

# FieldTeq Guide

## Creating a Project

Access: <https://fieldteq.victoria.ac.nz> or <http://www.victoria.ac.nz/sbs/about/resources>

Access from campus computers or from home using [VPN](#) connection

**Please use Internet Explorer to avoid problems**

Log in: university username and password, preceded by a **domain** and a **backslash**:  
Staff\username or Student\username

Questions: contact Mel Dohner; KK 420, 463 5233 ext. 5580, [mel.dohner@vuw.ac.nz](mailto:mel.dohner@vuw.ac.nz)

**The use of FieldTeq is mandatory for all field outings.** While it can be cumbersome to fill in all the forms, all requested information is important in the event that a worst case scenario occurs and a search and rescue team is called out to recover you and your party.

### Creating a project

This guide was produced to standardize the information supplied in FieldTeq, to provide examples for users, and to reduce the likelihood of your project being rejected. Ideally, the creation of a FieldTeq project and the planning of research trips will occur simultaneously to improve the research experience.

The initial approval of a project will take time. There are at least three people that must be contacted in the approval process (the terrestrial officer, the review board, and the supervisor).

**Plan for project approval to take AT LEAST a week, if not longer.**

Projects do not need to be stagnant, unchanging documents. New sites or risks are likely to be discovered. In this case, just revert the project to draft, make the changes, and re-lodge the draft.

**Use the "change comments" box** to let reviewers know what has been changed to speed up the re-approval process.

### Login

At first login, you are taken to your "Home". Click on "Project" to see list of your approved projects. Select "add new" (**Figure 1**).

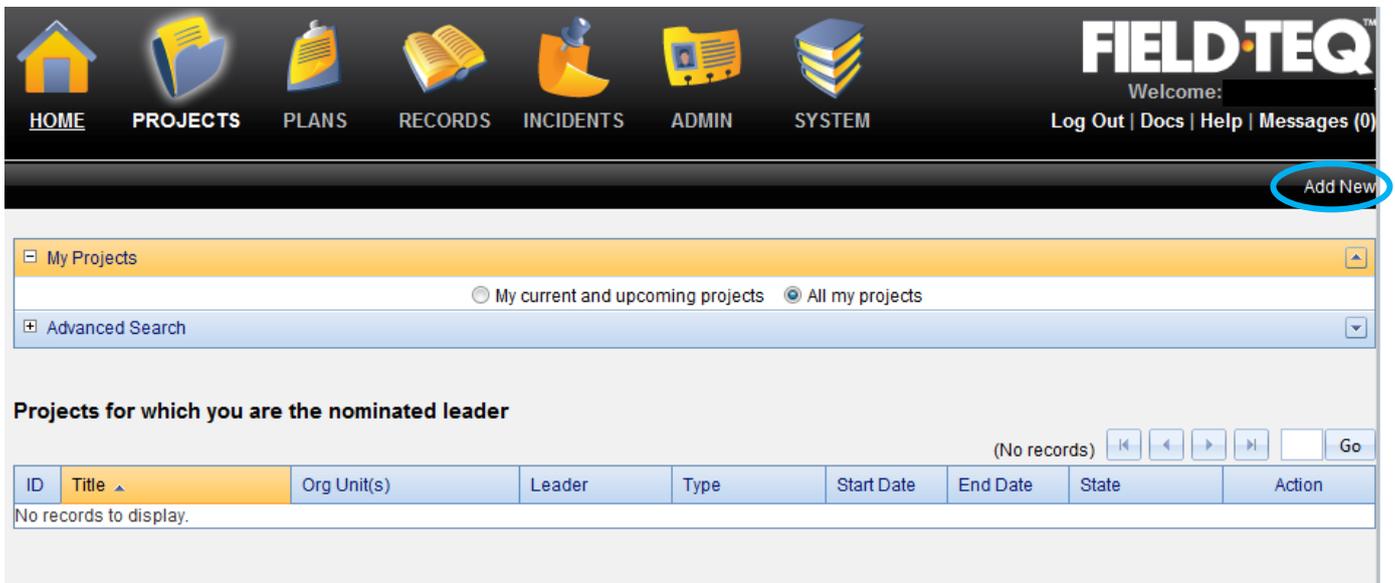


Figure 1. Under the "Projects" icon, you can view your current projects and lodge new projects by clicking on "add new" (blue circle).

