

## 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 with a menu: Working Calendar, Organisation Timezones, Currency Settings, Language Settings, Region (highlighted), Section, Floor, Room, Roles, and Resource Groups. The main area displays a table of regions. Above the table are two buttons: '+ Add Region' and '+ Bulk Upload'. The table has columns for Region, Address, and Status. To the right of the table are three icons: a QR code icon, an edit icon, and a delete icon. A download icon is also present at the top right of the table area. Numbered callouts 1 through 7 point to these elements: 1. '+ Add Region' button, 2. Table body, 3. Status column, 4. QR code icon, 5. Edit icon, 6. Delete icon, 7. Download icon.

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

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.

## Resource Groups



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		Settings Access <span>5</span>	
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"/>
		Mobile Application	<input 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
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Scope 1

+ Add

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

FACILITIES MANAGEMENT ×
MAINTENANCE MANAGEMENT ×

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 links: Vendor Info, Account, Contact Person, Skill Set, Tenant Supervisor, Vendor Type, and Documents. The main content area is titled 'Vendor Info' and includes a profile picture placeholder with the text 'Add Vendor Image', a 'Vendor Name \*' input field, and a 'Registration No. \*' input field.

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 links: 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

- New Workflow:** To create a new Workflow.
- Workflow Name:** To display the name of the workflow the User defined.
- Module Name:** The module selected by the User to build the Workflow. Select Work Permit to create workflow.
- Status:** To describe the status of the Workflow. Whether active or inactive. The Workflow will trigger only if it is in an active status.
- 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"/>	
<div>  Add New         </div>					

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.

<div> Supporting Documents <div>  Add </div> </div>				
Serial No.	Document Name	Mandatory	Status	Action
1	Safe Work Method statement	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
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"/>	

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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