	REF2		Clear cypress tree		
Auto Matched 0	3	New	300	5511.7351	Boola Views Pty Ltd	13/6/2027	REF3		Clear cypress tree		
Verified 1	Displaying 1 to 3 of 3 items										
Rejected 1	<input type="button" value="Set Category"/> <input type="button" value="Attach To..."/> <input type="button" value="Reject"/> <input type="button" value="Finalise Ledger"/>										

During the reconciliation process all data is in a draft state, and no payments are applied until you finalise the import at the end of the matching process. You can leave this screen at any time and return to it with your current draft saved.

The aim for processing payments is to:

1. match each payment to a Crisisworks record, and
2. allocate it to a financial category

To match a payment to a Crisisworks record:

1. Select one or more payments using the selection checkbox against the record
2. Click **Attach To...** and then enter the Crisisworks record ID you wish to attach these payments. You can do this with multiple payments at once, but the record must be in the correct event being reconciled, and the record must be one of the supported types (**Request**, **Recovery Case** or **Infrastructure Assessment**)
3. **Tip:** use two tabs or browser windows to allow you to search Crisisworks records for their IDs whilst remaining in the reconciliation screen. This also allows you to add new records that may not exist, and then add the resulting record ID directly to the payment record.

To set a category:

1. Select one or more payments using the selection checkbox against the record
2. Click **Set Category**, then select one of the categories (Emergency, Non-Emergency). These categories exist to assist with NDRRA claims.

If payment records appear that should not be matched, you can reject them and Crisisworks will not apply them during the finalise step.

1. Select one or more payments using the selection checkbox against the record
2. Click **Reject**
3. **Tip:** If you later want to unreject the payment, simply match it and it will be automatically unrejected.

The counters on the side keep track of how you are going:

Counter	Description	Payment will be applied when finalised
Total	The total number of payments in the import file	-
New	The number of unprocessed payments — these need matching	No
Auto Matched	The number of payments successfully auto-matched by Crisisworks during the import. You can inspect these and leave them as-is, or you can override individual matches.	Yes
Verified	The number of payments you have manually matched.	Yes
Rejected	The number of payments to be ignored during this import	No

At the top of the counters sidebar is a magnifying glass, which takes the user to a search interface where the user can search payment data by its data.



## Finalising your reconciliation

Once you have matched or rejected all payments, you can proceed to finalise the payments. Finalising writes the payments against the Crisisworks records, and allows that data to be accessed via the reporting system.

Although there is no undo feature, Crisisworks will sanity-check your payments to ensure that all payments are allocated to compatible records, that the records are within the correct event and that you have set valid categories to each payment. It will also not allow you to proceed if you have any payments in the **New** status.

To finalise your import, click **Finalise Ledger** from the Reconciliation data grid. The system will prompt you to type the word 'Yes' to confirm the reconciliation is complete. Once this is done, the finalisation process will commence in the background. It may take up to 15 minutes to process, and during this time you can safely close off your browser to perform other work. Check the status of the work via the status column of the Reconciliations screen.

Once the reconciliation is complete, you can no longer remove the reconciliation file, and the payments will appear for the supported records, and in reports.

## Aborting a reconciliation

At any time during a reconciliation you can click **Remove** from the reconciliations data grid to remove the reconciliation file and start again.

## Reporting

A number of reports are available to view the payments in context with the emergency.

To access the reports, click **Overview > Reports > Recovery Reports**

Report	Description
Finance - Recovery Cost Per Asset Class Summary	A report summarising costs per asset class. Please note - these costs are derived from Infrastructure Assessments only
Finance - Recovery Cost Per Asset Summary	A report summarising costs per asset. Please note - these costs are derived from Infrastructure Assessments only. The actual cost is derived from the Finance Module.
Finance - Recovery Cost Per Infrastructure Resource Assignment	A report detailing the costs per resource assignment for Infrastructure Assessments. The actual cost is derived from the Finance Module.

## Running a report

1. Navigate to the report you wish to run (Overview > Reports)
2. Click **Generate Report** to generate a new report (or you can load previously-generated reports via the **Snapshots** menu item on the left-hand side)
3. Select the event to report upon
4. Configure the additional optional filters as required
5. Select and deselect the columns as required for the output
6. You can group by a particular column, and then order by another column.
7. Click **Run Report** to execute the report

## Report Snapshots

Reports can take a few minutes to complete, during which time you are safe to close the browser or navigate to other screens. If you do remain on the page, the completed report will automatically appear once it has generated. If you decided to come back later, the completed report will be available from the **Snapshots** menu item on the home page of the report.

## Downloading as a Excel spreadsheet

Once viewing the completed report snapshot, you can view and print as-is, and you can also generate and download the data in an Excel spreadsheet. To do this, scroll to the bottom of the report to find the buttons.

## Appendices

### Import file formats

#### Crisisworks CSV

CSV Heading	Description
-	A unique identifier for the record
amount	The value of the payment
accountRef	The posting account
lookup1	Used for automatically matching data. This is configured onto lookup1 to work with auto-matching rule 1, which allows auto-matching for contractors that quote asset numbers.
lookup2	A Crisisworks Item ID (e.g. Request ID). This is mapped to lookup2 to work with auto-matching rule 2, which allows auto-matching for contractors that quote Crisisworks record IDs.
description	A descriptive text for the payment
paymentDate	The date of payment
paymentRef1	A reference field for matching/filtering
paymentRef2	A reference field for matching/filtering
paymentRef3	A reference field for matching/filtering

#### JD Edwards CSV

Internal ID	CSV Heading	Description
id	-	A unique identifier for the record

amount	LT 1 Amount	The value of the payment
accountRef	Account Number	The posting account
lookup1	Asset Number	Used for automatically matching data. This is configured onto lookup1 to work with auto-matching rule 1, which allows auto-matching for contractors that quote asset numbers.
lookup2	Item ID	A Crisisworks Item ID (e.g. Request ID). This is mapped to lookup2 to work with auto-matching rule 2, which allows auto-matching for contractors that quote Crisisworks record IDs.
description	Explanation	A descriptive text for the payment
paymentDate	Batch Date	The date of payment
paymentRef1	Sub-Ledger	A reference field for matching/filtering
paymentRef2	Asset Number	A reference field for matching/filtering
paymentRef3	Explanation -Remark-	A reference field for matching/filtering

## Auto-matching rules

The following built-in auto-matching rules are included by default.

#	Finance Ledger Item Table	Matches to	Comments
1	lookup1	Asset.code	<p>If the payment record contains an asset code in this field, Crisisworks will look for any matching records that are related to that asset. If any are found, the first record is auto-matched to this payment.</p> <p>This allows your contractors to quote the road's asset number to auto-allocate it to the damaged road in Crisisworks. There is typically only one impact assessment record per asset per event, which makes this a reliable method for working with contractors, especially if they already know the asset numbers as part of their daily work.</p>
2	lookup2	Register_Item.id	<p>If the payment record contains an ID in this field, Crisisworks will look for any Crisisworks records in the current event with that ID. If it exists, it will be auto-matched.</p> <p>This rule allows contractors to quote the Impact Assessment, Request or Recovery Case ID in their invoice to auto-allocate their payment to that record.</p>

Additional auto-matching rules can be configured as required for customers with specialised requirements — contact our service desk for details.

## Fire Permits

For more information on this module, please contact [Datalink Service Desk](#).

## Technical Reference

### Default schema

Field ID	Label	Form Type	Data Type	Values	Notes
firstName	First Name	text	string(255)		Required
lastName	Last Name	text	string(255)		

organistion	Organisation	text	string(255)		
postalAddress	Postal Address	textarea	clob		
phoneNumber	Phone Number	tel	string(255)		
email	Email	text	string(255)		
commsMethod	Preferred method of contact	radio	enum	post, email, phone	Required
locationManual	Property Details	textarea	clob		If you can not find the address in the above look up, please enter the location of the requested burn here.
requestedBurnStartDate	Requested Start Date	datePicker	timestamp		Please use the date picker calendar icon to select the date.
requestedBurnCompletionDate	Requested Completion Date	datePicker	timestamp		Please use the date picker calendar icon to select the date.
cfaBrigade	CFA Brigade	select	string(255)		
burnArea	Estimated Burn Area (Hectares)	text	string(255)		
burnReason	Reasons for burn/Additional Comments	textarea	clob		Required; please provide details regarding why the requested burn is required.
materialsBeingBurned	Materials Being Burned	info			Read only
materialsBeingBurnedWindrow	Window	checkbox	boolean		
materialsBeingBurnedStubble	Stubble (from crops such as Wheat, Barley,Oats, Peas)	checkbox	boolean		
materialsBeingBurnedOther	Other	checkbox	boolean		
materialsBeingBurnedOtherDetails	Other Materials Being Burned	textarea	clob		Only available if 'materialsBeingBurnedOther:true'
acknowledgementInfo	Acknowledgement	info			Read only
acknowledgement	I confirm that the particulars are true and correct and that i am authorised to conduct the burn on the above land.	checkbox	boolean		Required
approvedBurnStartDate	Approved Start Date	stateTransitionDatePicker	timestamp		When this date is reached, the item Status will automatically transition to "In Progress"
approvedBurnCompletionDate	Approved Completion Date	stateTransitionDatePicker	timestamp		When this date is reached, the item Status will automatically transition to "Approved Burn Period Expired".
siteVisited	Site Visited	checkbox	boolean		
siteVisitedDate	Site Visited Date	dateTimePicker	timestamp		Only available if 'siteVisited:true'
activity		auditLog			

## Non-schema fields

Field ID	Label	Form Type	Data Type	Values	Notes
hasAsset	Property	asset			Required; supports Parcel and Property; MDA94 projection used for geospatial assets; the location can be searched either by parcel or property. Once the type has been selected, start typing your address and then select the correct match. Only one property can be added per application. If you have multiple properties, a separate application for each should be submitted.
hasEvent		event			
hasMap	Location	geo			Uses MDA94 projection
hasStatus		status			Only available if '^id:true'

hasTags		tags			
---------	--	------	--	--	--

## Workflow

Workflow ID	Label	Value	Next States	Initial State
NEW	New Application	20	NEW, ISSUED, INPROGRESS, DECLINED, CLOSED	
ISSUED	Permit Issued	30	ISSUED, INPROGRESS, DECLINED, CLOSED	
DECLINED	Permit Declined	-40	DECLINED, CLOSED, ISSUED	
INPROGRESS	In Progress	50	INPROGRESS, ISSUED, COMPLETED, CLOSED	
COMPLETED	Approved Burn Period Expired	60	COMPLETED, INPROGRESS, CLOSED	
CLOSED	Application Closed	-10	CLOSED	

## Weed & Pest Management

This page contains only partial information. For more information on the usage of this module, please contact [Datalink Service Desk](#).

## Technical Reference

### Main schema

Field ID	Label	Form Type	Data Type	Values	Notes
weedName	Species	select	string(255)		
weedNameOther	Name of Weed	text	string(255)		Only available if 'weedName:/other/'
percentageCover	Percentage Cover	select	string(255)		
identificationMedia	Assessment Photos	media			
supportingInfo	Supporting Information	rte	clob		Any additional information relevant to this inspection.
method	Treatment Method	select	string(255)		
chemical	Chemical	select	string(255)		
windDirection	Wind Direction	select	string(255)		
windSpeed	Wind Speed (KPH)	select	string(255)		
temperature	Temperature (°C)	select	string(255)		
treatmentInfoPlaceholder		info			Read only
treatmentDate	Treatment Date	datePicker	timestamp		
treatmentStartTime	Site Start Time	timePicker			Defaults to
treatmentEndTime	Site End Time	timePicker			
treatmentCalculatedTotalTime	Calculated Treatment Time(hrs)	text	string(255)		This time is calculated automatically using the the above Treatment Start and End Times if set.
treatmentManualTotalTime	Treatment Time Override	number	integer		Use this field to manually enter the Treatment time in hours (ef 5.75). This will override the calculated time.
treatmentMedia	Treatment Photos	media			
details	Treatment Comment	rte	clob		Any additional information relevant to the treatment.
assignee	Assessor Assignment	assignment			Single assignment to Users

assigneeTreatment	Treater Assignment	assignment			Single assignment to Users
activity		auditLog			

## Non-schema fields

Field ID	Label	Form Type	Data Type	Values	Notes
hasAsset	Asset	asset			Required; supports Road and Reserve; MDA94 projection used for geospatial assets
hasEvent		event			
hasMap	Infestation Location	geo			Uses MDA94 projection
hasStatus	Status	status			
hasTags		tags			

## Workflow

Workflow ID	Label	Value	Next States	Initial State
NEW	Inspect	1	NEW, OPEN, COMPLETED, UNABLE, NOTREATMENT, CLOSED	
OPEN	Treatment Required	2	OPEN, STARTED, COMPLETED, UNABLE, NOTREATMENT	
STARTED	Treatment In Progress	3	STARTED, OPEN, COMPLETED, UNABLE, NOTREATMENT	
COMPLETED	Treated	4	COMPLETED, CLOSED	
UNABLE	Unable to Treat	5	UNABLE, OPEN, STARTED, CLOSED	
NOTREATMENT	No Treatment Required	6	NOTREATMENT, CLOSED, OPEN	
CLOSED	Closed	-2	CLOSED, OPEN	

## Rostering & Availability

This page contains only partial information. For more information on the usage of this module, please contact [Datalink Service Desk](#).

## Technical Reference

### Timesheet Availability

#### Default schema

Field ID	Label	Form Type	Data Type	Values	Notes
fromDate	Date from	datePicker	timestamp		Required; A valid date
toDate	Date until	datePicker	timestamp		Required; A valid date
availableUserId	User	select	string(255)		Required; A valid user ID
activity		auditLog			

## Non-schema fields

Field ID	Label	Form Type	Data Type	Values	Notes
hasEvent	Location	event			Always uses event <i>globalReferences</i>
hasStatus	Availability	status			

hasTags	Tags	tags			
---------	------	------	--	--	--

## Workflow

Workflow ID	Label	Value	Next States	Initial State
NEW	New	1	AVAILABLE, UNAVAILABLE	
AVAILABLE	Available	2	AVAILABLE, UNAVAILABLE, CANCELLED	
UNAVAILABLE	Unavailable	3	UNAVAILABLE, AVAILABLE, CANCELLED	
CANCELLED	Cancelled	-1	CANCELLED, AVAILABLE, UNAVAILABLE	

# FAQs and Practice Notes

In this section

## Using global events to manage permanent information

### On this page

- [Overview](#)
- [When to use global events](#)
- [When not to use global events](#)
- [Creating global events](#)
- [Securing global events](#)
- [Working with global event data](#)

## Overview

Global events are workspaces that are used to store information to be accessed across multiple events.

Examples of records that use global events are **operating procedures**, **documents** and **contact lists** — in these cases, users can access this information regardless of the event they are working on, and the information remains active irrespective of when regular events are opened or closed.