## Project Details

We don't want a research proposal and we're not worried about the goal of your research. We want to know where you're going, roughly when and where you're going, and activities that you'll be undertaking. **No field should be left blank (Figure 2).**

Fill in all fields with as much action oriented detail as possible, as outlined below.

**Organisational unit:** SBS

**Title:** Sensible and meaningful to everyone

**Description:** Brief, detailing what you'll be doing in the field (e.g. diving, measuring trees, intertidal collecting) and general work areas (e.g. on the coastal Wairarapa, Akatarawa forest park)

**Project leader:** Select your name

**Project type:** Select appropriate item (e.g. Master's Project, PhD)

**Supervisors:** Select one person, your primary supervisor

**Activity types:** Select appropriate (e.g. Terrestrial trip)

**Locales:** Select appropriate (e.g. Local: Wellington area, Regional: Wellington district, etc)

**Dates:** Overestimate how long the project will take so you don't have to re-lodge it if it expires.

**Field trips per year:** Give your best guess to the number of field trips/year time spent in field

**Days per field trip:** Day trip or multiple days with overnight accommodation?

**Means of Contact:** IN THE FIELD. Cell phones may not work, do you have a satellite phone? What is the number?

**Min. people per field trip:** Always 2 or more, unless supervisor authorizes working alone. We expect to see working alone risks if this is the case. (Contact [mel.dohner@vuw.ac.nz](mailto:mel.dohner@vuw.ac.nz) for example working alone risks, template risks are currently being reviewed).

**Comments:** Additional information that will help us evaluate this project. State items that aren't a risk (e.g. will not be driving, chemicals pose no risk). Please state what permits are required (MPI, DoC, EPA, Regional Council, etc). **If no permit is required, please write "no permit required".** While permits aren't a health and safety risk, collecting without a permit is considered a reputational risk.

After filling in the above fields, click "save" and continue filling out remaining tabs.

Draft / Save Cancel

Organisational units: [Not approved] Victoria University of Wellington / School of Biological Sciences  
Select

**Title:** \* Practice Project for Quick Guide

**Description:** \* Action oriented description of your project - not the goals of your research.  
 Intertidal collection at Island Bay, DBH measurements of trees at Otari-Wilton Bush, handling DoC pest traps on Stewart Island. ^

**Project leader:** Your Name v **Project type:** \* Training v

**Supervisors:**  
 Your PRIMARY supervisor v  
< None selected > + Add x Remove

**Activity types:**  
 Diving Operations  
 Laboratory Work  
 Terrestrial Trip v

**Locales:**  
 National  
 Regional  
 Local v

**Start date:** 8/06/2017 v **Field trips per year:** 20 v

**End date:** 3/07/2018 v **Days per field trip:** 7 v

**Means of contact:** Local sites, Cell phone: #  
 Remote sites, Sat Phone: # v **Min. people per field trip:** 2 v

**Comments:** MPI Collecting permit required, DoC H&S protocols to be followed, v

Figure 2. Generic example for filling out the project details of a new project. When completed, click "Save" at the top (blue circle)

## Methods

Selecting a method loads the project with template risks that have been identified for that method. Tick all methods that apply to any activity that may be carried out under the project. Always include at least "Terrestrial – Generic Risks".

## Site Info

This is an important step. All sites visited in the course of a project must be included in the approved project. **Sites can't be visited if they aren't included in the project.** Therefore, add any sites that you are considering visiting. If new sites are identified after project approval, the project must be reverted to draft, site locations and site risks added, and the project lodged for re-approval.

