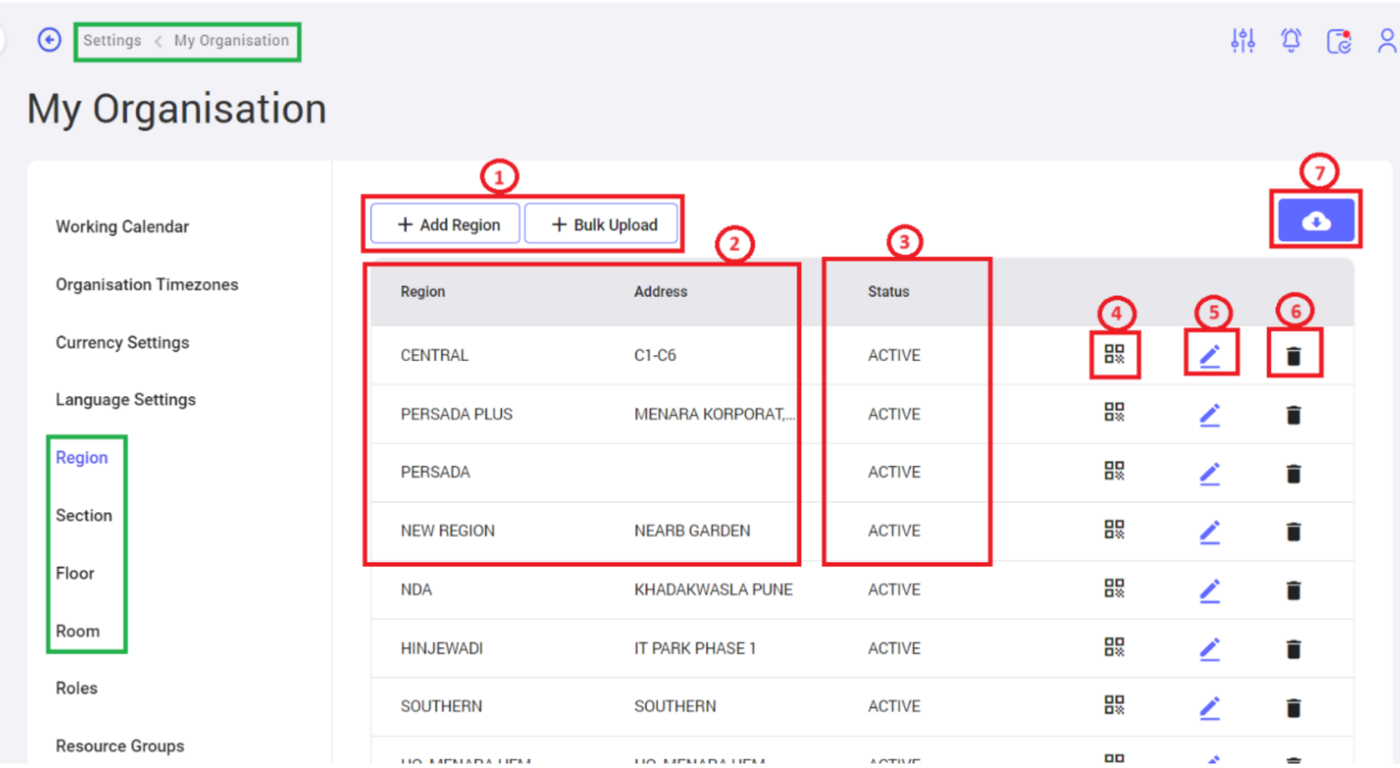
2. Pre-requisites

Location Config:

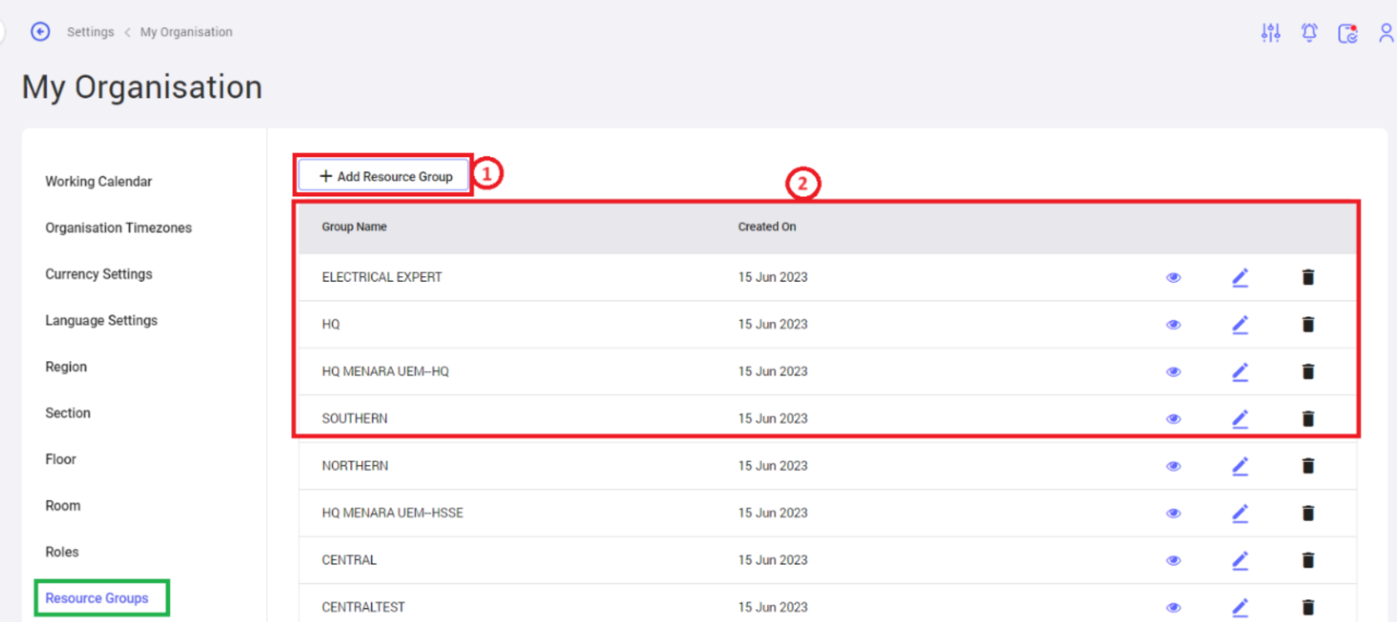
Configure roles by navigating to Settings >> My Organization. Location configuration includes region, section, floor and room.



1. **Add Region & Bulk Upload:** These options are used to add individual regions or add regions in bulk.
2. **List View:** To display list of regions configured.
3. **Status:** To describe the status of the region. Whether active or inactive.
4. **QR Code Icon:** To view the QR code.
5. **Edit:** To edit specific region.
6. **Delete:** To delete specific region.
7. **Download Icon:** To download QR code list with or without image:

Resource Group Config:

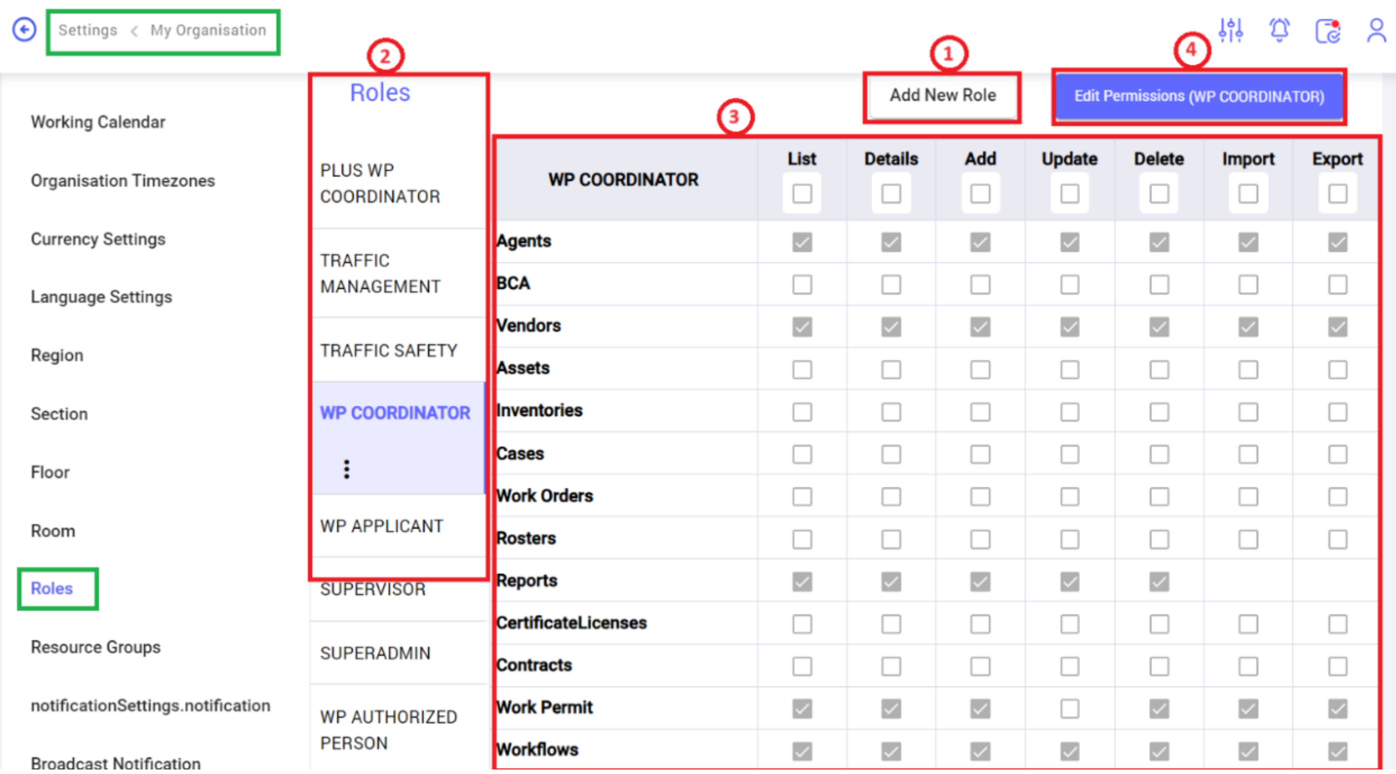
Configure Resource Group by navigating to Settings >> My Organization >> Resource Groups.