For most installations, Crisisworks comes with two built-in global events:

1. Global Workspace — all users normally have access to data in this workspace, which makes it a good place to store procedures, policies, plans and contact lists.
2. Organisation Workspace — only officers of the primary organisation normally have access to this workspace, making it a good place to store data that should not be seen by external users such as agency EMLOs.

Administrators can create additional global events to provide private workspaces for key positions.

## When to use global events

Global events are useful for securely storing documentation, contact lists and other information that does not pertain to any specific incident or event. Data in global events are only accessible by users sharing a position that is attached to the event, meaning secure workspaces can be easily created.

Use global events if you want a private place to put contacts or library records that can only be seen by some positions which will be accessible across all events.

Global events replace the concept of "Agency Workspaces" in Crisisworks 3.

## When not to use global events

Global events are not for incidents. For any real emergency, use a normal event instead.

Global events can not be selected in the event selector, nor in the manage duty Screen. This means users cannot go on duty for global events. Instead, users are automatically given access to global events whenever any of their competent positions match positions allocated to a global event.

## Creating global events

To create a global event:

1. First, create a regular event.
2. Now edit the event and check the Global Event checkbox, then re-save the event.

**Advanced**

**This is a global event**  
Global events are active in the user interface irrespective of which event you select. Consult the documentation before use.

**This is a template.**  
Check this box if you'd like to use this event as a template to create future events from.

See [Setting an event](#) for more instructions on setting up an event.

## Securing global events

Global events are managed like any other event, where you add and remove positions to the event to provide access. Unlike regular events, users cannot go on duty for global events, so security is granted immediately based on the user having a competency for any position added to the event.

To manage access to global events.

1. Click Manage Events
2. Click the global event you wish to manage
3. Click Manage Positions
4. Select the positions you wish to have access, and press save



The screenshot shows the Crisisworks interface with a navigation bar at the top containing 'DEV-1', 'Overview', 'Events', 'Operations', 'Recovery', 'Library', 'Settings', 'Help', 'Zombie Invasion', and 'Lance Villarreal'. Below the navigation bar is a breadcrumb trail: '/ Events / Council Workspace'. On the left is a sidebar with menu items: 'General', 'Positions', 'Registers', 'Resources', and 'Activity Summary'. A yellow notification box at the top of the main content area states: 'This is a system event, limited additions can be made. Any removed options will be reapplied when the system is next updated.' Below the notification is a table of resources.

	Position	Organisation	On Duty	# Competent	# On Call
<input type="checkbox"/>	<b>Datalink</b>				
<input type="checkbox"/>	Datalink Administrator	Datalink	-	0	0
<input type="checkbox"/>	Datalink Developer	Datalink	-	1	0
<input type="checkbox"/>	<b>Coordinators</b>				
<input checked="" type="checkbox"/>	Municipal Emergency Resource Officer	Council	Lance Villarreal	3	0
<input type="checkbox"/>	Deputy MERO	Council	-	0	0
<input checked="" type="checkbox"/>	Municipal Recovery Manager	Council	-	3	0
<input type="checkbox"/>	Deputy MRM	Council	-	0	0
<input type="checkbox"/>	Municipal Emergency Response Coordinator	Police	-	2	0
<input type="checkbox"/>	<b>Council</b>				
<input checked="" type="checkbox"/>	User Administrator	Council	Lance Villarreal	5	0
<input checked="" type="checkbox"/>	Full Access Administrator	Council	-	1	0
<input checked="" type="checkbox"/>	MRM/MERO Assistant	Council	-	0	0
<input checked="" type="checkbox"/>	Council EMLO	Council	-	3	0
<input checked="" type="checkbox"/>	Recovery Officer	Council	-	4	0

Note that any built-in global events (such as "Council Workspace" and "Global Workspace") can have positions added, but positions cannot be removed.

## Working with global event data

Records in global events are integrated into the register views used for managing normal events, so global and non-global records appear in the same list.

As an example, in the following image, 4 global contacts and 1 council contact are displayed in the same list as the 12 records in the selected event. The datagrid shows the 17 records in total, and users work across the entire list.

ID	Name	Position	Phone	Type	Updated	Event
14771	ACME Fencing ACME Fencing		555 1234	Contact_item		Global Workspace
14784	Smith, Colin		555	Contact_item		Larger Emergency Example
14790	BOM BOM			Contact_item		Global Workspace
14807	BOM BOM			Contact_item		Larger Emergency Example
14809	Flintstone, Fred		555 12234	Contact_item		Larger Emergency Example
14811	Smith, Mary		5555	Contact_item		Larger Emergency Example
14814	Jackson, Mary			Contact_item		Larger Emergency Example
14815	Ambulance Ambulance		555 emergency	Contact_item		Global Workspace
14824	Smart, Maxwell Control	Secret Agent	555 shoe	Contact_item		Council Workspace
14822	Cow, pat Farmer	Owner/operator	98763698	Contact_item		Larger Emergency Example

Annotations in the screenshot include: a yellow box stating "All of the records from the current event and shown together with the records from all global events you have access to"; red circles around "Global Workspace" in the Event column for records 14771, 14790, and 14815; a red circle around "Council Workspace" for record 14824; a red circle around "4th item off screen" at the bottom right; and a red circle around the "Global Workspace" counter in the left sidebar.

Counters in the left-hand sidebar allow the user to see only local event records (click the "Large Emergency Example" counter), or see just one of the two available global events (clicking "Global Workspace" or "Council Workspace").

When adding or editing records, users with permission to select events can allocate the record into one of their global events, by selecting it in the **Event** field, which can be found in the **Advanced** fieldset.

The screenshot shows the 'New Library Document' form with the following details:

- Title:** Asthma Storm Practice Note
- Body:** Rich text editor with formatting options (Bold, Italic, Underline, Bulleted List, Numbered List, Indent, Outdent, Table, Image, Link, Unlink).
- Attachments:** Add File or drag and drop files.
- Details:** Reference type: Document; Status: Current.
- Tags:** Input field with instructions: "(Start typing for suggestions, use comma to separate tags. New tags will automatically be created)".
- Advanced:** Event dropdown menu is open, showing options: Active, **Zombie Invasion** (selected), Global, Council Workspace, Global Workspace.

The 'Zombie Invasion' option in the Event dropdown is circled in red.

## Using event templates to simplify future event creation

Event Templates allow administrators to set up preloaded records, participants and other preferences that are “copied” into newly created events. Use event templates to:

- save time,
- enforce consistency and reduce errors, and
- automatically create records and send announcements to participants and on call users,

at the time the event is created.

Large organisations can implement many of the checklists from their Emergency Management plans by entering them into an event template or into a global reference library. This will make access to the information during an emergency far quicker and more effective.

### Creating an event template

To create an event template:

1. Create a regular event
  - a. Click Events > Manage Events
  - b. Click New Event
  - c. [Set up the event normally](#)
2. Go on duty and select the event to work with it
3. Add any register records (e.g. [information messages](#)) you wish to be part of your template. These records will be created automatically for any event created off this template in future.
4. When you are happy with the event, edit it and change it to a template.
  - a. Click the event's name from the event selector at the top right of screen
  - b. Click Edit Event
  - c. Check the **This is a template** event checkbox
  - d. Click Save

You will be taken off duty for the event and it will no longer be available for use as a regular template, and it will become available within the Event Templates select box for future event creation.

To edit this event template again, you can uncheck the template checkbox to convert it back to a regular event, then go on duty to manage its records.

Elements that can be pre-created in an event template include:

- **Positions** - Add all of the staging positions you would like, knowing you can always add more later if the event/emergency grows larger than expected.
- **Resources** - Add the resources from your system resources, resources can be used to help take costs and utilisation of resources
- **Registers** - Most of the time you will use all of the registers you have licensed, however you can choose a different set of registers.
- **Requests** - Any requested saved in an event template will be cited into the new event, this includes all data elements in the request, including the assignment of the requests.
- **Information** - Information can be set up, some could be place holders for information to be added later. Any information added in the Rich Text area will come across, so you can have information such as check lists or Tables pre created to edit in the new event.
- **Contacts** - Contacts will also be copied into the new event however if you know your contacts in advance, you should consider using “Global” contacts, as these contacts are available in all events for all users that have a matching position in the global events.

### Creating events based on event templates

To create an event based on a previously created event template, simply select the event template from the Event Templates selector when [creating an event](#).

## Providing agency EMLOs with read-only access to recovery data

As of Crisisworks 4.4, a new built-in security policy is available to provide read-only access to users.

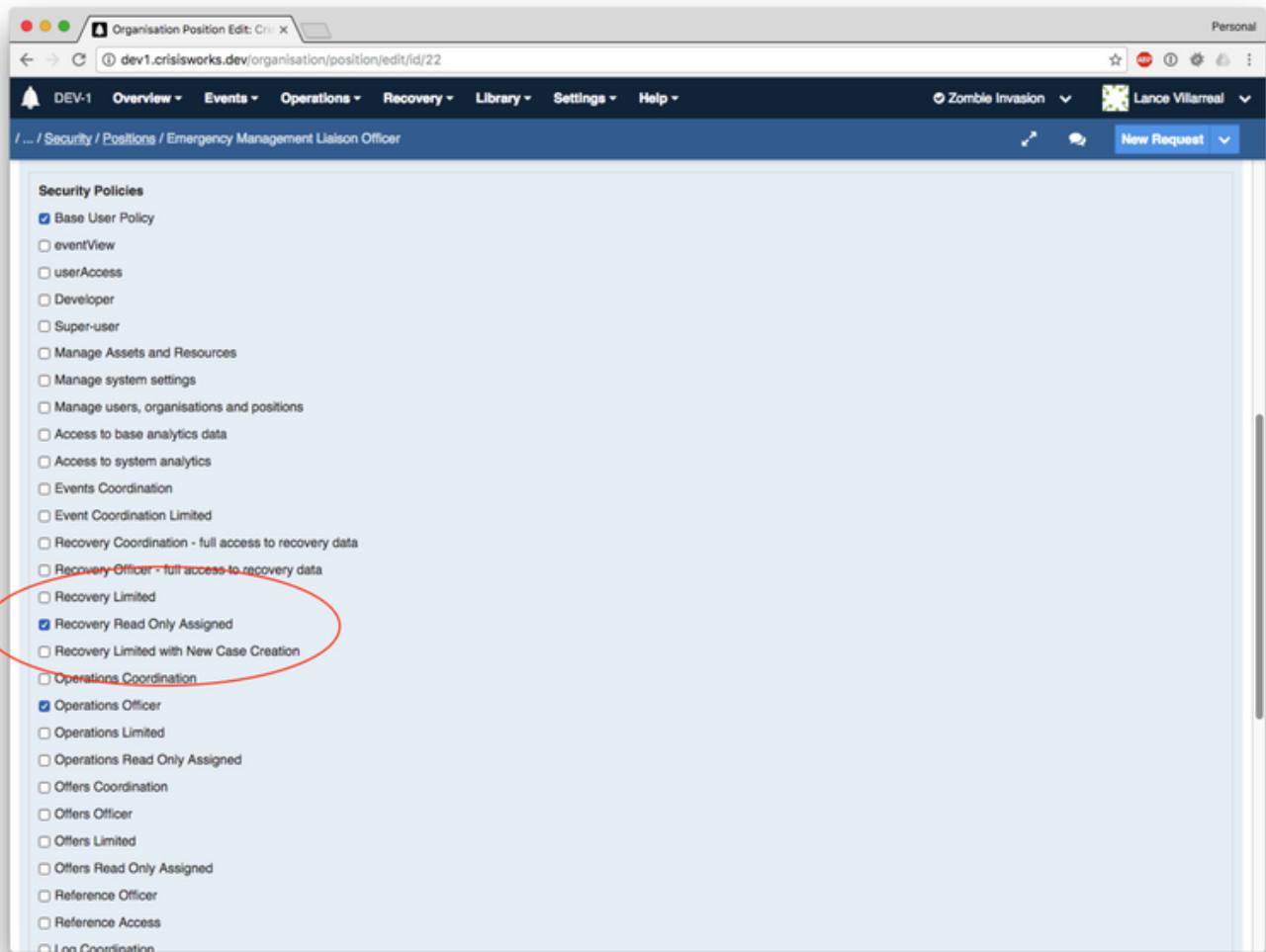
Crisisworks grants permissions on a per-position basis, so you must first identify which position you wish to grant this access. Common examples include Red Cross, DHHS, DELWP, VCC and DEDJTR.

To grant this access:

1. As an administrator, first log onto Crisisworks
2. Go to Settings > Positions
3. Select the position you wish to grant access
4. Select the policy you wish to grant based on the following table — recommended is "Recovery Read Only Assigned"
5. Click save

The following policies grant read only recovery data

Policy Name	Description
Recovery Coordination	<b>NOT RECOMMENDED</b> Provides full read, write and coordination access to recovery data
Recovery Officer	<b>NOT RECOMMENDED</b> Provides full read access, with write access to assigned recovery data
Recovery Limited	Provides read/write access to cases created by the user
Recovery Limited with New Case Creation	Provides read/write access to cases created by the user, and can create new cases
Recovery Read Only Assigned	Provides read only access to assigned cases



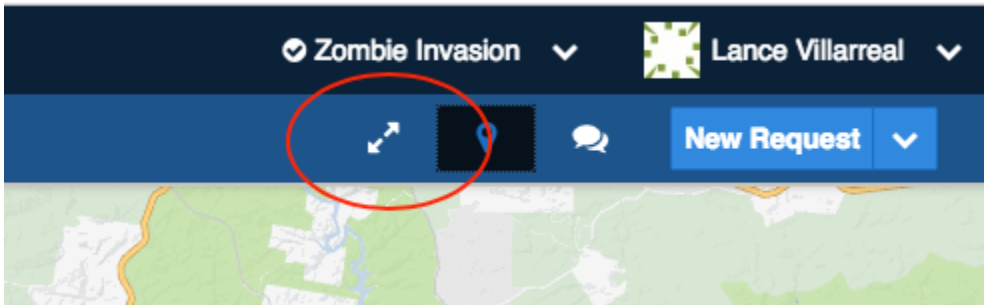
## Setting up projectors

In Crisisworks, almost any page can be set up in a full-screen projector mode, and when activated, the site layout is simplified to focus on the content rather than navigation, and the current page will automatically refresh periodically.

- [Enabling Projector Mode](#)
- [Projecting the dashboard](#)
- [Projecting a register datagrid \(e.g. requests\)](#)
- [Projecting a full-screen map](#)
- [Common room configurations](#)

## Enabling Projector Mode

To enable projector mode, simply browse to the page you wish to project, and click the projection "zoom" icon at the top right of screen.



## Projecting the dashboard

The dashboard can be projected to show a live feed of recent activity, important announcements and record totals as an incident progresses.

To project:

1. Navigate to the dashboard
2. Click the Projector Zoom icon at top right of screen

The datagrid will show live audit activity updates and counter updates, and the page itself will refresh every 90 seconds to maintain long-term browser health.