Two options are available for adding sites (**Figure 3**):

**FIELD-TEQ™**  
Welcome: Mel Dohner  
Log Out | Docs | Help | Messages (0)

HOME PROJECTS PLANS RECORDS INCIDENTS ADMIN SYSTEM

ProjectDetails Methods Site Info Risks Safe Work Procedures Photos Attachments Admin Activity Plans Reports

Notices Change Logs

Draft Link To Shared Add New

**Project ID:** 349 **Project Leader:** Your Name  
**Project Title:** Practice Project for Quick Guide **Project Type:** Training  
**Start Date:** 8/Jun/2017 **End Date:** 3/Jul/2018

Include Archived Page 1 of 3 (37 records) Go Excel

Site	Location	Nearest Medical Centre	Remote	Shared	Approved	Action
Kau Bay, Mirimar Peninsular, Wellington Harbour	Lat: -41.2883 Lon: 174.8296 Massey Rd Mirimar Wellington 6022 New Zealand	Wellington Hospital	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Details
Cape Palliser, Wairarapa	Lat: -41.6129 Lon: 175.2917 3763A Cape Palliser Rd Cape Palliser Wellington 5772 New Zealand	Wellington Hospital	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Details

Figure 3. Site info tab of a project. Circled in blue are the two options for adding a site; either "Linked To Shared" or "Add New".

#### 1) Link to Shared

Brings up sites used over multiple projects or years. May be associated with site specific risks (e.g. Cape Palliser and seal colony risks). Since these sites are shared, site details cannot be edited.

#### 2) Add new

**Site:** area where you park and work. May encompass a large or small area. Give it a name and add any contact info for land access (e.g. contact name/number for DoC or private owner)

**Latitude / Longitude:** Google it if you can't get the map to work.

**Tick box if location is remote**

**Nearest Medical centre:** If the nearest hospital is not listed, select "Administrator to Add".

**Then e-mail** [mel.dohner@vuw.ac.nz](mailto:mel.dohner@vuw.ac.nz) with the name and, if known, address of the nearest medical centre. Mel will update the site during the approval process.

**Emergency assistance time:** best guess, remember may be delayed in poor conditions

**Medical centre evacuation time:** how long to get through the doors of the nearest medical centre, after being rescued

**Walk out time:** to get to vehicle from the field site

**General supplies:** food/drink, sun protection, gumboots, etc

**Extra medical supplies:** site specific concerns (e.g Bees/wasps, bring anti-histamines or epi-pen)

Once the site details have been added, click "save". You'll need to then click "back" to return to the "Site Info" tab (**Figure 4**).

Figure 4. Generic example for adding a new site to a project. If the nearest medical centre is "Administrator to Add", be sure to e-mail the facility information to [mel.dohner@vuw.ac.nz](mailto:mel.dohner@vuw.ac.nz). Once saved, click on "back" (in blue circle) to return to "site info" tab.

## Risks

This is the risk assessment for the project and should adequately address all possible risks that could be encountered during any activity associated with this project. The risk tab is pre-loaded with risks based on the selected methods and listed in order of risk rank. **Your project will be rejected if obvious risks have not been included.** Critically thinking of the environment you are in, the risks you will encounter, and the controls required to minimize harm will ensure the safety of all participants.

### Add a new Risk

Template risks are generic in scope only. Most projects will have site, equipment, or activity risks that are not automatically brought in. **New risks can, and should, be added as required.**

To add a new risk: Click "Add New" (**Figure 5**). Fill in each field to the best of your ability. Note, natural rank and post control rank will be calculated from your severity and likelihood values.

**Task:** Short name for the activity/method/site where the hazard occurs (e.g. handling traps)

**Hazard:** Short phrase indicting the hazard associated with the task (e.g. crushing from trap spring)

**Natural Severity:** Assuming no protective equipment or training, what is the worst outcome the hazard could pose to someone's health?

