

2. Pre-requisites

Location Config:

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

The screenshot shows the 'My Organisation' settings page. On the left is a sidebar menu with options: Working Calendar, Organisation Timezones, Currency Settings, Language Settings, Region (highlighted), Section, Floor, Room, Roles, and Resource Groups. The main content area displays a table of regions. At the top of the table are two buttons: '+ Add Region' and '+ Bulk Upload'. The table has columns for Region, Address, and Status. Each row includes three action icons: a QR code icon, an edit icon, and a delete icon. A download icon is located at the top right of the table area.

Region	Address	Status	QR Code	Edit	Delete
CENTRAL	C1-C6	ACTIVE	QR Code	Edit	Delete
PERSADA PLUS	MENARA KORPORAT...	ACTIVE	QR Code	Edit	Delete
PERSADA		ACTIVE	QR Code	Edit	Delete
NEW REGION	NEARB GARDEN	ACTIVE	QR Code	Edit	Delete
NDA	KHADAKWASLA PUNE	ACTIVE	QR Code	Edit	Delete
HINJEWADI	IT PARK PHASE 1	ACTIVE	QR Code	Edit	Delete
SOUTHERN	SOUTHERN	ACTIVE	QR Code	Edit	Delete
HO MENARA HELM	HO MENARA HELM	ACTIVE	QR Code	Edit	Delete

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.

	Settings Access	5
WP RECOMMEND AUTH	Asseto Plan	<input type="checkbox"/>
	My Organisation	<input checked="" type="checkbox"/>
WP AUTHORITY	Global Filters	<input type="checkbox"/>
PTW AUTH PERSON	Assets	<input type="checkbox"/>
	Cases	<input type="checkbox"/>
	Workorders	<input type="checkbox"/>
	Agents	<input checked="" type="checkbox"/>
	Inventories	<input type="checkbox"/>
	Roles	<input type="checkbox"/>
	IoT Gateway	<input type="checkbox"/>
	Shift Roster	<input type="checkbox"/>
	Knowledge Base	<input type="checkbox"/>
	Certificate and Licenses	<input type="checkbox"/>
	Contracts	<input type="checkbox"/>
	Work Permit	<input checked="" type="checkbox"/>

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.

Settings < Work Permit

Scope 1

+ Add

2

TOLL x TRAFFIC SAFETY x MECHANICAL ELECTRICAL & ELECTRONIC x COMMERCIAL FACILITIES 3

FACILITIES MANAGEMENT x MAINTENANCE MANAGEMENT x

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.

The first screenshot shows the 'New Vendor' page. The breadcrumb 'Vendors < New Vendor' is highlighted with a red box, and a red circle with the number '1' is next to it. The page title is 'New Vendor'. The left sidebar contains a list of menu items: Vendor info, Account, Contact Person, Skill Set, Tenant Supervisor, Vendor Type, and Documents. The main content area is titled 'Vendor Info' and includes a circular image placeholder with the text 'Add Vendor Image'. Below this are two input fields: 'Vendor Name *' and 'Registration No. *'. The second screenshot shows the 'New Agent' page. The breadcrumb 'Agents < New Agent' is highlighted with a red box, and a red circle with the number '2' is next to it. The left sidebar contains a list of menu items: Agent Info, Agent Registration Details, Vendor Details, and Resource Group. The main content area is titled 'Vendor Details' and includes a checkbox labeled 'Is Vendor'.

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.

Workflow

New Workflow

Workflow Name	Module Name	Status	Latest Version
WP Initiation LCP	WORK PERMIT	Active	6
PTW Initiation	WORK PERMIT	Active	10
WP Initiated	WORK PERMIT	Active	15
WP Termination	WORK PERMIT	Active	5
WP Suspension	WORK PERMIT	Active	7
WP Reactivation initiated	WORK PERMIT	Active	4
WP Closer	WORK PERMIT	Active	2

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 Option.

Category	Active	On-site Declaration	Frequency	On-site Verification	
Confined Space	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Once	<input type="checkbox"/>	✎
Excavation	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Once	<input type="checkbox"/>	✎
Lane Closure	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Once	<input type="checkbox"/>	✎
Lifting & Hoisting	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Once	<input type="checkbox"/>	✎

testing	<input type="checkbox"/>				✎
Pesticides	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Once	<input type="checkbox"/>	✎
Working at Height	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Daily	<input type="checkbox"/>	✎

+ Add New 1

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

Supporting Documents					
<input type="text"/>	+ Add 1				
Serial No.	Document Name	Mandatory	Status	Action	
≡ 1	Safe Work Method statement	<input type="checkbox"/> 3	<input checked="" type="checkbox"/> 4	✎ 5	
≡ 2	Risk Management (HIRARC)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	✎	
≡ 3	Environmental Risk Management (EAI)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	✎	
≡ 4	Manpower List	<input type="checkbox"/>	<input checked="" type="checkbox"/>	✎	
≡ 5	Foreign Worker Permit	<input type="checkbox"/>	<input checked="" type="checkbox"/>	✎	
≡ 6	EOSP	<input type="checkbox"/>	<input checked="" type="checkbox"/>	✎	
≡ 7	CIDB Green Card	<input type="checkbox"/>	<input checked="" type="checkbox"/>	✎	

- 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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Revision #2

Created 11 September 2024 10:34:15 by Sushma Palapatta Chandran

Updated 13 September 2024 03:38:54 by Sushma Palapatta Chandran