## Projecting a register datagrid (e.g. requests)

Datagrids are at the heart of Crisisworks, and projecting these screens can create a live filter of important data to the team.

To project:


1. Navigate to the register you wish to project
2. Click the Projector Zoom icon at top right of screen
3. Now configure the datagrid's settings:
  - a. select the counter or filter you wish to view,
  - b. show or hide the map, and
  - c. select the sort order on the datagrid

The page will display instantaneous updates to counters, with the results on the datagrid and map refreshed at approximately 90 second intervals. When the page refreshes, your settings are retained.


## Projecting a full-screen map

A full-screen map conveys a sense of scope to officers in the EOC, and it can be set up as follows:

1. Project a register datagrid as explained above
2. Expand the map

3. Click on the Map Layers button (  ) to configure the layers you'd like to monitor — recommended is "SCC Observations", "SCC

Points of Interest" all of the built-in "Open" layers (e.g. Open Requests, Open Recovery Cases)

4. Finally, click the Map Zoom button from the map controls ()

The datagrid will maintain the map in full-screen mode as it refreshes its data.

## Common room configurations

It is recommended to have at least two projectors, with more being ideal.

Number of projectors	Recommended configuration
1	Project the <b>Request</b> datagrid with a filter on <b>Active</b> , ordered by last updated. Optionally expand the map and enable the <b>SCC Observations</b> layer.
2	Have one projector on the <b>Dashboard</b> , with the other on the <b>Request</b> datagrid with a filter on <b>Active</b>
3+	Add additional projectors as required, such as: <ul style="list-style-type: none"> <li>• A full-screen map</li> <li>• Separate datagrids for information and requests</li> <li>• The request datagrid filtered for a specific problem within the event (e.g. 'unassigned' is great if you're experiencing a flood of inbound requests; 'high priority' is great if you have a large number of open requests)</li> </ul>

## Troubleshooting why a user cannot see library records

The [Library](#) is a great place to store your procedures, policies and reference information, however it is typically configured as a global event and this can present some difficulty with some situations. This article aims to help administrators to understand why this occurs and help grant users access to library documents or indeed any other global content.

## Understanding global events, duty and security

The library uses a [global event](#) to store its data.

Global events allow permanent data to exist irrespective of specific events (such as fires or floods). They are permanently available and therefore do not allow users to go on duty for them, however duty is part of the underlying security model for Crisisworks and users must be on duty for an event to access its data. ,

Crisisworks gets around this by automatically managing a user's access to global event data whenever they go on or off duty to non-global events.

The reasons users typically cannot see library data are:

1. The global event does not contain any positions that the user are competent in, and/or
2. The user is not currently on duty for any events

## Troubleshooting checklist

Please check these possible areas (you will need to have Crisisworks Administration permissions):

	Check	Notes
1	Does the global event have at least one position to which the user is competent?	Make sure the correct positions have been added to the event.  You can edit the positions for the event, after finding the event via "Manage Events" in the event menu.

2	Has the user ever gone on duty?	<p>A user must go on duty at least once in order to have the system configure access correctly. A user cannot go on duty directly to a global event, so you will need a live event for the user to go on duty.</p> <p>We recommend that you have a test or play area that is always open so users can join after they log in, once on duty in any event the library menu appears. Alternatively you may create a 'Standby' event or similar to allow users to be able to go on duty for the first time.</p> <p>Administrators can also manage another user's duties by selecting the user and clicking <b>Manage Duties</b> from the user profile.</p>
3	Does the user/position created actually have access to the reference library?	<p><b>Step one:</b> View the effective permissions for the user</p> <p>Goto the user's record and select the <b>View Effective Permissions</b>, to view if the user has access to the reference library.</p> <p>If the user does not have access then edit the user profile and give the user access to a position that has access, then click save.</p> <p><b>Step two:</b> View the effective permissions for the user's position(s)</p> <p>If after following step one the user still does not have access, check the user's position.</p> <p>From the user's profile, click to the user's position(s) and select the <b>View Effective Permissions</b>, to view if users on duty to that position have access to the reference library. If the position does not have access, edit the position and add "Reference officer" or "Reference access".</p> <ol style="list-style-type: none"> <li>1. A reference officer can add and edit library records</li> <li>2. Reference access gives read only access</li> </ol>

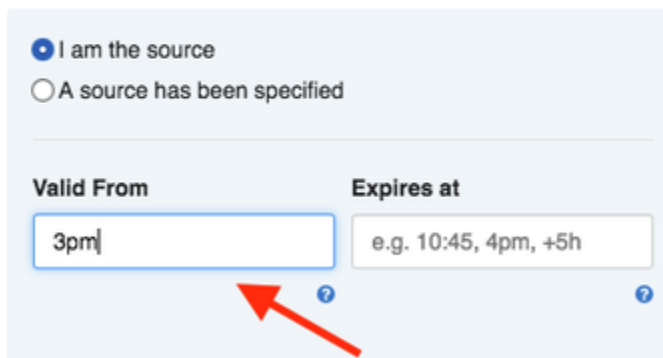
## Using Date and Time Fields

Date and time fields allow convenient ways of entering dates and times in various formats. You can type your desired date/time in one of the formats shown below, and Crisisworks will convert it into a fully formatted date or time when you leave the field.

For example, enter a time into the field:

### New Information

#### Source & Validity



The screenshot shows a form titled "Source & Validity". At the top, there are two radio buttons: "I am the source" (which is selected) and "A source has been specified". Below this, there are two input fields: "Valid From" and "Expires at". The "Valid From" field contains the text "3pm" and has a red arrow pointing to it. The "Expires at" field contains the text "e.g. 10:45, 4pm, +5h". Both input fields have a small blue question mark icon to their right.

and when you leave the field, it will automatically convert into the computed date and time:


## New Information

### Source & Validity

I am the source  
 A source has been specified

---

**Valid From**  **Expires at**



You can always go back into the field to change it if the computed timestamp isn't what you expected.

Examples of formats are:

Absolute date and time format

```
1/4  
1/4/17  
1/4/17 10:00  
1/4/2017  
1/4/2017 10:00  
10:00  
23:45  
10am  
5 pm
```

Relative day



```
last monday, last mon
last tuesday, last tues, last tue
last wednesday, last wed
last thursday, last thu, last thur, last thurs
last friday, last fri
last saturday, last sat
last sunday, last sun
yesterday
today
now
tomorrow
next monday, next mon
next tuesday, next tues, next tue
next wednesday, next wed
next thursday, next thu, next thur, next thurs
next friday, next fri
next saturday, next sat
next sunday, next sun
```

Addition (in the future)

```
+1h, +1hr, +1 h, +1 hr, +1 hour, +2 hours, +2hrs
+1m, +1min, +1 m, +1 minute, +1 min, +2 minutes, +20 minutes, +20mins
+1d, +1 d, +1 day, +2 days
+1w, +1 w, +1 week, +2 weeks
+1M, +1 M, +1 month, +2 months
+1y, +1 y, +1 year, +2 years
```

Subtraction (in the past)

```
-1h, -1hr, -1 h, -1 hr, -1 hour, -2 hours, -2hrs
-1m, -1min, -1 m, -1 minute, -1 min, -2 minutes, -20 minutes, -20mins
-1d, -1 d, -1 day, -2 days
-1w, -1 w, -1 week, -2 weeks
-1M, -1 M, -1 month, -2 months
-1y, -1 y, -1 year, -2 years
```

# Technical Topics

## In this section

## API Integration Guide

Crisisworks has a mature web services API that provides REST and RPC access to key data and functionality. This document provides details for system integrators to develop clients to connect, extract data and control Crisisworks.

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## Introduction

Crisisworks offers a unified web services endpoint for both REST (Representational State Transfer) and RPC (Remote Procedure Call) commands. Some commands are RESTful while others implement an RPC interface. All commands use HTTPS as the transport, and support the common HTTP/1.1 verbs such as GET, POST, PUT, PATCH and DELETE.

The general format for accessing the API is:

```
https://site.crisisworks.com/api/adapter/command?param=value&token=XXX
```

This comprises the following components:

<b>site</b>	Your Crisisworks site URL
<b>adapter</b>	Your selected data adapter; this transforms the data to the appropriate format
<b>command</b>	The command to run
<b>param</b>	Zero or more parameters and their corresponding values — see each command for details
<b>token</b>	Your authentication token, if required.

The API supports different adapters to read and write the data contained within the HTTPS transport. The default and recommended transport is JSON, which reads and writes the data in JavaScript Object Notation.

Adapter	Format	Description
json	Javascript Object Notation	The default and recommended adapter, which reads and writes JSON data using native Crisisworks JSON structures.
csv	Comma Separated Values	This adapter reads and writes data in CSV format, providing ready compatibility to many legacy systems. Due to the nature of CSV as a flat file format, complex linked structures cannot be represented, so it is only recommended for simpler integrations.
geojson	GeoJSON	A read-only adapter that returns JSON data in the open GeoJSON format. This provides ready compatibility for many geospatial platforms such as web mapping systems including OpenLayers and Leaflet.
binary	Binary	A binary response is used by some APIs (for example, <b>file</b> ) to return the raw source file
rss	RSS XML	A read-only adapter that returns the data in RSS format with the geospatial extension. This provides ready compatibility for RSS readers and news ticker systems.

### Example: Calling the "ping" diagnostic command

```
$ curl https://moira.crisisworks.com/api/json/ping
```

```
"2016-10-24T05:34:46+00:00"
```

## Working with Authentication

Most APIs require authentication, and in order to use any authenticated API, you must first acquire a valid API token.

To do this, first call the **register** API command, and supply the user credentials to retrieve a token. From then on, supplying that token to authenticated API commands will perform the command on behalf of that user.

### Fetching an API token

The register command takes a username and password and returns a token for use in using authenticated API commands.

## Inputs

The **register** API command takes the following parameters in a JSON payload within a **POST** method:

Parameter	Type	Mandatory	Description
uuid	string	Yes	A unique code that represents the connected device. For devices this is the device's UUID code. For servers, this should be the server's URL.
platform	string	Yes	A freetext string representing the type of connection — e.g. iPad, iPhone, Windows
version	string	Yes	The version of the client software
name	string	Yes	The name of the device — e.g. "Steve's iPad Pro"
username	string	Yes	The user username
password	string	Yes	The user's password

## Results

If the user is successfully authenticated, the command returns a JSON object with the following values:

Key	Type	Description
token	string	An API token which can be used to perform actions on behalf of a nominated user
htmlHtml	string	An HTML snippet that can be displayed in client software containing help and support information for Crisisworks

If the user's credentials are invalid, the server responds with a **401** HTTP error.

### Example: calling the "register" command to fetch an API token

#### Example

```
$ curl -X POST \
  -H "Accept: application/json" \
  -H "Content-Type: application/json;charset=UTF-8" \
  -d '{
    "uuid": "$YOUR_DEVICE_UUID",
    "platform": "$YOUR_CLIENT_PLATFORM",
    "version": "1",
    "name": "$YOUR_CLIENT_NAME",
    "username": "$YOUR_USERNAME",
    "password": "$YOUR_PASSWORD"
  }' \
  "https://$SITE_URL/api/json/register"

{
  "token": "8162e97a0fabf76b3bf0b1bfa50e90e8",
  "helpHtml": "Visit <a target=\"_blank\"
href=\"http://www.crisisworks.com/support\"
target=\"_blank\">Crisisworks Online Support</a> for help and support"
}
```

## Using a token to access secure API commands

Once you have acquired a token, it can be supplied to any authenticated command in one of two ways:

1. as one of the input parameters, or
2. in the Authorization header.

The token will remain valid until expired or revoked.

### Example: supplying the token as part of the payload

#### Example

```
$ curl
https://demo4.crisisworks.com/api/binary/file?id=568373&token=8162e97a0f
abf76b3bf0b1bfa50e90e8 > myfile.png
```

### Example: supplying the token as a Authorization header

```
$ curl -H "Authorization: BRAVO-AUTH
token=8162e97a0fabf76b3bf0b1bfa50e90e8" \
https://demo4.crisisworks.com/api/binary/file?id=568373 > myfile.png
```

## Working with RPC APIs

RPC APIs are simply a remote call to procedure on the server.

They use GET for read actions and POST for write actions, and accept payload formats based on the adaptor in use (e.g. "json").

#### Example: calling the "ping" command

```
# call the "ping" RPC command
$ curl https://moira.crisisworks.com/api/json/ping

"2016-10-24T05:34:46+00:00"
```

**Example**

```
# Call the "auth" RPC command to check the validity of a token
# curl --data "uuid=$YOUR_USERNAME&token=$YOUR_TOKEN"
$SITE_URL/api/json/auth

$ curl --data "uuid=dl&token=8162e97a0fabf76b3bf0b1bfa50e90e8"
https://demo4.crisisworks.com/api/json/auth

{
  "user": {
    "name": "David Jones",
    "userId": "dl",
    "roles": []
  }
}
```

## Working with REST APIs

REST provides a consistent URI for access and manipulation of a specific data record.

Under REST, a single URI represents a data record, and the HTTP verb controls the manipulation according to the following table:

Method	Description	Example
Collection Commands		
GET	Returns a collection of items based on a filter	GET /api/json/item?event=123
POST	Creates a new item	POST /api/json/item
Record Commands		
GET	Returns a single item	GET /api/json/item/id/1
PUT	Updates a single item	PUT /api/json/item/id/1
PATCH	Updates a single item with the supplied fields only	PATCH /api/json/item/id/1
DELETE	Deletes a single item	DELETE /api/json/item/id/1

## Collections

The Crisisworks REST API returns either returns a single object or a collection of objects, based on its invocation.

Collections contain the following JSON structure:

```
{
  "models": {
    "1": { ... }
    "2": { ... }
    "3": { ... }
    "4": { ... }
    "5": { ... }
  },
  "count": 5,
  "total": "22608"
}
```

In the collection structure:

- **models** contains an array of individual model structures,
- **count** contains the number of returned objects, and
- **total** contains the total set (this will be different if you call the API with a **limit** and/or **offset** parameter to paginate the set).

## Fetching a single record

Use the GET method and supply an 'id' parameter to fetch a single record.

```
GET /api/json/item/id/1
```

Each command returns records of a specific schema, and the example below is made up and not valid. Consult the command reference for details of the specific model.

**Example**

```
# fetch item id=1
curl
https://demo4.crisisworks.com/api/json/item/id/1?token=7d47548fca3226d32
d9404f604bed9bb
```

```
{
  "id": "1",
  "eventId": "234",
  "due": null,
  "isSensitive": false,
  "itemSchemaName": "default",
  "userId": "myuser",
  "status": "10",
  "templateName": null,
  "costEstimate": "10000.00",
  "type": "recoveryInfrastructure",
  "title": "Small Rd (ACCESS RURAL) ",
  "address": "Small Rd (ACCESS RURAL) ",
  "geo": {
    "points": [
      {
        "longitude": "142.35820543",
        "latitude": "-36.84567206999998"
      }
    ],
    "polygons": [],
    "linestrings": []
  },
  "assetId": "72784",
  "assignee": 0,
  "_canEdit": true,
  "dateCreated": "2016-09-29T15:07:27+10:00",
  "dateUpdated": "2016-09-29T15:07:27+10:00",
  "isTemplate": false,
  "tags": "",
  "descriptionPhotos": [],
  "scopePhotos": [],
  "contractors": [],
  "description": null,
  "scope": null,
  "costActual": "0",
  "priority": "2",
  "riskLevel": null
}
```



Note: The contents of the record structure depends on the type of content being retrieved.