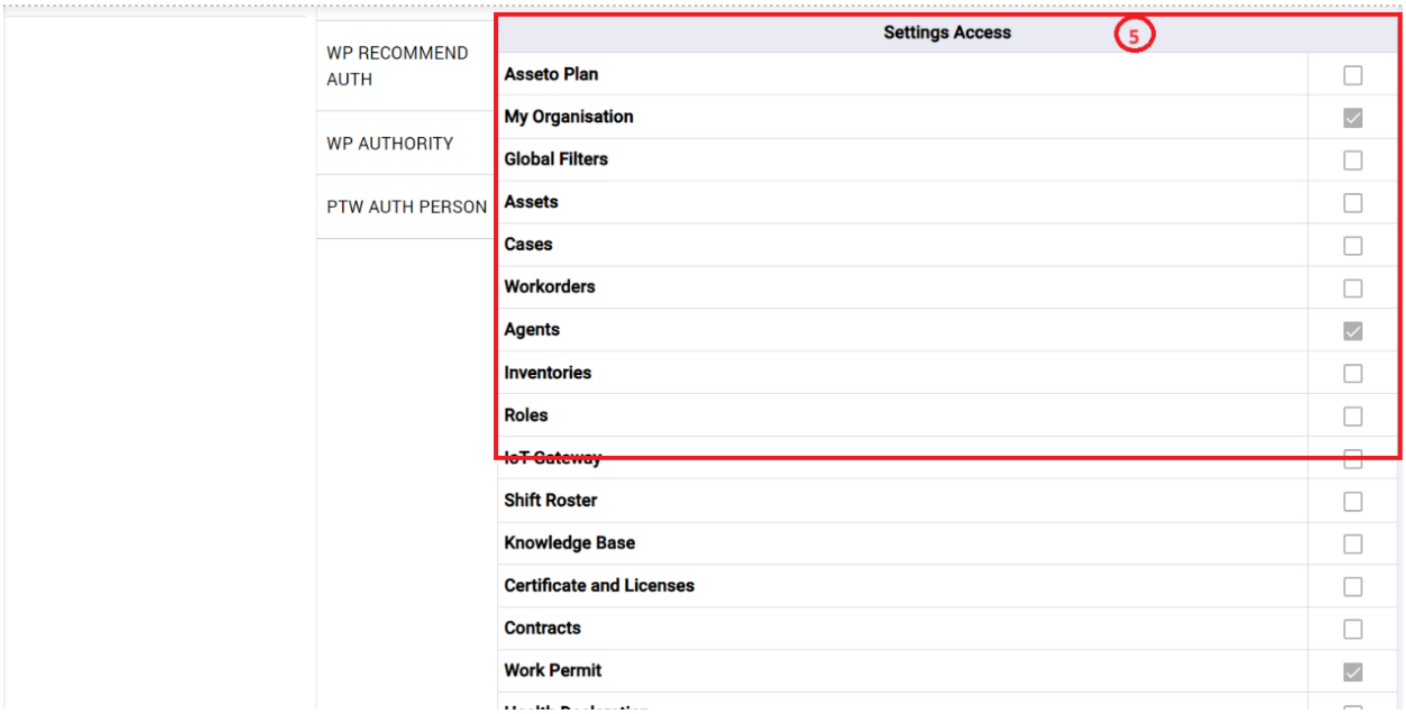


1. **Add Resource Group:** Create a Resources group with location & Agent skill sets parameters. Tag this Resource groups to Agents, so that based on the location that the coordinator selects during WP initiation, Agent's list will auto-populate in the drop-down.
2. **List View:** List of Resource groups displayed in the dynamic table with creation date, view icon (to view the details), edit icon (to edit), delete icon (to delete).

Role Config:

Configure roles by navigating to Settings >> My Organization.

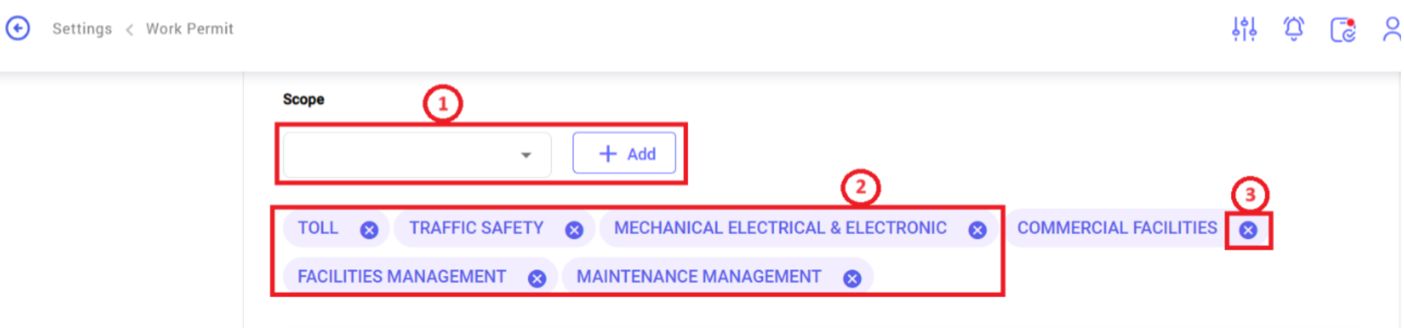




1. **Add New Role:** To add a new role, click on to this option. Users can define the role name they need & select the role type for that role.
2. **Roles:** Display the list of roles configured.
3. **Modules Access:** To provide access to specific modules to perform specific actions. Here Permissions can be provided for list view, details view, add, update, delete, import and export.
4. **Edit Permissions:** Edit Permissions enables edit functionality on permission access portion. It also provides save & cancel buttons to save changes or cancel changes.
5. **Settings Access:** To provide settings access to the specific role.

Scope Config:

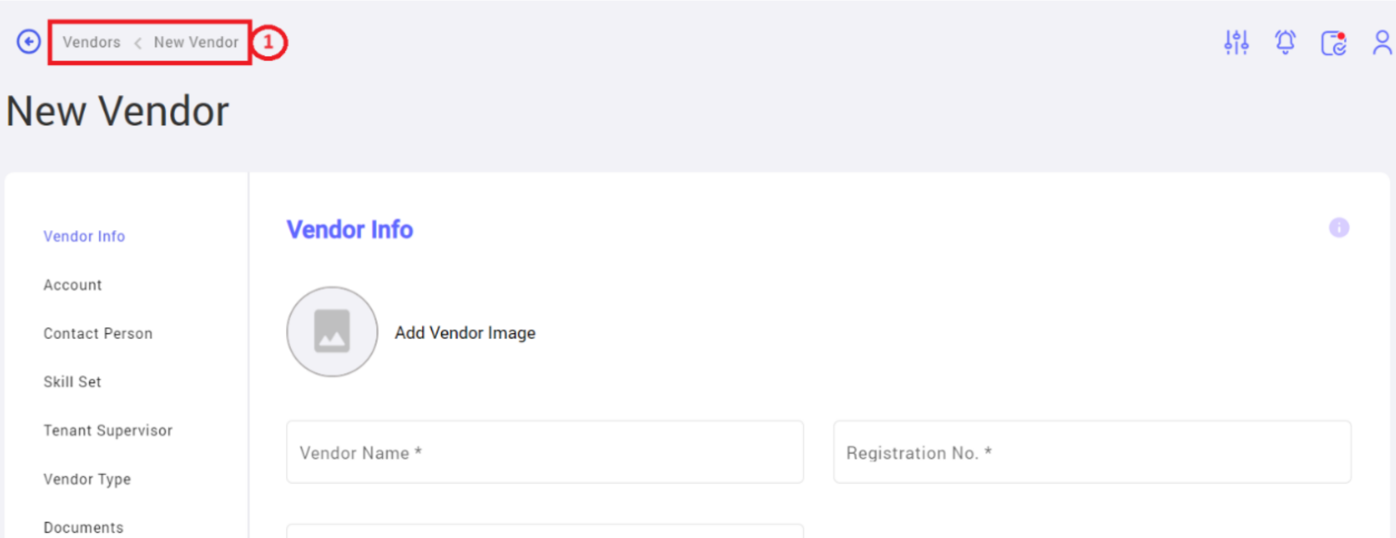
Configure scope by navigating to Settings >> Work Permit.

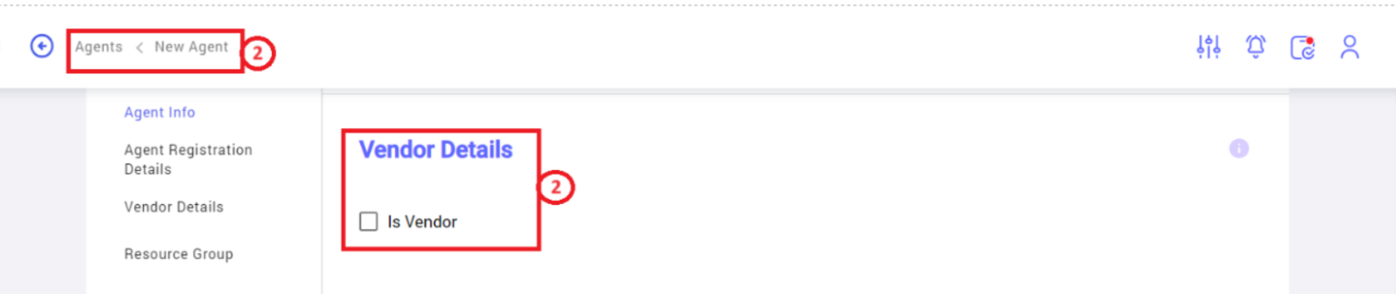


1. **Add Scope:** Scopes will be listed in the drop-down menu. Scope drop-down shows the list of skill sets configured in settings. Users can select the scope & click on Add option.
2. **Scopes:** Scopes added by Users are shown below the Scope field.
3. **Cancel Icon:** To remove the specific scope.

Vendor Config:

Configure Vendors from 2 sources. The details are given below.