**Natural Likelihood:** Assuming no protective equipment, training, or preventive measures, what is the likelihood of this hazard occurring?

**Control:** State the preparations and actions that will be taken to reduce likelihood of risk occurring and minimize severity if risk occurs. State actions that will be taken if the risk does occur?

**Post-control severity:** With controls in place, what it is the actual severity of the hazard?

**Post-control likelihood:** With controls in place, what is the actual likelihood of the hazard?

FIELD-TEQ™  
Welcome:  
Log Out | Docs | Help | Messages (0)

HOME PROJECTS PLANS RECORDS INCIDENTS ADMIN SYSTEM

Project Details Methods Site Info Risks Safe Work Procedures Photos Attachments Admin Activity Plans Reports Notices

Change Logs

All Risks Project Type Risks Activity Type Risks Activity Method Risks Activity Role Risks Site Location Risks

Draft / Add New

Project ID: 349 Project Leader: Your Name  
Project Title: Practice Project for Quick Guide Project Type:  
Start Date: 8/Jun/2017 End Date: 3/Jul/2018

Include Archived Page 1 of 4 (49 records) Go Excel

Context	Task	Hazard	Severity	Likelihood	Rank	Action
Activity Method : Terrestrial - Intertidal Fieldwork	Intertidal fieldwork	Rouge Waves	2 - Minor	3 - Possible	6	Details
Activity Method : Terrestrial - Intertidal Fieldwork	Intertidal fieldwork	Cuts and scrapes	2 - Minor	3 - Possible	6	Details
Activity Method : Terrestrial - Intertidal Fieldwork	Intertidal fieldwork	Hazardous marine life	2 - Minor	3 - Possible	6	Details
Activity Method : Terrestrial - Generic Risks	Terrestrial - Generic Risks	Slips, trips, falls	3 - Moderate	2 - Unlikely	6	Details
Activity Method : Terrestrial - Generic Risks	Terrestrial - Generic Risks	Insect stings and bites	3 - Moderate	2 - Unlikely	6	Details
Activity Method : Terrestrial - Generic Risks	Terrestrial - Generic Risks	Adverse Weather	3 - Moderate	2 - Unlikely	6	Details

Figure 5. List of project associated risks. To add a new risk, click on "Add New" (blue circle). To Alter or Remove a risk, click on "Details" (red circle).

## Alter a Risk

All controls for these risks should be reviewed and altered to reflect actual steps that will be taken in the field. Many template controls state the use of a personal locator beacon (PLB). If you are not going to take a PLB into the field, then remove this statement from the controls. The risk rankings can also be altered by changing the natural and post-control severity and likelihood rankings. These rankings might be changed for sites in low risk areas (e.g. Zealandia).

To alter a risk: click "Details" of the risk (**Figure 5**) then click "Edit" at the top risk page. Make changes and click "save". To return to the list of risks, click on "Back".

## Remove a risk

Not all template risks apply to all projects. If you feel a risk doesn't apply to your situation, delete it. The risk will be archived and remain associated with project. If you decide to reinstate the risk you can "Restore" it from the archives.

To remove a risk: click "Details" of the risk (**Figure 5**) then click "Remove" at the top of the risk page. Click "OK" to confirm risk removal. This risk is now archived. Click "Back" to return to the list of risks.

To view archived risks or restore risks: Click the view archived box (**Figure 6**), select "Details" for the risk to restore, and click "Restore".

Context	Task	Hazard	Severity	Likelihood	Rank	Archived	Action
Activity Method : Terrestrial - Undergraduate field trip	Terrestrial - Undergraduate field trip	Injury or medical incident suffered by a trip participant requiring evacuation	3 - Moderate	3 - Possible	9	<input checked="" type="checkbox"/>	Details
Activity Method : Terrestrial - Working with chemicals	Terrestrial - Working with chemicals	Accident with hazardous chemicals in the field	3 - Moderate	2 - Unlikely	6	<input type="checkbox"/>	Details
Activity Method : Terrestrial - Working with animals	Terrestrial - Working with animals	scratches, bites, stings or exposure to pathogens	3 - Moderate	2 - Unlikely	6	<input checked="" type="checkbox"/>	Details

Figure 6. To view archived risks, click the "Include Archived" box (blue circle). Archived risks are indicated by tick present in a new column of the table (red circle). Archived risks can be reinstated by clicking "Details" and then "Restore".