## Fetching a collection of records

Fetching a collection of RESTful objects is achieved by calling its base URL without an identifier. e.g.

```
GET /api/json/item
```

Filters can be added, depending on the object. e.g.

```
GET /api/json/item?limit=5&offset=50&type=recoveryInfrastructure
```

### Example

```
# Get results 50-55 of recoveryInfrastructure
curl
https://demo4.crisisworks.com/api/json/item?limit=5&offset=50&type=recov
eryInfrastructure&token=7d47548fca3226d32d9404f604bed9bb
```

```
{
  "models": {
    "10744": {
      "id": "10744",
      "eventId": "138",
      "due": null,
      "isSensitive": false,
      "itemSchemaName": "default",
      "userId": "depot2",
      "status": "10",
      "templateName": null,
      "costEstimate": "0.00",
      "type": "recoveryInfrastructure",
      "title": "Foo Rd, Smallville VIC 1234",
      "address": "Foo Rd, Smallville VIC 1234",
      "assetId": "58758",
      "assignee": 0,
      "_canEdit": true,
      "dateCreated": "2016-09-19T14:04:10+10:00",
      "dateUpdated": "2016-09-19T14:58:30+10:00",
      "isTemplate": false,
      "tags": "",
      "descriptionPhotos": [],
      "scopePhotos": [],
      "contractors": [],
```

```
        "description": null,  
        "scope": null,  
        "costActual": "0",  
        "priority": "2",  
        "riskLevel": null,  
        "_order": 2  
    },  
    "10755": {  
        ...  
    },  
    "10756": {  
        ...  
    },  
    "10757": {  
        ...  
    },  
    "10759": {  
        ...  
    }  
},  
"count": 5,
```

```

    "total": "312",
  }

```

## Submitting new records

New records can be submitted using POST.

- JSON Input follows the same structure as that returned from the GET API.
- The JSON response reflects the final values of the record after being saved.
- Possible error codes include 40x and 50x status codes. All have a human-readable message, and use http codes so you can follow that spec to know whether it's a temporary or permanent error.

```
POST /api/json/item
```

### Example

```

# submit a new record with some sample data
$ curl -X POST \
  -H "Accept: application/json" \
  -H "Content-Type: application/json;charset=UTF-8" \
  -d '{
    "title": "Test submission via API",
    "requestor": "Scott Davey",
    "type": "Recovery_Infrastructure",
    "token": "7d47548fca3226d32d9404f604bed9bb",
  }' \
  "https://demo4.crisisworks.com/api/json/item"

{
  "id": 234,
  "title": "Test submission via API",
  "requestor": "Scott Davey",
  "type": " Recovery_Infrastructure",
}

```

*Note: it is not normal to submit such a short request, but it makes for a good example.*

## Updating existing records

To update an existing record, use PUT or PATCH.

PUT and PATCH work similarly, where:

- PUT expecting a full record, while
- PATCH expects a change-set.

Tip: When using PUT, missing data will be treated as if the value is set to null, and this will overwrite existing values at the server.

Possible error codes include 40x and 50x codes, as usual.

```
PUT /api/json/item/id/246
```

### Example

```
# update existing record 246
$ curl -X PUT \
  -H "Accept: application/json" \
  -H "Content-Type: application/json;charset=UTF-8" \
  -d '{
    "title": "Test submission via API",
    "requestor": "Scott Davey",
    "type": "Recovery_Infrastructure",
    "token": "7d47548fca3226d32d9404f604bed9bb",
  }' \
  "https://demo4.crisisworks.com/api/json/item/id/246"

{
  "id": 246,
  "title": "Test submission via API",
  "requestor": "Scott Davey",
  "type": " Recovery_Infrastructure",
}
```

## DELETE

Delete can be called if the object supports it.

Certain RESTful commands may not allow deletions, in which case a 400 Bad Request will be returned. For those that do implement it, a 200 code will be returned on success, and 40x and 50x codes will be returned on failure.

```
DELETE /api/json/item/id/1
```

**Example**

```
# delete record 1
curl DELETE
https://demo4.crisisworks.com/api/json/item/id/1?token=7d47548fca3226d32
d9404f604bed9bb

true
```

**API Command Reference**

The following public API commands are available:

API Command	URL	Type	Methods	Authenticated	Description
<b>asset</b>	/api/json/asset	REST	GET, POST, PUT, PATCH, DELETE	Yes	Create, retrieve and delete assets from the system
<b>asset-type</b>	/api/json/asset-type	RPC	GET	Yes	Read-only access to look up asset types
<b>create-event</b>	/api/json/create-event	RPC	POST	Yes	A simple method to create events, usually based on existing templates
<b>event</b>	/api/json/event	REST	GET	Yes	Retrieve events and update them
<b>file</b>	/api/binary/file	RPC	GET, POST	Yes	Upload and retrieve file attachments. Note, this command only uses the <b>binary</b> adapter, and returns JSON on failure.
<b>item</b>	/api/json/item	REST	GET, POST, PUT, PATCH, DELETE	Yes	Create, retrieve and delete register items, which are the core operational record in Crisisworks.
<b>log</b>	/api/json/log	REST	GET	Yes	Read-only access to audit logs
<b>media</b>	/api/json/media	REST	GET, POST, PUT, PATCH, DELETE	Yes	Create, retrieve and delete media attachments on register items
<b>ping</b>	/api/json/ping	RPC	GET	No	A diagnostics command for debugging and uptime analysis
<b>register</b>	/api/json/register	RPC	POST	No	Register a username/password against a device and retrieve an API token
<b>resource</b>	/api/json/resource	REST	GET, POST, PUT, PATCH, DELETE	Yes	Create, retrieve and delete resources
<b>user</b>	/api/json/user	REST	GET, POST, PUT, PATCH, DELETE	Yes	Create, retrieve and delete users.
<b>user-position</b>	/api/json/user-position	RPC	POST	Yes	Update the current latitude/longitude of a user

These commands are mostly authenticated, and are either RPC or REST APIs. See below the more details on each command.

**Asset (REST)**

The asset REST command returns and manipulates assets in Crisisworks.

```
GET | POST /api/json/asset
GET | PUT | PATCH | DELETE /api/json/asset/id/123
```

## GET Parameters

Parameter	Key(s)	Type	Available Operators	Details
Limit	limit	Number	-	When paginating, how many records to return
Offset	offset	Number	-	When paginating, which record to start from
Token	token	String	-	The API token to authenticate
ID	<ul style="list-style-type: none"> <li>id</li> <li>id_operator</li> </ul>	Integer	<ul style="list-style-type: none"> <li>equals (default)</li> <li>in</li> </ul>	Returns a record of a specific ID (equals), or a collection of records within a comma-separated list of IDs (in).
Contains	<ul style="list-style-type: none"> <li>fulltext</li> <li>fulltext_operator</li> </ul>	String	<ul style="list-style-type: none"> <li>Contains (default)</li> <li>NotContains</li> </ul>	Returns records containing the supplied text, as analysed by the full-text search parser.
Sounds Like	<ul style="list-style-type: none"> <li>soundex</li> </ul>	String	-	Returns records where the title sounds like the supplied string  Aliases: name
Active	<ul style="list-style-type: none"> <li>active</li> </ul>	Boolean	-	Returns only active (or inactive) records based on supplied value
Type	<ul style="list-style-type: none"> <li>type</li> <li>type_operator</li> </ul>	String	<ul style="list-style-type: none"> <li>Equals (default)</li> <li>In</li> <li>NotIn</li> <li>IsNotBlank</li> <li>IsBlank</li> </ul>	Returns records matching the given asset type. For a list of asset types, see the <b>asset-type</b> API command.
Code	<ul style="list-style-type: none"> <li>code</li> </ul>	String	-	Returns records matching the given asset code
Is Impacted	<ul style="list-style-type: none"> <li>isImpacted</li> </ul>	Boolean	-	Returns records that have an active register item record in Crisisworks
Near	<ul style="list-style-type: none"> <li>latitude</li> <li>longitude</li> <li>range</li> </ul>	Number	-	Returns assets near the provided geospatial location.

### Example

```
# return 1 matching asset
$ curl
"https://demo4.crisisworks.com/api/json/asset?token=8162e97a0fabf76b3bf0
blbfa50e90e8&limit=1"

{
  "models": {
    "1": {
      "id": "1",
      "name": "TP827623",
      "code": "100044818",
      "type": "Asset_Property",
      "friendlyType": "Property",
      "geo": {
        "points": [],
        "polygons": [
          {
            "points": [
              {
                "longitude": "144.01960063",
                "latitude": "-37.67845485"
              },
              {
                "longitude": "144.01926323",
                "latitude": "-37.67851867"
              },
              {
                "longitude": "144.01912979",
                "latitude": "-37.67853825"
              },
              {
                "longitude": "144.01899564",
                "latitude": "-37.67855447"
              }
            ]
          }
        ],
        "linestrings": []
      },
      "_distance": null,
      "style": "green",
      "_within": false,
      "_order": 1
    }
  },
  "count": 1,
  "total": "22608",
  "updated": "2016-08-03T00:33:44+00:00"
}
```

## Asset Type (REST)

This command fetches the available asset types.

This command is read-only and only supports the GET REST method.

```
GET /api/json/asset-type
```

### Example

```
# fetch the available asset types
curl
"https://demo4.crisisworks.com/api/json/asset-type?token=8162e97a0fabf76
b3bf0b1bfa50e90e8"
```

```
{
  "models": {
    "Asset_Bridge": "Bridge",
    "Asset_Culvert": "Culvert",
    "Asset_Facility": "Facility",
    "Asset_Footpath": "Footpath",
    "Asset_Other": "Other",
    "Asset_PointOfInterest": "Point of Interest",
    "Asset_Property": "Property",
    "Asset_Reserve": "Reserve",
    "Asset_Road": "Road",
    "Asset_Stormwater_Pipe": "Stormwater Pipe",
    "Asset_Stormwater_Pit": "Stormwater Pit"
  },
  "count": 11,
  "total": 11,
  "updated": null
}
```

## Create Event (RPC)

This command provides an easy way to create events, usually based on existing event templates

```
POST /api/json/create-event
```



**Example**

```
$ curl -X POST \
  -H 'Accept: application/json' \
  -H 'Content-Type: application/json;charset=UTF-8' \
  -d '{
    "templateId": "12",
    "title": "My event",
    "description": "This is a demo event",
    "startDate": "2017-01-08T14:00:00",
    "endDate": "2017-01-08T15:00:00",
    "severity": "3",
    "uuid": "marketManager",
    "token": "f999008ef01f92d85cf77fd0918130c8"
  }' \
  https://demo4.crisisworks.com/api/json/create-event

{"code":200,"id":"26"}
```

**Parameters**

Key	Type	Required?	Default	Details
templateId	Number	No	ID of "Basic" template	The template event ID to base this new event on.
title	String	Yes	(None)	The title of the event
description	String	No	(None)	An optional description of the event
startDate	Date Time String	No	Current date/time	The time that the event is scheduled to begin
endDate	Date Time String	No	(None)	The time that the event is scheduled to end
status	Number	No	The default state for new events (Usually 1 "Open")	The status that the event should be set to when created
severity	Number	No	1	1=Test only, 2=Low Severity, 3=Moderate Severity, 4=High Severity
goOnDuty	Number	No	1	Should the user creating the event automatically go on duty for all candidate positions in the event? 1 = Yes, 0 = No

**Duty (RPC)**

This command provides a way to go on or off duty in an event

```
POST /api/json/duty
```

```
$ curl -X POST \
  -H 'Accept: application/json' \
  -H 'Content-Type: application/json;charset=UTF-8' \
  -d '{
    "participantId": "88",
    "onDuty": "1"
    "uuid": "marketManager",
    "token": "f999008ef01f92d85cf77fd0918130c8"
  }' \
  https://demo4.crisisworks.com/api/json/duty
```

```
{
  "code": 200,
  "duties": [
    "88"
  ],
  "onDuty": true,
  "eventId": "25",
  "id": "88"
}
```

## Parameters

Key	Type	Required?	Default	Details
participantId	Number	Yes	(None)	The ID of the participant to go on duty as
onDuty	Number	Yes	1	0 = go off duty, 1 = go on duty

## Event (REST)

This command fetches available events, and allows updating.