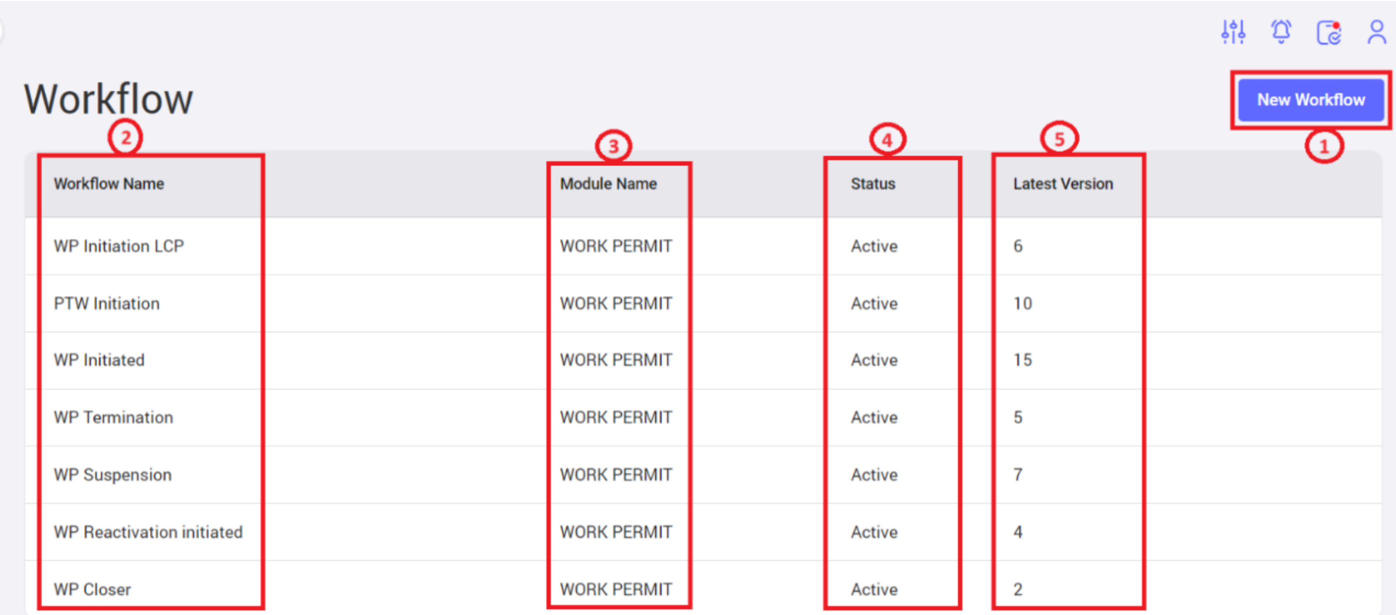




1. **Vendor Module:** Vendor can be configured by navigating to the module, Vendors >> New Vendor. Key in all the required inputs & save.
2. **Agents Module:** Vendor also can be configured from Agent module. Select the “Is Vendor” check box from Agent creation page. The Agent is an application is also considered as a Vendor.

Workflow Config:

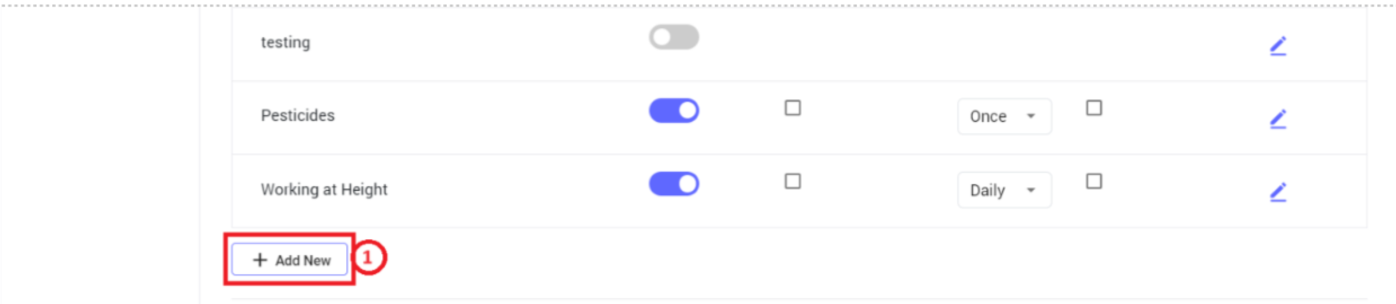
Configure Workflows related to WP / PTW triggers by navigating to Workflow >> New Workflow.



1. **New Workflow:** To create a new Workflow.
2. **Workflow Name:** To display the name of the workflow the User defined.
3. **Module Name:** The module selected by the User to build the Workflow. Select Work Permit to create workflow.
4. **Status:** To describe the status of the Workflow. Whether active or inactive. The Workflow will trigger only if it is in an active status.
5. **Latest Version:** To display the Version number of the Workflow. Latest version of the Workflow will trigger on User action.