## Safe work procedures

Use this tab as a reminder to yourself, as the project leader, what needs to happen on the day of the field work. **Fill out every field (Figure 7)**. Blank fields indicate thought hasn't been put into the project. **At the very least write in "not required"**.

**Responsibilities of key personnel:** What needs to happen to ensure a smooth and safe field excursion?

**Assets required for this project:** Any university gear or important equipment that is needed.

**Training to minimize hazards:** Do any of the sites, project methods, or equipment being used require training or a safety briefing for participants?

**PPE requirements:** What is the minimum personal protective equipment needed? Nearly all projects will need sturdy shoes, rain coats and/or sun protection.

Project Details	Methods	Site Info	Risks	Safe Work Procedures	Photos	Attachments	Admin	Activity Plans	Reports
Notices		Change Logs		Draft /   <span style="float: right;">Edit</span>					
Project ID: 349				Project Leader:		Your Name			
Project Title: Practice Project for Quick Guide				Project Type:		Training			
Start Date: 8/Jun/2017				End Date:		3/Jul/2018			
<p><b>Responsibilities of key personnel:</b> Ensure all supplies are loaded before departure, particularly equipment listed in the risk controls (first aid kit, rain coats, emergency whistles, etc). Ensure cell phones are charged and numbers exchanged between participants.</p> <p><b>Assets required for this project:</b> Vehicles, collecting gear, sampling permits</p> <p><b>Training required to minimise hazards:</b> Review signs and treatment for hyper- or hypothermia. Site specific briefing given at start of each trip.</p> <p><b>PPE requirements for all personnel:</b> sunscreen, sunhat, raincoat, and proper footwear</p>									

Figure 7. Example of how to fill in the "Safe Work Procedures" tab.

## Photos

This tab may or may not be useful for your project.

Good place to store site maps or JPEGs of informative documents

## Attachments

This tab is a good place to store collecting permits, a detailed itinerary with contact information, or any other information relevant to the project. However, there is a 5 MB limit.

**Maps marked with planned parking and project trails are extremely helpful if search and rescue is called.**

## Admin

Used by the Terrestrial Officer

## Activity Plans

Once your project is approved, you will lodge activity plans outlining field trip details (where, when, who). These activity plans do not require approval, but **they must be lodged for every outing!**

Refer to activity plan instructions for guidance on filling out activity plans.

## Reports

Three reports are available for viewing and exporting anytime, including after project approval.

- 1) Project details for plan participants; contains a summary of all the information included in the project, including all site locations, risks, and activity plans.
- 2) Project Registration; contains the same information as “project details for plan participants”, but also includes validation messages (information, warnings, and errors).
- 3) Risk Assessment; as the name suggests, it returns every risk identified in the project.

To export these reports (for e-mailing to participants or attaching to research proposals)

Click “view” (**Figure 8**). This launches the document into a new web page with a page navigator bar at the top. To export the report, click on the export icon (**Figure 9**) and select the desired export format.

The screenshot shows a web application interface with a navigation menu at the top. The 'Reports' tab is selected. Below the navigation menu, there is a summary box for a project with the following details:

- Project ID:** 349
- Project Title:** Practice Project for Quick Guide
- Start Date:** 8/Jun/2017
- Project Leader:** Your Name
- Project Type:** Training
- End Date:** 3/Jul/2018

Below the summary box, there is a table with 3 columns: Title, Description, and Action. The table contains 3 rows of report options. The 'View' button for the first report is circled in blue.