## Fetch Individual Event

### Example

```
GET /api/json/event/id/123
```

## Search Events

## Example

```
GET /api/json/event
```

## Parameters

Filter	Keys	Type	Operators	Details
limit	Limit	Number	-	When paginating, how many records to return
offset	Offset	Number	-	When paginating, which record to start from
token	Token	String	-	The API token to authenticate
ID	<ul style="list-style-type: none"> <li>id</li> <li>id_operator</li> </ul>	Number	<ul style="list-style-type: none"> <li>equals (default)</li> <li>notEquals</li> <li>in</li> </ul>	Set id_operator to the desired operator if changing from the default
Contains	<ul style="list-style-type: none"> <li>fulltext</li> <li>fulltext_operator</li> </ul>	String	<ul style="list-style-type: none"> <li>Contains (default)</li> <li>NotContains</li> </ul>	Set fulltext_operator to the desired operator if changing from the default
Status	<ul style="list-style-type: none"> <li>status</li> <li>status_operator</li> </ul>	String	<ul style="list-style-type: none"> <li>Equals (default)</li> <li>In</li> <li>NotIn</li> <li>IsNotBlank</li> <li>IsBlank</li> <li>IsStatusActive</li> <li>IsStatusInactive</li> </ul>	Set status_operator to the desired operator if changing from the default
Active	<ul style="list-style-type: none"> <li>active</li> </ul>	Boolean	None	Aliases: isActive
Title	<ul style="list-style-type: none"> <li>title</li> <li>title_operator</li> </ul>	String	<ul style="list-style-type: none"> <li>Equals</li> <li>NotEquals</li> <li>Contains (default)</li> <li>NotContains</li> <li>BeginsWith</li> <li>IsBlank</li> <li>IsNotBlank</li> </ul>	Set title_operator to the desired operator if changing from the default
Severity	<ul style="list-style-type: none"> <li>severity</li> <li>severity_operator</li> </ul>	Number	<ul style="list-style-type: none"> <li>Equals (default)</li> <li>In</li> <li>NotIn</li> <li>IsNotBlank</li> <li>IsBlank</li> </ul>	Set severity_operator to the desired operator if changing from the default
Registers	<ul style="list-style-type: none"> <li>registers</li> <li>registers_operator</li> </ul>	String	<ul style="list-style-type: none"> <li>Equals (default)</li> <li>In</li> <li>NotIn</li> <li>IsNotBlank</li> <li>IsBlank</li> </ul>	Set registers_operator to the desired operator if changing from the default
Started After	<ul style="list-style-type: none"> <li>startDateAfter</li> <li>startDateAfter_operator</li> </ul>	Date Time String	<ul style="list-style-type: none"> <li>Equals</li> <li>DateFuzzy</li> <li>NotEquals</li> <li>IsBlank</li> <li>IsNotBlank</li> <li>DateBefore</li> <li>DateBeforeEquals</li> <li>DateAfter</li> <li>DateAfterEquals (default)</li> <li>DateBeforeRel</li> <li>DateAfterRel</li> </ul>	Set startDateAfter_operator to the desired operator if changing from the default
Started Before	<ul style="list-style-type: none"> <li>startDateBefore</li> <li>startDateBefore_operator</li> </ul>	Date Time String	<ul style="list-style-type: none"> <li>Equals</li> <li>DateFuzzy</li> <li>NotEquals</li> <li>IsBlank</li> <li>IsNotBlank</li> <li>DateBefore</li> <li>DateBeforeEquals</li> <li>DateAfter</li> <li>DateAfterEquals (default)</li> <li>DateBeforeRel</li> <li>DateAfterRel</li> </ul>	Set startDateBefore_operator to the desired operator if changing from the default

Event Structure	<ul style="list-style-type: none"> <li>• descendants</li> <li>• descendants_operator</li> </ul>	String	<ul style="list-style-type: none"> <li>• NestedSetHasDescendants (default)</li> <li>• NestedSetNoDescendants</li> </ul>	Set descendants_operator to the desired operator if changing from the default
Tag	<ul style="list-style-type: none"> <li>• tag</li> <li>• tag_operator</li> </ul>	String	<ul style="list-style-type: none"> <li>• Tagged (default)</li> <li>• NotTagged</li> </ul>	Set tag_operator to the desired operator if changing from the default
Location	<ul style="list-style-type: none"> <li>• geo</li> <li>• geo_operator</li> <li>• geo_polygon</li> <li>• geo_radius</li> <li>• geo_centre</li> </ul>	Geo	<ul style="list-style-type: none"> <li>• GeoWithinPolygon (default)</li> <li>• GeoWithinRange</li> <li>• GeoWithinBoundingBox</li> </ul>	Set geo_operator to the desired operator if changing from the default
Template	<ul style="list-style-type: none"> <li>• isTemplate</li> </ul>	Boolean	None	
Global	<ul style="list-style-type: none"> <li>• isGlobal</li> </ul>	Boolean	None	
Counter ID	<ul style="list-style-type: none"> <li>• counter</li> </ul>	Number	None	Aliases: counterId
User Participation	<ul style="list-style-type: none"> <li>• participation</li> <li>• participation_operator</li> </ul>	String	<ul style="list-style-type: none"> <li>• (default)</li> <li>• active</li> <li>• notActive</li> <li>• ever</li> <li>• can</li> </ul>	Set participation_operator to the desired operator if changing from the default

**Example: Fetch the most recent event**

**Example**

```

$ curl
"https://demo4.crisisworks.com/api/json/event?token=8162e97a0fabf76b3bf0
b1bfa50e90e8&limit=1&order=id&orderDirection=DESC"

{
  "models": {
    "1021": {
      "id": "1021",
      "title": "Fire at Broadbeach",
      "description": "",
      "startDate": "2016-08-11T03:58:00+00:00",
      "endDate": null,
      "status": {
        "label": "Open",
        "value": 1,
        "style": "yellow"
      },
      "severity": "2",
      "participants": [
        {
          "id": "2758",
          "type": "position",
          "name": "Archive Officer",
          "positionId": "81"
        },
        {
          "id": "2759",
          "type": "user",
          "name": "Pete Bool",
          "userId": "pbool"
        }
      ],
      "userParticipants": [],
      "_isSelectable": true,
      "parentId": "1",
      "_order": 1
    }
  },
  "count": 1,
  "total": "50",
  "updated": null
}

```

**Update Event**

## Parameters

Key	Type	Required?	Details
id	Number	Yes	ID of the event to update
title	String	No	Changed title
description	String	No	Changed description
startDate	Date Time String	No	Changed start date
endDate	Date Time String	No	Changed end date
status	Number	No	New status (generally, 1 = open, -1 = closed)
severity	Number	No	1=Test only, 2=Low Severity, 3=Moderate Severity, 4=High Severity

**Example: Close an event and update its description**

```
$ curl -X PUT \  
  -H 'Accept: application/json' \  
  -H 'Content-Type: application/json;charset=UTF-8' \  
  -d '{  
    "id": "25",  
    "description": "This event was closed today",  
    "status": -1  
  }' \  
  
"https://demo4.crisisworks.com/api/json/event?uuid=marketManager&token=f  
999008ef01f92d85cf77fd0918130c8"  
  
{  
  "id": "25",  
  "title": "My Event",  
  "description": "This event was closed today",  
  "startDate": "2017-01-08T03:00:00+00:00",  
  "endDate": "2017-01-08T04:00:00+00:00",  
  "status": {  
    "label": "Closed",  
    "value": -1,  
    "style": "grey"  
  },  
  "severity": "3",  
  "participants": [],  
  "userParticipants": [],  
  "_isSelectable": true,  
  "parentId": "1"  
}
```

### File Attachment (RPC)

Documentation is currently unavailable for this command

### Register Item (GET)

A RESTful command to access and manage register items, which are the primary business object within the system.

```
GET|POST /api/json/item
GET|PUT|PATCH|DELETE /api/json/item/id/123
```

## GET Parameters

In addition to the standard filters listed below, each register may also have a list of additional filters. Please consult the register guide or contact Datalink's Service Desk for more details.

Filter	Keys	Type	Operators	Details
limit	Limit	Number	-	When paginating, how many records to return
offset	Offset	Number	-	When paginating, which record to start from
token	Token	String	-	The API token to authenticate
Contains	<ul style="list-style-type: none"> <li>contains</li> <li>contains_operator</li> </ul>	String	<ul style="list-style-type: none"> <li>Contains (default)</li> <li>NotContains</li> </ul>	Aliases: search; Set contains_operator to the desired operator if changing from the default
Record ID	<ul style="list-style-type: none"> <li>itemId</li> <li>itemId_operator</li> </ul>	String	<ul style="list-style-type: none"> <li>equals (default)</li> <li>notEquals</li> <li>in</li> </ul>	Aliases: id; Set itemId_operator to the desired operator if changing from the default
System ID	<ul style="list-style-type: none"> <li>systemId</li> <li>systemId_operator</li> </ul>	String	<ul style="list-style-type: none"> <li>Equals (default)</li> <li>NotEquals</li> <li>Contains</li> <li>NotContains</li> <li>BeginsWith</li> <li>IsBlank</li> <li>IsNotBlank</li> </ul>	Set systemId_operator to the desired operator if changing from the default
Type	<ul style="list-style-type: none"> <li>type</li> <li>type_operator</li> </ul>	String	<ul style="list-style-type: none"> <li>Equals (default)</li> <li>In</li> <li>NotIn</li> <li>IsNotBlank</li> <li>IsBlank</li> </ul>	Aliases: class; Set type_operator to the desired operator if changing from the default
User ID	<ul style="list-style-type: none"> <li>userId</li> <li>userId_operator</li> </ul>	String	<ul style="list-style-type: none"> <li>equals (default)</li> <li>notEquals</li> <li>in</li> <li>CurrentUser</li> <li>NotCurrentUser</li> </ul>	Aliases: user; Set userId_operator to the desired operator if changing from the default
Event	<ul style="list-style-type: none"> <li>eventId</li> <li>eventId_operator</li> </ul>	String	<ul style="list-style-type: none"> <li>InEvent (default)</li> <li>InSubEvent</li> <li>InEventOrSubEventOrGlobal</li> <li>InActiveEvent</li> <li>ActiveParticipating</li> <li>Active</li> <li>Any</li> </ul>	Aliases: event; Set eventId_operator to the desired operator if changing from the default
Since	<ul style="list-style-type: none"> <li>since</li> <li>since_operator</li> </ul>	String	<ul style="list-style-type: none"> <li>Equals</li> <li>DateFuzzy</li> <li>NotEquals</li> <li>IsBlank</li> <li>IsNotBlank</li> <li>DateBefore</li> <li>DateBeforeEquals</li> <li>DateAfter (default)</li> <li>DateAfterEquals</li> <li>DateBeforeRel</li> <li>DateAfterRel</li> </ul>	Set since_operator to the desired operator if changing from the default



Until	<ul style="list-style-type: none"> <li>• until</li> <li>• until_operator</li> </ul>	String	<ul style="list-style-type: none"> <li>• Equals</li> <li>• DateFuzzy</li> <li>• NotEquals</li> <li>• IsBlank</li> <li>• IsNotBlank</li> <li>• DateBefore (default)</li> <li>• DateBeforeEquals</li> <li>• DateAfter</li> <li>• DateAfterEquals</li> <li>• DateBeforeRel</li> <li>• DateAfterRel</li> </ul>	Set until_operator to the desired operator if changing from the default
Is a template item	<ul style="list-style-type: none"> <li>• isTemplate</li> </ul>	String	None	
Counter ID	<ul style="list-style-type: none"> <li>• counter</li> </ul>	String	None	Aliases: counterId
	<ul style="list-style-type: none"> <li>• eventImplicit</li> <li>• eventImplicit_operator</li> </ul>	String	<ul style="list-style-type: none"> <li>• InEvent (default)</li> <li>• InSubEvent</li> <li>• InEventOrSubEventOrGlobal</li> <li>• InActiveEvent</li> <li>• ActiveParticipating</li> <li>• Active</li> <li>• Any</li> </ul>	Set eventImplicit_operator to the desired operator if changing from the default

### Example

```
# fetch all active 'fpn' records
$ curl
"https://demo4.crisisworks.com/api/json/item?type=fpn&active=1&token=8162e97a0fabf76b3bf0b1bfa50e90e8"
```

```
{
  "models": {
    "14919": {
      "id": "14919",
      "eventId": "1014",
      "due": null,
      "isSensitive": false,
      "itemSchemaName": "moorabool",
      "userId": "pkakris.mb",
      "status": "20",
      "templateName": null,
      "costEstimate": "0.00",
      "type": "fpn",
      "title": null,
      "address": null,
      "assetId": null,
      "assignee": "2632",
      "assignee_info": "Pete Kakris",
      "_canEdit": true,
      "dateCreated": "2016-03-03T13:13:33+11:00",
      "dateUpdated": "2016-03-03T13:13:33+11:00",
      "isTemplate": false,
      "tags": "",
      "infringementNumber": null,
      "contractors": [],
```

```
"media": [
  {
    "id": "602",
    "uri": "\/api\/binary\/media\/602",
    "thumbUri": "\/api\/binary\/media\/602?type=thumb",
    "type": "image\/jpeg",
    "name": "blob.jpg",
    "created": "2016-03-03T02:13:22+00:00",
    "size": "71785"
  }
],
"mergedFile": [],
"activity": null,
"cutGrassWeeds10cm": false,
"removeDebris": false,
"firebreak10m": false,
"cutGrassWeeds5cm": false,
"trimTrees": false,
"removeFlammable": false,
"notes": null,
"dateNewFromWeb": null,
"dateNewFromMobile": null,
"date1stInspectionRequired": null,
"dateHazardExists": "2016-03-03T02:13:33+00:00",
"dateComplianceInspectionRequired": null,
"dateRequestCompulsoryClearing": null,
"datePostClearanceInspectionReview": null,
"dateHazardCleared": null,
"dateTemporaryExemptionGranted": null,
"dateClosed": null,
"dateNoticeWithdrawn": null,
"dateFpnSent": null,
"infringementSentDate": null,
"_order": 1
},
"14968": {
  "id": "14968",
  "eventId": "1014",
  "due": null,
  "isSensitive": false,
  "itemSchemaName": "moorabool",
  "userId": "pkakris.mb",
  "status": "20",
  "templateName": null,
  "costEstimate": "0.00",
  "type": "fpn",
  "title": "PARCEL 45530943",
  "address": "PARCEL 45530943",
  "assetId": "24733",
  "assignee": "2632",
```

```
"assignee_info": "Pete Kakris",
"_canEdit": true,
"dateCreated": "2016-06-20T14:06:27+10:00",
"dateUpdated": "2016-06-20T14:06:27+10:00",
"isTemplate": false,
"tags": "",
"infringementNumber": null,
"contractors": [],
"media": [],
"mergedFile": [],
"activity": null,
"cutGrassWeeds10cm": true,
"removeDebris": false,
"firebreak10m": false,
"cutGrassWeeds5cm": false,
"trimTrees": false,
"removeFlammable": false,
"notes": null,
"dateNewFromWeb": null,
"dateNewFromMobile": null,
"date1stInspectionRequired": null,
"dateHazardExists": "2016-06-20T04:06:27+00:00",
"dateComplianceInspectionRequired": null,
"dateRequestCompulsoryClearing": null,
"datePostClearanceInspectionReview": null,
"dateHazardCleared": null,
"dateTemporaryExemptionGranted": null,
"dateClosed": null,
"dateNoticeWithdrawn": null,
"dateFpnSent": null,
"infringementSentDate": null,
"_order": 2
}
},
"count": 2,
```

```

    "total": 2,
    "updated": null
  }

```

## Audit Log

This fetches a collection of audit logs, either for a given object (with itemId specified), a given event (with eventId specified) or across the system.

```
GET /api/json/log
```