PTW Category Config:

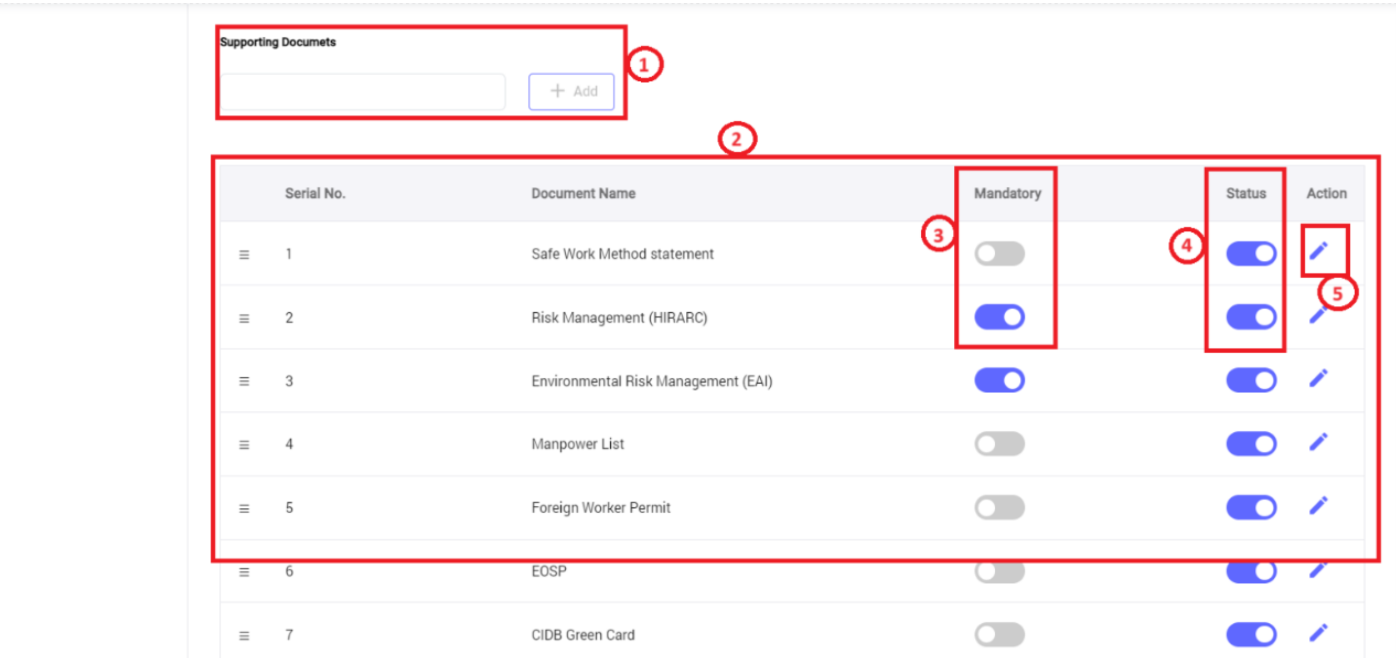
PTW Category can be configured by navigating to Settings >> Work Permit >> Work Permit Op tion.



1. **Add New:** To create a new category.
2. **Category:** To view the Categories configured.
3. **List View:** To display the list of categories configured in settings with related information.
4. **Status:** Toggles describe the status of the category. Active & Inactive are the statuses available.
5. **On Site Declaration:** To describe on-site declaration for specific PTW category Required or not.
6. **Frequency:** To view the frequency for specific category type. Once & daily are the current options available.
7. **On-site Verification:** To describe on-site verification for specific PTW category Required or not.
8. **Edit Icon:** To edit the specific Category configuration.

Support Document List Config:

Support Document List can be configured by navigating to Settings >> Work Permit >> Work Permit Option.



1. **Add Option:** Used to add new Support document name.

2. **List View:** To display all Support documents names in a dynamic table.
3. **Mandatory:** To describe whether the specific support document upload is mandatory or optional.
4. **Status:** If the toggle is enabled, the support document will be visible on Contractor form. If disabled, the specific document will not be displayed.
5. **Edit Icon:** To edit specific support document details.

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