Title	Description	Action
Project Details For Plan Participants	This is the details of a project which will be given to all participants of an activity plan of the project.	View
Project Registration	This is the project registration report that shows the details of a project.	View
Risk Assessment	This is the risk assessment report that shows the assessed risk details for a project.	View

Figure 8. Three report options available from the “Reports” tab. To open the reports in a new web page, click “View” (blue circle).

Save as attachment within FIELD-TEQ

1 of 3 Find | Next

**Project Details For P**

Date: 02/08/2017

**Project**

349 Practice Project for Quick Guide

**Details**

Project Type	Start Date	End Date	Activities Per Year	Days Per Activity	People Per Activity
Training	08/06/2017	03/07/2018	20	7	2
<b>Organisational unit(s)</b>	[NOT APPROVED] Victoria University of Wellington / School of Biological Sciences				
<b>Description</b>	Action oriented description of your project - not the goals of your research. Intertidal collection at Island Bay, DBH measurements of trees at Otari-Wilton Bush, handling DoC pest traps on Stewart Island.				
<b>Activity type(s)</b>	[NOT APPROVED] Terrestrial Trip [NOT APPROVED] Laboratory Work				
<b>Locale(s)</b>	[NOT APPROVED] Regional [NOT APPROVED] Local				
<b>Means of contact</b>	Local sites, Cell phone: # Remote sites, Sat Phone: #				
<b>Tasks with high risk</b>					
<b>Responsibilities</b>	Ensure all supplies are loaded before departure, particularly equipment listed in the risk controls (first aid kit, rain coats, emergency whistles, etc). Ensure cell phones are charged and numbers exchanged between participants.				
<b>Required training</b>	Review signs and treatment for hyper- or hypothermia. Site specific briefing given at start of each trip.				
<b>Required equipment</b>	Vehicles, collecting gear, sampling permits				
<b>Minimum PPE</b>	sunscreen, sunhat, raincoat, and proper footwear				
<b>Lodgement date</b>					
<b>Comments</b>	MPI Collecting permit required, DoCH&S protocols to be followed				

**Project Leader and Supervisors**

Figure 9. Viewing a FieldTeq report will open a new web page with page navigation features at the top. To export, click the export icon (blue circle) and select the preferred export format from the drop down box.

## Notices & Change Logs

The "Notices" tab logs all notices sent out in association with the project.

The "Change Logs" tab archives all changes made to the project, including the day and person.

## Lodge the project

When all tabs have been completed, return to the “project details” tab. Click “**Lodge to Terrestrial Officer Review**” at the top (**Figure 10**). This will produce a pop up dialog box (**Figure 11**). This box gives summary information and a list of warnings or errors. Errors must be fixed before the project can be lodged. Warnings can be ignored, but should be addressed if possible. Click “Confirm” to lodge your project.

Your project has now been sent to the terrestrial officer for administrative review. The officer will ensure all required fields are satisfactorily filled out and that all obvious risks are included. **The officer is not responsible for ensuring all risks are included in the project or that all controls are adequate.** This is the responsibility of the project leader and their supervisor. Once the administrator has cleared the project for required information, it will be passed onto a terrestrial review board to further ensure the information, risks, and controls appear adequate. Again, the board does not know the sites and activities so they are not responsible for ensuring all risks are in the assessment. Once the project has cleared the board, it will be sent to the supervisor for review and approval.

### **Supervisor approval implies:**

- The student and supervisor have, to the best of their abilities, identified all of the risks for the proposed methodology
- The controls for those risks are appropriate and adequate
- The supervisor will ensure that the student uses the stated controls
- Any incidents/accidents will be notified using the normal VUW reporting process

After the administrator receives confirmation of supervisor approval, the project will be approved in FieldTeq.

Due to the number of people involved in approving a project, project approval can take time. **Plan for project approval to take AT LEAST a week, if not longer.** It is important that projects are thoroughly thought out ahead of time in order to include all potential sites and risks. Addition of new sites or new risks requires re-lodging the project.