## GET Parameters

Filter	Keys	Type	Operators	Details
limit	Limit	Number	-	When paginating, how many records to return
offset	Offset	Number	-	When paginating, which record to start from
token	Token	String	-	The API token to authenticate
ID	<ul style="list-style-type: none"> <li>id</li> <li>id_operator</li> </ul>	String	<ul style="list-style-type: none"> <li>Equals (default)</li> <li>NotEquals</li> <li>Contains</li> <li>NotContains</li> <li>BeginsWith</li> <li>IsBlank</li> <li>IsNotBlank</li> </ul>	Set id_operator to the desired operator if changing from the default
Event	<ul style="list-style-type: none"> <li>eventId</li> <li>eventId_operator</li> </ul>	String	<ul style="list-style-type: none"> <li>InEvent (default)</li> <li>InSubEvent</li> <li>InEventOrSubEventOrGlobal</li> <li>InActiveEvent</li> <li>ActiveParticipating</li> <li>Active</li> <li>Any</li> </ul>	Aliases: event; Set eventId_operator to the desired operator if changing from the default
Scope	<ul style="list-style-type: none"> <li>scope</li> </ul>	String	None	
Item	<ul style="list-style-type: none"> <li>itemId</li> </ul>	String	None	Aliases: item
Organisation	<ul style="list-style-type: none"> <li>organisationId</li> </ul>	String	None	Aliases: organisation
Participant	<ul style="list-style-type: none"> <li>participantId</li> </ul>	String	None	Aliases: participant
Position	<ul style="list-style-type: none"> <li>positionId</li> </ul>	String	None	Aliases: position
Register	<ul style="list-style-type: none"> <li>registerId</li> </ul>	String	None	Aliases: register
User	<ul style="list-style-type: none"> <li>userId</li> <li>userId_operator</li> </ul>	String	<ul style="list-style-type: none"> <li>equals (default)</li> <li>notEquals</li> <li>in</li> <li>CurrentUser</li> <li>NotCurrentUser</li> </ul>	Set userId_operator to the desired operator if changing from the default
User Object	<ul style="list-style-type: none"> <li>userObjectId</li> </ul>	String	None	
Assignment	<ul style="list-style-type: none"> <li>assignmentId</li> </ul>	String	None	Aliases: assignment
Event (Implicit)	<ul style="list-style-type: none"> <li>eventImplicit</li> <li>eventImplicit_operator</li> </ul>	String	<ul style="list-style-type: none"> <li>InEvent (default)</li> <li>InSubEvent</li> <li>InEventOrSubEventOrGlobal</li> <li>InActiveEvent</li> <li>ActiveParticipating</li> <li>Active</li> <li>Any</li> </ul>	Set eventImplicit_operator to the desired operator if changing from the default

**Example**

```
#fetch the audit log for item 14968
$ curl
"https://demo4.crisisworks.com/api/json/log?token=8162e97a0fabf76b3bf0b1bfa50e90e8&limit=5&item=14968"
```

```
{
  "models": {
    "1004527": {
      "time": "2016-06-20 4:06:27 +0000",
      "id": "1004527",
      "type": "Items",
      "summary": "created a fire prevention notice and set it to
hazard exists",
      "message": "",
      "images": [],
      "labels": [
        {
          "style": "yellow",
          "label": "Hazard Exists"
        }
      ],
      "dataChangeCount": 10,
      "itemCount": 1,
      "userName": "Pete Kakris",
      "userPosition": "Crisisworks Administrator, FPN
Coordinator",
      "userOrganisation": "Datalink",
      "userId": "pkakris.mb",
      "userPositionId": "7",
      "userAvatarUrl":
"https://demo4.crisisworks.com/var/files/thumbs/80ea44413272ba499d
dd0413fc2858cf_57c193f71dbbed2361bce727c9ce1642_w60_h60_fit.png",
      "objId": "14968",
      "objType": "Fire Prevention Notice",
      "objIcon": "ico_hazard_fire.png",
      "title": "PARCEL 45530943",
      "url":
"https://demo4.crisisworks.com/register/item/view/id/14968",
      "registerId": "fpn",
      "registerName": "Fire Prevention Notice",
      "eventId": "1014",
      "eventName": "FPN Inspections",
      "assignments": [
        {
```

```

        "id": "pkakris.mb",
        "name": "Pete Kakris",
        "type": "Mecc_User",
        "avatarUrl":
"https://demo4.crisisworks.com/var/files/thumbs/80ea44413272ba499d
dd0413fc2858cf_57c193f71dbbed2361bce727c9ce1642_w60_h60_fit.png"
    }
],
"status": "Hazard Exists",
"statusClass": "yellow",
"statusValue": 20,
"visibility": "",
"targetUsers": [
    "pkakris.mb"
],
"targetPositions": [],
"comment": null,
"targetOrganisations": [],
"sound": "message_received",
"logEntries": [
    {
        "objId": "1031017",
        "objClass": "Fpn_Inspection",
        "objTitle": "PARCEL 45530943",
        "subject": "created a Fire Prevention Notice",
        "dataChanges": [
            {
                "name": "eventId",
                "label": "Event",
                "oldValue": "FPN Inspections",
                "newValue": "FPN Inspections"
            },
            {
                "name": "status",
                "label": "Status",
                "oldValue": "",
                "newValue": "Hazard Exists"
            },
            {
                "name": "assetId",
                "label": "Asset",
                "oldValue": "",
                "newValue": "PARCEL 45530943"
            },
            {
                "name": "cutGrassWeeds10cm",
                "label": "Cut grass and weeds over the whole
property to a height of no more than 10cm.",
                "oldValue": "",
                "newValue": "Yes"
            }
        ]
    }
]

```

```

        },
        {
            "name": "removeDebris",
            "label": "Leaves, twigs and other vegetation
debris must be removed at regular intervals.",
            "oldValue": "",
            "newValue": "No"
        },
        {
            "name": "firebreak10m",
            "label": "A firebreak of 10 metres wide is
to be cut inside the property boundary as close as practicable to the
fence-line, to a height of not more than 10cm",
            "oldValue": "",
            "newValue": "No"
        },
        {
            "name": "cutGrassWeeds5cm",
            "label": "Cut all grass and weeds within 30m
of any building to a height of no more than 5cm.",
            "oldValue": "",
            "newValue": "No"
        },
        {
            "name": "trimTrees",
            "label": "Trim trees and shrubs clear of
roofline, walls and other elements of the buildings.",
            "oldValue": "",
            "newValue": "No"
        },
        {
            "name": "removeFlammable",
            "label": "Remove flammable objects such as
firewood, mulches, rubbish and garden furniture from within 10m of the
vulnerable parts of the building like windows, decks and eaves.",
            "oldValue": "",
            "newValue": "No"
        },
        {
            "name": "assignee",
            "label": "Assign To",
            "oldValue": "",
            "newValue": "Pete K"
        }
    ]
},
{
    "objId": "1031018",
    "objClass": "Fpn_Inspection",
    "objTitle": "PARCEL 45530943",

```

```
        "subject": "linked to User Pete K"  
      }  
    ],  
    "userOrganisationId": "",  
    "subject": "",  
    "_order": 1  
  }  
},  
"count": 1,
```



```
"total": 1,  
"updated": null  
}
```

## Register Item Media (REST)

Documentation is currently unavailable for this command

## Ping (RPC)

This command provides simple diagnostics, and is the "hello world" of API connectivity.

```
/api/json/ping
```

### Example

```
$ curl "https://demo4.crisisworks.com/api/json/ping"
```

```
"2016-10-24T08:41:07+00:00"
```

## Device Registration (RPC) — Authentication

This command authenticates a username/password, registers the device and returns an API token for that device.

```
POST /api/json/register
```

This command is an RPC command that supports the POST method.

**Example**

```
$ curl -X POST \
  -H "Accept: application/json" \
  -H "Content-Type: application/json;charset=UTF-8" \
  -d '{
    "uuid": "40fjsjf0r-djsdjdks3-sjdhfhj3",
    "platform": "iPhone/7",
    "version": "2",
    "name": "Scott Davey's Phone",
    "username": "sdavey",
    "password": "itsasecret"
  }' \
  "https://demo4.crisisworks.com/api/json/register"

{
  "token": "8162e97a0fabf76b3bf0b1bfa50e90e8",
  "helpHtml": "Visit <a target=\"_blank\"
href=\"http://www.crisisworks.com/support\"
target=\"_blank\">Crisisworks Online Support</a> for help and support"
}
```

**Resource (REST)**

This command provides a RESTful way to access and manage resources within the system.

```
GET|POST /api/json/resource
GET|PUT|PATCH|DELETE /api/json/resource/id/123
```

**GET Parameters**

Filter	Keys	Type	Operators	Details
limit	Limit	Number	-	When paginating, how many records to return
offset	Offset	Number	-	When paginating, which record to start from
token	Token	String	-	The API token to authenticate
ID	<ul style="list-style-type: none"> <li>id</li> <li>id_operator</li> </ul>	String	<ul style="list-style-type: none"> <li>equals (default)</li> <li>notEquals</li> <li>in</li> </ul>	Set id_operator to the desired operator if changing from the default
Contains	<ul style="list-style-type: none"> <li>fulltext</li> <li>fulltext_operator</li> </ul>	String	<ul style="list-style-type: none"> <li>Contains (default)</li> <li>NotContains</li> </ul>	Set fulltext_operator to the desired operator if changing from the default

Type	<ul style="list-style-type: none"> <li>• type</li> <li>• type_operator</li> </ul>	String	<ul style="list-style-type: none"> <li>• Equals (default)</li> <li>• In</li> <li>• NotIn</li> <li>• IsNotBlank</li> <li>• IsBlank</li> </ul>	Set type_operator to the desired operator if changing from the default
Status	<ul style="list-style-type: none"> <li>• status</li> <li>• status_operator</li> </ul>	String	<ul style="list-style-type: none"> <li>• Equals (default)</li> <li>• In</li> <li>• NotIn</li> <li>• IsNotBlank</li> <li>• IsBlank</li> <li>• IsStatusActive</li> <li>• IsStatusInactive</li> </ul>	Set status_operator to the desired operator if changing from the default
Organisation	<ul style="list-style-type: none"> <li>• organisationId</li> <li>• organisationId_operator</li> </ul>	String	<ul style="list-style-type: none"> <li>• In (default)</li> <li>• NotIn</li> </ul>	Set organisationId_operator to the desired operator if changing from the default
Category	<ul style="list-style-type: none"> <li>• categoryId</li> <li>• categoryId_operator</li> </ul>	String	<ul style="list-style-type: none"> <li>• Equals (default)</li> <li>• In</li> <li>• NotIn</li> <li>• IsNotBlank</li> <li>• IsBlank</li> </ul>	Set categoryId_operator to the desired operator if changing from the default
Tagged	<ul style="list-style-type: none"> <li>• tag</li> <li>• tag_operator</li> </ul>	String	<ul style="list-style-type: none"> <li>• Tagged (default)</li> <li>• NotTagged</li> </ul>	Set tag_operator to the desired operator if changing from the default

**Example**

```
# fetch 5 resources
curl
"https://demo4.crisisworks.com/api/json/resource?token=8162e97a0fabf76b3
bf0b1bfa50e90e8&limit=5"
```

```
{
  "models": {
    "1": {
      "id": "1",
      "title": "Sand Bags",
      "description": null,
      "_order": 1
    },
    "2": {
      "id": "2",
      "title": "Grader No. 1 ZNO159",
      "description": "Moorabool Shire Council Graders (Total 4)",
      "_order": 2
    },
    "3": {
      "id": "3",
      "title": "Loader No. 1 SWQ492",
      "description": "Moorabool Shire Council Loaders (2)",
      "_order": 3
    },
    "4": {
      "id": "4",
      "title": "Grader No. 2 YHV493",
      "description": "Moorabool Shire Council (4 available)",
      "_order": 4
    },
    "5": {
      "id": "5",
      "title": "Grader No. 3 TGN897",
      "description": "Moorabool Shire Council Graders (4 in
total)",
      "_order": 5
    }
  },
  "count": 5,
  "total": "339",
  "updated": null
}
```

## User (REST)

Provides a RESTful way to access and manage users.

```
GET|POST /api/json/user
GET|PUT|PATCH|DELETE /api/json/user/id/abc
```

## GET Parameters

Filter	Keys	Type	Operators	Details
limit	Limit	Number	-	When paginating, how many records to return
offset	Offset	Number	-	When paginating, which record to start from
token	Token	String	-	The API token to authenticate
Word Search	<ul style="list-style-type: none"> <li>• fulltext</li> <li>• fulltext_operator</li> </ul>	String	<ul style="list-style-type: none"> <li>• Contains (default)</li> <li>• NotContains</li> </ul>	Set fulltext_operator to the desired operator if changing from the default
ID	<ul style="list-style-type: none"> <li>• id</li> <li>• id_operator</li> </ul>	String	<ul style="list-style-type: none"> <li>• equals (default)</li> <li>• notEquals</li> <li>• in</li> </ul>	Aliases: id; Set id_operator to the desired operator if changing from the default
Online	<ul style="list-style-type: none"> <li>• online</li> </ul>	Boolean	None	
On Duty	<ul style="list-style-type: none"> <li>• onduy</li> </ul>	Boolean	None	
Active	<ul style="list-style-type: none"> <li>• active</li> </ul>	Boolean	None	
On Call	<ul style="list-style-type: none"> <li>• oncall</li> </ul>	Boolean	None	
Tags	<ul style="list-style-type: none"> <li>• tag</li> <li>• tag_operator</li> </ul>	String	<ul style="list-style-type: none"> <li>• Tagged (default)</li> <li>• NotTagged</li> </ul>	Set tag_operator to the desired operator if changing from the default
Organisation	<ul style="list-style-type: none"> <li>• organisationId</li> <li>• organisationId_operator</li> </ul>	String	<ul style="list-style-type: none"> <li>• In (default)</li> <li>• NotIn</li> </ul>	Set organisationId_operator to the desired operator if changing from the default
Competencies	<ul style="list-style-type: none"> <li>• roleId</li> <li>• roleId_operator</li> </ul>	Number	<ul style="list-style-type: none"> <li>• RelatedTo (default)</li> <li>• NotRelatedTo</li> </ul>	Set roleId_operator to the desired operator if changing from the default
Receive SMS	<ul style="list-style-type: none"> <li>• receiveSMS</li> </ul>	Boolean	None	
Receive Email	<ul style="list-style-type: none"> <li>• receiveEmail</li> </ul>	Boolean	None	

### Example

```
curl
"https://demo4.crisisworks.com/api/json/user?token=8162e97a0fabf76b3bf0b1bfa50e90e8&limit=5&active=1"

{
  "models": {
    "andrew": {
      "id": "andrew",
      "firstName": "Andrew",
```

```
"lastName": "Salzano",
"phone": null,
"mobile": "0401601133",
"email": "noc+andrew@datalink.com.au",
"externalId": null,
"address": null,
"position": null,
"organisationId": "POLICE",
"profile": null,
"onCall": false,
"receiveSMS": false,
"receiveEmail": false,
"optInLearningCentre": false,
"optInNewsletter": false,
"optInAnnouncements": false,
"active": true,
"competencies": [
  "17"
],
"tags": "",
"lastPosition": {},
"geo": {},
"lastPositionDate": "2017-03-03T03:37:59+00:00",
"lastLoginAt": null,
"lastOnline": null,
"lastUpdated": null,
"isOnline": false,
"_order": 1
},
"ben": {
  "id": "ben",
  "firstName": "Ben",
  "lastName": "Gusler",
  "phone": null,
  "mobile": "0401601133",
  "email": "noc+ben@datalink.com.au",
  "externalId": null,
  "address": null,
  "position": null,
  "organisationId": "COUNCIL",
  "profile": null,
  "onCall": false,
  "receiveSMS": false,
  "receiveEmail": false,
  "optInLearningCentre": false,
  "optInNewsletter": false,
  "optInAnnouncements": false,
  "active": true,
  "competencies": [
    "10"
```

```
    ],  
    "tags": "",  
    "lastPosition": {},  
    "geo": {},  
    "lastPositionDate": "2017-03-03T03:37:40+00:00",  
    "lastLoginAt": null,  
    "lastOnline": null,  
    "lastUpdated": null,  
    "isOnline": false,  
    "_order": 2  
  }  
},  
"count": 2,
```

```

    "total": 2,
    "updated": "2017-03-03T03:37:19+00:00"
  }

```

## Examples

The following examples provide quick integrations for popular requirements.