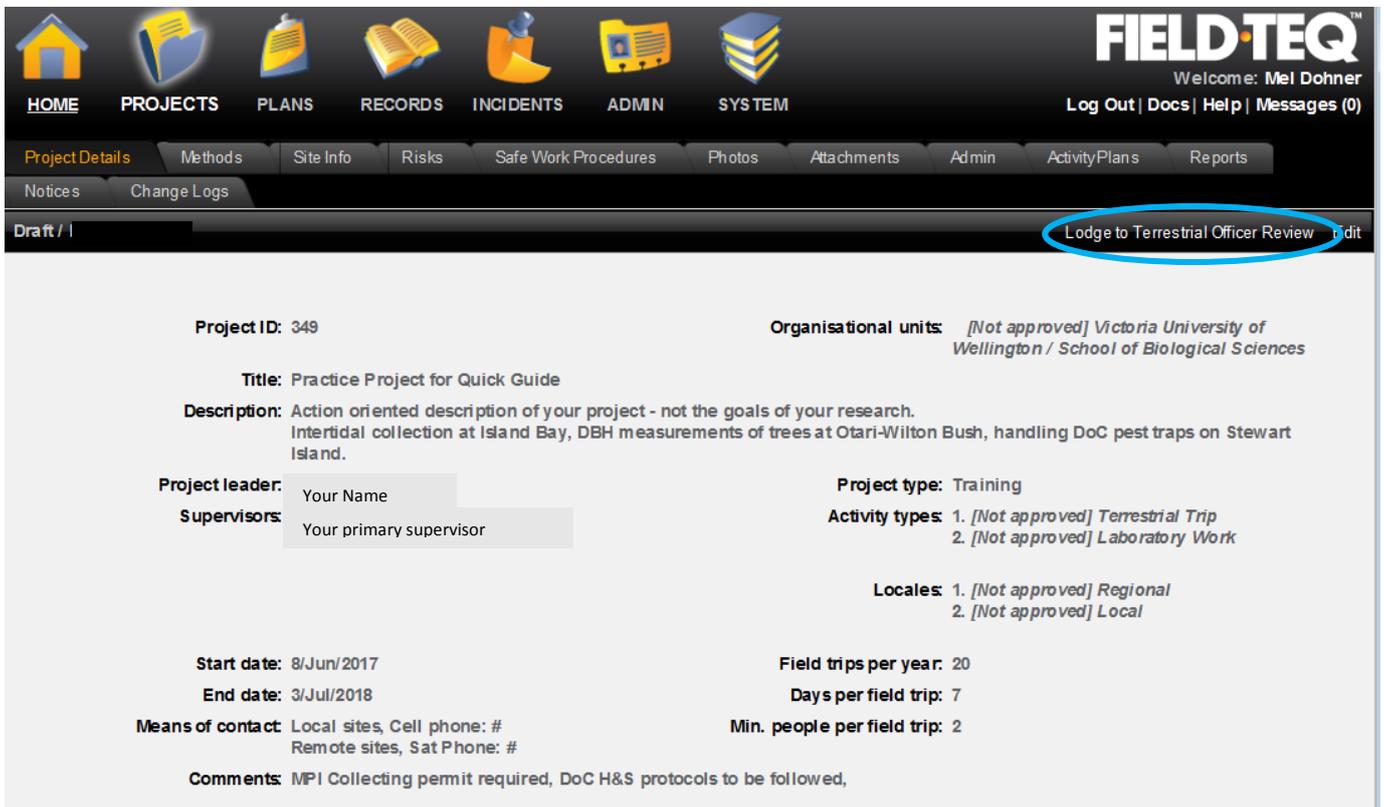


Figure 10. Click "Lodge to Terrestrial Officer Review" (blue circle) to submit project for approval