### Displaying all Fire Prevention Notices on a map using GeoJSON

This example displays a set of icons for each fire prevention notice record in Crisisworks on an OpenLayers map.

#### Steps

1. Obtain your authentication token
2. Prepare and test a URL to fetch the data
3. Add the URL into OpenLayers

#### Step 1

First, fetch an API token based on a user account with credentials that provide access to the FPN registers and event. This is described above in the section [Working with Authentication](#).

#### Step 2

The following URL will fetch a live list of all FPN records for a given event. Replace **site**, **token** and **event** with your own values.

#### URL

```

https://site.crisisworks.com/api/geojson/item?event=1014&type=fpn&token=
8162e97a0fabf76b3bf0b1bfa50e90e8

```

#### Example: Testing the URL

```

# Test the URL
curl
"https://demo4.crisisworks.com/api/geojson/item?event=1014&type=fpn&toke
n=8162e97a0fabf76b3bf0b1bfa50e90e8"

```

```

{
  "type": "FeatureCollection",
  "features": [
    {
      "type": "Feature",
      "geometry": {
        "type": "GeometryCollection",
        "geometries": [
          {

```



```
    "type": "Polygon",
    "coordinates": [
      [
        [
          144.32965753,
          -37.74266446
        ],
        [
          144.32848934,
          -37.73833017
        ],
        [
          144.34002576,
          -37.73953299
        ],
        [
          144.34046432,
          -37.73957869
        ],
        [
          144.34008872,
          -37.74173357
        ],
        [
          144.3397433,
          -37.74371525
        ],
        [
          144.32965753,
          -37.74266446
        ]
      ]
    ],
    {
      "type": "Point",
      "coordinates": [
        144.32965753,
        -37.74266446
      ]
    }
  ],
  "properties": {
    "iconFile": "ico_fire_yellow.png",
    "iconShadow": "sq_shadow_full.png",
    "iconSize": "[messa32,40]",
    "iconAnchor": "[16,34]",
    "style": "yellow",
    "status": "yellow",
```

```
        "id": "14968",
        "title": "PARCEL 45530943",
        "url":
"https:\\\\demo4.crisisworks.com\\register\\item\\view\\id\\14968",
        "info": [
            "Status: Hazard Exists",
            "Updated: 2016-06-20 14:06:27"
        ]
    },
    "_hasLineStrings": false
```

```

    ]
  }
}

```

**Step 3**

Add the URL above into your system as a GeoJSON layer. If developing on OpenLayers, [this tutorial explains how to add a GeoJSON layer](#).

**Fetching all Fire Prevention Notices to import into another system using CSV**

This example downloads CSV data for import into another system

**Steps:**

1. Obtain your authentication token
2. Prepare and test a URL to fetch the data
3. Add the URL into OpenLayers

**Step 1**

First, fetch an API token based on a user account with credentials that provide access to the FPN registers and event. This is described above in the section [Working with Authentication](#).

**Step 2**

The following URL will fetch a live list of all FPN records for a given event. Replace **site**, **token** and **event** with your own values.

**Example**

```

# Fetch all FPN records via CSV
curl
"https://demo4.crisisworks.com/api/csv/item?type=fpn&event=1014&token=81
62e97a0fabf76b3bf0b1bfa50e90e8"

id,eventId,due,isSensitive,itemSchemaName,userId,status,templateName,cos
tEstimate,type,title,address,assetId,assignee,assignee_info,_canEdit,dat
eCreated,dateUpdated,isTemplate,tags,infringementNumber,contractors,medi
a,mergedFile,activity,cutGrassWeeds10cm,removeDebris,firebreak10m,cutGra
ssWeeds5cm,trimTrees,removeFlammable,notes,dateNewFromWeb,dateNewFromMob
ile,date1stInspectionRequired,dateHazardExists,dateComplianceInspectionR
equired,dateRequestCompulsoryClearing,datePostClearanceInspectionReview,
dateHazardCleared,dateTemporaryExemptionGranted,dateClosed,dateNoticeWit
hdrawn,dateFpnSent,infringementSentDate,_order
14919,1014,,,moorabool,pkakris.mb,20,,0.00,fpn,,,,,2632,"Pete
Kakris",1,2016-03-03T13:13:33+11:00,2016-03-03T13:13:33+11:00,,,,,Array,A
rray,Array,,,,,,,,,,,,,"Thu, 03 Mar 2016 13:13:33 +1100",,,,,,,,,,1
14968,1014,,,moorabool,pkakris.mb,20,,0.00,fpn,"PARCEL 45530943","PARCEL
45530943",24733,2632,"Pete
Kakris",1,2016-06-20T14:06:27+10:00,2016-06-20T14:06:27+10:00,,,,,Array,A
rray,Array,,1,,,,,,,,,,,,,"Mon, 20 Jun 2016 14:06:27 +1000",,,,,,,,,,2

```

**Step 3**

Now consume the URL in your application.

### Example

```
#!/bin/bash

# Prepare a file with the import data
# Note we're using the 'CSV' adapter in this example, but you could also
# use the 'JSON' adapter for structured output.
cd /tmp
rm -f daily-import.csv
curl
"https://demo4.crisisworks.com/api/csv/item?type=fpn&event=1014&token=81
62e97a0fabf76b3bf0b1bfa50e90e8" > daily-import.csv

# Now import into my system
# (this part is dependant on your application)
import daily-import.csv
```

## Built-in Positions for Local Government users

- View the companion article [Built-in Security Policies](#) for details on the capabilities of each policy
- View the [derived spreadsheet](#) showing each position and each effective permission
- In Crisisworks, navigate to a position or a user and click [View Effective Permissions](#) to view an expanded list in the system.

Local government users of Crisisworks get the following built-in positions.

ID	Name	Policies	Capabilities summary
	System Administrators		
councilFullAccessAdmin	Full Access Administrator	sysAdmin + analyticsBase + analyticsSystem + analyticsOperations + analyticsRecovery + specialFinance	Can manage users, organisations, positions, system settings and coordinate all records across all registers.
councilSysAdmin	User Administrator	userAdmin + settingsAdmin + assetAdmin + operationsBasic	Can manage users, organisations and positions.
Coordinators			
councilMERO	MERO	baseUserPolicy + eventCoordination + operationsCoordination + offerCoordination + recoveryCoordination + referenceOfficer + analyticsOperations + analyticsRecovery + analyticsSystem + specialFinance + sysAdmin	Create, manage and coordinate all events, manage users and system settings, has full read-write access to operations and recovery data and can assign and move records between events.

councilDeputyMERO	Deputy MERO	baseUserPolicy + eventCoordination + operationsCoordination + offerCoordination + recoveryCoordination + referenceOfficer + analyticsOperations + analyticsRecovery + analyticsSystem + specialFinance + sysAdmin	Create, manage and coordinate all events, manage users and system settings, has full read-write access to operations and recovery data and can assign and move records between events.
councilMRM	MRM	baseUserPolicy + eventCoordination + operationsCoordination + offerCoordination + recoveryCoordination + referenceOfficer + analyticsOperations + analyticsRecovery + analyticsSystem + specialFinance + sysAdmin	Create, manage and coordinate all events, manage users and system settings, has full read-write access to operations and recovery data and can assign and move records between events.
councilDeputyMRM	Deputy MRM	baseUserPolicy + eventCoordination + operationsCoordination + offerCoordination + recoveryCoordination + referenceOfficer + analyticsOperations + analyticsRecovery + analyticsSystem + specialFinance + sysAdmin	Create, manage and coordinate all events, manage users and system settings, has full read-write access to operations and recovery data and can assign and move records between events.
<b>Council Officers</b>			
councilCoordinatorAssistant	MRM/MERO Assistant	baseUserPolicy + operationsCoordination + offerCoordination + recoveryCoordination + referenceOfficer + analyticsOperations + analyticsRecovery	Full read-write access to operations and recovery data, can assign and move records between events and can access reports.
councilEMO	Council EMLO	baseUserPolicy + operationsCoordination + offerCoordination + recoveryBasic + referenceOfficer + analyticsOperations	Full read-write access to operations data, can assign and move operations records between events, limited access to shared recovery data, and access to operations reports.
councilRecoveryOfficer	Recovery Officer	baseUserPolicy + operationsOfficer + offerOfficer + referenceOfficer + recoveryOfficer	Full read access to recovery data with edit ability to assigned records, full read-only access to operations data, and can edit assigned operations data
councilERCSupportOfficer	ERC Support Officer	baseUserPolicy + operationsCoordination + offerOfficer + recoveryCoordination + referenceOfficer + analyticsOperations + analyticsRecovery	Full read-write access to operations and recovery data, can assign and move records between events and can access reports.
councilMSIAOfficer	MSIA Officer	baseUserPolicy + operationsOfficer + referenceOfficer + recoveryCoordination + analyticsRecovery	Full read access to operations data with edit ability to assigned records, full read-write access to recovery data and access to recovery reports.
<b>Council Special Roles</b>			
councilVprCoordinator	VPR Coordinator	specialVprCoordinator	Access to the VPR as a council coordinator
councilVprAccess	VPR User	specialVprAccess	Access to the VPR with read-only access
councilFinanceOfficer	Finance Officer	baseUserPolicy + analyticsBase + analyticsOperations + analyticsRecovery + analyticsFinance + recoveryBasic + operationsBasic + recoveryBasic	Access the finance system
<b>Council Contractors</b>			
—			
<b>External Agency Users</b>			
policeMERC	MERC	baseUserPolicy + operationsCoordination + offerCoordination + specialAnnouncer + referenceAccess	Full coordination of operations and offer registers with access to send announcements, and read only access to reference items
policeEMLO	Police EMLO	baseUserPolicy + operationsBasic + referenceAccess	
—	« Agency » EMLO	baseUserPolicy + operationsBasic + referenceAccess	"Response EMLOs" have full access to operations data, and can edit data assigned to them.  <b>WARNING</b> Positions created from agencies originally in Crisisworks 3 must be edited manually to conform to this model.

—	Red Cross EMLO DHHS EMLO DELWP EMLO VCC EMLO DEDJTR EMLO	baseUserPolicy + operationsBasic + referenceAccess + recoveryBasicReadOnly	"Recovery EMLOs" have full access to to operations data, and can edit data assigned to them, plus has limited access to shared recovery data.  <b>WARNING</b> Positions created from agencies originally in Crisisworks 3 must be edited manually to conform to this model.
---	--	--	---

## Built-in Security Policies

Crisisworks Security Policies are the building blocks used for creating positions.

Crisisworks comes with the following built-in security policies for local government users.

### Naming conventions

The following naming conventions are in use:

- "Coordination" — means full access to data with assignment and moving
- "Officer" — means full access to data without assignment and moving
- "Basic" — means limited access only to assigned events and/or records
- "ReadOnly" — means the user cannot write or create
- "New" — adds the ability to add a new record
- "Special" — means a custom rule that does not fit any convention

Additionally, the following register group names are used:

- "recovery" means all the registers in the recovery module
- "operations" means request, message, offer, log, contact
- "reference" means "wiki"

### Built-in Security Policies

The following policies are built into most Crisisworks installations.

Name	Description	Developer Tag	Developer ID
<b>Base policies</b>			
Base User Policy	All users get this by default. Can edit own profile, and access the log and contact registers	Base	baseUserPolicy
Developer	Access to the policy development and system diagnostics screens	Base	policyDeveloper
Super-user	Super-user, with access to all events and all features	Base	sysAdmin
Manage Assets and Resources	Can manage assets and resources	Base	assetAdmin
Manage system settings	Can access all of the settings screens	Base	settingsAdmin
Manage users, organisations and positions	Can manage users	Base	userAdmin
UserAccess	Can view the users list	Base	UserAccess
<b>Event policies</b>			
Events Coordination	Full management and coordination to all events, with the power to create new events.	Council	eventCoordination
Event Coordination Limited	Full management and coordination to events in which the user is participating.	Council	eventBasic
Event View	Can View an Events's overview details such as positions & people on duty		EventView
<b>Recovery policies</b>			

Recovery Coordination - full access to recovery data	Full read/write access to recovery data within involved events, with the ability to manage assignments and moving records between events.	Council	recoveryCoordination
Recovery Officer - full access to recovery data	Full read access to recovery records within involved events, and ability to edit assigned records.	Council	recoveryOfficer
Recovery Limited	Limited read/write access to recovery records within involved events where the data is assigned or shared.	Council	recoveryBasic
Recovery Read Only Assigned	Limited read-only access to recovery records within involved events where the data is assigned or shared.	Council	recoveryBasicReadOnly
Recovery Limited with New Case Creation	Adds the ability to create new recovery cases and associated sub-records. Note: this needs a read-write policy such as recoveryBasic as well.	Council	recoveryBasicNewCase
<b>Operations (Request, Information)</b>			
Operations Coordination	Full read/write access to operations data within involved events, with the ability to manage assignments and moving records between events.	Council	operationsCoordination
Operations Officer	Can edit all requests, can not assign or add resources  Can view and edit all Contacts  Can view and edit all Information and Log records: Can edit records they create	Council	operationsOfficer
Operations Limited	Limited read/write access to requests within involved events only where the data is assigned, and limited read-only access to information within involved events where the data has been shared, or where the user is the author.  Can view and edit Log items Items they have created. Can view and edit Contacts in events they have access to	Council	operationsBasic
Operations Read Only Assigned	Limited read-only access to operations records within involved events only where the data is assigned or shared.	Council	operationsBasicReadOnly
<b>Offers</b>			
Offers Coordination	Full read/write access to offers within involved events, with the ability to manage assignments and move records between events.	Council	offerCoordination
Offers Officer	Full read access to offers within involved events, with the ability to edit and re-assign data that is assigned.	Council	offerOfficer
Offers Limited	Limited read/write access to offers within involved events only where the data is assigned	Council	offerBasic
Offers Read Only Assigned	Can view offers they have been assigned	Council	offerBasicReadOnly
<b>Logs</b>			
Log Coordination	Can see and edit all Logs	Council	logCoordination
Log Officer	Can see and edit all Logs	Council	logOfficer
<b>Reference items</b>			
Reference Officer	Full read/write access to reference items in involved events	Council	referenceOfficer
Reference Access	Full read access to reference items in involved events	Council	referenceAccess
<b>Special Policies</b>			
Resource Manager	Can view and edit resources	Council	specialResourceManager
Resource Assignment	Can assign resources within the request form	Council	specialResourceAssignment
Announcer/Publisher	Can send announcements from the Information register	Council	specialAnnouncer
Finance Access	Can access the finance module, if licensed.	Council	specialFinance
Publisher	Can publish "Promote" items to the Dashboard	Council	specialPublisher
Access to recovery analytics	Access to the reports in folder "Recovery reports"	Council	analyticsRecovery
Access to operations analytics	Access to the reports in folder "Operations Reports"	Council	analyticsOperations
Access to offers analytics	Access to the reports in folder "Offers Reports"	Council	analyticsOffers
Access to base analytics data	Can access the analytics system and the base system reports.	Base	analyticsBase

Access to system analytics	Access to the reports in folder "System Administration Reports"	Base	analyticsSystem
Access to Resource analytics	Access to the reports in folder "Resource Reports"	Base	analyticsResources
<b>VPR</b>			
VPR Coordinator	Council only Position Gives VPR Access and Coordination Access. Will not work for users that aren't from Council Organisation.	Council	specialVprCoordinator
VPR Access	Council only Position Gives VPR Access. Will not work for users that aren't from Council Organisation.	Council	specialVprAccess

## Register Permissions Glossary

When viewing configured register security permissions, the following access options are available.

Name	Description
Can access the register	The user can see the register in navigation
Can access a set of items	The user can view lists of items in data grids and lists
Can indirectly update an item	Can edit items that are embedded in sub-forms
Can directly see the register in the user interface	Controls whether this register is included user interfaces such as navigation
Can directly view an item	Can view a full item record in the UI and via the API
Can directly create an item	This controls the "New" button on the UI, and allows top-level items to be created
Can directly edit an item	Controls the "Edit button on the UI, and disallows top-level edits to items
Can assign an item	Can assign items to users, positions and resources
Can add a comment to an item	Can add a note to be added to the history of a record using the yellow comment box
Can move an item between events	Can move items between events including global workspace events.
Can see the unassigned counter	Can see the counter for non-assigned, active records
Can create an item without Register Workflow Restrictions	Can bypass workflow states to set any status code at any time

## Importing Data into Crisisworks

The Crisisworks import facility allows you to bulk insert new records and update existing records by uploading a CSV file.

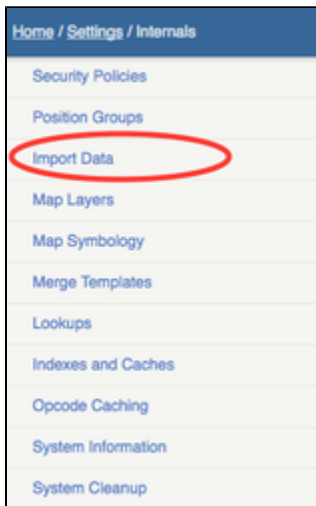
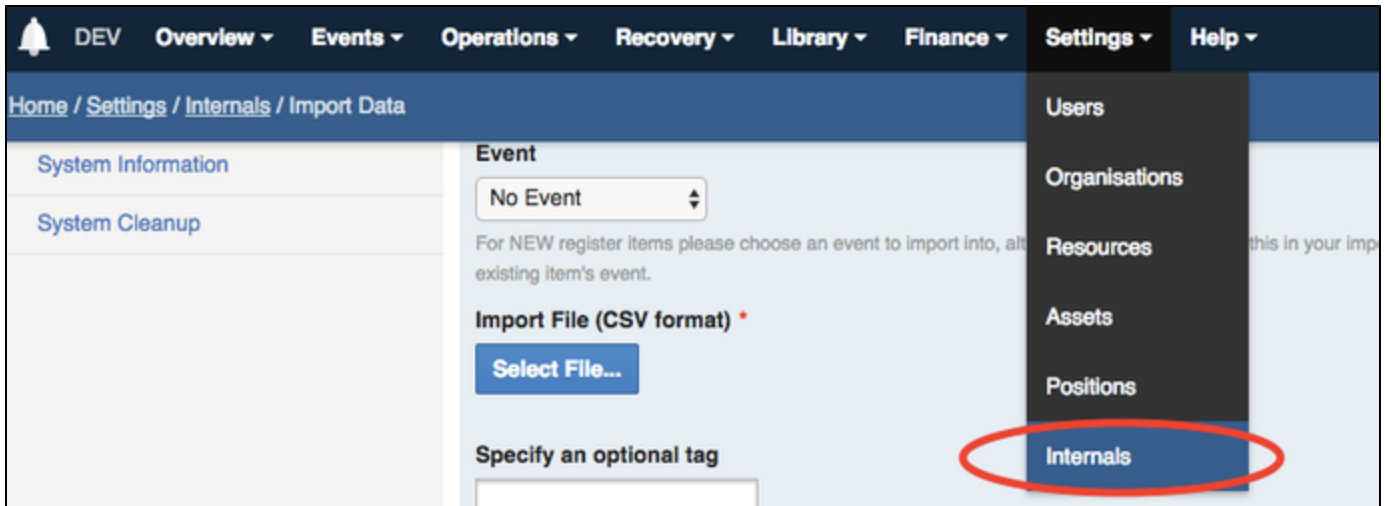
### On this Page

- [Importing Data](#)
- [Supported Import Types:](#)
- [The Import Form](#)
- [Updating Existing Records / Inserting New Records](#)
  - [Users](#)
  - [Register Items](#)
- [Viewing Details of your Import](#)

### Importing Data

You can import data into Crisisworks by going to the Settings Menu and choosing Internals. On the left hand side you will see a link called Import Data.





## Supported Import Types:

Currently the import facility supports the importing of:

- **Users** (visit this page for specific information on importing Users)
- **Contacts** (visit this page for specific information on importing Contacts)

Please note: imports cannot be undone once they are imported. However, you can specify an optional tag to add to each record so you can identify all imported reco

## The Import Form

**What do you want to import?**

User Import from CSV

**Event (for New register items only)**

No Event

For NEW register items please choose an event to import into, alternatively you can specify this in your import file. For all other import types, choose No Event. Note - for existing Register Items it will use the existing item's event.

**Import File (CSV format)**

Select File...

**Specify an optional tag**

Each item imported will be tagged with this tag. This may be useful for identifying imported records.

**Test Only**

Clicking Test Only will test your import file and output any errors if there are any issues. It will check the data but it will not import it.

**Comment (for the audit log)**

Import

### What do you want to Import?

This drop down list will display what data can be imported which is configured per site. General options (such as users, contacts) will be displayed, but you may have a customised import displayed for your site. Choose what you want to import from the drop down list.

### Event (for new register items only)

The event selector will only list the events you are currently participating in. If you do not see an event in this list, you must go on duty for the event for it to appear in this Event list.

You only need to choose an Event from this list if you are inserting **NEW** register items. Users do not require an Event to be selected. New items will be inserted into the event selected.

If you choose an Event from the list and you have existing records in other events, it will not update the item's event. The current item's event will override what is selected here.

If you wish to add records to multiple events, you can specify the Event ID in your CSV file. As long as you are participating in these events, the records will be added to these separate events. The Event ID specified in your CSV file will override the Event selected on the Import Form for any new records.

### Import File (CSV Format)

You will need to upload a CSV file from your computer. To create the CSV file, it may be easier to export data to a report first by selecting the appropriate records in the Datagrid and clicking the Export to Report button. Once the report has been run, you can then click the "To CSV" button. This will generate a CSV file that is compatible with the import system. Make any necessary changes to the records in the CSV file (including adding new records if necessary), save it and choose this file to import.

### Specify an Optional Tag

You can optionally specify a tag that will be added to every record that is imported. This may be useful for identifying which records were imported. Please note - this will not overwrite any existing tags, it will simply add a new one. You can leave this field blank if you do not wish to add a tag to each imported record.

### Test Only

It may be useful to test your import before actually importing your data. To do this, click on the Test Only checkbox. This will run through the import process and attempt to import each line of the import file but it won't actually save the records. Once the test import is complete it will return a "Complete" or "Error" status allowing you to view the details of any errors so you can fix up any issues before performing an actual import of your data.

### Comment

The comment box allows you to enter an optional comment which will be displayed on the Dashboard and audit history log once the import is complete. Leave this field blank if you do not wish to add a comment for audit history.

Click the **Import** button to commence the import. You can refresh the page at any time to display the status of your import in a table at the bottom of the import screen. (See Viewing Details of your Import below).

## Updating Existing Records / Inserting New Records

### Users

For users, any matching users will be updated. If no match is found, a new user will be created. If non-required fields are empty they will be ignored. The user import feature matches on the "id" field.

### Register Items

For register items (such as Contacts), if an ID is specified, it will attempt to find a match to an existing item. If no match is found it will skip this item and report an error. If a match is found, the record will be updated.

To insert new records, simply leave the ID field blank.

## Viewing Details of your Import

Once your import has been processed, a table will appear at the bottom of the import screen showing the status of the Import. Once the import has completed, it will either update to a status of "Complete" or "Error". You can click on the View Details link to view information on the import. Any errors that occurred will be displayed in here.

If any errors are found with your data, it will report on each specific error in the View Details area. The error items will be skipped and the import process will continue and save all of the correct items.

**Import From File**

Please upload a file to import. [Click for Import Instructions](#)

**Please Note:**

- Imports cannot be undone
- You must go on duty for any events that you are updating or importing records into so you have the appropriate permissions to perform these actions
- The event selector only shows events you are on duty for. If you want to import into an event not shown, go on duty to the event and refresh this page.
- You only need to select an event for any NEW register items if you have not specified an event in your import file. If an event is specified in your import file, it will override the event selector on this form for new items.
- You do not need to select an event on this form for existing register items. When updating items, the event is not updated and cannot be changed.

**What do you want to import?**

User Import from CSV

**Event (for New register items only)**

No Event

For NEW register items please choose an event to import into, alternatively you can specify this in your import file. For all other import types, choose No Event. Note - for existing Register items it will use the existing item's event.

**Import File (CSV format)**

Select File...

**Specify an optional tag**

Each item imported will be tagged with this tag. This may be useful for identifying imported records.

**Test Only**

Clicking Test Only will test your import file and output any errors if there are any issues. It will check the data but it will not import it.

**Comment (for the audit log)**

Import

ID	Status	Command	Date To Run	Date Created	Date Completed	User ID	
1	Error	Scheduling import	an hour ago	an hour ago	an hour ago	dl	<a href="#">[ View Details ]</a>

## Importing and exporting users to and from Crisisworks

Please read the general [Importing Data into Crisisworks](#) instructions before proceeding with Importing users.

## Importing users

From the "What do you want to import?" drop down list on the Import Form, select the **"User import from CSV"** option.

You will need to upload a file in CSV format with a list of users to import. Any matching users will be updated. If no match is found, a new user will be created with the User ID specified. If non-required fields are empty they will be ignored. The user import feature matches on the "User ID" field.

You do not need to choose an Event from the Import form when importing users.

To import changes to existing users, it may be easier to export them to a report first by selecting the appropriate users in the User Datagrid and clicking Export to Report. Once the report has been run, you can then click the "To CSV" button. This will generate a CSV file that is compatible with the import system. Make any necessary changes to the records in the CSV file, save it and choose this file to import.

Alternatively, you can download the sample User Import CSV file below and base your import on this file.

Please note: imports cannot be undone once they are imported. However, you can specify an optional tag to add to each record so you can identify all imported records.

## CSV File Format

The following CSV fields & rules are needed for the import to work.

Download the [User Import Sample CSV file](#)

Below is a list of CSV fields that should be added to your CSV file. The Field column displays what the headings should be in your CSV file.

Field	Description
User ID	the userId in Crisisworks. (Required field)
Password	an optional password for the user.
First Name	text (Required field)
Last Name	text (Required field)
Email	text (Required field)
Mobile	text
Phone	text
Address	text
Active	can use Yes or No. Defaults to 1.
Position	text (this is a free text field of the user's position title which doesn't relate to their competencies in Crisisworks)
Organisation	text. Must match an existing organisation in Crisisworks. This can be set to either the organisationId or the organisation name.
Tags	optional tags for the user.. Comma separated for more than one tag. Leave blank if not needed. Alternatively, you can add a tag to the import form which will be added to every user record imported.
Competencies	the names of the competencies in Crisisworks for the person to have. Comma separated list. ie Co-ordinator, Administrator. If organisationId is set, it will add the organisationId to the query when checking on the position so the position must exist in the organisation.
User On Call	can use Yes or No. Defaults to 0
Receive SMS Alerts	can use Yes or No. Defaults to 1.

Receive Email Alerts	can use Yes or No. Defaults to 1.
Subscribed to Learning Centre	can use Yes or No. Defaults to 0.
Subscribed to Newsletter	can use Yes or No. Defaults to 0
Subscribed to System Outages	can use Yes or No. Defaults to 0.
Auth Source	name of the external system which authoritative datasource for the user ID's
Auth User Name	userID from the Auth Source.
User Notes	this will use the profile field.

## Importing Contacts into Crisisworks

Please read the general [Importing Data into Crisisworks](#) instructions before proceeding with Importing users.

### Importing Contacts

From the "What do you want to import?" drop down list on the Import Form, select the "**Contacts import from CSV**" option.

For any new contact records you wish to insert into Crisisworks, you will need to either choose an Event from the drop down list or specify the Event ID in your spreadsheet for the record. If an Event ID is specified in your spreadsheet for a new item, it will override the Event selected on the Import Form.

You will need to upload a file in CSV format with a list of contacts to import. Any matching contact records will be updated. If no match is found, it will skip this item and report an error. If non-required fields are empty they will be ignored. The contact import feature matches on the "Contact ID" field which relates to the Crisisworks record ID of the record.

To import changes to existing contacts, it may be easier to export them to a report first by selecting the appropriate contacts in the Contacts Datagrid and clicking Export to Report. Once the report has been run, you can then click the "To CSV" button. This will generate a CSV file that is compatible with the import system. Make any necessary changes to the records in the CSV file, save it and choose this file to import.

Alternatively, you can download the sample Contacts CSV file below and base your import on this file.

Please note: imports cannot be undone once they are imported. However, you can specify an optional tag to add to each record so you can identify all imported records.

### CSV File Format

The following CSV fields & rules are needed for the import to work.

Download the [Contacts Import sample CSV import file](#)

Below is a list of CSV fields that should be added to your CSV file. The Field column displays what the headings should be in your CSV file.

Field	Description
Contact ID	the id in Crisisworks. (Required field)
Contact Status	the status of the record. This can be set to Active or Inactive. Defaults to Active.
First Name	text (Required field)
Last Name	text (Required field)

Event ID	the ID of the event the current contact exists in or the event to insert new contacts into. Alternatively you can leave this field blank and choose the Event Selector on the Import Form when inserting new records
Organisation Name	text. (this is a free text field of the contact's organisation which doesn't relate to the Organisations in Crisisworks)
Contact Position	text. (this is a free text field of the contact's position title which doesn't relate to positions in Crisisworks)
Contact Email	text
Contact Rank	text
Contact Notes	text
Contact Tags	optional tags for the contact. Comma separated for more than one tag. Leave blank if not needed. Alternatively, you can add a tag to the import form which will be added to every contact record imported.

## Getting Support

If the matter is urgent you should call us on 03 9521 4400 or 1300 DATALINK for priority response.

- [Log a Service Desk ticket](#)