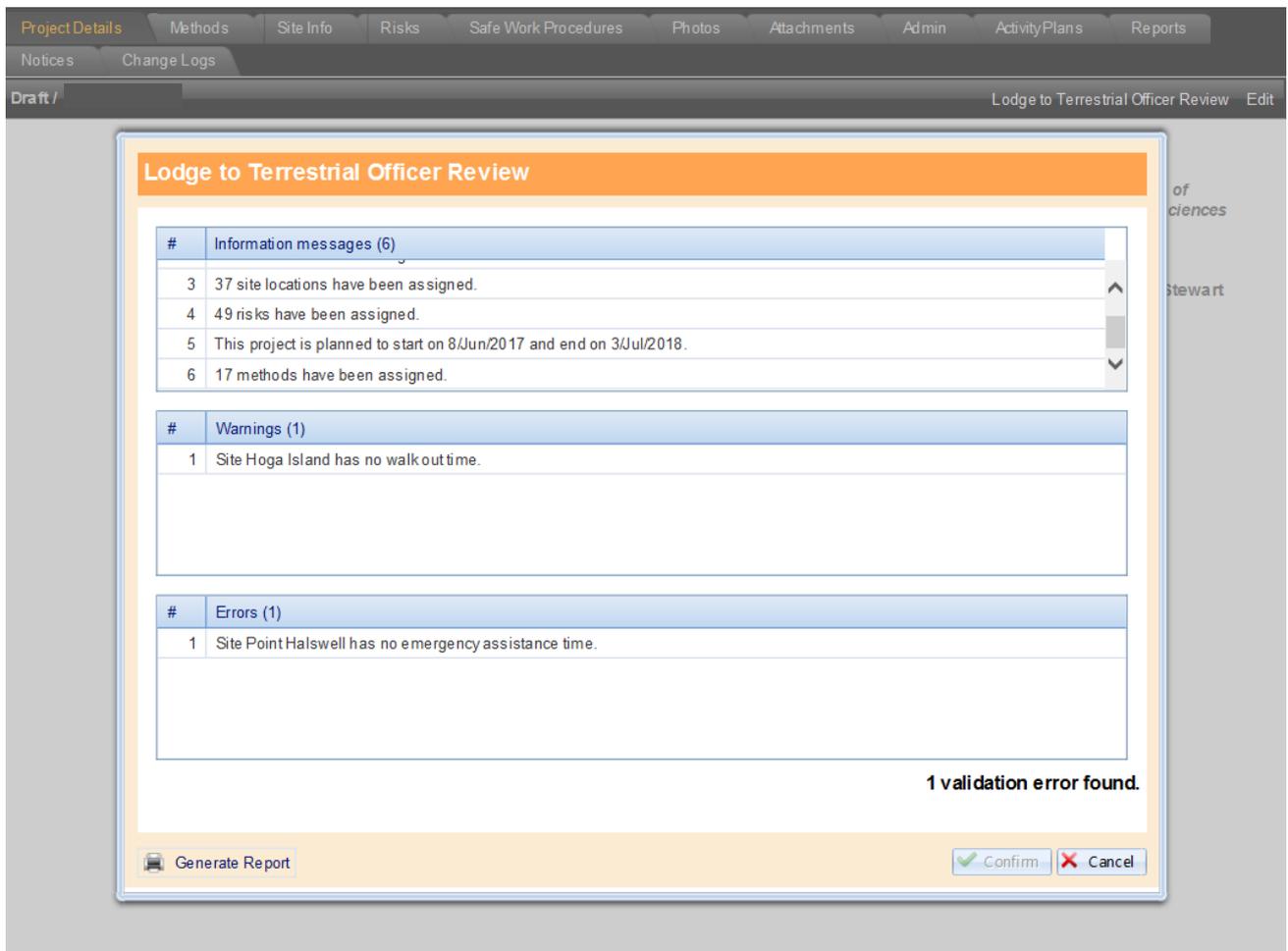


Figure 11. The dialog box produced from lodging a project to the terrestrial officer. Projects with errors cannot be lodged until the errors are addressed. Warnings are okay, but should be addressed if possible.